



## CS1. Studies on national media research capability as a contextual domain of the sources of ROs

The aim of the **first case study** is to describe and analyse the **countries' monitoring capability**: the ability and possibilities of various agents to observe the developments of the media and the changes in society emanating from the media transformations, as well as related risks and opportunities for deliberative communication, and applying the obtained knowledge in making media political decisions.

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# ESTONIA

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## **Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities**

### **Executive Summary**

Estonian media research was institutionalized in the 1970s and until the first decade of the 21<sup>st</sup> century media and journalism research was steadily improving. In 2013 communication and media studies at University of Tartu was ranked between 51 and 100 (QS World University Rankings 2021), in 2020 between 201-220. After 2014/2015 the media monitoring capabilities have signs of degradation. Above all, the decrease in research and monitoring resources is caused by the worsening of the financing situation of Estonian science and higher education. Secondly, Estonian policy makers' interest in media usage and media developments has been small and random. Therefore, the media usage data is mainly collected by commercial monitoring organizations, the data is not accessible for public institutions. In the 21<sup>st</sup> century, journalism and communication research has been carried out, to a large extent, under the umbrella of various European research projects, in which Estonian researchers have successfully participated.

Journalism, media accountability and media usage domains are relatively well covered with studies and data, while in case of legal regulation and media competencies domains the RO analysis can only lean on fragmentary case studies. Key actors concerning data collection and knowledge producers are individual researchers, courts, Data Protection Inspectorate, Statistics Estonia, media monitoring companies, and media organizations.

## **1. Introduction**

### **1.1. Main traditions and turns in the 21<sup>st</sup> century and current situation of the media research and monitoring system**

While assessing the monitoring ability of Estonian journalism, media usage, media related competencies and the normative environment affecting the media, it is important to consider that research and higher education on journalism and media are related economically and in terms of expertise. Academic research is carried out at the University of Tartu and, since the 21<sup>st</sup> century, at the University of Tallinn. Public Broadcasting had its own research group, but it was closed in 2017. Audience monitoring is carried out by private companies and media houses (editorial metrics).

The tradition of critical media and communication research in Estonia goes back to Prof. Juhan Peegel, the founder of Estonian academic journalism education in 1954 (at University of Tartu), who started the research on Estonian press history. The academic study of the history of Estonian journalism allowed students to deal with national cultural memory and provided access to

the press of the pre-war Republic of Estonia, which, in general, was banned by the Soviet authorities. Although knowledge of the history of Estonian journalism has been important in shaping the identity of Estonian journalists, studies of the history of journalism have faded since the second decade of the 21<sup>st</sup> century due to lack of funding. Currently, five researchers study the history of Estonian journalism, but this is no one's main course of action or research.

In the mid-1960s, sociological media studies emerged, which laid ground to the larger analyses of the news media's role in societal processes today. In 1965, a readership survey by the Tartu local newspaper *Edasi* was conducted. This was one of the first representative surveys of the media audience in the whole Soviet Union. During the late 1960s, sociological media research was carried out by the Laboratory of Sociology at the University of Tartu. In 1975 the Laboratory was closed by the Soviet authorities, but the audience research tradition remained. In 1970s-1980s, these research groups conducted regular monitoring of broadcasting audience structure, interests, and expectations at Estonian Radio and Television. In the late 1970s, and early 1980s, also regular content analysis of radio and television broadcasts was done (Vihalemm 2001, 65). During the same period, the first journalists' survey (in 1988) and several surveys of newspaper readership and content analysis were carried out by Tartu University researchers. However, "the empirical results of surveys could not be published at all, as they were considered to be "for official use only" (Ibid.). Sociological media research continued and flourished in the 1990s, when societal and media transition in the Baltic countries became the focus of the research.

In 1976, a separate journalism department was established at the University of Tartu, where 15 journalism students were admitted every year (study lasted 5 years). Based on this department (teachers and students), a community of journalists with a very strong identity and clear professional values as well as critical attitude towards Soviet power and propaganda was established by the early 1990s. The alumni of the journalism department contributed to independence in the early 1990s. According to Professor Emeritus Peeter Vihalemm (2019, 54): "By the end of 2019, the total number of students who received at least three years of bachelor's education in journalism and/or communication during 63 years (1957-2019) was 1572."

In 2012, the journalism program on BA level was opened also at Tallinn University. On MA level there are two programs: communication and contemporary media. The research staff is 3-4 persons. Currently the research focuses on Audiovisual Arts and Media Research – this is also the name of the doctoral study program at Tallinn University. At the University of Tartu, the doctoral program is named Media and Communication with the admission of three doctoral students annually.

The research and higher education policy of the 21<sup>st</sup> century in Estonia is characterized by the merger of small units, and later also by the merger of specialty programs (incl journalism and communication). The research capacity of the press and media depended on the research grants received. A lot of support for the growth of young journalism researchers was the opportunity to belong to the Centre of Excellence in Cultural Theories in 2010–2014.

The Institute of Social Sciences was formed by the merger of the Institute of Journalism and Communication, the Institute of Sociology and Social Policy of the University of Tartu and the Faculty of Library Sciences of the Viljandi Academy of Culture in 2014.

## 1.2. Explanations of any other structural peculiarities that may be important for the report

In the 1990s Estonian research and higher education policy created some major changes: **(1)** The Estonian scientific community was decreased by about a half. In 1999 the share of people involved in research and development in the Estonian labor market was 0.89%, while only Portugal and Luxemburg remained behind Estonia in Europe at the time. (Sürje, Küttner 2001, 35).

(2) Competition-based research funding was set up. (3) Structure reform of research institutions started. (4) A high-level research commitment was written into the career model of professors and other teaching staff at the universities. (5) Evaluating the research reforms, scientists pointed out (Sürje, Küttner, 2001, 35) that “competition-based allocation of public budget research funds has a number of positive aspects – it increases the responsibility of researchers, teaches them how to use money more efficiently and supports the ability to write project applications”. In the beginning of the 21st century the main criticism of the research system established in the 1990s was related to the arguments that the Estonian research system was expanding (e.g., cf. Schiermeier 2019). The evaluation system for researchers favored expanding the number of researchers, but not requiring quality. All scientific reforms in Estonia have been carried out primarily from the perspective of natural, medical and technological sciences. This is illustrated, for example, by the above-mentioned Science Reform Conference: only one of the 27 speakers represented social sciences, more specifically political science and sociology. The field of social sciences includes law, economics, public administration, information sciences, journalism, media, communication.

The 21st-century Estonian science and higher education policy is also characterized by several reforms. In 2002, Estonia's transition to the Bologna 3+2 system took place in a very short time. Switching to the 3+2 system for journalism education meant a compressed BA studies, while very few students continue with their master's studies in journalism. In the Master's degree, journalism studies became one of the possible field of studies in general communication program. The reasons for such a decline in journalistic education were purely economic ones. Pressure from the University of Tartu to concentrate, reduce and cheapen curricula started in the years of structural reform in 2014/2015. Similar changes took place also at Tallinn University.

The economic higher education reform, which started in the autumn of 2013, enabled higher education free of charge for all students, but left higher education institutions in an ever-increasing lack of money. The growing lack of money led to the closure of several study programs and steady cheapening of the content of curricula. The abolition of paid studies had also a strong impact on social sciences and social scientists as the salaries of social scientists were combined as the sum of state funding, tuition fees and various small-scale grants. As a result of different reforms, the job security decreased and academic career became less attractive to young people.

Example of reform without prior in-depth analysis is the reform of research funding in 2008-2012. The principles of funding were not discussed in public and in the first year, the researchers applying for grants were informed about the applications' assessment criteria only after the deadline for submission of applications. The main idea was to increase the size of the grants and decrease the number of grants. The reform created a situation where in the field of media and communication funding was less likely to be received, even if the reviews for the application for money were positive. The field of social sciences, which includes journalism and media studies, has never been a priority in Estonia. However, the science policy of the 1990s enabled the preparation of a number of journalism and media researchers who have proved to be competitive in the 21st century in order to obtain research grants mainly from the EU funding system which became accessible in 2004.

### **1.3. Main institutions / bodies and actors of media / communication / journalism research, monitoring and education**

Urmas Loit (2018) mapped the main actors (and their activity) concerning media governance (state represented by several institutions, courts, media organizations, organizations representing different stakeholders related to media, universities). The list of organizations that collect data about media and media usage is even longer. Therefore, we shall point out only the main

monitoring agents in this sub-chapter and will mention other Corporate Agents in chapters that are related to the four domains.

Currently in Estonia, the main data and knowledge collecting actors (concerning the four domains of ROs) are academic research groups and single researchers of University of Tartu and Tallinn University. The number of persons involved in journalism and media research is about 30.

Outside academia, some analytical experts are working for different research companies (PRAXIS, socio-economic research center in Estonia conducted the international Survey of Adult Skills /PIAAC, 2012-2015) and the labor market monitoring and future skills forecasting system OSKA: 2019 involved media and journalism sector) or at Statistics Estonia (Eesti Statistikaamet, a state office), collects data and provides analysis on television, radio and broadcasting). However, the academic research agenda is dependent on EU funded research projects to a large extent since 2004 (see Appendix 1).

Consumer Protection and Technical Regulatory Authority collects data on media market conditions concerning broadcasting and broadcasting licenses; Data Protection Inspectorate (concerning the freedom of information) is collecting cases but provides limited amount of analysis – the Inspectorate is chronically overwhelmed of different tasks; Statistics Estonia and commercial research enterprises (audience studies, Kantar EMOR is the largest one) as well as media organizations gather data about media usage (editorial metrics), but the information is either paid or not available to the public or the researchers. The research unit of the public service broadcasting ERR was closed in 2017. Monitoring platform - [www.palgad.ee](http://www.palgad.ee) - that provides overview on salaries in different professional sectors also includes salaries of media sector (and journalists) since last year, the quality of data has improved since 2012. The Development Monitoring Institute published an important report on Estonia's freedom of information in August 2022.<sup>14</sup>

International Monitoring projects are Press Freedom Index, Media Pluralism Monitoring; European Social Survey (media questions). The Ministry of Culture has been collecting data on broadcasting (within last few years): the number of employees and employment contract; the financing of different channels; the content, type and number of programs.

In 2019 Estonian Ministry of Culture ordered an overview on media situation. More than ten researchers and practitioners were included in reporting and the paper was designed for media policy but has never been used. The research was financed by the Cultural Endowment of Estonia (*Eesti Kultuurkapital*) and this is the only one in the 21<sup>st</sup> century. In 18.11.2021 Estonia accepted the Development Plan for "Culture 2021-2030" ([kehtivad valdkonna arengukavad | Eesti Vabariigi Valitsus](#)). In the Appendix 5 states that "9. Media policy-making is knowledge- and data-driven. The state continuously monitors the media sector, reducing duplication and developing a common data reporting system. Programme and content analyses are regularly commissioned, which also allows to promote media self-reflection and media criticism" (page 33).

#### 1.4. The funding system of media research and monitoring

Although the possibilities for funding science have been discussed very much in recent years, including in the Parliament, good decisions have not been reached. Currently, the largest Estonian funding instruments are institutional research funding and personal research funding, which is allocated from the state budget through the budget of the Ministry of Education and Research in the organization and responsibility of the Estonian Research Council (ETAG, established in 2012). Research grants for individual researchers and research teams are competitive.

<sup>14</sup> Cf. <https://www.err.ee/1608691183/arenguseire-ametnike-ebakindlus-pidurdab-avaliku-teabe-laiemat-avaldamist>

Basic funding for research institutions (operational support) is distributed within universities, there is little money left for social sciences.

This data should be interpreted in the general context of public funding of higher education. According to the Public Funding Observatory 2020/2021 of the European University Association "Estonian universities continue operating with considerably fewer resources than in 2008 despite two significant funding efforts in 2011 and more recently in 2017". The funding decrease in 2008-2017 was - 23% - that is the highest in Europe.

The support of private funding for science in Estonia is minimal and private capital does not support research and media research at all. The sectoral distribution ratios as well as the evaluation methodology for applications have been changing since 2012 annually. For example, in 2019 – the success rate was only 11% (out of 66 applications 7 received the grant, 5% from the whole money was for social sciences; the success rate and the money was the lowest in comparison to other disciplines). The success rate increased in 2020: 21% (10 grants and the percentage from the whole money was 8%).

National research database (ETIS) provides current information about all researchers, their publications, grants, supervised students and expert activities. The limitation of the database is that it does not allow for a search based on keywords. Researcher profiles provide the best opportunity to find information about publications and research projects.

#### 1.4. Publications, data sources and main monitoring actors of legal and ethical regulation domain

There are six types of sources concerning legal and ethical regulation:

1. Estonian laws on freedom of expression and freedom of information, and the comments of the laws. Ethical regulation: codes of ethics.
2. Case laws: cases of the Supreme Court (*Riigikohus*) [www.nc.ee](http://www.nc.ee) and cases of the district courts; cases solved by the *Data Protection Inspectorate*; accountability cases handled by *Pressinõukogu* (PN), *Avaliku Sõna Nõukogu* (ASN), and ombudsman of the Estonian Public Broadcasting.
3. Case law analyses (hereinafter CLA<sup>15</sup>); systematic overviews of the court cases (their reports are descriptive by nature); systematic analysis of ASN and PC cases. In case of Estonia there is no case law analysis.
4. Academic research. Topic focused articles or other academic works on Estonian laws and implementation practices (academic articles; MA thesis of students, PhD thesis). Analysis on Estonian media policy that covers legal regulation of the media.
5. Cases covered by media concerning freedom of expression and/or freedom of information.
6. International indexes and/or research on freedom of expression and freedom of information.

Generally, the case law concerns the freedom of speech available but there are no systematic and analytical reports on tendencies that are reflected in case law.

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<sup>15</sup> CLA is a process of studying judgments (and if necessary, other court documents as well) in all of its aspects in order to identify problems in the uniform application of law by the courts. In the course of such a research an analyst ascertains the scope of problems that exist in the field of application of material and/or procedural norms. CLA also differs from academic research carried out at universities because CLA is a more practical research tool than academic research and it is directly derived from the needs of the judiciary and the legal practice. The object of a particular research is usually wider, the materials are large-scale and the research questions are more of a practical nature. (<https://www.riigikohus.ee/en/case-law-analysis>)

**The bibliographical database** (124 publications) includes 11 publications that are related to the legal regulation of media in Estonia, 10 of these are about media accountability and journalism ethics (see Appendix 2). The first textbook in the Estonian language on freedom of expression and freedom of information was published by Harro-Loit in 1996; the next textbook on information law was published by Nõmper and Tikk in 2007. However, these textbooks did not focus on the analysis of the current legal situation in Estonia concerning freedom of expression and freedom of information (and were not included into the database).

## 2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

### 2.1. Freedom of Expression

In Estonia, as in other democracies, freedom of expression is guaranteed by the Constitution. Defamation was decriminalized in Estonia in 2002 when the new Penal Code entered into force. Since then, defamation is mainly regulated by the *Law of Obligations Act (Võlaõiguseadus, LOA)*. According to the subsection 1046 (1) of the LOA, it is unlawful to defame the honor of a person, inter alia, by an inappropriate value assessment, unjustifiable use of the name or image of a person, violation of privacy or other personal right. Article 2 of the same provision also contains exceptions (other statutory benefits and the interests of third parties or the public). Paragraph 1047 of the LOA provides for the unlawfulness of disclosure of inaccurate information: Compensation for patrimonial and non-patrimonial damage are regulated by (Article 131, Article 134(2) and Article 1043 of the LOA).

There are no legal differences between real-life and online defamation. However, Estonian Information Society Services Act (*Infoühiskonna teenuse seadus, ISSA*) (Articles 8-10) states that the service provider shall not be considered liable for online publications, if its role is merely technical, automatic and passive; the service providers are not obliged to monitor the information that they transmit or store. These are the main legal sources that regulate defamation and disinformation.

Laws are well accessible online, comments on the laws appear in *Juridica* magazine, the only legal journal in Estonia, but we found only four publications partly related to the freedom of expression.

The most relevant legal act concerning personal data is the Protection of Personal Information Act (directly related to the GDPR). Article 156 of the Penal Code provides that violation of confidentiality of messages is a criminal offense, article 157 regulates the illegal disclosure of personal data, illegal disclosure of sensitive personal data and illegal use of another person's identity. These are the main legal sources that regulate defamation, disinformation, and personal information/privacy.

The main opportunity to assess how freedom of speech is balanced against defamation, disinformation and privacy is to carry out close reading of **key cases** of the Supreme Court (nc.www.ee). However, the cases of the Supreme Court reflect only partly the ROs concerning the freedom of speech. The number of media-related cases solved by the District Court and National Court is rather small: we could count about 20 cases in 2000-2021 that are related to the freedom of speech and media. two key cases solved by the ECHR (*Tammer v Estonia & Delfi v Estonia*).

There are no systematic reviews on court cases concerning the freedom of expression. There is a systematic analysis on *moral damages*, these CLAs include the analysis of the cases related to the media. The reports cover the several years between 2005–2019 (e.g., Lillsaar & Vutt 2009, Vutt 2017; Piho & Kalev 2020). This analysis is relevant as it demonstrates that moral damages

in Estonia are mainly small and modest and do not have a chilling effect regarding the freedom of expression.

Few Master's thesis handle specific problems that are related to the freedom of expression: defamation, criminalization and decriminalization of defamation, moral damage etc. (Luide 2003, Einla 2016, Vissak 2018). While the students' analysis includes analytical references to the National Court decisions, none of these theses include systematic analysis of court decisions.

The main international source that provides continuous and comparative assessment of freedom of expression is the Press Freedom Index published every year since 2002 by Reporters Without Borders (RSF). International comparative research on freedom of expression and freedom of speech has been carried out also by the Media Pluralism Monitoring (2014-2021, four reports) and MEDIADEM (EU Framework 7) projects (e.g., Harro-Loit & Loit 2011). The latter puts more focus on the legal framework of the rights and less onto the implementation.

The teachers and students of the University of Tartu have collected the cases that reflect the implementation of the freedom of expression and have been published in the media since 2015. The number of cases that deal with the restrictions on the freedom of expression of experts working at some institutions and lay members of society have been increasing since then. Our private collection of cases also includes SLAPP cases. This is increasing problem for journalists as well as people who publish their opinion in social media. There is no possibility to get overview on the number of lawsuits against media, journalists and people who have been sued because of expressing their opinion in the media.

## 2.2. Freedom of information

The right to information is explicitly recognized in the Constitution, in the Public Information Act and in the Personal Data Protection Act. However, as it is written in the "Rule of Law report" 2021, 10) *"The right of access to information finds legal and formal protection in the Constitution, yet its practical implementation may vary. As was the case last year, stakeholders indicated that the public administration in certain cases tends to deny and/or delay access to public information. Some ministries, reportedly, interpret the defined exceptions regarding the disclosure requirements, such as data protection, broadly. This leads to a divergence in practice regarding access to information. This finding is corroborated by the MPM (Media Pluralism Monitor – authors' remark) 2021, which maintains a medium risk with regard to the protection of right to information"* (European Commission 2021).

Neither the Stakeholder interviews nor the MPM methodology allow for more detailed monitoring of the mechanisms and dynamics of disclosure restrictions. Only systematic collection and analysis of cases is suitable for this purpose. However, such monitoring is not carried out in Estonia. Cases collected by UT researchers and students within the media regulation courses show a tendency of decreasing transparency in the Estonian state.

There is one supreme court key case concerning the journalists' access to public information (2021, court decision upon Pärnapuu – journalistic access to court records and solved by the Supreme Court).

The most powerful agent concerning the **implementation of the freedom of information** is **Estonian Data Protection Inspectorate** (EDPI). The EDPI is processing cases (complaints, decisions are not accessible) and is producing guidelines and educational material in order to increase the knowledge on personal data protection (especially since 2018). The cases handled by Estonian Data Protection Inspectorate upon access to public data and personal data protection is publicly available, analysis is provided in yearbooks (2017, 2018, 2019, 2020).

There are also a number of student theses that have studied document access in different public organizations (e.g. Rohtoja 2011; Adamson 2013; Kuhi, 2014; Aitsam, 2015) The aim of the



works by Adamson and Kuhi was to scrutinize how the city governments of Kohtla-Järve, Võru, Tallinn and Pärnu do follow the regulations on accessing public documents. Aitsam focused her work on the routine 13 ministries of the Republic of Estonia following setting restrictions onto accessing the public documents. The study concluded that the approach when setting access restrictions was very different. Regards to monitoring, the students' works are limited to a narrow research focus and different timeframes of the empirical data collection.

There are no studies on the protection of whistleblowers in Estonia. In 2016-2021 researchers from the University of Tartu have collected four cases published in the media, which show that there is no protection for whistle-blowers.

There are currently no specific legal provisions requiring the disclosure of ownership information. Nonetheless, general information related to entrepreneurship is electronically available in the Business Register. The current draft act transposing the AVMSD includes a new provision regulating publicly available data on structure and transparency of media ownership, based on the relevant provision in the AVMSD. Currently, ultimate ownership of media companies is not available to the public in all cases. (<https://eur-lex.europa.eu/legal>)

### 2.3. Accountability system

One of the most topical issues since Estonia's independence and abolishing censorship was media accountability and self-regulation. Along with the establishment of self-regulatory mechanisms (ASN as a Press Council in 1991, Code of Ethics of Estonian Journalists in 1997 and another Press Council in 2002), the academic scholarship has been critically analyzing their performance and impact (Harro-Loit & Lauk 2003; Harro-Loit & Balčytiene, 2005, Loit, Lauk, Harro-Loit, 2011; Lauk & Denton 2011; Harro-Loit, Lang, Himma-Kadakas 2012; Loit & Harro-Loit 2013; Loit, Lauk & Harro-Loit 2018). Due to the participation of Tartu University researchers in international projects (MediaAct and MEDIADDEM), media accountability issues have also been investigated in comparison with other countries (e.g., Lauk 2008; Lauk & Jufereva 2010; Lauk, Harro-Loit, Väliveronen, 2014; Harro-Loit, 2015). The cases have been collected by the two press councils, *Pressinõukogu* and *Avaliku Sõna Nõukogu* (ASN), as well as there are systematic overviews on the nature of complaints as well as the academic research development of the media accountability instruments since 2010. In a comparison of Estonian self-regulation system with the Finnish one (Lauk, 2014), it was demonstrated how much the prestige and impact of the accountability mechanisms depend on the advancement of civic culture in a society. BA thesis by Eva Kübar (2006) studies the interaction between the two press councils, media organizations and complainants. This qualitative analysis of documents opened very well the agents-related risks of the Estonian accountability system in the beginning of the century.

The awareness of professional ethics among Estonian journalists has been studied also by the students. Four theses (Kangur 2009; Kasenõmm 2011, Karu 2013; Koemets 2017) focus on the moral awareness and moral reasoning skill of Estonian journalists (BA theses were not included into the database). The thesis by Marko Paloveer (2012) was a self-ethnography about solving moral dilemmas concerning reality shows (also not included into database as not related to news journalism). Five BA theses focus on ethics issues concerning one program or media organization (Volmer 2009, Sükijainen 2014; Rebane 2015) or a very specific issue (Kuulpak 2019; Puhm 2021). These qualitative studies provide knowledge on existing risks and opportunities but not about the tendencies.

### 3. Publications, data sources and main monitoring actors of journalism domain

The main sources of the data and research on Estonian journalists and journalism are:

1. International comparative surveys (such as WJS)
2. National surveys
3. Data gathered by the National statistical office, Ministry of Culture, Consumer Protection and Technical Regulatory Authority (*Tarbijakaitse ja Tehnilise Järevalve Amet*); commercial companies (e.g. Kantar Emor); media organizations (editorial metrics) and Union of Estonian Journalists (Ajakirjanike Liit)
4. Academic studies (articles, books, book chapters, conference presentations, doctoral dissertations;) published internationally
5. Academic studies (articles, books, book chapters, research reports, biographical lexicon.
6. The Annual Books of Estonian Academic Journalism Association), published nationally.
7. Non-academic publications (memoirs, autobiographies, articles in the media, anniversary articles, jubilee articles and obituaries, journalists' blogs, etc.)
8. Other sources (graduate and postgraduate theses; presentations at conferences and seminars, correspondence, e-correspondence etc.)
9. News in media (newsworthy events concerning media market, working conditions, key persons in media etc.).

Journalism domain is well covered with publications - academic research papers and book chapters, (graduate) student papers, doctoral thesis and books aimed at the general readership. The bibliographical database contains 60 publications (out of 124) belonging to the journalism domain. Steady increase of the publications started in 2017 (see appendix 2) – the increase is partly related to two young scholars (Signe Ivask and Marju Himma-Kadakas) who defended their doctoral theses in 2018 and 2019 respectively. However, out of these 60 publications 18 provide information and analysis on market conditions. This bias is related to the traditional direction of research, which focuses on monitoring the development of the media system and the media market. Most of the articles describe the current situation in the media market but do not offer the analysis of diachronic changes. Public broadcasting and working conditions are represented by 8 publications and professional competencies by 5 articles. In addition to the research issues that are defined by the grants, the research agenda comes from scientists and not from the initiative of the Estonian state.

Although the domain is well covered by publications and is thematically rich, the journalism domain is characterized by a lack of consistency of the data. The publications cover different periods of time, and therefore it is complicated to draw conclusions of trends on the basis of these publications. **Surveys** on journalists' role perceptions, ethical principles, workload and working conditions have been also conducted irregularly, depending on funding, researchers' interest and other conditions. The first face-to-face survey was done by journalism researchers of Tartu University even before independence, in 1988 with 362 respondents from all media organizations. The second survey, conducted in 1995, was largely the follow-up to the first survey, partly using similar questions to detect differences before and after independence. Another similar survey of somewhat smaller scale (227 respondents), but nevertheless representative, was carried out by a freelance editor and writer Scott Abel (under the auspices of Tallinn University) in 2006 (Abel, 2006). In the same year, a MA student Maria Jufereva conducted the first survey of Estonian Russophone journalists (including all 110 journalists). This survey used the same questions as the 1995 survey. Another survey, focused on Russophone journalists, was

conducted in 2011 again by Maria Jufereva and analyzed in her doctoral study (Jufereva-Skuratovski, 2021).

The next surveys are related to the international comparative surveys. In 2009, Henrik Örnebring, then fellow of the Reuters Institute for the Study of Journalism coordinated a survey and interviews with journalists in seven European countries (the UK, Sweden, Germany, Italy, Poland, Latvia and Estonia). Journalists were asked how they understood and interpreted what they were doing as journalists, how their work life had been changing and what factors shaped their everyday practice. The online survey received 277 responses. In 2009, Estonia joined a global survey project, *Worlds of Journalism Study (WJS)*, focused on comparative study of journalism cultures in 67 countries all over the world. The survey in Estonia (274 respondents) was conducted within the framework of the above-mentioned project. The WJS continues its third wave of surveys in 110 countries (incl. Estonia) during 2021–2023 with a thematic focus on journalism, risk, and uncertainty.

Since 2010 the comparative approach has become dominant (e.g. Harro-Loit, 2015; Kõuts-Klemm, Rožukalne, Jastramskis, 2021). International comparative research covers topics that are focused by WJS survey time and intensity of the work of journalists, role perceptions (Harro-Loit, Josephi 2019; Ramaprasad et al. 2019); ethics and accountability instruments (MediaAct; MEDADEM; GLOHOMA), autonomy.

More than before, attention has been paid to the research on editorial practices (Ivask et al., 2017; Ivask, 2019; Himma-Kadakas, Möttus, 2021), journalists perceptions about their professional ideology (Jufereva, 2016), skills and competencies (Harro-Loit & Ugur 2018; Himma-Kadakas, 2019; Himma-Kadakas, Palmiste, 2018), psychological issues like stress, burnout, feeling bullied or harassed (Ivask, 2017; Ivask, Siil, Laak, 2017; Ivask, 2020).

While the field of journalism in general is relatively well studied, there are areas (especially in relation to the research in newsroom practices, working atmosphere and conditions, including gender issues) where the empirical data are either absent or are covered only by students' thesis. One doctoral dissertation (Pilvre 2011) was focused on the representation of women in media.

The Estonian- language publication that systematically publishes short overviews on Estonian journalism studies is *Eesti Akadeemilise Ajakirjandusseltsi aastaraamat* – Yearbook of Estonian Academic Journalism Society (this is published annually since 2009). This yearbook publishes problem articles, summaries of student research papers, as well as presentations of community meetings and summaries of discussions that followed the presentations. We did not include single articles in the bibliographical database, but this yearbook is important source presenting views of different actors of Estonian journalism.

An overview on journalism education and graduates have been documented in two anniversary albums published by the unit of journalism, University of Tartu (Kurvits et al. 1994 and Loit 2014, in two volumes).

### 3.1. Market conditions

Changes in the media market are one of the few areas where **data** has been collected continuously. For example, Kantar Emor has been describing changes in advertising volumes by channel for years. Media Health Check (2017–2018) has described changes in ownership and overall business performance. Information on corporations is available in the Business Register. Ownership relations have been monitored by the Media Pluralism Monitoring project, but there is inevitably an oligopoly in Estonia due to the small market that does not change. EU financed Media Pluralism Monitoring has been carried out for four times (2014, 2016, 2020, 2021). The

country report points out risks concerning press freedom, market pluralism, political autonomy and inclusiveness.

The ownership has been also analysed by academic researchers in articles that mostly focus on public broadcasting (Jastramskis, Rožukalne & Jõesaar 2017) and in Policy report (Kõuts-Klemm, et al. 2019) in what the market conditions were precisely among the aspects analysed. Some analyses of market development have been published in the early 2000s (Lauk 2004; Lauk & Šein 2009).

As it was mentioned in the beginning of this sub-chapter, academic articles on market conditions describe mainly macro-level situation and changes: distribution of advertising turnover between channels, channels and publications owned by larger corporations etc. The costs concerning the production of journalistic content is not distinguishable. Information about the economic situation and economic problems of media organizations can be found in the news, sometimes in the presentations of media executives at conferences or seminars. For example, the CEO of the Äripäev media company (since 2007) Igor Rõtov has explained how the Estonian business paper “Äripäev” came over the economic slump of 2010 by 2016 (Rõtov 2019). Often, the presentations on conferences also provide insights to the media industry, which media organizations seldom publish.

One of the key persons in Estonian media Mart Kadastik (long-time editor-in-Chief of the daily *Postimees* and later representative of the owners) published a book (2016) where he describes the changes of owners and power games concerning the Estonian media market in the 1990s and until 2015. Kadastik provides a subjective viewpoint, but the book enables to understand what roles were played by different media owners and the commercialization of the Estonian media. Kadastik also opens up the background of decisions made in the media business.

Urmas Loit has been collecting and analyzing data on broadcasting (2005) and, wider, the overall (digital) media (Loit, Siibak 2013, Loit 2018) (regulation, ownership, policy; changes concerning the local media (2016), incl. radio (e.g., in Kõuts-Klemm et al. 2019)) and he also was one of the country analyst in first Media Pluralism Monitoring reports on Estonia (for 2014, 2016). In his PhD thesis (2018), he, inter alia, introduced the methodology for monitoring radio programming output (Addendum 2) based on what, in several occasions, the Ministry of Culture (the then surveillance authority for the broadcasting) had earlier carried out supervision upon radio stations' performance.

One approach concerning the risks of journalistic autonomy in relation to economic changes was related to the diminishing border between journalism and marketing communication (Saks and Harro-Loit 2006; Harro-Loit and Bærug, 2011; PhD thesis by Bærug 2017).

The most recent and biggest risk – the influence of global media corporations to the local advertising market – has not been studied, although Kantar Emor has been watching the tendencies. Public data can be found in the news. For example, in 2017, a research expert at Kantar EMOR said that at least 6.6 million euros moved out of Estonia in 2016, primarily to Google and Facebook, through the largest media and digital agencies in Estonia. A year earlier, this amount was 5.1 million. The expert explained that the data were obtained from 16 major media and digital agencies operating in Estonia by adding up their net advertising contributions to Google and Facebook (Oja, S. 2017). Five years later, another news story (Oja, B. 2021) reveals several problems **evoking** difficulties in estimating the market shares of Google and Facebook and the concurring changes for Estonian media business models. The interviewees of this news story were CEO-s of Media House, Ekspress Grupp and Äripäev. Thus, the data appearing in the news streams, including interviews with the media managers, can be found with the help of search engines in the news archives to analyse changes in the media economy.

### 3.2. Public service media

The development and dynamics concerning the public broadcasting has been a topic for many public discussions at various conferences and in news.

Andres Jõesaar is the Estonian scholar who has extensively published on the impact of the EU audiovisual policy on Estonian public broadcasting in English as well as about the Estonian TV channel ETV+, oriented to the Russian speaking minority (Jõesaar, 2011a, 2011b, 2014, 2015b, 2015c; 2015d; 2017b, 2017c, 2022). Jõesaar, an Associate Professor of Media Policy of the Baltic Film and Media School at Tallinn University is the leading expert on public broadcasting policy in Estonia. He has been the chairman of the Estonian National Broadcasting Council and the head of the media research department, as well as the director of corporate clients and media services at Tele2 and the chairman of the board of TV3. As of 2022, Andres Jõesaar started working as a media advisor to the Ministry of Culture.

In 2021, a former television journalist and teacher at Tartu and Tallinn Universities Hagi Šein launched a comprehensive volume on the development of Estonian television in the digital era, during 2000-2020 (Šein, 2021). This book is a landmark both in Estonian audiovisual scholarship and among the studies on the Estonian television sector. Doctoral dissertation by A. Nani (2018) focuses on the audiences of the public broadcasting.

### 3.3. Production conditions

In Estonia, the conditions of journalistic production have been studied in a number of projects, but Marju Himma Kadakas, whose research interest has been primarily related to online journalism, has focused most on this topic. Quite a lot of empirical data has been collected by students' BA and MA thesis (Allik 2019). Himma-Kadakas has published several scientific articles together with her students.

Some of the students' graduation papers have recorded media reforms about which other data can no longer be found. For example, Rebane (2007) collected and analysed the online reform of Estonian news journalism; Kase (2011) carried out observation and interviews concerning the working practices of Estonian online news journalists. There are also unique documentation of the changes concerning production conditions at different news organizations (e.g. Korv, 2000; Teder 2005). One student work has been done about foreign correspondents (Aunapuu 2012). There is no studies on the resources of investigative journalism.

### 3.4. Working conditions

The research on working conditions is currently led by Signe Ivask, who has published several articles on risks related to journalistic work: burnout, feedback and harassment. Ivask has coached many of the students' graduation papers that open different aspects of working conditions (Puuraid 2014; Siil 2017; Külaots 2017 – burnout and distress of journalists; Tismus 2020 – feedback).

The MA thesis of Tali (2009) brought together different surveys. This is a special study because it analyses the change in journalist work over a longer period of time (1988-2009). Some students' studies have opened topics that allow to study the risks and opportunities concerning the work from atypical angles. For example, Tammeorg (2012) used recorded observations and carried out research on editorial meetings at one Estonian media organization. Laak (2014) tested how to support young journalists with supervision; Mugra (2016) investigated how the work and communication of journalists is affected by the open office; Janson (2017) investigated the perception of job tasks among regional newspapers; (Sommer (2021) focused her research on cases when journalists do not publish news-worthy stories. In two graduation papers,

students have studied the harassment of female (Palgi 2020) and male journalists ( Riives 2019).

Relatively less is known about the different aspect of **employment conditions** (MediaAct collected data on income, the results were published in the Yearbook of Estonian Academic Journalism Association) and actual salaries as the managers and owners regard this as a business secret. (The data provided by <https://www.palgad.ee> provides data on average level of journalists' salaries. Two student thesis have been focusing on the working conditions, risks and opportunities of freelancers (Karro 2015; Nutov 2019). The MA thesis of Nikkolo (2010) conducted and analysed survey on **job satisfaction** among journalists.

Journalism researchers also participated at the Centre of Excellence in Cultural Theory (2008-2015). The risk-related approach was focused on **temporal aspects** of journalism and **journalistic work** and was also empirically studied by a student, who used observations and in-depth interviews in order to map the rhythms of journalists' working time (Kivi 2016). A comparative analysis (based on the theoretical knowledge of acceleration, and the database of WJS) on the temporal aspects of journalistic work was published by Halliki Harro-Loit & Beate Josephi (2020, online 2019).

This review shows that empirical studies on employment conditions and specific work conditions have been carried out on almost all variations. The limitation of studies, as stated above, is the very different timing of their conduct, the absence of repeated studies and, in some cases, a very small sample size. On the other hand, journalism students (some of whom have been familiar with the organizations or even working at the media organization they are collecting data about) have been able to use methods that could not have been used by a researcher coming outside of the journalistic community: observations, in-depth interviews. Thirdly, many different works of journalism students make it possible to study one problem (for example, working conditions) from a wide range of different aspects.

Journalism **competencies, education and training** has been handled from two perspectives: from the point of actual competences journalists' perceive and from educational (training) point of view.

The research on actual competencies have been led by Marju Himma-Kadakas, who also defended her PhD thesis on journalistic skills and competencies in contemporary online environment. She has been guiding also several students' theses on this topic.

Journalism as one of the market sectors is researched and evaluated by the Estonian Professions Chamber every seven years as OSKA (skills and competencies study) reports, initiated by the Estonian Government. The reports try to forecast the future trends of the job market and society. Study consists of original data collection and secondary research (economic and market data complemented with interviews with experts). According to the latest evaluation 65% of approximately 1500 journalists in Estonia have university degrees (Kutsekoda, 2019: 85), but the number of journalists with journalism degrees is not known. There are different calculation concerning the number of journalists in Estonia (1000- 1500).

The development of **academic journalism education** up to 2008 is described by Epp Lauk in the volume of European Journalism Education (Ed. by G. Terzis) (Lauk, 2009); Harro-Loit analyzed the financing of journalism education in 2009. Nevertheless, a broader and deeper academic analysis of the quality and scope of journalism teaching is missing. Journalism curricula have been evaluated only in the framework of quality assessment of higher education on the regular basis by the Estonian HE Quality Agency. The last assessment by international experts was carried out in 2017 and the most burning problem in the whole report has been raised as the insufficient financing of teaching (Estonian Quality Agency 2017). The quality assurance

system has been changed and now the institutional internal assessment will be used instead of the international one.

Journalistic competences has been also developed in conjunction with the curriculum development via international cooperation (University of Tartu was active in EJTA/European Journalism Training Association, the Tartu Declaration 2006 revised 2013 and 2020 ([Tartu Declaration 2020 | European Journalism Training Association \(ejta.eu\)](#)) is one source that reflects the international dimension of the curriculum development). University of Tartu withdrew its membership four years ago because the scarcity of financial resources (no money for the membership fee).

#### *3.4.1. Intra-organizational diversity (human resources and gender, age, class, education, cultural balance /autonomy among journalists)*

Gender, age and education distribution among journalists has been studied to some extent through the WJS survey, and female and male journalists have been studied separately only in the above mentioned two works in the context of aggressive feedback and harassment.

The autonomy of journalists is an area that is reflected in a great many studies. However, the work of Niinepuu (2012) studied for the first time how Estonian journalists perceive their autonomy and restrictions on autonomy, is of significant importance, along with journalistic competencies, education and training.

#### *3.4.2. Professional culture and role perception*

The studies of the professional culture of journalism in Estonia focus on the diachronic development of journalism culture (e.g. Harro-Loit 2000, 2014; Lauk 2008; Lauk&Hoyer 2008; Lauk 2009, 2017; Lauk & Harro-Loit 2016) as well as the personal development of journalists (studies of biographical data and life stories), journalists' role perception and values. (In this report, we have placed studies concerning the values under a chapter of accountability.)

Lots of effort has been put into biographical data gathering and interviewing journalists of older generations. Three volumes of journalists' memoirs were published by Tartu University in the 2000s (Pallas, A. ed. 2004; Pallas, A., Tammar, H., Uus, S. eds., 2006; and Pallas, A., Uus, S. eds., 2009). The first remarkable result of biographical data gathering was published in 2014 by Tartu University Press: *Brendekenist Peeglini. Eesti ajakirjanduse biograafilise lühileksikon (R. Kurvits and A. Pallas)*. This book contains short biographies of 348 journalists, editors, contributors and correspondents who were active in journalism (Estonian, Baltic-German, Estonian Russian press and diaspora press) from its beginning in Estonia in the 18th century up to 1940.

The research project (Tartu University) *Changing Journalism Cultures: A Comparative Perspective (2008-2012)* established several new research directions for Estonian journalism for the future years. The 1990s, the years of the democratic transition in Estonia had brought forward the questions of particularities of the development of journalism culture in the post-soviet/post-communist countries in comparison with the 'liberal' model generally adopted by the established Western democracies. New questions were formulated: What are the comparable elements that express the quality of journalism cultures? What factors influence the development of journalism cultures in different countries? Departing from these questions, the project laid foundation to following directions in Estonian journalism research: 1) journalistic practices: journalistic work process, working environment, work culture (Tali, 2011), 2) professionalization of Estonian journalism: professional ideologies and values, ethics, professional roles and autonomy (Örnebring, Lauk, 2010; Einmann, 2011). An important dimension in this research were contextual factors (historical and cultural backgrounds, development of journalistic education, economic factors and their influence, technologies, commercialization, etc. The critical-analytic approach advanced in the publications the project produced (Lauk, 2008; 2009)

The research on Estonia's Russophone journalism started along with the transition studies, since the sociological research had disclosed the existence of two different information spaces in the Estonian society, separated along the linguistic lines: Estonian and Russian ones. As the state's integration efforts have not been able to close this gap, it continues to impede the integration of the Russophone population into Estonian society. The early 2000s were the most active years of academic research on the Russophone media (Jakobson & Iljina, 2002, Jakobson 2002; Lauk & Jakobson 2009). In the more recent years, this research has been mostly related to the state's attempts to advance Russian language public broadcasting (Jõesaar, Jufereva, Rannu, 2014; Jõesaar, 2015a; Jõesaar, 2017a; 2021). The gradual shrinking process of the Russophone media in Estonia is well described by Jõesaar and his co-authors in the *Media Transformations* journal in 2013 (Jõesaar, Rannu, Jufereva, 2013). Some studies also focus on Russophone journalists in Estonia (Jufereva & Lauk, 2015).

After the end of the project of *Changing Journalism Cultures*, not a single project focused primarily on journalism has received funding from the Estonian Science Agency. Although good prerequisites were created for further research, and several articles (e.g., Harro-Loit 2014) and book chapters published (also internationally), the funding was not continued. See Appendix 2.

## 4. Publications, data sources and main monitoring actors of media usage patterns

### 4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

There has been a clear distinction between academic and commercial research in audience studies – in aims, methods and scope of research. **Academic research** has been carried out mainly by the University of Tartu, in recent years by the University of Tallinn as well (since the 2010s). Academic research from **Tartu University** is grounding strongly on the sociological tradition where media usage has been interpreted in the broader societal context (Salovaara-Moring, Kallas 2007; Opermann, Vihalemm 2017). There are less risks or opportunities in the focus, rather the studies attempt to explain the media usage patterns and their relations to social practices, life-worlds of individuals, and general changes in society.

### 4.2. Relevance of news media

Two biggest longitudinal studies carried out in the research tradition of media sociology at the University of Tartu in the 21<sup>st</sup> century are:

1) Thematically exhaustive study “Mina. Maailm. Meedia (Me. The World. The Media)” that use original data collected by the representative surveys in years 2002, 2005, 2008, 2011, and 2014, but limited to the Estonian scope only (PI-s Marju Lauristin, Peeter Vihalemm, Veronika Kalmus, Triin Vihalemm). It has been greatly a transformation-study with explanatory character – looking back and trying to explain the changes in post-communist Estonia and looking less into the future (Masso et al., 2020). The importance of the study lays on the trends the researchers have found that can explain the future developments of Estonian society. The risks and opportunities have been rather side-effects in some articles with narrower topics (political participation and media usage, digitalization, fragmentation of audiences). The research group has been dealing with the media usage from the perspective of risks and opportunities from two angles: how is the diverse media use by an individual related to the higher social and political participation; and how the growing usage of digital media causes changes (partly verbalised as risks) to social cohesion. Since media was perceived as having a significant role in social and political transition (Vihalemm, Lauk, Lauristin, 1997), the public financing was granted for several projects with



the slightly different focus of the same research team. Recent years the researchers from the research group are using data collected in other research projects and the exhaustive and regular monitoring does not take place anymore. Smaller scale qualitative studies deal with definition of news among audiences (Kõuts-Klemm, Opermann), media repertoires (Kõuts-Klemm), online audiences of micro-celebrities (Murumaa-Mengel), social media audiences (Siibak, Murumaa-Mengel). The most important projects by the researchers:

2020-2021 Prospects of Estonian and German local independent media in the era of global platformization, disinformation campaigns and political populism (PI Ragne Kõuts-Klemm)

2019-2021 What is news? News perceptions and practices among young adults in times of transition (PI Signe Opermann)

2015-2018 H2020: CATCH-EyoU – Constructing Active Citizenship with European Youth: Policies, Practices, Challenges and Solutions (PI Veronika Kalmus)

2014-2016 Content and audience of the Estonian cultural media (PI Peeter Vihalemm)

2) International study “EU Kids Online“ 2006-2009, 2009-2011, 2018-2019 (PI-s Andra Siibak, Veronika Kalmus). The EU Kids Online has employed a rather critical view analysing online risks for the youngest generation. Since the international consortium doesn't finance the study, the data collection has been carried out in every wave based on the different financing sources (by the personal grants, in the framework of EU financing, by the ministries and state offices).

Based on the research tradition of media sociology the members of the research group of Tartu University have been participating in analysing the media usage as a subtopic of “Integration monitoring” (initiated by the Culture Ministry and Integration Foundation, and lead mainly by Tallinn University or by think-tanks and NGO's). The focus has been on media usage among the Russian-speaking population in Estonia. Most clearly the risks have been conceptualised in the integration framework - two separate media spheres where Estonians and Russian-speaking population are living are risks for social cohesion and safety of society. The data have been collected as representative surveys in 2008, 2011, 2015, 2017, 2020 as a part of the state program on integration of ethnic minorities. The financing has been stable, following the state programs. The data about media usage has been only a minor part of the broader survey (Researchers from Tartu: Triin Vihalemm, Külliki Seppel, Ragne Kõuts-Klemm). Currently, a PhD Thesis about Russian-language audiences will be compiled (by Mihhail Kremez).

In **Tallinn University** the focus of academic media usage research has been mainly on the television, but original data collection has been rare up to recent years. The contribution of academic researchers has been to collect the available statistics and to interpret it in the framework of development tendencies in television.

In recent years (2019, 2020) Tallinn University has been financing original data collection about media usage. The data were collected in the form of representative surveys with the help of commercial research agencies (PI Andres Jõesaar). Jõesaar deals mainly with two topics: trends in public service broadcasting and usage patterns among Russian-speaking audiences. The other direction in Tallinn University is led by Katrin Tiidenberg, who analyses social media usage from the perspectives of agency and self-realization of users.

Estonia does not participate in the Reuters' Digital News Reports that is currently the most comprehensive and up to date comparative research about the media usage trends in Europe.

The **commercial research** about media usage is carried out by several research agencies. However, compared to the 2000s, the number of agencies that carry out audience research has been diminishing (compare e.g. Salovaara-Moring and Kallas 2007), indicating the concentration trends in the media market research. The commercial research is descriptive, the interpretation of tendencies especially in the broader societal context is missing. The former tendency that media themselves ask for more complicated research about their audiences from research

agencies is fading (e.g. there is no Research Centre as a part of the Estonian Public Broadcasting anymore, the Estonian Association of Media Enterprises do not order readership surveys anymore).

The media usage data are currently the interest of different media planning and advertising agencies. The collection of data takes place slightly differently by different agencies, the biggest research data providers in Estonia are:

Kantar Emor started their media usage surveys from 1990s as separate databases about (1) readership data on newspapers and magazines (as omnibus surveys), (2) TV-viewing data (telemetry); (3) radio listening data (as diary data), (4) internet usage data (initially as survey data, later as the combination tracking and web questionnaires); (5) survey on a media day is the latest product (combination of omnibus and web questionnaire). Kantar Emor analyzes the collected data mainly in the interests of data purchasers.

International market research company Norstat entered the Estonian market in 2007, but is currently providing very precise data about audiences, based on the wide-range international methodology they use in all countries.

The market share of other private research companies (Turu-Uuringute AS, OÜ Saar-Poll, Faktum AS) has been gradually decreasing.

The state-initiated data collection about the media usage by the Estonian Statistical Office is sporadic. The cultural institutions (incl. radio and TV-stations) provide their operating data quarterly (data about their program provision and economic data). Special surveys about the audience behaviour have been complementing the regular statistics collected about the cultural production and consumption - nevertheless, this kind of research is quite sporadic as well. The aggregate data from the open access statistics database by Statistical Office is usable for everyone. The data don't enable detailed or longitudinal analyses about the risks in the media usage domain.

*“When collecting media data, Emor relies on a methodology that has long justified itself; we make changes in data collection very tenaciously. It would be best to keep parallel data collection methods going then - e.g. by switching from a TV diary to a measurement survey, we were able to do this for a while. But most of the time, change has to be done quickly, and two parallel studies cannot be allowed by the company. In addition to the direct commercial benefits Emor has also assumed an internal obligation to inform the public about the main issues - e.g. the monthly data of television viewing, radio listening.*

*The direction is that all customers who need media usage data use them on a software-based basis. They will not be prepared analysis reports, but will have access to the current database of the data collector and will be able to carry out the necessary analyses themselves. There is no other company or agency collecting media data on the Estonian market on this basis. Statistics Estonia collects a little bit in its activity diary, but it's a little bit.*

*If the client is prepared an analytical report, he or she will receive the right to use the data, but this does not include the right to publish the data. For example, even if the Ministry orders the data, it may use it only within its own authority - there is no possibility to publish the data. It is possible to draw conclusions from them, and these conclusions can be public.*

*The interest in media data has remained stable - no customers have fallen away or increased. Even in the case of internet data, Emor's advantage is that Emor brings usage data into contact with the user, i.e. the person - not counting devices or accounts. But, for example, Gemius, which also collects internet data - it is a black box in its methodology. No one knows how they collect their statistics or what it means. Norstat' is an intermediary, they don't have their data. Media agencies have their*

own panels. These panels are made by polling companies hired by the media agency to collect data (e.g. Norstat). (*Expert interview 25.10.2022*)<sup>16</sup>

### 4.3. Trust in media

In the framework of the Standard Eurobarometer the data about media usage will be regularly collected on a very general level (number of users and **trust** in media).

## 5. Publications, data sources and main monitoring actors of media related competencies domain

The media -related competencies of the lay members of society is a complicated issue as the discourse has changed over time. In the beginning of the 21<sup>st</sup> century the very broad term was media literacy (MIL), currently the dominant concept in teacher education is labelled as digital competencies. Research and development of media-related competencies in Estonia has been biased towards the younger generation from the beginning. During the first decade of the 21<sup>st</sup> century the research focused on development of Estonian national curricula (Ugur & Harro-Loit 2010). During the first decade of the 21 century Ugur was the leading researcher who developed critical analysis on **didactics of general media literacy**.

In 2012-2015 **teachers'** digital competencies and the influence on students' abilities were studied via the research grant led by Pille Pruulmann-Vengerfeldt. In 2018 the Baltic grant focused on media literacy development **in the higher education curricula**.

*Digital competencies and education* have received special attention and special financial support from Estonian State since 2014/2015. Digital competences are well described as well as there are different assessment tools.

The bibliographical database includes 31 (out of 139) publication on media related competencies, however, the publications that are focused on assessment are related to the latest EO project and the results are published only in 2021, 2022 (see Appendix 2).

The projects about media related competencies:

- 2020-2023 H2020: Youth Skills (PI Veronika Kalmus) (University of Tartu)
- 2020-2022 H2020: CORE - Children Online: Research and Evidence. A knowledge base on children and youth in the digital world (PI Veronika Kalmus) (University of Tartu)
- 2019-2022 H2020: The impact of technological transformations on the digital generation (PI Merike Sisask) (University of Tallinn)
- 2014-2018 The Digital Literacy and Multimodal Practices of Young Children (PI Sirje Virkus) (University of Tallinn)
- 2013-2018 Conceptualisations and experiences with public and private in technologically saturated society (PI Andra Siibak) (University of Tartu)
- 2011-2015 Generations and inter-generational relationships in the emerging information society (PI Veronika Kalmus) (University of Tartu)

### 5.1. Normative sources

The Estonian DigiEfekt project re-conceptualizes digital competence through 10 dimensions and focuses on the question of how different approaches to applying digital devices, environ-

<sup>16</sup> An expert from a media research company explained methodologies and access to data (interviewed by Ragne Kõuts-Klemm, 24 Oct 2022, 50 min, Zoom).

ments and content in learning will have an effect on digital competence and several other cognitive and non-cognitive learning outcomes (Pedaste et. Al 2022).

(MIL) has been stressed in state programs and development plans of school curriculum. The topic gets a lot of attention from the ministries, nevertheless it has remained uncoordinated. The White Paper (2021) about the stand of MIL in Estonia states that the field is characterized by the conceptual vagueness, fragmentation and lack of cooperation between different agents, insufficient preparation to teach MIL topics in schools, and sporadic financing (*Meediapädevuse valge raamat/White Paper on Media Skills, 2021*).

## 5.2. Assessment of media related competencies among citizens

In 2004 Epp Lauk published the first assessment study about media competences of Estonian schoolchildren. Later research on actual media-related competencies has been mostly related to the EU Kids Online research project, CORE and Youth Skills (Estonian teams led by Veronika Kalmus). Most important projects about the media competencies among the younger generation provide information about risks and opportunities with the perspective to the future. In 2019 Estonian Digital Competence Test was carried out among Estonian 9th grade pupils. On the basis of the Estonian Digital Competence Test, it is possible to distinguish eight digital competence factors: (1) operational knowledge and skills, (2) content creation factor 1, (3) content creation factor 2, (4) attitudes towards technology, (5) self-assessment of digital skills factor 1, (6) self-assessment of digital skills factor 2, (7) safety-related behaviour in the digital world, and (8) problem-solving related behaviour in the digital world (Pedaste, Kalmus, Vainonen 2021). From this list one can see that MIL and digital competencies concept overlap only partly. Moral awareness concerning media and communication is missing from both concepts. Nevertheless, the research about other age or socio-demographic groups is almost missing.

The Media Literacy Index, compiled by the Open Society Institute in Sofia calculates the media literacy score for Estonia as well. Whereas Estonia is ranked among the top five in several years (2017, 2019, 2021), the index is rather an estimation about the resilience to disinformation. It is an aggregate indicator characterizing the media environment in great extent and less the actual skills of citizens.

Digital Economy and Society Index (DESI) compares digital skills of citizens in the EU, dividing skills as low, basic and above basic skills. The index composes data from PIAAC studies, thus interpreting the internet usage skills mainly.

The growing body of public finances is not dedicated to research but to intervention, like IREX Media Literacy in the Baltics Program (Maria Murumaa-Mengel).

Concurrently, there is no data about the actual “levels” on media related competencies of middle-aged and elderly population.

## 6. Analysis of Research and Monitoring Capabilities and Quality

### 6.1. Comparative analytical overview on available research and access to the research

The Estonian monitoring capability across the four domains is different concerning the temporal, methodological viewpoint, as well as coverage of various aspects of ROs. Temporal dimension means, in particular, whether and to what extent it is possible to monitor diachronic changes on a data-driven basis concerning categories related to risks and opportunities. There is also a difference in the availability of raw data, analyses and knowledge.

There is a lot of **data** concerning the **domain of legal and ethical regulation**, but little **knowledge** on the actual situation concerning implementation of freedom of expression and freedom of information. The lack of monitoring capacity is partly methodological: there is no capacity to collect and analyse cases that reflect the interpretation and implementation of laws and norms. Case studies enable to ask who is acting against whom and what indicates the pressure on journalists or opinion makers. In other words, the case-study method - if applied systematically - would, in particular in the regulatory domain, allow monitoring of power relations and balance between different parties.

In Estonian the court cases are spread, and one should know the case law in order to find the relevant cases. However, the focus of analysis as well as the “sample” of the cases is limited.

Many important cases that actually reflect the risks concerning the freedom of information are published by professional journalists. An opportunity is the analytical work of cases done by the Data Protection Inspectorate. Monitoring of the development of media accountability instruments is easy due to the research projects. The data (methodology has been partly using case study approach) is systematically processed into knowledge and published in various articles since 2010.

Human resources are important for monitoring capabilities. In a small country like Estonia, where the number of **researchers** in the media field is small, the research work of students is also important, enabling the collection of empirical data over the years that individual researchers, especially without funding, would not be able to collect. Due to the relatively long tradition of academic journalism education, the **journalism domain** is well represented by many methodologically and theoretically diverse small-scale research papers. However, monitoring agency depends on single researchers and journalism students. In addition, Estonian journalism researchers have been successful in participating in international and EU-financed research projects and international networks.

During the first decade of the 21<sup>st</sup> century also **journalism education and training** was methodologically developed – concerning curriculum as well as didactics. This approach does not have any comparative dimension, which is a risk by itself.

Estonian Academic Journalism Society with its yearbook is important corporate agent concerning journalism discourse that brings together academia and practitioners. Consistency of the yearbook is particularly important.

The monitoring of the processes in the **media usage domain** in Estonia has been mainly descriptive (when we classify research as exploratory, descriptive and explanatory). Explanatory research has been carried out by the academic institutions in the framework of more established research traditions (like “Me. The World. Media” and EU Kids Online) and there the risk discourse has been visible. The monitoring capability has been decreasing due to the lack of national research funding in the field since 2014. Nevertheless, Estonian media and audience researchers have been successful in participating in international and EU-financed research projects. In sum the main risk concerning the media usage domain is: who’s interest is served by the studies and what is the methodology that enables to find answers that are most important to the society?

The focus on media **related competencies concerning lay members of society** is put on children (and adults in the role of parents of these children) and teachers. Awareness and literacy on communication ethics is entirely missing in research agenda. It might be possible that this topic might get more attention via character education programs led by the Ethics Centre at the University of Tartu. Concurrently, media literacy is declared important in different policy documents. In sum, there is a gap between the declared importance of media literacy and actual media literacy of people who belong in different age, social and ethnic groups.

## 6.2. Monitoring capabilities and the quality of data and knowledge

Estonian information systems have limits concerning the “find” functions, but a lot of data is digitally archived. ETIS enables to find key researchers, their publications and grants (together with the sum of money and the financing body); students’ thesis are publicly accessible via DSpace system. The database is completed by the researchers themselves and, as it forms the basis for the evaluation of research, the researchers are interested in its accuracy and timeliness.

One of the risks concerning the monitoring capabilities is lacking cooperation between private and public sector, research community and policy makers. The state’s contribution to the studies and use of the research has been criticized. Already in 2015 the National Audit Office concluded that:

*Although the state strives to make decisions on the best possible evidence, the National Audit Office is of the opinion that the use of studies in knowledge-based policymaking is not significant. Studies are mainly used as background information. The capacity of state agencies to commission studies is not equal, the commissioning of studies is inadequately coordinated and not all of the studies that have been commissioned are easily accessible to the general public. (National Audit Office, 2015)*

An expert with a long experience in media (former official of the Ministry of Culture) explains why so little available wisdom has been used for media policy making:

*Estonian monitoring capability increased during the first decade of the 21st century. The reason was that in the 1990s the academic research financing model encouraged researchers to do a lot of work with little money, the competition was tough, but the success rate was high and the career model in academia motivated researchers and educators to work hard. Therefore, in the „There is little knowledge about the media sector. Unfortunately. Partly because of the lack of ability to formulate questions that would support decision making. But partly because policy makers have not had any desire to receive information.*

*The media study, conducted in collaboration between the two universities, was a very good start. But that was just the beginning. There was no similar study. The desire to create some kind of analytical basis on which to make informed decisions in the first place has existed for years, but there seems to be a lack of a sufficient understanding of what we want to know.*

*These pieces of information that are needed by the Technical Surveillance Authority (TSA) and those that are necessary for policy making are different in nature. The ideal is that TSA collects this information itself, monitors it constantly and has an understanding of what is happening in the media (e.g. what is harmful content) and can react quickly. Policy making must include, for example, understanding how the media market works, what processes take place there. How cash flow is generated and when it may fall away. (Expert interview, 24 Oct 2022)<sup>17</sup>*

Estonian monitoring capability increased during the first decade of the 21st century. The reason was that in the 1990s the academic research financing model encouraged researchers to do a lot of work with little money, the competition was tough, but the success rate was high and the career model in academia motivated researchers and educators to work hard. Therefore, in the first decade of the 21st century, many researchers qualified for international grants and consor-

<sup>17</sup> An expert with long experience in media (former official of the Ministry of Culture), interviewed by Ragne Kõuts-Klemm, 24 Oct 2022 (23 min, Zoom).

tiums, and doctoral programs in journalism and media and communication attracted talented young people.

Journalism and media studies were better financed in 2000-2015 (see appendix 2). Until 2013-2015 the competition-based financing was 80-82% of the whole financing by the Estonian Research Agency. Since 2016 the science financing system has increased competition (the success rate for Estonian research grants in social sciences and culture [MP7] has been 11,1 in 2014; 18,8 in 2015; 13,1 in 2016; 20,6 in 2017 and 8,9 in 2018 [https://www.etag.ee/wp-content/uploads/2019/03/Eesti\\_teadus\\_2019\\_veeb.pdf](https://www.etag.ee/wp-content/uploads/2019/03/Eesti_teadus_2019_veeb.pdf)) and journalism studies have not received any research money. Audience studies got the last grant in 2014 and later there has been only EU based financing. This situation explains the nature of databases, data collection and knowledge acquisition (Appendix 2).

In 2000-2021 we could count altogether 26 researchers who have been or are involved in the research on the four domains of ROs. A critical question concerning human capital is related to the training of young researchers. Five young researchers and teachers were offered a teaching position along with doctoral studies in 2010-2012. Two out of three researchers are now holding postdoc positions, three are finishing their doctoral studies, their expert knowledge has been highly evaluated. A generational shift is taking place at the end of the second decade of the 21st century

In addition to the researchers there are a few organizations where the employers are expected to carry out analytical work (Praxis, Estonian Statistics and few other smaller organizations). The Estonian Data Protection Inspectorate is understaffed in comparison to the other two Baltic states ([https://edpb.europa.eu/our-work-tools/our-documents/other-guidance/overview-resources-made-available-member-states-data\\_en](https://edpb.europa.eu/our-work-tools/our-documents/other-guidance/overview-resources-made-available-member-states-data_en)). The analytical department of the National Court has many other focuses than freedom of speech and freedom of information.

## 7. Conclusions

Estonian monitoring capability is controversial. On the one hand it is efficient – the small number of people is used as efficiently as possible. Motivation system forces academic staff to be internationally competitive. On the other hand, in the second decade of the 21st century, the potential of monitoring media and journalism has been significantly reduced by reforms in higher education and science.

During COVID, the weakness in the communication between the public, the Estonian government and the Health Board was fully revealed. In other words, Estonia is an example of a country where, over the decades, a good and multi-faceted culture of journalism, media and communication research and monitoring has been built, but this expertise is not used.

However, the small size of the Estonian state also offers opportunities, in particular it is possible to test different methods, approaches, since the volumes of studies, in order to make generalizations, do not have to be too large. Secondly, a small community allows researchers and experts to well know each other's work and collaborate in common projects. The key question is whether the career system motivates enough cooperation.

The lack of resources has led to scientists being forced to actively search for research tools outside Estonia - this has helped to integrate research in the field of journalism and media with international community and international standards allowing to increase the competitiveness of Estonian scientists.

International funding for research has been significant compared to public funding. Part of the reason for the small size of the state's contribution is the absence of a negotiated and meaning-

ful knowledge of the importance of the media sector in the development of democracy. The state has not been a “smart subscriber”.

Inconsistency in funding has also led to inconsistency in monitoring – the focus of research has changed significantly over time. It also means that longitude knowledge cannot be formed.

## Appendix 1

**Table 1. Media related research grants and financing**

Name of the project	duration	Finance/ financing institution	keywords	Researchers in- volved
Critical Explorations of Media Related Risks and Opportunities for Deliberative Communication: Development Scenarios of the European Media Landscape MEDIADCOM	2021-2024	EU	All domains	Halliki Harro-Loit Epp Lauk Ragne Kõuts- Klemm Mari-Liisa Parder Kuldar Taveter Urmas Loit
ySKILLS - Youth Skills	2020-2023	EU 104 700	Media related competencies	Veronika Kalmus, Signe Opermann, Mari-Liis Tikerperi, Marit Sukk
CORE - Children Online: Research and Evidence. A knowledge base on children and youth in the digital world	2020-2022	EU 89 000	Media compe- tencies	Veronika Kalmus, Signe Opermann, Maria Murumaa- Mengel, Marit Sukk
EU Kids Online Survey Estonia	2018-2019	EST 25 000 + 20 000 + 20 000 + 20 000	Media usage, media related competencies	Veronika Kalmus, Andra Siibak, Marit Sukk
Acceleration of Social and Personal Time in the Information Society: Practices and Effects of Mediated Communication	2014-2019	EST 574 800	Media usage	Veronika Kalmus, Ragne Kõuts- Klemm, Triin Viha- lemm, Marju Lau- ristin, Peeter Viha- lemm, Halliki Harro-Loit
LSHUH14157 "Meediasotsioloogilise uuringu „Kultuuriajakirjanduse sisu ja kasutajaskond“ läbiviimine"  Content and audience of the Estonian cultural media	2014- 2016	EST (Min- istry of Culture) 58 155	Journalism	Peeter Vihalemm

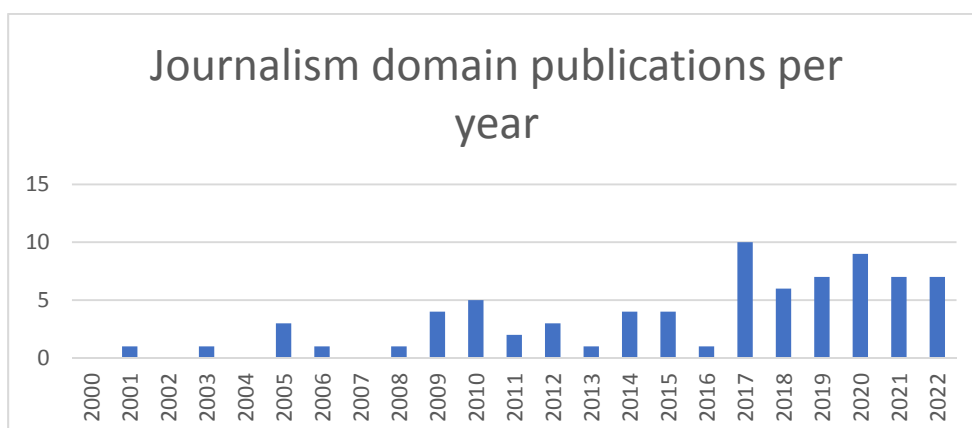
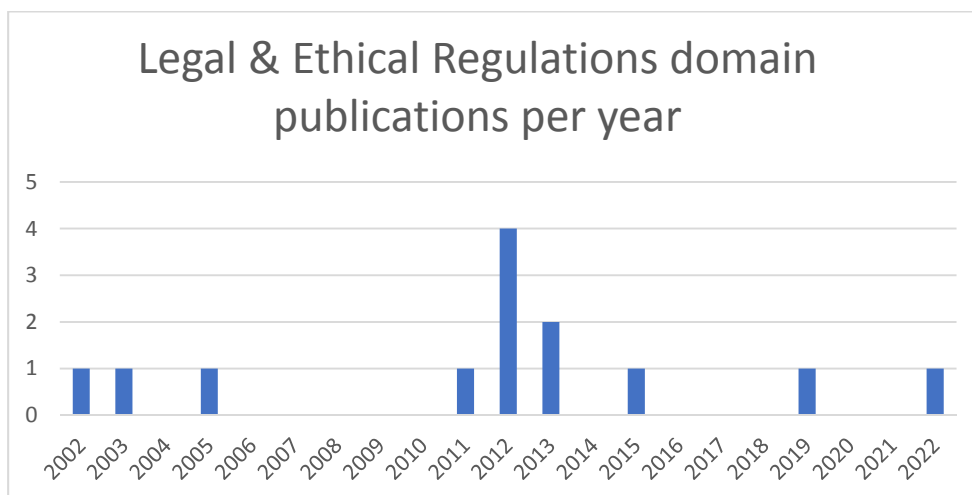


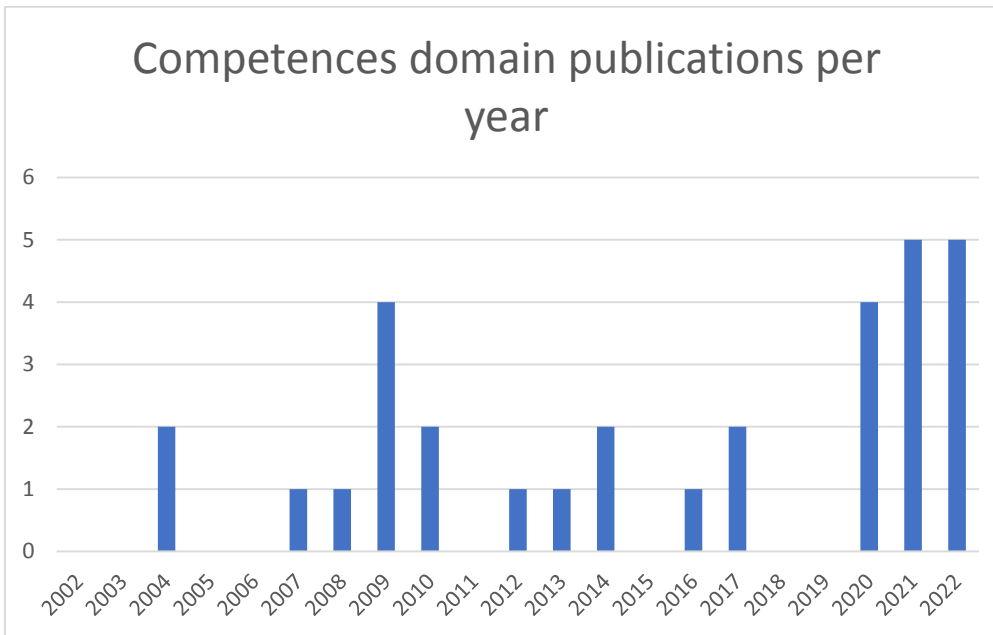
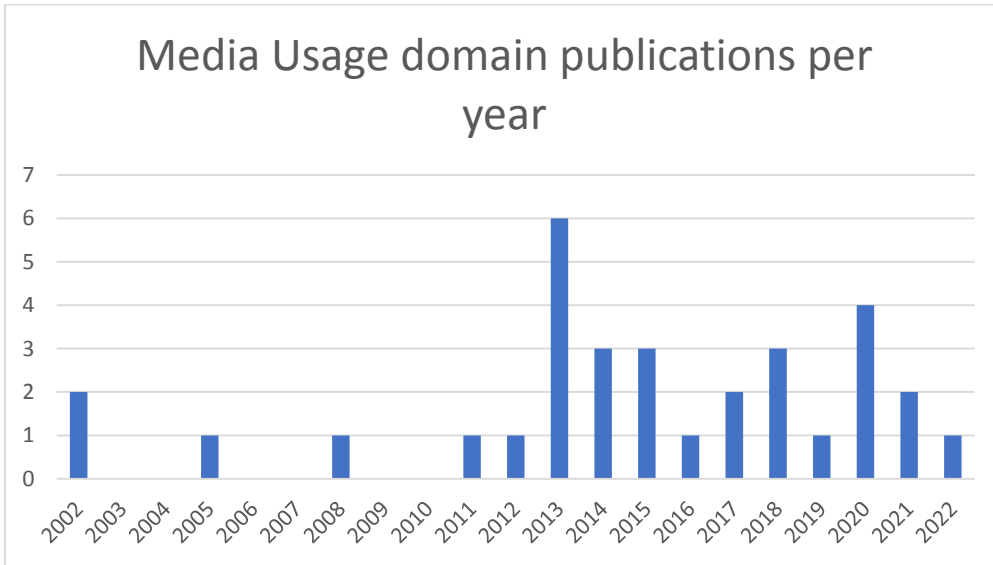
Survey of the Situation and Trends of Estonian Media Policy	2019	EST 20 150	Media (policy)	Ragne Kõuts-Klemm, Halliki Harro-Loit, Signe Ivask, Marten Juurik, Urmas Loit, Andres Jõesaar, Indrek Ibrus, Väino Koorberg, et al.
Digital era complexities for audiovisual industries of small countries in the European Union	2017-2021	EST 201 600	Media (industry)	Ulrike Rohn, Andres Jõesaar, Sten Kauber
TU Center of Excellence in Media Innovation and Digital Culture	2015-2021	EST 138 000	Media (industry), digital culture	Indrek Ibrus
CATCH-EyoU – Constructing Active Citizenship with European Youth: Policies, Practices, Challenges and Solutions	2015-2018	EU 157 500	Media usage, media related competencies	Veronika Kalmus, Ragne Kõuts-Klemm, Signe Opermann, Mari-Liis Tikerperi, Andu Rämmer
"Assessing the risk for media pluralism in EU and beyond: application of the Media Pluralism Monitor tool (MPM2015116) in 30 European countries	2016			Halliki Harro-Loit Urmas Loit ; Andres Kõnno
Analüüsi teostamine Eestis kehtiva meediateenuse regulaatorasutuse regulatsiooni vastavuse kohta audiovisuaalmeedia direktiivi ettepanekule/ Examination of the compliance of the regulation of the media service regulator in Estonia with the proposal for an Audiovisual Media Directive	2016	EST 1200	Media regulation	Andres Jõesaar
Centre of Excellence in Cultural Theory	1.02.2008–3 1.08.2015	300 000 for the research group		Halliki Harro-Loit Anu Masso Katrin Kello Marten Juurik
Update and the Pilot Test Implementation of the Media Pluralism Monitor	2014	12 500		Halliki Harro-loit Urmas Loit
WJS	2010- 2014(+)	No financ- ing	Journalism sur- vey	Epp Lauk, Halliki Harro-Loit, Ragne Kõuts-Klemm, Marju Himma-Kadakas
Promoting efficient co-operation network of film and media schools and media industry	2013-2014	Norway 30 000	Media education	Andres Jõesaar
"MediaAct - Media Accountability and Transparency in Europe	1.02.2010– 31.07.2013	EU 54 990	Media accounta- bility	Epp Lauk Halliki Harro-Loit Urmas Loit
"MEDIADDEM European Media Policies Revisited: Valuing and Reclaiming Free and Independent Media in Con-	1.04.2010– 31.03.2013	EU 118 600,02 EUR	Media policy	Halliki Harro-Loit, Epp Lauk, Urmas Loit

temporary Democratic Systems				
"Õpetajate IKT kasutusaktiivsuse mõju õpilaste tehnoloogia teadlikule kasutusoskusele Impact of the ICT activity of teachers on the knowledgeable use of student technology	13.12.2010–20.12.2013	36 164,47 EUR	Teachers digital competencies Media related competencies	Pille Pruulmann-Vengerfeldt Kadri Ugur
Actual complexity of cultural communication and methodological challenges of cultural research	1.01.2007–31.12.2012	EST Research 319 294,75	Journalism history, journalism cult com	Epp Lauk /Halliki Harro-Loit
"Changing Journalism Cultures: A Comparative Perspective	1.01.2008–31.12.2012		journalism	Epp Lauk
"Formation of the 21st Century Media Society in Estonia	2001-2005 2014			Marju Lauristin, Peeter Vihalemm, Ragne Kõuts-Klemm Halliki Harro-Loit

## Appendix 2

### Bibliographical data in 4 domains. Publications per year.





## Appendix 3

### List of researchers

Marju Lauristin; Peeter Vihalemm (Baltic media systems; media usage); Epp Lauk (journalism profession, education, policy, accountability, Estonian press history) Ragne Kõuts-Klemm (sociology of journalism and media usage); Halliki Harro-Loit (Journalism studies, media policy and regulation, interviewing, media history), Kadri Ugur, Urmas Loit, Signe Ivask, Marju Himma-Kadakas (skills of journalists), Pille Pruulmann-Vengerfeldt (one period, media literacy); Veronika Kalmus (children usage), Signe Opermann (children usage); Andres Jõesaar (public service media, Russian-speaking audiences); Indrek Ibrus (media industry, media innovation), Ulrike Rohn; (media pluralism); Katrin Tiidenberg (social media audiences), Alessandro Nani (media innovation); Triin Vihalemm (Russian-speaking audiences); Maarja Lõhmus (public service media); Hagi Šein (television market and audiences), Salme Rannu (media usage), Andres Kõnno (media pluralism monitoring), Valeria Jakobson (Russian-language media), Maria Jufereva-Skuratovski (thesis on russophone journalists 2021). Indrek Treufeldt, Mari-Liisa Parder, Marten Juurik (journalism and media ethics, information law), BritLaak, Viivika Eljand Viivika Eljand-Kärp (journalistic interviewing), Liis Auväärt, Eleri Lõhmus, Marit Sukk (media usage), Mihhail Kremez (Russian-language audience)

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