TRANSFORMATION OF POST-COMMUNIST BROADCAST MEDIA:

A CASE STUDY OF ESTONIA

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ABSTRACT

The world in the late twentieth century experienced a third wave of democratization. Most notable was the collapse of the Soviet Union and the demise of communism in Eastern Europe. Among the challenges confronting these countries was the transformation of their state broadcast structures into independent democratic broadcast systems. This study utilized a case study and historical approach to examine the restructuring of a broadcast media system in a post-communist country, Estonia. The implications that can be drawn from this study is that post-Communist broadcast system transformations are complex, especially considering the formidable challenges confronting a country as it revamps both its political and economic system.

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INTRODUCTION

The world in the late twentieth century experienced a third wave of democratization. Since the 1974 coup in Portugal, over forty countries experienced a transition from non-democratic to democratic political systems (Huntington, 1996, p 4). Most notable was the collapse of the Soviet Union and the demise of communism in Eastern Europe. These post-Soviet societies found themselves in an awkward position caught between the old state-centered

totalitarian system and democracy and its rules, between the old command economy and a competitive market economy.

Burdened with the baggage and relics of a state-managed political, economic, and social system, these societies followed a route to democracy influenced by both the legacy of their recent past and by their future goals (Frentzel-Zagorska, 1993, p 177). As these countries made this transformation, they democratized their institutions and liberalized their economies. Russell J. Dalton (1996) noted that "for the first time we are witnessing a transition from communism to democracy, and the nature and destination of this transition is unclear (p 1)."

The transformations in Eastern Europe and the Post-Soviet Countries serve as a backdrop against the political fatigue suffered by the West and Central Europe, illuminating the challenges confronting democratization and communication. (Bruck, 1993). Further, these newly democratic countries provide an excellent opportunity to study the effects and outcome of radical political and economic changes in a mass media system. These post-communist countries faced many challenges as they politically and economically transforming their institutions and societies. This study utilized a case study approach to examine the challenges and developments in the transformation of a broadcast system in a post-communist country, Estonia.

After gaining its independence in 1991, Estonia's existing state-run broadcasting structure was a relic inherited from the Soviet Union. Estonia was particularly aggressive as it democratized its political system and transformed its economy. As Estonia focused on restructuring its broadcast system it faced a number of challenges. In addition, a number of questions and issues arose as Estonia changed its state broadcast structure into an independent democratic broadcast system. This research focused on the first five years of the restructuring of Estonia's broadcast system, 1991-1996. During this period, Estonia saw the significant development of a private broadcast system to parallel its state owned and operated public system of radio and television stations. For this study, the primary guiding question was: What challenges did Estonia confront as it transformed its broadcast system?

REVIEW OF THE LITERATURE

A country's mass media system mirrors the political, social, economic, and geographic conditions of that nation, revealing the character and nature of that society (Head, 1985). Research approaches in studying mass media systems include historical, descriptive, comparative, and critical perspectives. Much of the research on mass media

systems normally incorporated two or more of these approaches. This study utilized historical and descriptive research approaches in examining the transformation of Estonia's broadcast system between 1991 - 1996.

Historical research of mass media systems examines the historical context or development of a particular mass media system. Studies include areas such as the development of a specific medium in a mass media system, the evolution of a particular mass media entity, and a review of a particular historical period for a mass media system. Examples include Smeyak's (1973) historical examination of the development of broadcasting in Guyana, Smith's (1974) history of British broadcasting, Ellis's (1979) study of the evolution of Canadian broadcasting, Brigg's (1985) study of the BBC's first fifty years, McDowell's (1992) examination of the history of the BBC broadcasting in Scotland, Cathcart's (1984) history of the BBC in Northern Ireland, and Criswell's (1997) recent study of British Broadcasting history. Historical examinations contribute to an understanding of the contextual issues surrounding the development of mass media systems.

Descriptive research contributes information on various factors and attributes of a mass media system. Many of these studies involve comparative research, comparing various mass media systems by a set of descriptive factors, and most include historical overviews of a mass media system's development. The research incorporating these approaches examines a number of mass media dimensions. Alan Wells (1996) sets forth five key factors upon which a media system can be examined and studied. He believes that an analysis of a media system should begin with the following questions: "How is the media controlled?, How is it financed?, What is its purpose?, Whom does it serve?, and How does it ascertain the effect it is having? (p 7)." Wells observes that control is a key factor in studying media systems. He cites A. Namurois' classification scheme composed of four types, state-operated, public corporation, public interest partnership, and private enterprise, as an adequate beginning to study control (p 5-6).

Some descriptive studies of mass media systems include Ploman's (1976) description of broadcasting in Sweden, Hallman's and Hindley's (1977) study of broadcasting in Canada, Sanders' (1978) research on broadcasting in Guyana, Fisher's (1978) study of broadcasting in Ireland, Noriega and Leach's (1979) examination of broadcasting in Mexico, and Chatterji's (1987) description of broadcasting in India. Early descriptive research was conducted in the 1970s on radio and television in Eastern Europe while these countries were still communist (Paulu, 1974). In addition, research was done incorporating both descriptive and historical approaches with Porter and Hasselbach's (1991) study of Germany's broadcast regulation. Recent descriptive research on African countries was conducted by Carver (1995)

on Malawi and South Africa, by Lauriciano (1995) on Mozambique, by Lush (1995) on Namibia, and by Maja (1995) on Kenya, Tanzania, Uganda, Zambia, and Zimbabwe.

Review of Literature on Post-Communist Mass Media Transformations

Studies concerning the political and economic changes of mass media systems in post-communist Eastern Europe and the newly independent countries from the demise of the Soviet Union involved various aspects of the transition itself, and the role of the mass media in these transformations. The few studies done in the last decade included: snapshot reports of the mass media in transition, the lack of changes in some mass media systems, the aspects of changes occurring in the mass media systems, the barriers and limitations to changes in the mass media, the processes of change in a mass media system, the mass media's role in political development, the descriptions of mass media in post-Communist countries and the development of a transitional press concept to supplement the Four Theories.

Hester, Reybold, and Conger (1992) edited a series of articles that provided sketches of various media at the onset of democratization in 1991. A year later Hester and Reybold (1993) provided further snapshots of journalistic and mass media activities and the challenges in Eastern and Central Europe during democratization. In his examination of Belarussian mass media, Oleg Manaev (1993) noted that despite democratization there had been no change in the mass media's political and economic status. The mass media still remained dependent on government authorities based on the principle of social management. Changes in the mass media systems of post-Communist countries were examined in an analysis of East Germany's media system as unification and democratization occurred (Robinson , 1995). A study of Romania noted that improvements and dramatic increases in broadcast competition and freedom in that country were attributed to the "development of alternative networks, access to Western-style programming and production techniques, the rise of private, independent broadcasters, and the international exchange of broadcast content (Mollison, 1998, p 127)." Barriers and limitations to changes in mass media systems were observed in studies of the Ukraine, Hungary and Germany (Pryliuk, 1993). Observations concerning media and change in Hungary concluded that creating a democracy and its institutions was difficult when a people's history and socialization did not include the expectations and assumptions needed to accomplish it (Kováts & Whiting, 1995).

Peter Humphreys (1994) examined the development of German media policies since 1945. Part of this study included the imposition, upon unification, of West Germany's pluralistic media policies and system on East Germany. While studying the process of change in a mass media system, Kleinwaechter (1997) studied the transition of

broadcasting in Eastern and Central Europe. The role of the mass media in political and economic development were examined in Romania and in a study of the comparison of Brazilian and Eastern European mass media (Gross, 1996). Gross (1993) also researched the role and effect of the mass media in forming public opinion in Romania, noting that the media's efforts produced mixed results.

Mass media's role in the process of democratic transition was compared in Brazil and Eastern Europe (Busato, 1993, Gross, 1996). Janice Overlock (1996) offered a descriptive overview of media developments in the newly independent post-Communist countries, providing a brief description of the number and programming of radio and television stations and the status of developing broadcast laws. John Downing (1996), using Poland, Hungary, and Russia as his focus, examined the multiple roles of the media in the political, economic, and cultural transitions taking place in these countries between 1990 - 1995.

In studying the rapid changes occurring in Bulgaria's media structure, it was discovered that the prescriptive concepts of authoritarian, libertarian, Communist, social responsibility and democratic socialist coexist. Media developments in post-communist Bulgaria were examined leading to the development of a descriptive transitional press concept (Ognianova, 1996).

The transformations in Eastern Europe and in the newly independent post-Soviet nations furnished new opportunities to study the democratization of mass media systems (Bruck, 1993). They have had to redesign themselves politically and economically. As one of the new post-Soviet nations, Estonia's transformation was significantly different from that of the Eastern European nations, because its political and economic structures were highly integrated with the Soviet Union. Upon gaining its independence in 1991, Estonia embarked on an aggressive campaign of political and economic changes. One major focus of these changes concerned its broadcasting system.

Estonia

Estonia is situated on the eastern shores of the Baltic Sea, bounded in the north by the Gulf of Finland. It shares borders in the east with Russia and in the south with Latvia. The northern most of the three Baltic Republics, Estonia is larger than Denmark, Netherlands, Belgium, or Switzerland. The country covers 45,226 square kilometers

with another 2,315 sq. km in dispute with Russia (Fjuk & Kaevats, 1994). By comparison, its is approximately the size of New Hampshire and Vermont combined (Cannon & Hough, 1995).

The Soviet Union occupied Estonia from June 1940 to August 1991, with brief German occupation during WWII. Before this, Estonia had experienced over 20 years of independence from Czarist Russia. Under Soviet occupation, the Soviet Union controlled Estonia's mass media system and served the purposes of the Communist Party. During this period, Estonian mass media operated under the Lenin doctrine that the media must serve as collective propagandist, collective agitator, and collective organizer (McNair, 1991).

In August 1991, upon gaining its independence from the Soviet Union, Estonia immediately began changing the political and economic system imposed upon them by the Soviets. Left with the remnants of a fifty-year communist political system and centrally planned economy, Estonia proceeded to restore its democracy with a new democratic constitution and institutions. The development of independent broadcast media began with protections provided for by the new constitution, ratified in June 1992, guaranteeing freedom of the speech and of the press. Section 45 secured the "right to freely circulate ideas, opinions, persuasions and other information by word, print, picture and other means.

In its early development, Estonia's broadcast system after independence faced a number of obstacles. It was an environment that challenged the development of a private broadcast system and the maintenance of a public broadcasting system.

RESEARCH QUESTIONS

Estonia gained its independence in August 1991. Like many of the newly independent post-Soviet countries and post-Communist countries of Eastern Europe, Estonia restructured and changed its political and economic systems. Unlike post-Communist Eastern Europe, Estonia had the burden of shedding the shackles of fifty years of Soviet occupation and control. An important part of this transformation was the democratization and privatization of its broadcast media system. The following research questions guided this investigation:

- What challenges did Estonia encountered in transforming its state owned and controlled broadcasting structure into an independent broadcast media system?; and
- What were results of the transformation of Estonia's broadcast system in terms of a public broadcasting structure and a private broadcasting system?

The answers to these research questions provided insight into the challenges that confronted Estonia, and generally other post-communist and post-Soviet countries, as they restructured their state broadcast structures into an independent democratic broadcast system.

METHODOLOGY

This research employed a case study approach, which study the changes and development in Estonia's broadcast system. A case study approach was adopted since it focuses on understanding the dynamics existing within a single environment or setting (Arneson, 1993). Although the case study relied on the judgement of the researcher, it offered the advantage of triangulating sources of information, including personal interviews, newspaper reports, documents, and independent reports (Feagin et al, 1991). Estonia was chosen as a case study since it was recognized as the most advanced of the newly democratic states of the post-Soviet countries (Barnard, 1997).

The method used to study Estonia's broadcast system was historical. Startt and Sloan (1989) recognized that "one purpose of good history is to provide understanding of change (p 20)." Historical research furnished a "contextual foundation for identifying and understanding (Arneson, 1993, p 163)" issues and problems of the subject under study. Primary sources were used such as documents in conjunction with interviews to provide a historical view of the problem or experience of a situation. The major requirements for historical research were that evidence had come substantially from primary sources and that they had been checked for authenticity and credibility. Close examination and comparison of information gathered through primary sources contributed to establishing credibility and authenticity (Smith, 1981).

Purposeful sampling methods were used to select informants for in-depth interviews. For this study a snowball sampling method was used to recruit informants for interview. According to Babbie (1992), when a purposive sampling method was used, such as snowball, the researcher selected a sample of individuals that he "believe(s) will yield the most comprehensive understanding of [the] subject of study (p 292)." Some participants were interviewed for information they possessed, while others were interviewed for whom they knew. The latter respondents did not have information for study, but directed the researcher to someone who did. The researcher started the snowball by approaching individuals in Estonia's broadcast media. Then respective government ministries of culture and telecommunications were selected for interview for their knowledge of the development of Estonia's broadcast system.

Each informant was asked to suggest others to be interviewed. The Estonians interviewed for this research can be found in the appendix.

Research concerning Estonia's broadcast media system necessarily included accounting for all groups and interests that sought to influence its development. This included the following actors: government officials, members of parliament, former and current public and private broadcast owners and operators, broadcast interest groups or associations, and other interested parties such as journalists and consultants. The nature of the issues raised by the research questions influenced the "range of actors, the extent, depth, and effectiveness of their involvement, and their various motivations and behavior (Humphreys, 1994, p 6-7)."

Estonia's new constitution, government laws, and private documents were studied and compared for information and their contribution to the development of this new democratic broadcast system. Information also was gathered from the Baltic English language newspaper, *The Baltic Independent*, now *The Baltic Times*, reviewing issues for the five year period under examination. Estonian language newspapers *Eesti Päevaleht* and *Postimees* were also studied for relevant articles with the help of an Estonian. In addition, information provided by *Baltic Media Facts* and reports by the European Community contributed to the findings found in this dissertation.

The researcher spent approximately five weeks in Estonia interviewing various respondents, including government officials, parliament members, public broadcasters, private broadcasters, and consultants. Interviews provided the opportunity to gain information from different actors concerning Estonia's broadcast system. For this study the researcher enlisted a native Estonian versed in both the subject and the English language to serve as an interpreter or to clarify the questions or answers.

Treatment of the Data

Qualitative methods generated a tremendous amount of data. The information provided depth and detail on the research topic through direct quotation and description of situations, events, and interactions. Identification and organization of relevant data often was difficult yet important for successful analysis. Interpretation followed as the researcher studied the data for ideas, causes, and relationships. Then the analysis concluded with the researcher establishing trust in the interpretations by reviewing the data for alternative explanations (Patton, 1987). Analysis of the data collected in Estonia was enhanced by the constant review that occurred during the comparing and contrasting of information. Often additional ideas and information emerged that enriched the findings.

RESULTS

Broadcasting in Estonia: Development 1991 - 1996

In seeking to restore democracy, Estonia, while writing a new constitution, needed to create a marketplace economy and develop the institutions necessary for a democracy, including the development of a democratic broadcast system. Hagi Shein (personal communication, December 1996), managing director of Eesti Televisioon, noted that one of the first things in this process was the transition of Eesti Televisioon and Eesti Raadio to public broadcasting.

Initial development and growth of Estonia's broadcasting system meant overcoming several obstacles. These included availability and differences in technologies, the lack of a developed and mature retail marketplace, the lack of legislation for licensing and governing broadcasting in Estonia, and the lack of expertise in developing and managing broadcast stations in a democratic free market environment. In response to these challenges, development of Estonia's broadcast system began almost immediately.

Technical

Technical obstacles included differences in Soviet and Western frequencies and standards. Hardware was a problem since Estonia's market economy was yet to develop and the state had limited resources and it was costly to convert to new transmitters based on Western technical and frequency standards. Because the Soviet Union sought to control information broadcast to its population, its technological standards and those of Eastern Europe were different from the West. For example, Americans use the NTSC standard for television and the European countries use PAL; however the Soviet Union used the SECAM color system. Radio frequencies were also different. The Soviet Union and Eastern Europe utilized the 66 to 74 MHz bands while Western countries utilized 88 to 108 MHz (M. Hunt, personal communication, December 1996).

Despite these technical problems, the transformation of Estonian broadcasting began rapidly. With Estonian independence, new frequencies were allocated in the 88 to 108 MHz band by the International Telecommunication Union (ITU). New private radio stations received licenses to broadcast on the new Western frequencies. However, audiences for these new stations initially were limited since it was estimated that only about 15 to 20 percent of the population, mainly in northern Estonia, had receivers equipped to listen to the new frequencies. Hunt (personal communication, December 1996) observed that this changed as additional new radio stations went on the air and radio receivers equipped with the Western frequencies became readily available and more affordable.

An important factor influencing the redirection of Estonian broadcasting was that the state-owned transmitters for radio and television, which Estonia inherited from the Soviets, were placed under the control and ownership of Eesti Telekom, a state owned company that was under the direction of the Ministry of Transport and Communication. Estonian public radio, public television, and private commercial television stations had to lease and pay rent for use of the transmitting system to Eesti Telekom. Estonian public radio continued to broadcast on the old transmission system since it was expensive to replace the approximately twenty transmitters that covered the country. New transmitters were slowly acquired and geared initially to areas with higher concentrations of the population (M. Hunt, personal communication, December 1996).

Eesti Telekom generated needed revenues for a country having limited resources and a developing market economy. One major problem with this arrangement was that Eesti Telekom raised the rent for Estonian public radio and public television approximately 16 times during the first year, while state subsidies to public radio and public television remained fixed (Hunt, personal communication, December 1996). While the rate of inflation was certainly high, the rate increases inhibited the ability for private and public broadcasting to develop and grow.

Since private radio stations had their own transmitters, they were not affected. But when private television developed, that segment also rented its transmitters from Eesti Telekom and experienced the high lease fees and rate increases. Ilmar Taska (personal communication, December 1996), owner of Kanal Kaks (Channel 2), complained about the increasing costs of transmitter rental fees. *The Baltic Independent* quoted Taska as saying that

> Latvian Telekom does not trouble one with huge price increases . . . In Latvia, we have to pay 22,126 kroons ($1,813 USD) a month for transmission costs, while in Estonia a similar transmitter costs us 149,554 kroons ($12,258 USD) a month (Trummel, 1995).

He noted that this was equivalent to almost 50% of the station's operating costs, compared to 5% to 10% for stations abroad.

Sturgess Dorrance (1994), an American consultant, observed that transmitter rental costs were extremely high when compared to the U. S. where costs were rarely more than 5% of a station's operating expenses. Taska expressed concern that the money and time expended over the issue of transmitters in Estonia could have been better spent on development of original programming and expanding the channel (Trummel, 1995). The high transmitter fees also possibly had the effect of inhibiting the development and growth of private television. Money spent on transmitter fees

incurred a high opportunity cost since it could have been better invested in premium programming, making private television more competitive with public television.

The concern for high transmitter fees obscured another potential problem with perhaps greater impact, government ownership of the transmitters. Transmitter ownership provided the government opportunities to wield control over those stations that rented transmission systems from Eesti Telekom. While there was no evidence to show that it had occurred, interview respondents cited it as a concern. Simon Holmberg (personal communication, May 1998) noted that there was opportunity for the government to exert indirect influence over public radio and public television by increasing the transmitter fees but not their subsidies.

The fees charged for transmitter rental came at a time when the Estonian government had limited resources and its market economy was still developing (R. Veidemann, personal communication, December 1996). The increasing rates were associated with the high inflation rates Estonia experienced during this period after independence. Yet, the high fees placed greater pressure on both public and private broadcasters' budgets. The high cost of transmission placed greater pressure on public broadcasting to increase revenues through advertising in order to support their operations. The high transmission fees for private television broadcasters inhibited their ability to develop, grow, and compete with public broadcasting and other private stations.

Economic

The lack of a developed and mature market economy hindered development of Estonia's democratic broadcast system. All aspects of the economy were previously monopoly owned and controlled by the state (the Soviet Union). Competition did not exist and the advertising that had existed were commercials for state owned enterprises (H. Haldre, personal communication, December 1996). The initial years of Estonian independence therefore, found a market economy in its infancy in terms of retail development, maturity and competition.

After independence, advertising started out minimally since many businesses did not feel the need to advertise (H. Sinisalu, personal communication, November 1996; R. Ricci, personal communication, December 1996). Sinisalu observed that the majority of advertising came from transnational firms seeking to introduce their products into a new marketplace. Such advertising grew as Estonia's market economy developed. Limited advertising revenue hindered private broadcasting's ability to grow and thrive and was compounded by competition from a public broadcasting system, already subsidized by state revenues. Despite government support, public broadcasting competed with private

broadcasters for these limited advertising dollars. As noted earlier, the economics of high rental fees for transmitters assessed by the state-owned company, Eesti Telekom, hindered the development of both public and private broadcasters. Thus, the lack of a mature market economy, competition for limited advertising dollars in a developing economy and the economics of high transmission rental fees in an inflationary economy slowed public and private broadcasting development in Estonia.

Legislation

The reform and development of independent broadcast media began with protections provided for by the new constitution, ratified in June 1992, guaranteeing freedom of the speech and of the press. Section 45 secured the right to freely circulate ideas, opinions, persuasions and other information by word, print, picture and other means . It stated that there was no censorship. With these protections, the development of a democratic broadcasting system in Estonia began.

The initial lack of legislation guiding the licensing and regulation of both public and private broadcasting presented a major challenge for the development of Estonia's broadcast system. Estonia's state-owned broadcasting system had served as a tool of the state and communist party. Now as Estonia's 'public' broadcasting system, financed and operated by the state, its role and operations were now unclear without legislation to give direction. This was evident in the conflict that evolved with private broadcasters over the advertising and entertainment programming on public broadcasting stations. Public broadcasting in Estonia was permitted additionally to finance its operations with advertising and to broadcast entertainment programming. To the consternation of private broadcasters, public broadcasters were acting more like private radio and television stations (U. Loit, personal communication, November 1996).

The lack of legislation from August 1991 to June 1994 was problematic in the development of private broadcasting in Estonia. The process, procedures, and criteria for getting a license were ambiguous, often resulting in conflict. Legislation was needed to specify the criteria of how licenses were to be assigned and to regulate broadcasters. It would not be until the June 1994 Broadcast Law that legislation was enacted regulating broadcasting in Estonia.

The antagonistic relationship between public and private broadcasters demonstrated the need for legislation, as did the issues surrounding the state-owned transmission system. However, for approximately the first three years of independence, Estonian broadcasting existed with no permanent legislation to license and regulate it. The regulation

that eventually was enacted, the June 1994 Broadcast Law, left a number of issues unresolved, exacerbating the conflict between public and private broadcasters.

Training

The lack of expertise concerning the operations and direction of a free and independent media created another challenge to the development of a democratic broadcast system in Estonia. In addition, this lack of business knowledge and skills also created a problem in the general retail sector. Sinisalu (personal communication, November 1996) indicated that most entrepreneurs in Estonia had been educated to manage businesses under the old communist command economy. Competition did not exist in this environment. However, with the economic changes, businesses had to learn about marketing and competition as a new retail environment developed. Entrepreneurs that had entered the private broadcasting business lacked the strategic and operational knowledge associated with the successful operation of a broadcast station in a competitive environment. This included marketing, programming, management, sales, and cost control. Thus, public and private broadcasters and their employees had to learn the skills of functioning in a competitive broadcast environment, where most had little experience.

Another part of the lack of business experience related to the general retail market. For over fifty years, Estonia's economy was centrally planned and owned by the state. Now, as Estonia privatized state enterprises and changed its economic structure, the managers and employees of this developing market economy had to learn new business skills and practices, including learning to compete and advertise in a market economy. Since Estonia's new market economy was just developing during the period under study, one problem for commercial broadcasters was the limited advertising market available to them. The new retailers that established themselves during this period had little competition and felt no need to advertise. This challenged broadcasters, dependent on advertising for revenue, and limited their ability to grow in this developing market economy (R. Ricci, personal communication, December 1996).

Eesti Televisioon: Estonian Public Television

When independence was achieved, there were four state-operated television stations that Estonians could receive: Eesti Televisioon (ETV), Ostankino Televisions (KTV I), Russian Television (KTV II), and St Petersburg Television. The Ostankino (Central TV 1) and Russian (Central TV 2) television stations were national channels that originated out of Moscow. The St Petersburg channel was a local area station serving the region. All three of these Russian-language television stations shared transmitters with ETV in Estonia (M. Hunt, personal communication,

December 1996). The coverage of these television stations in Estonia varied. Lindstro'm (1995) noted in his research that only 7500 people in Estonia could not receive any channel. Estonians living in Northern Estonia could receive Finnish TV, and Swedish TV was accessible to Estonian's living on the islands. Latvian TV reached Estonians in Southern Estonia.

The Ostankino, Russian, and St. Petersburg television stations continued to broadcast on transmitters in Estonia for the first two years of independence (TV companies compete for Russian air-time, 1993). The majority of the audiences in Estonia watched Eesti Televisioon (ETV), while the majority of the non-Estonians watched Ostankino (Hoyer et al. (1993). By May 1993, the Russian and St Petersburg television stations had discontinued transmitting in Estonia due to a lack of funds for transmission charges (*"TV Companies Compete for Russian Air-Time," 1993*). Ostankino TV also discontinued broadcasting in Estonia in early 1994 because of the transmitter costs involved (*"Ostankino TV Channel Axed," 1994*); (25 million rubles or $23,000 USD a month, Källu, 1993).

Eesti Televisioon (ETV) was launched in 1955 (Hoyer et al., 1993). At independence, Eesti Televisioon[1] and Eesti Raadio were operated as separate entities (H. Shein, personal communication, December 1996). Peeter Sookruus (personal communication, December 1996), managing director of Eesti Raadio, noted that state television and state radio had existed together until 1989 when they were separated. The number employed by Eesti Televisioon when the country gained its independence was more than 1,000 (*Casperson, 1997*). The station broadcast primarily in the Estonian language and covered almost the entire country . This contrasted with the limited coverage of the private commercial television stations that appeared later.

Subsidized primarily by the state during Soviet occupation, commercial advertising was introduced on the station during the 1970's. Advertising at that time came from:

> wealthy state enterprises or different cultural events. The TV audience especially laughed at the poor quality and low-production levels of these commercials. Income was relatively small and constituted, even in 1990, only around 2 percent of the total budget (Hunt, personal communication, December 1996).

[1] To prevent confusion, from this point Estonian government owned television will be referred to as public television. The previous reference of State Television refers to the Soviet approach to broadcasting where the broadcast media were state owned and operated, serving as a tool to promote and preserve the interest of the state. Estonian government owned radio will be referred to as public radio. Generally public television and public radio serve the public's interest rather than the state.

Eesti Televisioon continued to sell advertising after independence, which helped to provide revenue, albeit small at first, at a time when government resources were very limited (Hunt, personal communication, December 1996). However, as Estonia's market economy developed and grew, advertising revenues increased significantly each year and by 1996 it constituted almost 34% of Eesti Televisioon's revenues (Eesti Televisioon on Glance, 1996). Advertising on both public television and public radio caused considerable tension between public and private broadcasters (R. Lang, personal communication, November 1996). This issue was significant during the drafting of Estonia's Broadcast Law.

During the early period of independence, the number of employees of Eesti Televisioon decreased from over 1000 to about 640 people (H. Shein, personal communication, December 1996). Part of the decrease occurred, in part, to cut costs and increase productivity during a time when the Estonian government's financial resources were very limited. Another aspect of the decrease in personnel at Eesti Televisioon, and also Eesti Raadio, was the attrition due to employees leaving for better paying jobs in private broadcasting. Nele Laanejare (personal communication, November 1996), Chief-Editor of Estonia's newest television station , TV1 , observed that she and others were approached by private broadcasters and offered better wages.

Eesti Raadio: Estonian Public Radio

State radio consisted of three channels at the time of independence. Eesti Raadio had been established after German occupation in 1944 (E. Kokkota, personal communication, May 1998). The second Estonian radio station, Vikerraadio (Rainbow Radio) began broadcasting news and music in 1967 (Hoyer et al, 1993). The third Estonian radio station, Stereoraadio began broadcasting in 1986. All three stations at the time of independence were broadcasting primarily in Estonian, although Eesti Raadio had broadcast some Russian language news and programs (E. Kokkota, personal communication, May 1998).

Eesti Raadio at the time of independence had more than 800 employees.[2] As with Eesti Televisioon, Eesti Raadio had commercials on the stations since the 1970s (Hunt, personal communication, December 1996). In addition, Eesti Raadio also rented transmitters from Eesti Telekom. Herkki Haldre (personal communication, December 1996) was appointed by the Riigikogu in 1992 as managing director of Eesti Raadio. With Estonia's economy in poor shape,

[2] Estonian state radio refers to the organization that operated the three stations at independence, Eesti Raadio, Vikeraadio, and Stereoraadio. After May 1993, the Estonian public stations were Vikeraadio, Klassikaraadio, Raadio 2 and Raadio 4. Stereoraadio had merged and become Klassikaraadio. Eesti Raadio had merged with Vikeraadio. Both Raadio 2 and Raadio 4 started broadcasting in May 1993.

his idea to the Riigikogu was for Estonian public radio to create and develop a new commercial channel, Raadio 2. Once it was successfully operating, according to Haldre's plan, this radio station would be sold off, generating badly needed revenue for renovating the public radio archives and Estonia's antiquated transmitter system. *The Baltic Independent* noted that

> Mr. Haldre believes that R2 will eventually help to finance the building of a network of Western-style transmitters to replace the Russian ultra short transmitters which are used at the moment; the 100 million kroons needed for the project will come, it is hoped from the privatization of R2 once it has built up a large enough audience (Barne, 1993).

Raadio 2 began broadcasting in May 1993. At the time Haldre (personal communication, December 1996) used the establishment of commercial public Raadio 2 as an opportunity to clear commercials off the other two public radio stations, distinguishing them as public compared to the new commercial public station. The new Raadio 2 was targeted at young people with pop and rock music, talk shows, and news programming.

As managing director of Estonian public radio, Haldre (personal communication, December 1996) also established in May 1993, Raadio 4, a Russian language station. Before that there had been only about two hours of Russian language programming on the stations. Because of the large Russian minority population in Estonia, he felt it necessary to provide a Russian language station geared to this population. Haldre stated that "what surprised me most was that I was accused later by a commission of Parliament of wasting tax payers' money" on Raadio 4. However, since Estonia's population was composed of 30% Russians he felt that "you had to serve them with programming."

The primary goal of Raadio 4 was to "give information and news about changes and activities in Estonian society and cultural life (Eesti Raadio, 1996)." It was a 24-hour a day channel serving the Russian-speaking population with programs, also for Byelorussian, Ukrainian, and Armenian minorities. Raadio 4 also carried advertising as a means to finance its operations.

Estonian public radio's other two stations were the original Vikerraadio and Klassikaraadio. Vikerraadio's (Rainbow) programming represented traditional public broadcasting fare, including literary adaptations and radio drama, thematic discussions, children's programs and music. Every hour, Vikerraadio had newscasts, with longer news programs broadcast four times a day. The station broadcast 19.5 hours a day with 37% of the population listening daily (Eesti Radio, 1996).

Klassikaraadio (classical radio) broadcast for 9 hours a day with a daily listenership of 1.3%. The channel programed classical music and broadcast live concerts, operas, and other musical events for listeners. All four channels covered the whole country. In addition to its four channels, Eesti Raadio had a "commitment to record, produce, preserve, and distribute Estonian music and other recordings of cultural and historical value (Eesti Radio, 1996)." Eesti Raadio had a considerable archive of recorded programs, concerts, and music dating back to just after WWII. Unfortunately, bombing destroyed materials recorded before the war. At the time of this study, Eesti Raadio was in the process of dubbing onto compact disc materials from its archives to help preserve an important part of Estonian culture (I. Hausmann, personal communication, December 1996).

As with television, tensions concerning advertising also occurred between Eesti Raadio and the new private commercial radio broadcasters, especially with the development of Raadio 2. Private broadcasters felt that they should not have to compete with public broadcasting for advertising dollars. In 1992, they organized to form the Eesti Ringhaalinguites Liit (Association of Estonian Broadcasters [AEB]), representing the interests of private broadcasters before government and non-government organizations ("Radio in Estonia Shows Endurance," 1997). In essence, according to AEB Managing Director Urmas Loit (personal communication, November 1996), " public broadcasters have started to act like a private broadcaster" in that they competed for advertising dollars and broadcast entertainment programming, yet were subsidized by the state. What caused further irritation was the consideration that tax dollars paid by private broadcasters went to help subsidize public broadcasting with which they competed for advertising dollars (R. Lang, personal communication, November 1996).

The Riigikogu's Culture Commission sought to resolve the frictions between the public and private radio broadcasters by investigating the issues concerning advertising. The particular issue under investigation was that Estonian public radio, particular Raadio 2, was using "its subsidized status to offer advertising to audiences and at prices with which local commercial stations cannot compete (Barne, 1993)." The commission issued regulations in June 1993 that were in effect until a law on mass media was enacted by The Riigikogu. The regulations issued by the Culture Commission limited the content of programming, available airtime, and format of the advertisements aired on Raadio 2 (Barne, 1993).

The commission cut the permissible commercial airtime on Raadio 2 from 16% down to 5%. Originally the commission had set the limit at 7%, but Sulev Alajõe, Chairman of the Culture Commission indicated that it was

changed to 5% "in order to make it easier for [private] local stations to survive (Barnes, 1993)." Rein Lang, owner of AS Trio Ltd., found the action meaningless since it set the percentage for total airtime and not for each hour. Lang observed "that since no one would want to advertise during the night, state radio can still use 14 percent of prime time for advertisements (Barnes, 1993)." He also felt the commission should have regulated the rates that Eesti Raadio charged for commercials. The advertising issue continued to cause friction while the broadcast law was drafted and after its enactment. As of 1996, 80% of Estonian public radio's budget came from state subsidies, while advertising income from Raadio 2 and Raadio 4 made up the other 20% (P. Sookruus, personal communication, December 1996).

In addition to the advertising issues, Estonian public radio also had to rent its transmitters and, in the process, experienced a number of increases in fees from Eesti Telekom (M. Hunt, personal communication, December 1996). This contrasted with private radio broadcasters who, for the most part, owned their own transmitters. Haldre noted that "Telekom's transmission charges have rocketed since Parliament approved Eesti Raadio's annual budget last spring (Drew, 1993)." According to Peeter Sookruus (personal communication, December 1996) managing director of Eesti Raadio, fees for transmitters made-up almost 40% of the budget. At that time, Eesti Raadio was looking at cutbacks in its programming and other services. In 1996, Eesti Telekom raised its fees for transmission 18.5% ("Transmitting Rates to Raised," 1997). Thus, in addition to the tensions with private broadcasters, Eesti Raadio was faced with tension with government ministries over the rising costs of transmission fees.

By the end of 1996, Eesti Raadio had grown to four national radio stations. During the period after independence, Eesti Raadio had added Raadio 2, a popular music station targeted at young audiences, and Raadio 4, a Russian-language radio station with a mixture of music, news, and information programming. Eesti Raadio stations easily dominated local private radio broadcasters with a combined weekly listenership of 63% compared to all local private radio's 27% (Baltic Media Book, 1996).[3] Subsidized by the government, Eesti Raadio supplemented its budget through advertising revenues from Raadio 2 and Raadio 4. The result was that private broadcasters were indignant about a public radio broadcasting system that competed with them for listeners and advertising dollars.

Estonian Private Broadcasting: Early Development, Licensing and Regulation

[3] Ten percent of weekly radio listening occurred with stations outside Estonia.

After Estonia gained its independence, there were no established laws to guide it in issuing and regulating licenses to radio and television stations. Until the 1994 Broadcast Law, the Ministry of Culture and Education[4] oversaw broadcasting in Estonia via government acts. The process for receiving a license was two-fold. A person desiring a radio or television station had to apply for a frequency from the Ministry of Transport and Communication and then a broadcast license from the Ministry of Culture and Education (M. Laur, personal communication, November 1996). Haldre (personal communication, December 1996) noted that to obtain a broadcast license from the Ministry of Culture and Education, a prospective licensee had to provide information on intended programming, other proposed activities, and investment and control of the proposed station. The process for obtaining a broadcast license remained the same after enactment of the 1994 Broadcast Law.

According to Vello Lään (personal communication, May 1998), the process for approving Raadio Tartu, the first local commercial station to go on-the-air after independence, began in 1990 while Estonia was still under the control of the Soviet Union. This station, located in a university city 190 km from Tallinn, was founded and originally supported by the city of Tartu, the County Council, and Eesti Raadio (V. Lään, personal communication, May 1998). Due to the cost of operating this station, it was eventually privatized. Other community stations popped up in various regions, but eventually they either were privatized or went off-the-air ("Radio in Estonia Shows Endurance," 1997).

The first 'private' radio commercial license was issued to Raadio KUKU. As the first independent private radio station, Raadio KUKU began airing in Tallinn in March 1992, six months after Estonia gained its independence. Owned by three Estonians who formed the company, AS Trio Ltd., the station was dependent on advertising dollars. Its programming consisted of popular Western music and talk (Lang, 1996). Raadio KUKU was considered to have an ACE format (Adult Contemporary European) and was known for its slogan, 'Radio for the thinking person.' The station also broadcast commentary, news, and news analysis. The owners of Raadio KUKU, AS Trio Ltd., networked the station with others they owned in Tartu, Viljandi, and Paide. These stations carried Raadio KUKU's programming for a majority of the broadcast day and inserted only one or two hours of local programs ("Radio in Estonia Shows Endurance," 1997).

Seven months after Raadio KUKU began broadcasting, AS Trio Ltd. in November 1992, also developed and put on-the-air Raadio Tallinn, now Raadio 100, a private commercial Russian language radio station. The station was

[4] The Ministry of Culture and Education was a combined ministry under the Mart Laar government. In 1995, Prime

made possible with a grant from the Open Estonia Foundation, funded by the Soros Foundation. Raadio 100 was located in Tallinn and reached 50 kilometers outside the city. It broadcast 24 hours a day with live daytime programming and music by satellite at night. Raadio 100 was described as a mainstream station with a commitment to public service that included offering "a range of cultural programmes from fairytales for children through special classic and jazz music hours (Raadio 100, 1996)." Interestingly, Raadio 100 (1996) indicated that

> Information service in Estonia are [sic] largely fractured along ethnic and political lines. Radio 100 is an expedition. We are independent of state or political control. We strive to avoid taking an editorial position in our main task of providing information to the Russian-speaking community. Political rivals from all sections of society meet for live debates in our studios.

Raadio 100 was joined by a sister station in Narva in September 1995 operating on the same frequency, 100. Narva is located in Northeastern Estonia, at its border with Russia. The Narva station aired the Tallinn Raadio 100's programming plus some local production.

Radio stations have appeared and disappeared during the first five years of independence. Early development of Estonia's market economy occurred in its major cities, principally Tallinn in northern Estonia, and to a lesser degree Tartu. The rural areas and smaller cities, particularly in southern Estonia, lagged in the development of a market economy. Thus, limited advertising revenues in these areas made it difficult for local radio stations to survive financially.

Some stations, such as Raadio KUKU, united to form networks across the country to increase reach and advertising potential. Three large music stations created "nation-wide networks using regional licenses . . . Raadio UUNO [owned by AS Trio Ltd.], B3 [owned by AS Is-Music Studio], and Raadio Love [owned by Woodlinger International] ("Radio in Estonia Shows Endurance," 1997)."

Television licenses began to be issued when the transmitters and frequencies broadcasting the Russian and St Petersburg stations became available. Both stations had ceased their broadcasts in Estonia due to the costs of Eesti Telekom transmission fees. In the spring of 1993, nine television companies bid for the two channels that were soon to be available. Since the rules for dispersing the channels were not clear, seven companies, all domestically financed, organized against the other two companies, which were foreign financed. They demanded that the decision concerning

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Minister Tiit Vahi separated the ministry into two, Ministry of Culture and Ministry of Education.

the channels not be made until after a broadcast law was adopted (*"TV Companies Compete for Russian Air-Time," 1993)*. The Estonian broadcasters indicated that "they are guarding the interests of viewers against the inflow of low-grade American programmes (*"TV Companies Compete for Russian Air-Time," 1993*, p 3)" expected to be brought in by foreign investment.

Ignoring the demands of Estonian broadcasters, the ministry granted the commercial television licenses in May 1993. However, these licenses were only valid until the adoption of a broadcast law, but not beyond December 31, 1993. However, since no law was enacted by December, the licenses were extended until there was a broadcast law. At that time, commercial television channels would have to resubmit plans on programming, investment, and proposed activities to obtain a new license (Trummel, 1993).

Along with the licensing, the Ministry of Culture and Education responded to domestic broadcast concerns with several regulations to guard against the possibility of all day broadcasting of low-quality Western programming. The regulations were in effect until a broadcast law was enacted.

> The amount of foreign produced programmes must not exceed 30 percent, and 10 percent of all programming must be bought from local film producers. All programming ventures must at least be 51 percent owned by an Estonian enterprise (Källu, 1993, p B7).

According to then Minister of Culture and Education Paul-Eerik Rummo, the ownership provision was "a move at maintaining control over foreign capital in the Estonian media (Källu, 1993, p B7)."

Actually, the licenses for the first private commercial television stations went to three television companies, two of which shared the same transmission system. Licenses were granted in May 1993 to RTV (Estonian Commercial Television), EVTV (Estonian Video and Swedish Kinnevik group), and Kanal Kaks (AS Taska) (Trummel, 1993). All three companies were Estonian owned, but the latter two included foreign stockholders and or financing. Under the temporary licenses granted these companies, RTV and EVTV shared the same frequency operating on twenty transmitters with access to over 90 percent of the population. The transmission system and frequency assigned to Kanal Kaks involved five transmitters which could only be received in Northern Estonia, reaching about 60 percent of the country's population (Tammerk, 1994).

The first private television broadcasts did not actually occur until July 31, 1993 when RTV went on-the-air and August 1 when EVTV started its broadcasts. RTV and EVTV broadcast programming at different times, on the same

frequency, using the same transmitters rented from state owned Eesti Telekom. RTV aired programming on Saturday and Sunday mornings, filling the time with family oriented shows. EVTV broadcast seven nights a week from 8pm to 11pm airing soap operas, talk shows, feature films, and news. Western shows on EVTV included *E-Street, Miami Vice, Rescue 911, and Equalizer* (Oll, 1993).

Kanal Kaks was launched on October 1, 1993 by Ilmar Taska, an Estonian born Hollywood producer (Herbert, 1994). At first the station only had enough staff and programs to broadcast on the weekends. However, by January 1994, Kanal Kaks expanded its broadcasts to every day (Trummel, 1994). A major portion of Kanal Kaks broadcasts of three and a half hours of nightly programming were dominated by films, many of which were European and American movies. In addition, *The Baltic Independent* noted that "Taska has enchanted viewers by resurrecting Estonian films that had not been shown for years (Herbert, 1994, p 8)."

One interesting snag for Kanal Kaks came a few months after it had begun its broadcast when it decided to discontinue the Russian dubbed and Estonian subtitled soap opera *Santa Barbara*. Kanal Kaks northern coverage area at the time included the region where the majority of Estonia's Russian minorities resided. The station was besieged with letters and calls from disgruntled viewers. Taska recounted that the demand was so great that "some Russians even told us that they would go collecting money themselves to have it translated (Herbert, 1994, p 8)." The Russian voice-over, *Santa Barbara*, was brought back within a short period of time and was still on-the-air in 1996.

CONCLUSION

The challenges confronting Estonia epitomize those that confront post-Communist nations seeking to democratize their broadcast media systems. The following conclusions can be drawn from this study's findings.

The political and economic changes of a Communist state-owned and operated broadcast system result in short-term solutions with long-term consequences.

The results of this historical study reveal the complexities involved in changing post-Communist broadcast media systems. The infrastructure and economic system inherited from their Communist predecessors provide these nations little in the way of resources needed to initiate the changes needed to establish democratic free market systems. Post-Communist countries inherit antiquated broadcasting infrastructures, requiring tremendous investment to convert to Western frequencies and technologies. The financial resources needed by these governments to accomplish this task are limited during the early stages of these changes. In addition, the population has it own problem needing to purchase

new receivers to listen or view broadcasts on the new frequencies. Realistically, few people at the onset of a developing new market economy can afford to buy them.

In addition to renovating a broadcasting infrastructure there is the issue of deciding what to do with state owned and operated broadcast stations and transmitting facilities. The transformation of state broadcast systems into public broadcast media is complicated by the lack of a developed private broadcasting structure to meet the immediate needs of the population. Without established private broadcast media, the previous state-owned, now public broadcasting, system may choose to offer entertainment programming, in addition to educational and cultural material, in order to serve the needs of viewers. Also, since government financial resources are limited during this early period, these public stations are permitted to supplement their budgets with advertising revenues.

The problem with this arrangement is that it is difficult to change once it is established. Public broadcasting stations would find it hard to give up their favored position with audiences and the revenues produced by advertising. In addition, since most public broadcasters are part of the original state broadcast system, they have established influential positions and know where to lobby the parliament and government to maintain the status quo, especially in the enactment of broadcast legislation.

In transforming state broadcast systems into public broadcast media, post-Communist countries need clearly to determine and define their new role in society. Policymakers in post-Communist countries also need to understand the consequences of supplementing public broadcasting government subsidies with commercial advertising. While these short term solutions address immediate needs for viewers in society and public broadcasters, it creates long-term problems in the development and growth of independent private broadcast media.

The development of a private broadcast system in post-Communist countries, during the institution of political and economic changes, requires more than the marketplace; it requires regulation, training, and understanding of the publics of public and private broadcasting.

In Estonia's case, broadcast entrepreneurs lacked the infrastructure, legislation, expertise, and mature market economy to support the development and growth of a private broadcast system. In addition, Estonian private broadcasters lacked the established franchise that the public system had achieved over the course of time with listeners and viewers.

Unlike public broadcasters, private broadcasters in post-Communist countries do not have an established infrastructure to facilitate their development. They must build studios and transmission systems, acquire programming,

and staff their stations. Unfortunately, this takes money that private broadcasters lack. They therefore rely on foreign investment or partners to assist them. Further, the lack of legislation inhibits the development of private broadcasting since the government needs guidance on the granting of licenses. This exposes prospective broadcast entrepreneurs to the whims of government officials who arbitrarily handout licenses based on their personal guidelines or agendas.

Further complicating the development of private broadcasting in post-Communist countries is the lack of expertise in operating private broadcast media in a competitive environment. Most prospective private broadcasters are educated and trained under the old Communist system of a command economy. Unfamiliar with the workings of a market economy, they lack the skills necessary to manage and operate private stations in a competitive environment. The lack of a mature market economy is a further complication since there are little advertising dollars available to support private broadcasting stations. What little money there is, private broadcasters fiercely compete with others to acquire. Also, private broadcasters lack the skills used to develop advertising revenue by teaching budding businesses how to market by advertising in this new economy.

On top of all this, the growth of private broadcasting is inhibited by competition from an established public broadcasting system. The established public broadcasting system competes with developing private broadcast media for audiences and advertising dollars. However, public broadcasters compete unfairly since they benefit from an established infrastructure and audience and from government subsidies. Due to this arrangement the development and growth of an independent private broadcast media is inhibited and suffers. Public broadcasting easily dominates the private sector in resources and audiences.

The implication that can be drawn from this study is that post-Communist broadcast system transformations are complex, especially considering the formidable challenges confronting the country as it revamps both its political and economic system. It is extremely difficult for countries that have scarce resources to implement major change efforts. Policy makers are caught in a very difficult and awkward position of dealing with the present while looking to the long-term

RECOMMENDATIONS FOR FUTURE RESEARCH

Historical research should be conducted on other post-Communist broadcast systems, in order to compare and contrast their development. Research on the other Baltic States, Latvia and Lithuania, especially would be relevant since these countries shared the same fifty-year experience of Soviet occupation. It would help to contrast how each

Baltic State approached the transformation of their broadcast media and to compare their developments. In addition, research on the other Baltic States could also serve to contrast each country's political and cultural differences, and what influences these had on the reform and development of their respective broadcast systems.

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APPENDIX

For this study the following people were interviewed:

Eelmaa, Epp. Operations Manager, Kanal Kaks (Channel 2 TV). Interviewed December 1996.

Hausmann, Ilona. Eesti Raadio, International Relations Department. Interviewed December 1996.

Haldre, Herkki. Advisor, Hanasbank. Radio consultant. Past Director of Eesti Raadio. Interviewed December 1996.

Holmberg, Simon. Deputy Director, Baltic Media Centre. Interviewed December 1996. Telephone interview May 1998.

Hunt, Margus. Marketing Director, Eesti Telekom (Estonian Telephone Company Limited). Interviewed November and December 1996.

Jõesaar, Andres. Vice-President, TV3. Interviewed December 1996.

Kokkota, Evelin. Information Assistant, United States Information Service, American Embassy, Tallinn, Estonia. Interviewed November 1996.

Laanejare, Nele. Chief Editor at new television station TV1. Interviewed November 1996.

Lään, Vello. Director, Raadio Tartu. Past Director of Estonian State Radio. Telephone Interview. May 1998.

Lang, Rein. President and General Manager, AS Trio Ltd. Raadio Kuku. Interviewed November 1996.

Laur, Marju. Vice Head Department of Post and Telecommunications, Ministry of Transport and Communications. Past Deputy Ministry of Culture. Interviewed November and December 1996.

Laurinstin, Marju.. Professor, Tartu University. Interviewed December 1996.

Loit, Urmas. Managing Director, Eesti Ringhaalingute Liit (Association of Estonian Broadcasters). Interviewed November 1996.

Middleton, Victoria. Public Affairs Officer, United States Information Service, American Embassy, Tallinn, Estonia. Interviewed November 1996.

Palts, Tõnis. CEO and Chairman, AS Levicom. Interviewed December 1996.

Rebané, Raul. Deputy Director General, Editor-in-Chief, Eesti Televisioon. Interviewed December 1996.

Ricci, Raymond. Director, Love Raadio. Interviewed November and December 1996.

Rummo, Paul-Eerik. Member of Parliament. Chair Broadcast Council. Past Minister of Culture. Interviewed December 1996.

Shein, Hagi. Director General, Eesti Televisioon. Interviewed November and December 1996.

Sinisalu, Hando. General Manager, *Eesti Päevaleht*. Radio consultant. Interviewed November and December 1996.

Sookruus, Peeter. Director General, Eesti Raadio. Interviewed December 1996.

Tammerk, Tarmu. Editor-at-Large, *The Baltic Times*, (formerly *The Baltic Independent*). Managing Director, Eesti Ajalehtede Liit (Estonian Newspaper Association). Interviewed December 1996.

Taska, Ilmar. Chairman, Kanal Kaks (Channel 2 TV). Interviewed December 1996.

Veidemann, Rein. Advisor for Literature and Media. Past Member of Parliament. Past Chair of Broadcast Council. Interviewed December 1996.

Veskimägi, Margo. Member of Council, EMOR, Baltic Media Facts. Interviewed November 1996.