

# ESTONIA'S MEDIA LANDSCAPE

## *Balancing Freedom, Concentration, and Propaganda Challenges*

*Estonian journalists emphasise the critical importance of providing verified and balanced information to support democracy.*

Estonia's media landscape is characterised by a **high level of media freedom and light media regulation**, yet **highly concentrated ownership**.

In terms of plurality, Estonia, with its significant Russian-speaking minority, faces **potential susceptibility to Russian propaganda**, particularly in its eastern regions. While Estonia's government actively counters propaganda through **media literacy programs**, this challenge remains significant, especially in communities with closer cultural or linguistic ties to Russia. **Russian-language media is still seen as a necessary part of the media system to counter Russian propaganda and to inform citizens**. In this context, three private groups (mostly with domestic owners) and one public broadcaster dominate the market. Their portfolios include daily and weekly papers, local media, news portals, and radio and TV stations.

In terms of accuracy and reliability, the Estonian media outlets adhere to the Estonian Code of Journalistic Ethics, emphasizing **truthfulness, fact-checking, balance, and separation of facts and opinions**. Larger newsrooms have standardized workflows to ensure quality.

As part of the MeDeMap Horizon Europe project, we conducted twelve interviews with journalists and editors. Nine of the twelve interviewees worked for these four media groups, either directly or as subcontractors. The remaining represent local and minority media.

Concerning journalistic output, **investigative journalism faces time and resource constraints** that pose challenges. Local contexts affect investigative work, with anonymity issues in smaller communities. Generally, Estonian journalists emphasise the critical importance of providing verified and balanced information to support democracy. They see their role as **empowering citizens with accurate information** rather than dictating opinions. Challenges remain in **helping audiences navigate the overwhelming volume of available information** and maintaining objectivity in reporting.

While direct threats to media freedom are minimal in Estonia, **economic pressure from global digital platforms and declining print revenues pose significant challenges**. Internal threats, such as potential self-censorship and deviation from journalistic principles, are also concerns.

Sustaining quality journalism in Estonia will require addressing economic pressures, continuing to uphold high ethical standards, and finding innovative ways to engage audiences and represent diverse perspectives in an evolving media landscape.

Overall, Estonian journalism faces **challenges in resources, changing media landscapes, and societal polarization**. However, it maintains a strong commitment to democratic principles and professional ethics.

*Alessandro Nani, Andres Jõesaar, Arko Olesk and Kristiina Raud*  
Tallinn University

