

ifa ECP Monitor Country Report

Estonia

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1. External cultural policy objectives in geopolitical context

The small Baltic country of Estonia has a long history of occupation by the Swedish, German, and Russian Empires. In 1991, it re-gained its independence from the USSR. Like most post-Soviet countries in this period, Estonia was embracing a newfound sense of national identity. Even though it shares historical experiences and borders with Russia, in terms of culture and language, in many ways Estonia belongs more to the north than east of Europe (Marsh & McCabe, 2019). The native language, spoken by about 1.1 million people, belongs to the Finno-Ugric family.

The memory of the Soviet rule still shapes the political landscape in Estonia. The country is often perceived as the European buffer zone to its larger eastern neighbour. It was welcomed as a member of the European Union and NATO early on in 2004. Recently, the crisis in Ukraine and annexation of Crimea renewed old fears of Russian expansionism in the region. Estonia's north-eastern part, for example, is home to a sizeable population of Russian-speaking minorities (Upadhyay, 2017). From the perspective of Russia, there is a perception of threat of expanded NATO's presence on its borders.

With a small population scattered across a territory of 45,000 square kilometres¹, Estonia has a limited scope for action on the global stage. It ranks as the 100th largest economy in the world and 52nd in terms of its diplomatic reach (Lowy Institute, n.d.) (Table 1). Nevertheless, Estonia is exemplary in its ability to convey its message abroad. Given its diminutive size, it is admirable how successful Estonia has been so far in its nation branding (the "*Estonia brand*") (Polese, Kerikmae, & Seliverstova, 2018). With time, Estonia has become a popular study destination, as well as a booming market for start-up businesses and the IT industry. Above all, Estonia is famous internationally as a leading innovator in all things digital. Its citizens can access 99% of public services digitally and the country is noted for its e-residency programme and proven excellence in cyber security². E-Estonia might not have made it to the ranks of Soft Power 30, but its technological excellence is a very powerful diplomatic tool (Hardy, 2020).

Table 1: Estonia's geopolitical and geo-economic position

	2019	change since 2015
Population (millions) / ranking	1.32 / 154 th	1.31 / 0.76%
GDP ranking	100 th	103 rd
GDP per capita	21,220	34

¹ Within the EU, only Luxembourg, Malta, and Cyprus are smaller than Estonia.

² NATO Centre for Cyber Excellence (CCDCOE) is based in Tallinn, Estonia.

	2019	change since 2015
Cultural economy (%GDP)	0.90 ⁽²⁰¹⁸⁾	-0.10
Education economy (%GDP)	6.20 ⁽²⁰¹⁸⁾	0.30
R&D economy (%GDP)	1.61	0.15
Media economy (%GDP)	0.20 ⁽²⁰¹⁸⁾	0

Sources: Eurostat, World Bank

		2019	Change over 2015	
Geopolitical position	Hard power rank	119 th / 2.5893 ⁽²⁰²⁰⁾	-	-
	World trade rank (\$ million)	71 st / 40,664	83 rd / 34,543	↑
	Soft power rank	n/a	-	-
	Diplomacy rank	52 nd	40 th ⁽²⁰¹⁶⁾	↓

To paraphrase the Estonian saying, “before visiting Paris, go to Nuustaku”. That is, instead of focusing on its modest size, we should see how Estonia compares to its European neighbours. In the context of the Europe 2020 strategy,³ Estonia has aligned itself with most of the common objectives, ranking, according to most of the indicators, in the top ten. The country’s position is strongest in the domains of climate change and energy efficiency, but it fares much less favourably when it comes to poverty reduction and social inclusion (Statistics Estonia, 2014). In terms of overall economic progress, Estonia is an average EU member state. However, it lags behind significantly in per capita income compared to the EU28 standard⁴ and because of a relatively low productivity (Faolex, 2018). Estonia’s position in the international R&D funding comparison has not significantly improved in the last years, from 1.46% to 1.61% between 2015 and 2019.⁵ Similarly, there was less spending on cultural services (Table 1). Education is a top priority, as seen in the share of total government’s expenditure (Table 2). Estonia places among the European countries with the highest share of government education expenditure with 15.8%, just after Iceland (17.4%) and Switzerland (16.5%).

³ Europe 2020, a strategy for jobs and smart, sustainable and inclusive growth, is based on five EU headline targets which are currently measured by nine headline indicators. Source (Eurostat).

⁴ In 2019, GDP per capita for the EU28 group was €32,020. Source (Eurostat).

⁵ The decline is partly linked to EU Structural Funds, (Faolex, 2018).

Table 2: Government spending on ECP fields as a % of total outlays

	2019	% change since 2015
Culture	2.4 ⁽²⁰¹⁸⁾	- 0.2
Education	15.8 ⁽²⁰¹⁸⁾	0.8
R & D	1.61	0.15
Media	0.5 ⁽²⁰¹⁸⁾	- 0.1

Source: Eurostat

2. External cultural policy: an overview

An integral part of Estonian cultural policy is its multiculturalism. Estonia boasts great diversity with 194 different nationalities (69% of population are native Estonians) (Ministry of Culture, 2018). Moreover, with 15 percent of its 1.3 million population, it has one of the largest shares of foreign-born citizens in Europe. In the past few years, there has been an influx of nationals from other EU member states, which accounts for the positive net migration rate. A large majority of 'less-integrated' are the residents born in former Soviet states and their descendants (Jakobson, 2020). Minorities such as the Russians, Swedish, Germans and other groups faced many challenges during the transitional period in the 1990s. Citizenship was automatically given only to pre-soviet Estonian citizens and Estonian proclaimed the only official language. This move effectively excluded almost two fifths of the population. Even today the situation is complex. Ethnic Russian-speaking minorities which make up a quarter of the total population have been reluctant to fully integrate into the Estonian society thus causing of a number of political and socioeconomic problems for the government (Koort, 2014). On the other hand, ethnic Russians feel cut off from political life because of their identity and strict citizenship laws.⁶

If we set aside these restrictive trends during the 1990s, the Estonian nation-building project has since largely followed a multicultural path (Sarapina, 2019). One of the primary tasks of the Estonian Ministry of Culture is to ensure the integration process between newly arrived migrants, ethnic minorities and Estonians and secure cultural diversity. A cohesive and tolerant society is the main objective as evidenced in the programme, "Integrating Estonia 2020" (UNESCO, 2016). Another government strategy, "Sustainable Estonia 21", again highlights the importance of social and cultural cohesion. The viability of Estonian cultural space is listed as the first of the four main goals for sustainable development of the country (Riigikogu, 2005). The document defines Estonian culture as both the creation of Estonians as well as of other ethnicities living in Estonia.⁷

⁶ The Citizenship Act of 1992 defined Soviet residents in Estonia as immigrants. The Soviet settlers and their families either are citizens of another country or are issued stateless (alien grey passports). They may vote at the local level but not in general state and EU elections (Lõhmus, 2020).

⁷ Another document, the "National Minorities Cultural Autonomy Act" from 1993 stipulates that ethnic communities have a right of cultural self-organisation and government - German, Russian, Swedish, Jewish, or other communities numbering more than 3,000 (Lõhmus, 2020).

A second important factor is transnationalism. The Estonian term, *hargmaisus*,⁸ with its connotation of branching into different countries, seems the best illustration of this aspect of Estonian external cultural policy. Being home to a number of people and multinational companies, Estonia sets a good example of transnationalism. Firstly, there is the Estonian community living abroad, which still maintains its national identity. Owing to historical circumstances, the Baltic republic has always experienced significant migration flows. In 2015, at least 120,000 Estonian citizens lived abroad although this number is estimated to be higher at around 200,000 or 15% of all Estonians (Global Estonian, 2019). Countries with a large diaspora include Russia, Sweden, Finland, Germany, USA, Canada, and Australia (Kumer-Haukanõmm & Telve, 2017; Tiit, 2015). Secondly, transnationals are Estonians who work someplace else than their home country. Based on mobile phone activity abroad, there are at least 30,000 Estonians who commute for longer periods and in relation to work, studies, family ties, etc. Estonia is also the first country to offer e-residency⁹ and currently is a virtual home to over 45,000 individuals from 154 countries (EAS, n.d.). Thirdly, international companies with subsidiaries in Estonia encourage the free movement of people and knowledge. To accommodate all these factors, the national transnationalism policy includes a variety of measures like the Compatriots Programme (2014-2020) focusing on both diaspora and the Estonian cultural space, the e-residency, or the Global Estonian network¹⁰ (Ahas & Terk, 2017).

The objectives of official external cultural policy are described in the “General Principles of Cultural Policy up to 2020”. The government commits itself to creating opportunities for the internationalisation of culture: “Culture has an important role in external relations, export and the country’s public image” (Riigikogu, 2013). The document reveals the importance of culture as an export-oriented activity. Creative industries as a constitutive part of a knowledge-based economy have the potential to increase Estonia’s international competitiveness. To achieve this, greater inter-ministerial and cooperation with export-promoting organisations is planned. Another objective is to expand the network of representatives of culture. The state promises to support the preservation of Estonian identity abroad and facilitate cultural cooperation with the Estonian diaspora and other ‘kindred peoples’ (ibid.).

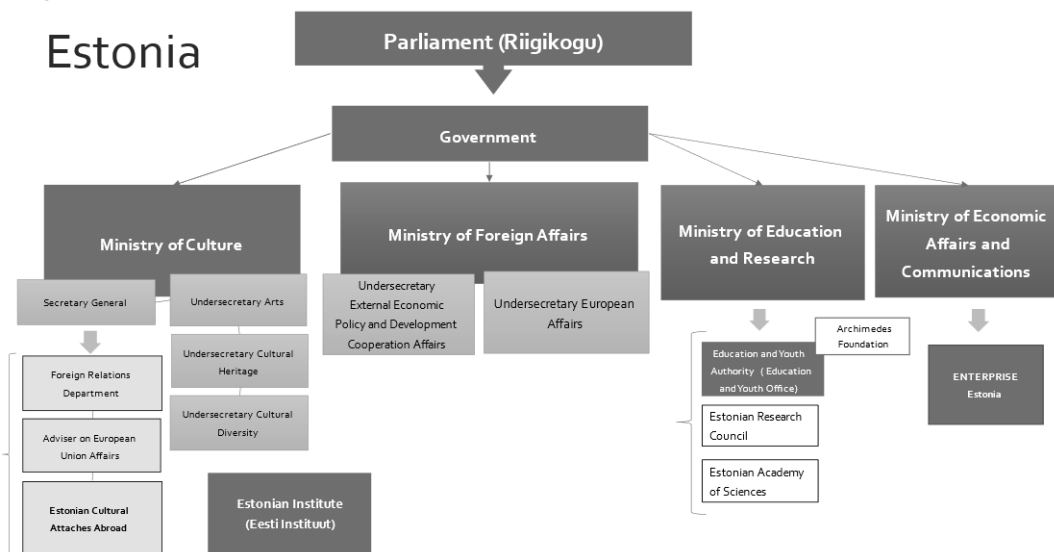
⁸ *Hargmaisus* - transnationalism as a social phenomenon.

⁹ e-Residency is a programme launched by Estonia on 1 December 2014. It is a government-issued digital identity and status that provides access to Estonia’s digital business environment. E-Residency, for example, allows digital entrepreneurs to manage business from anywhere, entirely online.

¹⁰ Available at <https://globalestonian.com/>.

Table 3: Key ECP Statistics for Country

	2019
Number of countries with ECP activities	96 ¹¹
Total number of institutions abroad	~18 2 (Estonian Institute), 16 (EAS)
Total number of FTE staff engaged in ECP activities	~689 8 cultural attaches, 12 (EE), 266 (EAS), 3 language teachers, 400 (Harno)
Government financial support (€ million)	-
Total expenditure of all ECP operators (€ million)	-
Comparative ECP ranking	minor

Figure 1: Institutional map of country's ECP

¹¹ Based on Estonian diplomatic representations abroad.

3. Fields of ECP

3.1. Culture and the arts

The main institutional actors involved in ECP are the Ministry of Culture, the Ministry of Foreign Affairs, the Estonian Institute, and Enterprise Estonia with its respective branches abroad (see Figure 1). The Ministry of Culture is the principal body responsible for the internationalisation of Estonian culture and the development of cultural relations. In part, these goals are achieved through the funding programme “Estonian Culture in the World”. Except for presenting Estonian culture around the world, the scheme supports various creative individuals and organisations to enter the international stage. The minimum grant per project is worth at least €4,000 and not more than €60,000. In the application round for 2021 the total funding available is €450,000 (Ministry of Culture, 2020b). Furthermore, the Ministry of Culture provides financial support to large scale international events and exhibitions through its grant programme “Estonian Culture Abroad”. Bilateral cooperation is organised on the basis of reciprocity where a partner country bears a share of expenses. Estonia currently has almost 50 bilateral cultural cooperation agreements and participates in 15 international organisations and programmes (Ministry of Culture, 2020c). The Ministry of Economic Affairs and Communications supports Estonia’s participation in major international cultural events. The Viljandi Traditional Music Festival, Tallinn Music Week, Black Nights Film Festival, Narva Opera Days, and other organizations also receive support from the Enterprise Estonia, a national foundation that aims to develop the Estonian cultural economy (Ministry of Culture, 2020d).

Transnational cultural cooperation with the Nordic countries was strengthened in 2018 with the creation of the Swedish-Estonian Cooperation Fund. Another initiative, the Baltic Culture Fund, with the shared budget of €300,000 supports the internationalization of Estonian, Latvian and Lithuanian culture. Further support comes from the Nordic Council of Ministers. Cultural exchange outside Europe in 2019 focused on East Asia, China and Japan (Ministry of Culture, 2020e).

Additionally, cultural organisations and NGOs engage in international cooperation. For example, the Cultural Endowment Estonia, one of the arm’s length cultural organisations, administers activities linked to the Baltic Culture Fund.¹² NGOs like the Estonian Centre for Architecture (ECA), which conducts domestic projects, also focuses on promoting contemporary Estonian architecture abroad. For example, ECA organises the Tallinn Architecture Biennale (TAB), an international architecture and urban-planning event.

In cooperation with the Ministry of Foreign Affairs, eight cultural attachés from the Ministry of Culture work in embassies¹³ (Lõhmus, 2020). Their main responsibility is to promote Estonian culture abroad and support bilateral cultural cooperation. Cultural attachés perform these tasks in Estonian embassies in Berlin, Brussels, Helsinki, London, Moscow, and Paris. Additionally, the General Consulate in New York has one cultural affairs coordinator. The Estonian Embassy in Brussels represents Estonian interests in the EU and the ambassador in

¹² Baltic Culture Fund promotes cultural cooperation between Baltic States, in order to strengthen the internationalization of Estonian, Latvian and Lithuanian culture through joint cultural events (Cultural Endowment of Estonia, n.d.).

¹³ Brussels, Berlin, Moscow, Helsinki, London, Paris and New York.

Paris represents Estonia in UNESCO (ibid.). In addition, international cultural promotion is the mission of the Estonian Institute.

The Estonian Institute (*Eesti Instituut*) was founded by former President Lennart Meri in 1989. Its initial purpose was to promote Estonia, which at the time aspired to independence, abroad. The Institute's activities started modestly due to lack of funds, but after Estonia's independence in 1991, a network of cultural missions was built alongside the Estonian diplomatic service. In addition to the central office in Tallinn, the Estonian Institute currently has two offices abroad and employs a dozen staff: in Helsinki (founded in 1995) and Budapest (1998). Previously, the institute had branches in Sweden (1999-2001) and France (2001-2009). The three existing branches today organize more than fifty cultural events across Europe (Estonian Institute, n.d.-a). The main aim of these activities is to offer the Estonian diaspora an insight into contemporary national culture, as well as nurture international cultural cooperation.

The Estonian Institute receives a part of its funds from the state budget via the Ministry of Culture. Total expenditure for the year 2019 was €774,458, around 20 percent less than four years ago (Table 4). The Ministry of Foreign Affairs, with a network of cultural attachés, is a close cooperation partner. The Ministry of Education and Research facilitates the teaching of Estonian language and culture (Estonian Institute, n.d.-b). A bulk of the Institute's activities involves informational work like dissemination of magazines and leaflets (Estonian Art, Estonian Literary Magazine, portal *kultuur.info*) with a circulation of around 12,000 copies (Estonian Institute, 2016). In 2019, the Institute celebrated its 30th anniversary and organised more events than usual including the International Estonian Language Week "KeelEST". The highest number of foreign learners of Estonian were in Hungary, but the largest number of active language learners are in Finland, Latvia, and Sweden (Estonian Institute, 2020).

Table 4: Key statistics on culture and the art

<i>Estonian Institute</i>	2019	2015
Number of countries present	8 ¹⁴	-
Number of cultural cooperation agreements	43	-
Number of institutes (active in 3 EUNIC clusters)	2	2
Number of FTE staff	12	24
Number of artists in exchange programmes	-	-
Budget (€)	774,458	994,016
Government financial support (€)	717,971	940,683

¹⁴ Based on the presence of cultural attachés abroad and Estonian Institute branches.

3.2. Language

Table 5: Key figures on language promotion

	2019	2015
Number of countries where courses are offered	20 ¹⁵	-
Number of students enrolled		
In-class	260 ¹⁶	-
Online reach	57,000 ¹⁷	-
Number of candidates for Estonian language qualifications	n/a	-
Number of language teachers	13	-
Budget (€)	-	-
Government financial support (€) (Estonian language and culture study abroad programme)	288,616	575,117

The main body responsible for Estonian language education policy is the Ministry of Education and Research and its substructure, the Estonian Language Council. The legislative basis is “the Language Act” from 2011 which aims to develop, preserve and protect the Estonian language and ensure its use as the main language for communication in all spheres of public life (Riigikogu, 2011). Ironically, instead of unifying the country, language has also been the major cause of tension along the fault lines between different nationalities. The integration of 327,802 ethnic Russians still presents a challenge (Statistics Estonia, 2020). For example, there have been several attempts at a transition to Estonian as the language of instruction in secondary schools, although this plan has repeatedly been postponed. As of 2021, the Estonian government was not planning to close Russian-language schools, but instead support them with Estonian language assistants (ERR News, 2021). In 2019, the Language Inspectorate¹⁸ revealed that in around 33% of Russian elementary schools the level of national language teaching was unsatisfactory (Lõhmus, 2020).

A number of measures target the topic of Estonian language training for less integrated residents.¹⁹ For example, the Ministry of Culture and its subsidiary, the Integration Foundation,

¹⁵ Schools and supplementary schools abroad that offer Estonian language and/or culture learning.

¹⁶ Participants who successfully completed the programme administered by the Estonian Institute, “Introducing the Estonian cultural space to low-integrated permanent residents and new immigrants living in Estonia”.

¹⁷ An advanced B1 e-learning Estonian language course, “Keeletee,” (www.keeteete.ee) (2,000 users) combined with “Keelekliik” Estonian language course at A1 and A2 levels (55,000 users).

¹⁸ The Language Inspectorate, or the Language Board (*Keeleinspektsioon*) is a governmental body under the Ministry of Education of Estonia tasked with the development and implementation of language policy.

¹⁹ “Integrating Estonia 2020”, “Adult Education Programme 2018–2021” for the implementation of “The Estonian Lifelong Learning Strategy 2020”, “Language Programme 2018–2021”, “Welfare Development Plan 2016–2023” (Kallaste, Kallas,

are the main co-ordinators in matters related to social cohesion. It is estimated that in 2017, the state and the EU social fund provided about €4 million worth of Estonian integration language courses with at least 6,000 participants (Kallaste et al., 2018). Integration activities also fall under the auspices of the Estonian Institute. In 2019, 361 participants entered and 260 successfully completed the programme (Estonian Institute, 2020). Newly arrived immigrants have access to many settlement support services like the website *settleinestonia.ee*, a Welcoming Programme, and free language courses (Jakobson, 2020). Free language learning opportunities are offered to other nationalities in the Estonian language centres in Narva and Tallinn, under the administration of the Integration Foundation. The Ministry of Culture announced it will expand its offerings in 2020 from 2,500 to 5,500 study places (Ministry of Culture, 2020d).

One of the objectives of the Estonian Language Development Strategy (2011-2017; 2020)²⁰ is the preservation of the Estonian language abroad. Aside from increasing the language competency of Estonian expatriates should they decide to return, this would open up new opportunities to disseminate a positive image of Estonia. The strategy is particularly relevant considering that the number of Estonians living and working abroad has increased steadily over the years. For the Estonian community temporarily residing abroad, the state offers support for learning and using the native language in the context of European and Estonian-language schools, Estonian language courses and Sunday schools, Estonian Language Days, etc. The total anticipated funding for this action (2011-2017) was €3,336,188 (Ministry of Education and Research, 2011). In 2017, estimated 2,800 Estonians abroad engaged in these activities (Ministry of Education and Research, 2011).

The measures targeting the preservation and the use of the Estonian language by the diaspora are, not uncoincidentally, referred to as the National Compatriots' Programme. The Estonian Institute seconded three language teachers to locations with a large Estonian community: in Riga (Latvia), Pechory (Russia), and Upper Suetuk (Russia). It supports Estonian organisations and schools abroad with study materials and occasional teacher trainings. Further assistance in form of study materials is provided to foreign universities which offer Estonian studies. Nearly 3,000 students from 30 countries have registered for this study programme (Estonian Institute, 2020).

In line with its digital ambitions, the state is also developing solutions for remote Estonian language learning. Recently, a B1-level online learning course, "Keeletee" was launched for Russian and English-speaking users to independently learn Estonian. "Keeletee" currently has over 2,000 users. It is a continuation of another e-learning course, "Keeleklikk" which offers free A1 and A2 level courses and caters to approximately 55,000 users (Ministry of Education and Research, 2020a).

& Anspal, 2018). Most of the activities are targeting the population in two cities, Tallinn and Tartu, and regions, Ida-Virumaa and Harjumaa (Lõhmus, 2020).

²⁰ In 2018, the state decided to extend the plan until the end of 2020. The Estonian Language Development Plan (2021-2035) is underway.

3.3. Primary and secondary education

In the face of competition from countries with more significant own-language educational systems abroad, such as France and Germany, Belgium has a relatively limited presence. Its offerings are regionally limited to six schools in four countries: Burundi, Morocco, Democratic Republic of the Congo and Rwanda. They form the Association of Belgian Programme Schools Abroad (“AEBE”). This system of international primary and secondary education is organized only by Wallonia. Correspondingly, these Belgian international schools are informed by the curriculum and requirements devised by the Wallonia-Brussels Federation. The creation of a seventh school, also in the Democratic Republic of the Congo, is currently underway (AEBE, n.d.). With more than 3,000 students and 240 teachers, Belgian schools still provide a substantial presence abroad (*Statut des enseignants*, 2018).

Table 6: Key figures on primary and secondary education

	2019	2015
Number of countries	20	-
Number of schools	70	-
Number of students	2,000 <i>estimate</i>	-
Number of staff / teachers	n/a	-
Government financial support (€ million)	-	-

The Estonian diaspora programmes generally focus on education. For example, an online basic school (*Üleilmakool*)²¹ enables the children of remote and mobile Estonians to continue their education according to the national curriculum. The e-school enrolled in the 2018/19 year 185 Estonian children from 28 countries (Ministry of Education and Research, 2020a). In addition, the state supports Estonian Sunday Schools abroad and organises various camps for young Estonian emigres so they can establish a connection with the motherland and their identity. Apart from financial aid for Estonia-related cultural activities, Estonian cultural societies abroad receive additional support by sending educators abroad (Jakobson, 2020). Estonian language and culture is the focus of some 70 supplementary and Sunday schools in twenty countries with a large diaspora, for example the US (10), Germany (7), and many in the neighbouring countries like Finland (19) and Sweden (5). The schools either offer general education in Estonian or teach children their native language, history, and culture. An estimated 2,000 students study there.²²

3.4. Tertiary education and science

There are 19 higher education institutions in Estonia. Ten universities offer at least one full degree programme in English. Incoming students can choose from a wide array of more than

²¹ E-basic school (Estonian Language Education Society), available at <http://www.yleilmakool.ee>. Students take part in around 20 courses via a Moodle platform or Skype classes.

²² According to latest available information in half of these schools studied at least 1,058 students. The total number of 2,000 is author’s estimate.

160 degree programmes taught in English (Estonian Brand, 2020). These facts demonstrate just how important internationalization is to the Estonian higher education system. There has been some steady, albeit slow, progress on that front. In the academic year 2019/20, 5,520 students decided in favour of the Estonian education brand, a new record compared to previous years (Harno, 2021). International students made up 11.6% of the student body. The top five sending countries were: Finland (1140), Russia (447), Nigeria (325), Ukraine (254) and Bangladesh (235) (Estonian Brand, 2020). To further support internationalisation and academic mobility, Estonia engages in active marketing of its education abroad (initiatives Education Estonia, Study in Estonia).

The Estonian Institute administers the Estophilus Scholarship for students who are interested in Estonian language and culture. The scholarship is financed by the Ministry of Education and research and is limited to €2,500 (ScholarshipDesk.com, 2020). Dora Plus is a government programme which aims to improve Estonia's visibility and attractiveness as a study destination for international MA and PhD students. The scheme (2015-2023) is being implemented with the support of EU Regional Development Fund. The scholarship budget for the 2020/21 academic year is €171,500, or 49 full scholarships (TLU, 2020). In line with its transnationalism policy, the government also offers a Compatriots scholarship programme which supports the studies of the young Estonians abroad in Estonian vocational and higher education institutions.

Table 7: Key figures on tertiary education

	2019	2015
Number of countries	-	-
Number of domestic universities	19	-
Number of universities / colleges abroad	-	-
Number of students	-	-
Number of foreign students ²³	4,391 ⁽²⁰¹⁸⁾	2,859
Number of students at trans-national higher education (TNE)	-	-
Number of government scholarships awarded	Dora Plus: 49	Estophilus scholarship: 10
Number of staff <small>Education and Youth Board (Harno)</small>	400	-
Budget (€)	Dora Plus: 171,500	-
Government financial support (€)	-	-

²³ Data based on Global Flow of Tertiary-Level Students | UNESCO UIS. (2020). Retrieved 2 September 2020, from <http://uis.unesco.org/en/uis-student-flow>.

Table 8: Key figures on science and research

	2019	2015
Number of countries	-	-
Number of domestic institutes	20 R&D institutions, 12 Research Centres of Excellence	-
Number of researchers / staff	-	-
Number of projects	638 Horizon2020 projects	-
Number scientists in exchange programmes	-	-
Budget (€ million)	Mobilias Plus: 35 ²⁴	-
Government financial support (€ million)	EEA Baltic Research Programme: 6	-

The science and research programme is designed and evaluated by the two main actors, the Ministry of Education and Research and the Ministry of Economic Affairs and Communications. Under their supervision, the Estonian Research Council (ETAg) funds research, and Enterprise Estonia, finances innovation (estonia.ee, n.d.). Other supporting institutions include the Estonian Academy of Sciences and the Archimedes Foundation. The latter was a government organisation tasked with implementing programmes in the area of education and research and administering the Erasmus+ cooperation and scholarships schemes. As of 2020, the Foundation's activities have been transferred to the Education and Youth Board (*Harno*). Most R&D activities are performed in the public sector, like the University of Tartu or the Estonian Biocentre. There are 20 R&D institutions in total (including 6 public universities) and 12 Research Centres of Excellence (Euraxess, n.d.).

The national targets for the development of research and innovation are determined in the "Knowledge-based Estonia 2014-2020" strategy. There are clear limitations to a developing country's R&D, most notably the lack of qualified labour. The third edition of the document concentrates on ensuring the competitiveness of Estonia in selected growth areas like information and communication technologies (ICT). For some time now, Estonia has been moving towards an innovative knowledge-based society, but the pace will depend on new generations of researchers and entrepreneurs. One of the prerequisites is to make Estonia more active and visible in transnational science cooperation (Ministry of Education and Research, 2014).

In the context of EU partnerships, Estonia holds a very good position in the Horizon 2020 programme. Estonia stands out in the number of contracts won in the programme -- 1.5 times more than the EU28 average (Ministry of Education and Research, 2020b). As of March 2020, there were 638 Horizon projects with Estonian participation and the EU's contribution to Estonian institutions reached €240.3 million.

²⁴ 83.5% of which is covered by the European Regional Development Fund.

As discussed before, cooperation with Nordic countries is one of Estonia's top priorities. Estonia takes on an active part in the Baltic Research Cooperation Programme. The programme is funded by Norwegian, Icelandic and Lichtenstein financial mechanisms and contributions from Estonia, Latvia, and Lithuania to a total of €23 million. In 2019, Estonia supported 7 research projects with a budget of €6 million (ETAg, 2019). NordForsk, an organisation under the Nordic Council of Ministers, is another platform where Estonian researchers can participate in calls for proposals (ETAg, n.d.).

International cooperation is further carried out through various schemes for researcher mobility. The Mobilitas Plus programme, for example, aims to improve internationalisation of Estonian research and Estonia's attractiveness as a destination country for study and science. The budget for the programme is €35,373,770, 83.5% of which is covered by the European Regional Development Fund (Kraav, n.d.). As a downside, "Knowledge-based Estonia" has struggled to convince some international talents. Foreign doctoral students are not particularly eager to join the Estonian labour force after graduation (Ministry of Education and Research, 2020b).

3.5. Foreign Media

In 2019, Estonia ranked 11th out of 180 countries in the World Press Freedom Index (RSF, 2020). Freedom House has also consistently named Estonia a free country with a high score of 94/100 in 2019 (Freedom House, 2020a). In general, the media are not subject to political interference and freedom of speech is enshrined in the constitution. However, media autonomy could be undermined by a concentrated media ownership (Freedom House, 2020b). The Estonian media did face some challenges lately, including the spread of Russian propaganda. As a result, at the end of 2019, the Russian news outlet Sputnik was forced to close its office in Tallinn. To retaliate, the Russian side launched a global campaign against Estonia claiming that Russian media there face oppression (ibid.).

The Estonian Public Broadcasting (*Eesti Rahvusringhääling* - ERR) is a publicly funded media outlet created in 2007 by the merger of Estonian Radio and Estonian Television. In 2017, the EER employed 675 people and reported a total budget of €37 million (Ministry of Culture, 2020a). It does not broadcast programmes intended for international audiences. However, EER has a Russian language output for domestic audiences.

The ethnic cleavage is perhaps best visible in the Estonian media landscape. In 2010, for example, 69.4 percent of all radio programmes were broadcasted in the Estonian language. 28.6 percent were in Russian, which roughly corresponds to the percentages of ethnic Estonians and Russians in the total population. At the time, the Russian minority had access to very limited television programming in their native language and were therefore cut off from the official channels of communication (Naaber, 2011). The weekly reach of EER among Russian viewers dropped from 40% in 2006 to under 20% in 2015 (Jõesaar, 2016). Moreover, TV channels airing from or controlled by Russia have become dominant, fuelling the fear that the minority population might become an easy target of misinformation and propaganda. These fears have become more tangible in the wake of the Russian-Ukraine conflict. Consequently, in September 2015, the Estonian government launched a Russian-language television channel, ETV+. However, the newcomer has struggled to keep up with the popularity of other Russian outlets. In December 2018, less than 1% of all viewing time was associated with ETV+ against

almost 12% for the three most popular Russian channels combined. This was unchanged in 2019, as the channel's popularity wavered around the 1 percent mark (BTI, 2020; Kantar Emor, 2019).

Table 10: Key figures on foreign broadcasting, including social media statistics

ETV+	2019	2015
Number of countries broadcasted to	1 (Estonia)	-
Number of languages	1 (Russian)	-
Number of channels	1	-
Audience / weekly (million)	1% share of viewing time	-
Budget (€ million)	-	2.53 ²⁵
New Media		
Social networks following (Facebook)	Kultuur.info 10,127 Culture.ee 3,120 Kultuur.info/ru 498	-
Audience / unique visitors (monthly /million)	Kultuur.info 178,694 Culture.ee 39,715 Kultuur.info/ru 42,458	-
Budget (€) ^(kultuur.info)	58,251	54,187

²⁵ Additional € 2.53 million added to the Estonian Public Broadcasting's budget for 2015 to support the launch of ETV+ (Jõesaar, 2016).

4. Challenges and future outlook

An integral part of Estonian external cultural action is its large diaspora (in percentage terms). The government has decided to focus more narrowly on the compatriots policy with the new Global Estonia programme. A better cooperation with ministries and the promotion of “Estonianness” between different organisations was announced, thus hinting at the importance of preserving the national identity abroad (Ministry of Culture, 2020e). The transnational community is a substantial asset and could serve as a side entry into global networks. However, while supporting the cultural life of its nationals abroad is a natural choice for Estonia, it could also mean that it is diverting from a more diverse international audience.

The uniqueness of Estonian ECP is also its domestic cultural policy, which tries to accommodate many other nationalities and the resident Russian-speaking population. However, the line between social cohesion and forced cultural assimilation can be a thin one. Much has changed for the better since the re-independence of Estonia and it has emerged as a modern multicultural state. The inner ethnical divide is a multifaceted problem to which no simple, one-dimensional solution exists. Initiatives like free language and integration courses and support for easier access to the labour force seem a very good start, as long as balance is preserved. In any case, Estonian policymakers will need to first deliver on the promise of multiculturalism at home before establishing a stronger international footprint.

The tiny Baltic state that gave the world Skype and e-residency is best known under its E-Estonia Brand. Its influence and participation in international cooperation depend greatly on this reputation. Therefore, it is building on its technological strengths, including e-governance, digital identity, e-services, and cybersecurity. E-Estonia is often referred to as Europe’s answer to Silicon Valley. In 2017, for example, it ranked third in Europe regarding the highest number of start-ups per capita largely thanks to an accommodating business environment (Funderbeam, 2017). The E-state has been a success story so far. Still, in order to keep up the momentum of its booming economy, it will need to focus more on not only attracting but also retaining foreign talent.

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Imprint

The External Cultural Policy Monitor

Developed by Helmut K. Anheier, Hertie School & UCLA Luskin School of Public Affairs, and ifa Competence Centre. Supervised by Helmut K. Anheier. Coordinated by Sarah Widmaier for ifa.

Preferred citation

Markovic, Darinka (11/2021). "Estonia. Country Report," in: Helmut K. Anheier and ifa (eds.). The External Cultural Policy Monitor. Stuttgart: ifa.

The views expressed are those of the authors and do not necessarily reflect those of the ifa.

Publisher:

ifa (Institut für Auslandsbeziehungen)
Charlottenplatz 17,
70173 Stuttgart,
Postfach 10 24 63,
D-70020 Stuttgart

www.ifa.de

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Author: Darinka Markovic

Copy-editing by:

ifa's Research Programme "Culture and Foreign Policy"

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DOI: <https://doi.org/10.17901/ecp.2021.040>