

# **BALTIC MEDIA HEALTH CHECK**

2014 - 2015

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## *Letter From the Editor*

### **Looking Forward to Boredom**

By Sanita Jemberga

Despite the wars and turbulences in world around us, for the Baltic media 2014 was a year of relative stability.

Latvia and Lithuania slipped a place in the *Freedom House* index of media freedom (to 28th and 25th from 180), and Estonia stayed where it was (16th). The slip was not due for a particularly worsening situation. The Baltic nations are still among 14% of world's inhabitants who live in a countries with a free press.

No big media players entered the Baltic media market, but none left, too. Estonian tycoons continued the trend to acquire outlets in the other Baltic countries, consolidating their leadership in the sector.

The trends are the same as elsewhere. Newspapers continue their downslide (but they are still pretty alive). Online keeps growing. Television still dominates. Financially, 34 of the 53 companies that directly own the 75 most popular media outlets in the Baltics have managed to increase turnover. 70% of them have managed to work with a profit, with Latvia's TV3 as an absolute leader.

In the last year's report, we looked at the impact of the economic crisis to Baltic media finances and the ownership of the Baltic media. After the annexation of Crimea by Russia, 2014 turned into a year of soul-searching about how to reach the hearts and minds of Baltic Russians who have lived largely in their separate world since the restoration of independence of Estonia, Latvia and Lithuania. Our main in-depth story looks into the different solutions all three countries have chosen. It was also the year of the strengthening of public broadcasters which got them into some hot water (see more in the new series "Digging Deeper"). It might have been a stable year, but with no boredom in sight.

# TRENDS 2014 - 2015

## Summary of Baltic Media Top 25 Financial Results in 2014

Rank	LITHUANIA	LATVIA	ESTONIA
1st Newspaper	Lietuvos rytas	МК - Латвия (rus)	Postimees
Publisher	Lietuvos Rytas, UAB	Izdevniecības nams Print Media, SIA	Postimees, AS
Turnover (euros)	8 366 295	1 125 036	13 906 000
Profit/Loss (after tax, euros)	2 039 313	6 311	499 000
2nd Newspaper	Vakaro žinios	Latvijas Avīze	Õhtuleht
Publisher	Respublikos Leidiniai, UAB	Lauku Avīze, AS	SL Õhtuleht, AS
Turnover (euros)	3 432 336	4 950 281	7 540 460
Profit/Loss (after tax, euros)	61 801	61 093	442 586
3rd Newspaper	Kauno diena	Diena	Maaleht
Publisher	Diena Media News, UAB	Dienas mediji, SIA	Eesti Ajalehed, AS
Turnover (euros)	3 655 873	2 682 785	12 627 336
Profit/Loss (after tax, euros)	-539 272	-670 829	639 752
4th Newspaper	Šiaulių kraštas	Вести СЕГОДНЯ (rus)	Eesti Ekspress
Publisher	Šiaulių kraštas, UAB	Izdevniecības nams Vesti, SIA	Eesti Ajalehed, AS
Turnover (euros)	1 562 612	1 614 595	12 627 336
Profit/Loss (after tax, euros)	-20 198	3 652	639 752
5th Newspaper	Sekundē	Латвийские Вести (rus)	Столица (rus)
Publisher	ON Media, UAB	Zīme, SIA	Tallinn City council
Turnover (euros)	735 617	na	1 000 000
Profit/Loss (after tax, euros)	62 276	na	na
1st Magazine	Savaitė	Ieva	Kroonika+Nädal
Publisher	UAB Savaitė	Žurnāls Santa, SIA	Ajakirjade Kirjastus, AS
Turnover (euros)	3 315 463	7 391 905	8 433 796
Profit/Loss (after tax, euros)	600 675	1 180 640	359 444

Rank	LITHUANIA	LATVIA	ESTONIA
<b>2nd Magazine</b>	<b>Žmonės</b>	<b>Privātā Dzīve</b>	<b>Kodu ja Aed</b>
Publisher	Žurnālų leidybos grupė, UAB	Žurnāls Santa, SIA	Ühinenud Ajakirjad AS
Turnover (euros)	7 111 196	7 391 905	1 546 950
Profit/Loss (after tax, euros)	529 625	1 180 640	<b>-56 645</b>
<b>3rd Magazine</b>	<b>TV Antena</b>	<b>Kas Jauns</b>	<b>Imeline Teadus</b>
Publisher	Lietuvos Rytas, UAB	Izdevniecība Rīgas vilņi, SIA	AS Äripäev
Turnover (euros)	8 366 295	5 790 117	12 907 460
Profit/Loss (after tax, euros)	2 039 313	188 671	1 154 012
<b>4th Magazine</b>	<b>Ji</b>	<b>Ievas Stāsti</b>	<b>Imeline Ajalugu</b>
Publisher	Žurnālų leidybos grupė, UAB	Žurnāls Santa, SIA	AS Äripäev
Turnover (euros)	7 111 196	7 391 905	12 907 460
Profit/Loss (after tax, euros)	529 625	1 180 640	1 154 012
<b>5th Magazine</b>	<b>Prie kavos</b>	<b>Ievas Virtuve</b>	<b>Naisteleht</b>
Publisher	UAB SS Leidyba	Žurnāls Santa, SIA	Presshouse OÜ
Turnover (euros)	1 350 104	7 391 905	1 881 963
Profit/Loss (after tax, euros)	69 399	1 180 640	<b>-48 893</b>
<b>1st Website</b>	<b>delfi.lt</b>	<b>delfi.lv</b>	<b>delfi.ee</b>
Owner	Delfi, UAB	Delfi, AS	Delfi, AS
Turnover (euros)	8 260 068	2478217	4814965
Profit/Loss (after tax, euros)	961 344	-1 784	449 667
<b>2nd Website</b>	<b>15min.lt</b>	<b>tvnet.lv</b>	<b>postimees.ee</b>
Owner	15 min, UAB	TV NET, SIA	AS Postimees
Turnover (euros)	2 477 452	1 940 899	13 906 000
Profit/Loss (after tax, euros)	311 953	<b>-147 016</b>	499 000
<b>3rd Website</b>	<b>lrytas.lt</b>	<b>kasjauns.lv</b>	<b>ohtuleht.ee</b>
Owner	Lrytas, UAB	Izdevniecība Rīgas Vilņi, SIA	SL Õhtuleht, AS
Turnover (euros)	2 550 430	5 790 117	7 540 460
Profit/Loss (after tax, euros)	409 430	188 671	442 586
<b>4th Website</b>	<b>alfa.lt</b>	<b>diena.lv</b>	<b>tv3play.ee</b>
Owner	Alfa Media, UAB	Dienas Mediji, SIA	AS TV3
Turnover (euros)	771 306	2 682 785	12 579 034
Profit/Loss (after tax, euros)	<b>-194 532</b>	<b>-670 829</b>	<b>-1 205 531</b>
<b>5th Website</b>	<b>balsas.lt</b>	<b>la.lv</b>	<b>jt.ee</b>
Owner	E. naujienos, UAB	Lauku Avīze, AS	Ühinenud Ajalehed
Turnover (euros)	392 302	4 950 281	5 221 000
Profit/Loss (after tax, euros)	-4 640	61 093	318 000

Rank	LITHUANIA	LATVIA	ESTONIA
<b>1st Radio</b>	<b>M-1</b>	<b>Latvijas Radio 2</b>	<b>Vikerraadio</b>
Owner	M-1, UAB	Latvijas Radio, VSIA	Eesti Rahvusringhääling
Turnover (euros)	2 635 755	9 176 443	29 371 098
Profit/Loss (after tax, euros)	888 529	147 877	-1 019 184
<b>2nd Radio</b>	<b>Lietus</b>	<b>Radio Skonto</b>	<b>Raadio Elmar</b>
Owner	Radijo Stotis Ultra Vires, UAB	Radio Skonto, SIA	Aktsiaselts Trio LSL
Turnover (euros)	554 190	1 657 612	2 321 115
Profit/Loss (after tax, euros)	107 996	100 134	127 216
<b>3rd Radio</b>	<b>LRT Radijas</b>	<b>Latvijas Radio 1</b>	<b>Sky Plus</b>
Owner	Lietuvos Nacionalinis Radijas Ir Televizija	Latvijas Radio, VSIA	Taevaraadio OÜ
Turnover (euros)	22 234 170	9 176 443	382 755
Profit/Loss (after tax, euros)	176 306	147 877	92 112
<b>4th Radio</b>	<b>Radiocentras</b>	<b>Star FM</b>	<b>Star Fm</b>
Owner	Radiocentras, UAB	Star FM, SIA	AS Mediainvest Holding
Turnover (euros)	571 304	842 798	1 558 717
Profit/Loss (after tax, euros)	292 439	128 227	108 981
<b>5th Radio</b>	<b>M-1 Plus</b>	<b>EHR (European Hit Radio)</b>	<b>Raadio 4 (rus)</b>
Owner	M-1, UAB	Super FM, AS	Eesti Rahvusringhääling
Turnover (euros)	2 635 755	150 426	29 371 098
Profit/Loss (after tax, euros)	888 529	57 148	-1 019 184
<b>1st TV</b>	<b>TV3</b>	<b>TV3</b>	<b>Kanal 2</b>
Owner	TELE - 3, UAB	TV 3 Latvia, SIA	Kanal 2, AS
Turnover (euros)	22 517 294	16 621 373	11 089 220
Profit/Loss (after tax, euros)	2 172 357	3 079 054	-512 090
<b>2nd TV</b>	<b>LNK</b>	<b>Первый Балтийский Канал (rus)</b>	<b>ETV</b>
Owner	Laisvas ir nepriklausomas kanalas, UAB	Pirmais Baltijas Kanāls, SIA	Eesti Rahvusringhääling
Turnover (euros)	21 186 284	2 593 301	29 371 098
Profit/Loss (after tax, euros)	1 274 328	14 413	-1 019 184

Rank	LITHUANIA	LATVIA	ESTONIA
3rd TV	LRT Televizija	LTV1	TV3
Owner	Lietuvos nacionalinis radijas ir televizija	Latvijas Televīzija, VSIA	TV 3, AS
Turnover (euros)	22 234 170	17 270 325	12 579 034
Profit/Loss (after tax, euros)	176 306	-132 941	-1 205 531
4th TV	BTV	LNT	Первый Балтийский Канал (rus)
Owner	Laisvas ir nepriklausomas kanalas, UAB	Latvijas Neatkarīgā Televīzija, AS	Pirmais Baltijas Kanāls, SIA
Turnover (euros)	21 186 284	8 478 743	2 593 301
Profit/Loss (after tax, euros)	1 274 328	-1 701 454	14 413
5th TV	TV6	НТВ Мир Baltic (rus)	НТВ Мир (rus)
Owner	TELE - 3, UAB	Baltijas Mediju Alianse, SIA	Baltijas Mediju Alianse, SIA
Turnover (euros)	22 517 294	13 614 132	13 614 132
Profit/Loss (after tax, euros)	2 172 357	74 090	74 090

Sources: Creditreform, Kredidiinfo, publicly available information

Media owners for which group results are available (including other operations or revenues produced by other media titles owned by the same owner) and which therefore can not be attributed solely as a result of the particular media outlet	Lietuvos Rytas, Respublikos Leidiniai, Diena Media News, Šiaulių kraštas, ON Media, Savaite, Žurnalu Leidybos grupe, SS Leidyba, Delfi, M-1, Lietuvos Nacionalinis Radijas ir Televizija, Tele-3, Laisvas ir nepriklausomas kanalas	Lauku Avīze, Dienas mediji, Izdevniecības nams Vesti, Zīme, Žurnāls Santa, Izdevniecība Rīgas Viļņi, TV 3 Latvia, Pirmais Baltijas Kanāls, Baltijas Mediju Alianse	Postimees, SI Ohtuleht, Eesti Ajalehed, Ajakirjade Kirjastus, Uhinenu Ajarkirjad, Aripaev, Presshouse, TV 3, Uhinenu Ajalehed, Eesti Rahvusringhaaling, Trio LSL, Taevaaudio, Mediainvest Holding, Kanal 2
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# TRENDS 2014 - 2015

## The year of Stability

By Aija Krūtaine, Sanita Jemberga

2014 looks like a year of stability for the most popular Baltic media outlets. After hardships endured during the global economic crisis in 2008 - 2013, the financial situation seems to have stabilized. The summary of financial results of 2014 are similar to those of 2013.

In 2014, 34 of the 53 companies that directly own the 75 most popular media outlets in the Baltics have managed to increase turnover. 37 from the companies or 70% managed to make a profit.

### Newspapers: Still Breathing

Newspapers keep falling in terms of the readership figures, being hit the first and most harshly by the changing habits of media users. But they might have found a way to exist.

Financial data shows that turnovers have decreased for a majority of TOP 15 Baltic newspapers owners, but only three from top 14 are posting losses in 2014 (*Kauno Diena* and *Šiaulių kraštas* in Lithuania, *Diena* in Latvia. Tallinn City Council does not publish newspaper for commercial reasons, so we do not count it in). The data have to be approached and interpreted with caution,

though, as for many of them only consolidated data of the parent companies are available, which may include also results of operations not directly connected with the newspaper.

In terms of the financial strength and newspaper circulation, Estonia is leading. While Latvian and Lithuanian companies post the profits of few or few tens of thousands, Estonian “top 5” seems to have set a standard of half a million euros as a common target. It’s publishing house *Postimees*, owned by *Eesti Meedia*, has a turnover of nearly 14 million euros, the largest for newspaper owners in the Baltics. *Postimees* circulation was 51,400 in December 2014.

In 2014, the average number of readers for one issue of a particular newspaper (cover) has fallen for all newspapers that have made it in the top, except one – Estonian weekly *Maaleht* which has managed to slightly increase it. Lithuania’s *Lietuvos Rytos* still has the biggest readership in the Baltics – the average number of readers for one issue of it is 250,000 people, but it has decreased by 15% from a year before.

Last year has also seen slight changes in the list of top 15 most read newspaper titles. Now four of them are in Russian, their influence most pronounced in Latvia, where

three from the five most popular newspapers are published in Russian. In Estonia which has a comparable size of Russian minority (i.e., every fourth person is Russian), only one paper in Russian has made it into “top 5”. It is not even commercial: it is a free paper by the Tallinn City Council, the infectious practice which is taking over independent regional newspapers in Latvia and has just been fended off in Lithuania’s parliament.

In Lithuania, *Respublika* has fallen out of “top 5” after turning from daily to weekly. In Estonia, the daily *Eesti Päevaleht* has dropped out of “top 5”.

## Magazines: Losing Readers, But Not Money

Magazines are also experiencing falling readership – the cover ratio fell for 12 magazines and only three have managed to increase their readership last year. Yet, magazine publishers are in a much better shape financially than their peers in newspapers. Seven of nine publishers had a profit, including five of them being able to increase it. Only one magazine owner has suffered losses last year (publisher of *Naisteleht*, Estonian women weekly).

Majority of magazine publishers have increased their sales.

If in newspapers the Estonian publishers are leading, in magazine segment they are dwarfed both by Lithuanian and Latvian readership figures. The market is the most concentrated in Latvia where one publishing house, *Žurnāls Santa*, is the publisher of 4 most read magazines. Established in 1991, it is the biggest publishing house in Latvia with a portfolio of 22 magazines.

Estonia is still the only Baltic country where the popular magazines about science and history have managed to make it into “top 5”. The rest, as elsewhere, is about women, TV listings and celebrities.

## Online: Going Strong

Contrary to print, online keeps growing.

In 2014, 10 out of 15 most popular websites saw their audiences grow. The year also brought in changes in the top 15 Baltic news websites. In Latvia, the things stayed as the year before. In Estonia, an online video player,

*tv3play.ee*, which belongs to *TV3 (MTG Group)* and the website of the local Järva newspaper, *jt.ee*, entered the top five, pushing out the business newspaper *Aripaev* and *reporter.ee*. In Lithuania, *alfa.lt* entered the list of the most popular fiver, drawing part of the content from *InfoTV* and *LNK*, and pushing business daily *vz.lt* out of it.

13 of 15 direct owners of the most popular websites increased their turnover while 9 had a profit. The data have to be approached and interpreted with caution, though, as for some direct owners only consolidated data is available and that includes also financial results of a newspaper (in case of *postimees.ee*, *ohtuleht.ee*, *jt.ee*, *kasjauns.lv*, *diena.lv* and *la.lv*) or TV channel (in case of *tv3play.ee*) production.

The online media in the Baltics continue to be dominated by Estonian entrepreneurs, and particularly Hans H. Luik and Margus Linnamäe. Luik’s *Delfi* website held the crown of the most popular news website in all three countries – Estonia, Latvia and Lithuania. Linnamäe’s *Eesti Meedia* is the global ultimate owner of the second most popular news portal in each country.

*Delfi* has increased its turnover in all three countries and improved profit in Lithuania and Estonia, while in Latvia company has suffered minimal losses around 1800 euros. According to annual report of *Ekspress Grupp*, the competition in Latvia is the toughest from all three Baltic countries. Therefore, company last year invested to increase editorial office and open new sites. Accordingly, the costs were higher than initially planned.

The tough competition also reflects in sales – *Delfi* turnover in Latvia of nearly 2.5 million euros is two times smaller than in Estonia and more than 3 times smaller compared to Lithuania. It is Lithuania’s *Delfi*, which is printing cash for *Ekspress Grupp* as last year it had a net profit of nearly 1 million euros, up almost 25% from a year ago. *Ekspress Grupp* notes that the result of *Delfi* in Lithuania was the most affected by the merger with *Ekspress Leidyba*, a Lithuanian magazine publisher owned also by *Ekspress Grupp*. The merger let to optimize the organizational structure, while creating possibilities for selling online and print advertising packages. Following the positive experience of the merger in Lithuania, in 2015, *Ekspress Grupp* plans to merge into one enterprise Estonia’s *Delfi* and *Eesti Ajalehed*, publisher of the popular newspapers *Maaleht*, *Eesti Ekspress* and *Eesti Päevaleht*.

## TV: Year Of News

Year 2014 might have been the one when people in the Baltics watched news more than entertainment shows to follow the events in so-near Ukraine. However, Lithuania is the only of the three Baltic countries where all 5 most popular TV channels have increased their share of viewing in 2014. It also pushed out of top five all Russia-originated channels.

In Latvia situation is contrary: all channels but Russian-language *NTV Mir* have seen their share of viewing decrease.

Situation is mixed in Estonia. Some channels increased their share of viewing, some lost viewers.

The public broadcasters in Lithuania and Estonia increased their share of viewing by, accordingly, 1.1 and 0.9 percentage points, while Latvia's public TV lost 0.2 percentage points of its share of viewing.

Swedish *MTG Broadcasting*, which owns a third of 15 most popular TV channels in the Baltics, is making money in Lithuania and losing in Estonia. In Lithuania, it has also climbed on the throne of the most watched TV channel in 2014. In Latvia, it has made an impressive profit of over 3 million euros with *TV3*. No one else of the Baltic televisions has reached that level in 2014. On another hand, *MTG* has been losing money with *LNT* for three years already. It has slid to the fourth place among the most watched channels, with *PBK* climbing up to the second.

*PBK* is run by another big Baltic media group, Latvian-born *Baltijas Mediju Alianse (BMA)*. It distributes Russian federal channels and also runs its flagship channel, *PBK*, where most of the content derives from Kremlin-aligned *Pervij Kanal*, but it is mixed with locally made news broadcasts and bulletins bought from *Euronews*. *BMA* turnover last year declined by 12% and profit – by 13%. The company's result might have been influenced by the temporary

suspension of programs on its rebroadcasted channels *PBK*, *RTR Planeta* and *NTV Mir* in Lithuania because of biased reports from Ukraine. It also was fined in Latvia. “With the goal of increasing net turnover, in 2015 the company's management will seek to prevent suspension of *Baltijas Mediju Alianse's* distributed television channel broadcasts for any reason, and focus on improving the company's image,” says its 2014 annual report. Yet, in the beginning of 2015 the broadcasting of programs on its rebroadcasted TV channel *Ren TV Baltic* was once again temporarily suspended in Lithuania.

## Radio: Healthy Business

The owners of popular radio stations are among the healthiest media companies in the Baltics. Of 12 direct owners of 15 most popular radio stations, 10 have managed to grow their sales and to have a profit. For some profit has fell, nevertheless only Estonia's public broadcaster *ERR*, which owns the most popular radio station in Estonia *Vikerraadio* and the Russian-language *Raadio 4*, 5<sup>th</sup> most popular station in Estonia, has posted losses in 2014. In terms of popularity, only one of top 15 radio stations in Baltics broadcasts in Russian: Estonian public broadcaster's *Raadio 4*, which has entered the top for the first time and pushed out *Русское Радио*.

# IT REALLY HAPPENED

## Top 15 things to remember about Baltic media in 2014 - 2015

### ESTONIA

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1. **Добрый вечер, говорит Таллинн.**

Estonia's public broadcaster started the channel for local Russian speakers, ETV+, in September, 2015 (see more in **The Parallel Universes** on page 15).

2. **Comment is free, but costly.**

The leading Baltic news website, *Delfi*, lost a nine-year battle over who is responsible for the offending user-generated comments. In a landmark case, the highest European court decided that the media bear the responsibility of everything what is posted on their websites (see more in **Everlasting battle** on page 28).

3. **Hello - and good bye.**

The granny of Estonian press, the biggest daily *Postimees*, had a turbulent year. First, the 100% of its shares became a property of one of the richest Estonian men, pharmaceuticals-salesman-turned-media-tycoon Margus Linnamäe (see the story **“Who is Margus Linnamäe?”** on page 25). Then columnist Hardo Pajula became the shortest living editor-in-chief in the recent history of Estonian press, quitting a job after a day. Pajula explained that his views on the future of the paper differs from the expectations of *Postimees* editors. So Merit Kopli continued to carry on as before.

4. **Child porn hit the fan.**

In the middle of 2014, another blog-style media outlet was born. Yet it was not like any other regular blog. *Nibilist.fm* became surprisingly popular. The person behind it is Kaur Kender, an enfant terrible of Estonian literature. *Nibilist.fm* often focuses on topics which the mainstream media do not cover, for example, stories told by prostitutes and junkies. The biggest scandal, however, was extremely violent Kender's fictional story about a child porn. At the end, story was deleted and author: investigated. It brought about a lively debate on where the freedom of speech ends and an unacceptable trash starts.

5. **Enter the new tycoon.**

Estonia is not short of home-grown media tycoons (at least compared to the other Baltic countries). In 2014, a new one entered a field. The 49th richest man in Estonia, Janek Veeber, helped Hans Luik's *Ekspress Grupp* to buy out AS *Ajakirjade Kirjastus* and AS *Õhtuleht* from competitors, *Eesti Meedia* (it held 50% of the companies, the other half was already owned by *Ekspress Grupp*). Now 50% of both enterprises are owned by *Ekspress Grupp*, and another half by OÜ *Suits Meedia* which is controlled by Veeber. Until the purchase Veeber was mainly known for investments in the energy sector.

## LATVIA

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### 1. Bear with us.

Latvia tried and failed to decide on how to entice local Russians away from Kremlin-aligned reality (see more in **The Parallel Universes** on page 15).

### 2. The battle is on. And the winner is..

As Latvian public broadcaster reclaimed the first place in the battle for ratings in 2015 (if only for two months at the time we went to print), the gloves are off with commercial rivals and politicians (see more in **Growing pains** on page 30).

### 3. Freezing the truth.

Latvian court took an unprecedented decision to freeze the assets of the publishing house “*Cits Medijs*”, the owner of the respected weekly magazine *IR*, in the libel case brought by insolvency administrator Māris Sprūds. Sprūds alleged that *IR* might not be financially able to pay the requested compensation if he wins. Court’s decision was criticised by journalism community as infringement of the press freedom and attempt to silence the uncomfortable truths about the murky business. Latvian parliament swiftly changed the law which allowed to freeze assets of the media companies before the court verdict. The court of the first instance exonerated *IR* in May, 2015.

### 4. You see me, you see me not.

Both Latvia’s newswires, *Baltic News Service* (BNS) and *LETA* changed hands in 2015. For a very short time both were owned by Estonia’s *UP Invest OÜ*, controlled by pharmaceuticals-salesman-turned-media-tycoon Margus Linnamäe (see the story “**Who is Margus Linnamäe?**” on page 25). He bought *BNS* already in spring 2014 (*LETA* was a second bidder - and lost). *LETA* was added to Linnamäe’s portfolio in August, 2015. The controlling interest of *LETA*

or 99.66% of the company’s shares are now owned by the *Newswork*: local subsidiary of *UP Invest*. To escape the negative decision of the Competition Council which has to approve such acquisitions, *BNS* was quickly sold to another Estonian, insolvency administrator and real estate businessman Arno Megi. Linnamäe kept *BNS* in Estonia and Lithuania, as well as control over the brand. Competitors were quick to point out that the sale of *BNS* Latvian subsidiary looked more like a smokescreen than a real deal.

### 5. Great expectations.

Latvian-Swedish telecommunications company *Lattelecom* moved into the TV content-production business, starting its first own entertainment TV channel, *360TV*, in August, 2015. *360TV* relies on a local semi-celebrities and is broadcast both on television and on web. The show is run by the former head of *MTG* in the Baltics, Kaspars Ozoliņš. According to *TNS* data, the channel had a share of viewing of 0.1 percent in September, 2015.

## LITHUANIA

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### 1. If you can't fight it, ban it.

Lithuania continued to temporarily ban the Kremlin-aligned TV channels, suspending the transmission of some *Ren TV Baltic* programs and *RTR Planeta* for three months over incitement of hatred in reports about the conflict in Ukraine. Since the end of 2013, Lithuania has placed similar bans five times. Although the move has been criticised by the purists of the freedom of speech, Vilnius actions were justified by European Commission in July, 2015. Brussels looked into the case because one of the channels, *RTR Planeta*, was registered in Sweden. EC said in the decision that “the measures taken by Lithuania are not discriminatory and are proportionate” to ensure that hatred is not incited in the media (see more **The Parallel Universes** on page 16).

### 2. No party.

After two decades long ban on political parties, banks and municipalities to own the mass media in Lithuania, this year parliament almost lifted the restrictions regarding the parties. Lithuanian president and local media called the planned changes a threat not only to the quality of public information, but also to media freedom and democracy. The parliament gave in at the end. However, Lithuanian mayors are finding their ways to circumvent the ban (see more in **No Party at the Local Media** on page 36).

### 3. We are not criminals.

In June, 2015, Lithuania's parliament voted to decriminalise insult. The law before included the special protection for public figures and the offence was still carrying a prison sentence. The changes will come into force in April, 2016. Move was lauded by OSCE Representative on Freedom of the Media Dunja Mijatović, but she called to take the next step and decriminalize libel, too.

### 4. Source protection.

In July 2014 by amending the Public Information Law and the Code of Criminal Procedure the parliament granted greater protection for journalists' sources. Now journalists only have to reveal their sources by a court's order and only if all other methods of investigation had been exhausted. The restrictions to the protection stay – journalists still can be instructed by court to reveal information sources for “vital and other significant public interests, for ensuring protection of Constitutional rights and freedoms of an individual and for executing justice“. Terms „vital and other significant public interests“ and „executing justice“ are left open to the interpretation of the courts. The amendments were proposed after an editor of BNS news agency was instructed by a pre-trial judge to disclose the source of the secret service report. A Vilnius court later revoked the instructions and found the search of editor's home unlawful.

### 5. Lady is not for filming.

In a true neighbouring spirit, the biggest Lithuanian media scandal of the year started in Latvia. In an interview with Latvia's public broadcaster *LTV*, the combative Lithuania's president Dalia Grybauskaitė (that black belt in karate is not given for nothing) refused to answer the questions, first, about her views on same-sex marriage and at the end also about her favourite basketball players. Grybauskaitė claimed that the questions were not among those *LTV* sent to her office to get the interview. She demanded the answers were cut from the program. *LTV* showed it all, prompting a furious discussion in Lithuania about the relationships between the politicians and the media.

# STORY OF THE YEAR

## The Parallel Universes

By Aija Krūtaine

“A reliable way to make people believe in falsehoods is frequent repetition, because familiarity is not easily distinguished from truth.”

*Nobel Laureate and author of “Thinking, Fast and Slow”  
Daniel Kahneman*

Awakened by Russia’s conflict with Ukraine, the Baltic countries are trying to figure out how to win the hearts and minds of their Russian minorities who are lured by Russian TV channels with seemingly endless federal financing. The worried Western allies are stepping up funds for journalist training and Russian-language programming, but there are more undercurrents to tackle in the Baltics, reaching beyond providing more and objective information.

The three Baltic countries – Estonia, Latvia and Lithuania - were among the first in the European Union to ring the alarm bells about manipulative messages slithering through Russian TV channels, which are widely popular among their Russian speaking populations. The Baltic countries have the biggest Russian minorities in the EU as percentage of their population. In the Baltics, it is a fact known for years that Russian speakers watch Russian TV channels, not local. It has also been common knowledge that information presented by those TV channels might not always be considered fair journalism. At the same time, until Russia’s annexation of Crimea in March, 2014, Estonians, Latvians and Lithuanians have cared little what Russian TV channels were broadcasting and what their neighbors were watching. Balts and Baltic Russians have been living in parallel information universes for over two decades. From time to time the issue was raised over how to reach and speak with Baltic Russians, yet no relevant actions followed.

### How the Baltics got large Russian minorities

*The Baltic countries share an extensive past with their neighbour Russia who has more than once conquered their territory. After the occupation of the Baltic states during the World War II, Soviet powers tried to russify the countries by resettling people from other Soviet republics. Many of them stayed after the restoration of independence in 1991. At the beginning of 2015, in Latvia around 26 percent of the population were Russians, in Estonia – 25 percent, but in Lithuania - 5 percent.*

Table No 1

**Most Popular TV Channels in the Baltic Countries in 2015**

Rank	Lithuania	Latvia	Estonia
<b>No 1</b>	<b>TV3</b>	<b>TV3</b>	<b>ETV (public broadcaster)</b>
Share, %	16,3	11,5	15,5
<b>No 2</b>	<b>LNK</b>	<b>LTV1 (public broadcaster)</b>	<b>Kanal 2</b>
Share, %	16	9,8	15,4
<b>No 3</b>	<b>LRT Televizija (public broadcaster)</b>	<b>PBK</b>	<b>TV3</b>
Share, %	9,3	8,8	10,9
<b>No 4</b>	<b>BTV</b>	<b>LNT</b>	<b>PBK</b>
Share, %	7,2	8,3	5,8
<b>No 5</b>	<b>NTV Mir Lithuania</b>	<b>NTV Mir Baltic</b>	<b>NTV Mir</b>
Share, %	5	7,4	5,2

Data: TNS LT, TNS Latvia, TNS Emor; Share, % - share of viewing, the percentage of the total viewing audience watching over a given period of time. Period - 01.01.2015-30.09.2015. Channels in Russian language marked in yellow.

It all changed in the beginning of 2014, when the “little green men” crossed Ukraine’s border and within less than a month Russia annexed Crimea. Baltic politicians condemned the events in Ukraine and accused Russia of spreading disinformation about the conflict on its TV channels. Lithuania’s president Dalia Grybauskaitė said Lithuania and other countries were subjected to an open information war and “we ourselves have to develop resistance to the propaganda machine”. While then defense minister, now the president of Latvia, Raimonds Vejonis said that Russia might try to increase negative sentiment in Latvian society and stir unrest through “certain specially-trained, professional provocateurs”.

Fuelled by the failure to make Russians a part of the local communities after the restoration of independence, politicians’ fear of their big neighbour fomenting unrest in the countries seems plausible. Each country has taken steps to try to limit the influence of Russian TV and to provide

alternatives. Still little has been proposed to promote a dialogue with the Russian minority. The perception that Baltic Russians are aligned with Russia and under the influence of its TV channels is widespread. Yet, rarely their voices and needs are heard.

### Into a Frenzy of Action

The events in Ukraine marked a turning point, forcing a reevaluation by European and U.S. politicians of the power wielded by Kremlin-aligned media over Russian speakers around the world.

In addition to the federal TV channels, like, *Россия 24* (Russia 24), *Первый канал* (the First channel), *НТВ* (NTV), Russia is expanding state-controlled RT (formerly Russia Today) in a multi-language media platform. A year ago it created the global news agency *Sputnik*. “Much of

the television news broadcast from Russia has exhibited a growing tendency to sensationalise, simplify, distort, co-opt and marginalise issues in ways that run counter to the universal values of fair and accurate journalism,” the European Endowment for Democracy (EDD) said in the summary of its feasibility study on “Russian Language Media Initiatives in the Eastern Partnership and Beyond”<sup>1</sup>. It was commissioned by the Dutch government, with Latvian government assisting, to assess what can be done to counter Russia’s propaganda.

While the first reaction that comes to mind might be to strike back with the same weapons, it’s likely to fail as there is a consistent lack of trust in most media outlets already now, according to EDD. As the West is calling Kremlin backed media propaganda, Russian speakers consider this message and any attempts to counter it Western propaganda. Nevertheless, the EU has created a small group of experts under the European External Action Service to respond to the challenges of “Russia’s ongoing disinformation campaigns”, but it’s work will be mostly focused on myth-busting on social networks. The EDD is proposing to create a news hub and content sharing platform to encourage the production and distribution of news and TV programs in the Russian language focusing on content that reflects local issues. Poland has pledged to support the EED’s initiative with 1 million euros and the Dutch government has pledged 1.5 million euros for a news exchange to bolster Russian language news agency<sup>2</sup>.

The US State Department has commissioned the University of South Carolina’s Newsplex Initiative and the New England Center for Investigative Reporting to create an investigative journalism training program in the Baltics for \$500,000. Suddenly, money is pouring into media that have been struggling financially for years and who lack resources more for content-production than they lack training.

## Going Slowly, but Steady

It took more than 20 years and events in Crimea to finally nudge Baltic leaders to see the risk of not having their Russian minorities engaged in the local community. It is a vulnerability that can be used against them. Earlier it was concluded that there was a need to provide an alternative

source of information, preferably a TV channel, for the local Russian speaking audience. The half-baked idea to create a joint European and/or Baltic TV channel in Russian language surfaced, but quickly sank. Each country decided to go its own way.

Estonia opted to create a new TV channel in Russian, *ETV+*, under the Estonian public broadcaster *ERR*. “The role of Russia and the role of Russian ruled media in the world changed during the last two years. All Western countries, including Germany and US, are more worried about the information, which is coming from Russia. And, of course, what happened in Ukraine was one important thing why the Estonian government, as well as the Latvian government, started to discuss [the need for] the Russian language multi-media channel,” said Ainar Ruusaar, a member of *ERR*’s board.



**Ainar Ruusaar,**  
ETV board member who was overseeing  
the creation of ETV+.

*Photo: ERR*

Created in nine months, the channel’s running costs are estimated at around 4 million euros per year as it aims to produce 24 hours of original programming a week, including news. Almost 100% of the money for the new channel this year came from Estonia’s state budget. In addition, *ETV+* received some small financial help from mostly Nordic countries to launch the new channel: to train journalists and do some marketing activities, says Ruusaar.

<sup>1</sup> <https://www.democracyendowment.eu/news/bringing-plurality-1/>

<sup>2</sup> <https://www.democracyendowment.eu/news/Supporting-RussianMediaPlurality/>

Table No 2

**Comparison of Share of Viewing of Russian TV Channels in the Baltics**

Country	Channel	Share, %, in 9M of 2015	Share, %, in 2014	Share, %, in 2013
Latvia	PBK	8,8	9,6	9,8
	NTV Mir Baltic	7,4	7,7	6,8
	RTR Planeta Baltija	6,5	5,0	5,7
	REN TV Baltic	3,5	4,3	4,7
Estonia	PBK	5,8	6,9	7,9
	NTV Mir	5,2	5,1	5,0
	RTR Planeta	4,6	4,6	4,1
	REN TV Baltic	1,8	2,0	2,1
Lithuania	NTV Mir Lithuania	5,0	4,0	5,5
	PBK	2,8	3,9	3,6
	RTR Planeta	*	2,6	4,0
	REN TV Baltic	1,1	2,3	2,6

Data: TNS LT, TNS Latvia, TNS Emor; share, % - share of viewing, the percentage of the total viewing audience watching over a given period of time.

\* Since January, 2015, TNS LT is not measuring the audience of RTR Planeta; it does not mean that people are not watching it.

The channel focuses on telling local stories about life and opportunities in Estonia. *ETV+*'s vision includes not only the creation of TV content, but also the use of multimedia to reach different audiences. Before it even went on air, *ETV+* drew wide attention, including that of critics who say its programs will not be able to compete with the grandiose productions of the Russian federal TV channels, or that it will be a TV channel spreading Western propaganda. Ruusaar stresses that from the very beginning it was clearly stated that *ETV+* would not be an anti-Russian propaganda channel. As a guest on one of the *ETV+* shows on the third day of broadcasting, Ruusaar joked that journalists get lists of people to be interviewed in North Korea, but there were no blacklists in Estonia. "We live in an independent country and we create an independent TV program," Ruusaar said. As Russian TV channels don't report local issues, *ETV+* should be able to compete with them in the future, says Ruusaar.

The new channel is on air from September 28, 2015. Funnily enough, more Estonians than Russian speakers watch it; after the massive discussion on its merits in Estonian media it is understandable. During the first week of broadcasts 294,000 people older than 4 years or 24,2% of population watched the channel for at least a minute<sup>3</sup>; of them 217,000 people or 25,7% of the audience reached were Estonians, while 77,000 people or 20,7% were of another ethnicity. "Now the reality is that about 200,000 people weekly watch *ETV+* more than 15 minutes and half of them are Estonians. But, of course, it is a long term project. Our target is that by next October half of Russian speakers in Estonia will watch this program more than 15 minutes weekly and 55% will know that here is a TV channel or multi media channel named *ETV+*. It is our huge task," says Ruusaar, who remains optimistic.

<sup>3</sup> <http://rus.err.ee/v/telekanal/61b6c3bc-03f5-456f-b067-50f8078d99b3/auditoriya-etv-v-pervuyu-nedelyu-posle-vykhoda-v-efir-sostavila-294-000-chelovek>

## Two to Tango

Latvia also toyed with the idea to create a public TV channel solely dedicated to Russian-speakers, yet it did not come to life for several reasons. While there was a political support for a joint Baltic TV channel, there was none for a local one. The nationalist party who is represented in the government, VL-TB/LNNK, feared that the creation of such channel just for Latvia will demotivate Russian speakers to learn Latvian. “Another reason was that we did not feel a strong support from the audience of Russian speakers. Apparently, they perceived this idea not like a channel that would be created for them about local topics, something that had to be done already 20 years ago, but as another attempt to brainwash,” says Olga Proskurova, the editor in chief of Russian content unit with the public broadcaster’s *LTV* news service.

Politicians did though have a strong urge to do something and allocated money to increase the number of Russian language programs on the public broadcaster *LTV*. Data showed that it was news that was steadily attracting Russian language viewers, but local TV channels had 10 times less Russian language news programs than those of the rebroadcasted Russian federal TV channels or their local offsprings<sup>4</sup>. Therefore, a year ago, in September, 2014, morning and evening news programs and three analytical programs totaling 12 hours of original Russian language content per week were introduced. In the first month (September 2014) the evening news were watched at least for a minute by 227,800 people older than 4 years or 11,5%, the monthly reach of a discussion program was 153,300 people or 7,7%. The reach of the other shows was below 100,000 people. “I cried when I saw the ratings of the first programs. But we grew fast and the ratings in January, 2015, were the best we had reached. We were really happy that people are watching us. Our competitors also understood that we are growing and in February *PBK* introduced short local news at the time when we had our evening news. It hit us really hard and our ratings again started to fall. But we don’t give up, we continue to work,” says Proskurova. In January, 2015, 483,800 people or 24,3% of the population watched local Russian language news on the public broadcaster at least for a minute. *PBK* news attracts two to four times more viewers than those of the public broadcaster.

In the new season (from September 2015) the morning news program was dropped. Instead a new program before the evening news was introduced, giving a reason for Russian language speakers to turn on TV in the evenings for a bit longer. The Russian language programs total 9 hours per week, which is 25% less than in the previous season. The reach of the Russian language programs on the public broadcaster have increased. In September 2015 compared to the same period a year ago, the reach of news and discussion shows increased by 10%, the reach of the interview program grew by 14%, but the reach of the investigative journalism program increased by 20%.



**Olga Proskurova,**  
head of Russian-language newsdesk in LTV.  
*Photo: Vladislavs Proškins, F64, IR*

<sup>4</sup> [http://ltv.lsm.lv/public/assets/userfiles/dokumenti/citi/SP\\_2015.pdf](http://ltv.lsm.lv/public/assets/userfiles/dokumenti/citi/SP_2015.pdf), page 7-8

Proskurova still believes that a separate channel is needed for the Russian language audience, but the chances of such an outcome are unlikely. “We can only continue to work and improve the quality of the programs we make. We do have ideas that we should expand to internet, but those are only ideas at the moment,” she says.

Other efforts to provide better journalism include the idea to set up the Baltic Centre of Media Excellence which would act as a one stop shop for all media training needs, as

the region is suddenly awash with trainers and money to spend on them. The idea is supported by Latvia’s Ministry of Foreign Affairs, who have awarded a grant for training journalists in the EU’s Eastern Partnership countries, and Nordic countries, who have been looking for the least controversial ways to strengthen Baltic media.

The Centre was formally established in Tallinn, in November 2015, and the founders were broadcasters and professional organisations representing all media segments from the Baltic countries.

Table No 3

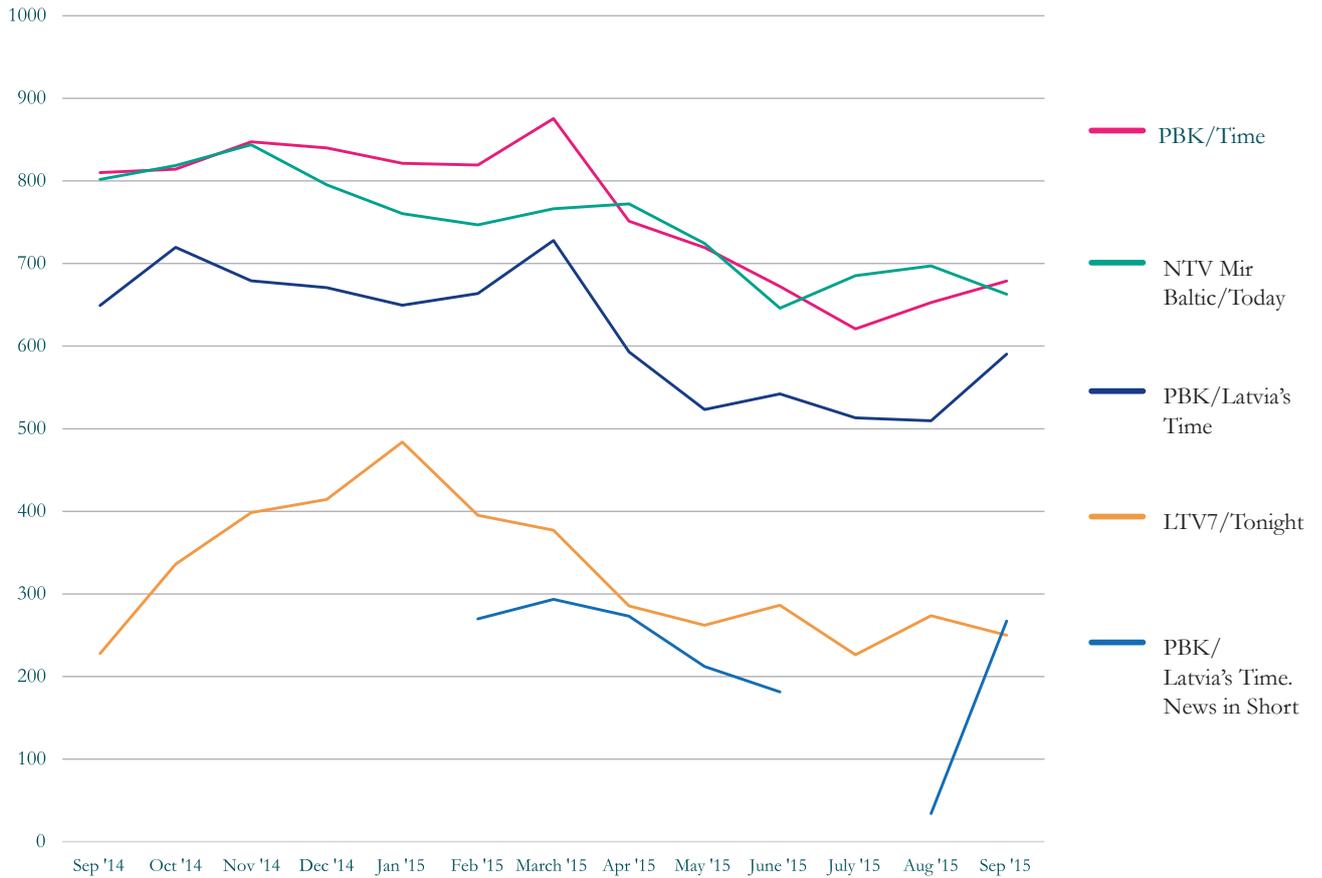
### Changes in Latvian public broadcaster’s Russian-Language Programs’ Reach

The Program	Type of the Program	Time Period	Times on Air During the Month	Reach, %	Reach, thousands
Tonight	Evening News	September, 2014	17	11,5	227,8
		January, 2015	22	24,3	483,8
		September, 2015	22	12,7	250,0
Dots on the I	Discussion Program	September, 2014	3	7,7	153,3
		January, 2015	4	10,4	207,1
		September, 2015	4	8,6	168,9
Personal Case	Investigative Journalism Program	September, 2014	3	4,0	79,7
		January, 2015	4	9,5	189,0
		September, 2015	3	4,9	96,0
Without Resentment	Interview	September, 2014	3	4,5	90,1
		January, 2015	4	7,2	142,2
		September, 2015	4	5,3	103,1

Data: TNS Latvia; Reach, thousands - total number of population that have watched a program at least for a minute during given period of time.

Table No 4

**Comparison of Russian Language News Reach (in thousands) on Various Channels**



Data: TNS Latvia; Reach (thousands) - total number of population that have watched a program at least for a minute during given period of time.

PBK/Time - Russian news program broadcasted on TV channel PBK at 20.00 every day of the week

NTV Mir Baltic/Today - Russian news program, here the total audience of all Today news programs throughout the day on various times is calculated, on air every day of the week

PBK/Latvia's Time - Latvian news program in Russian language broadcasted on PBK at 20.40 on weekdays

PBK/Latvia's Time. News in Short - Latvian news program in Russian broadcasted on PBK at 18.00 on weekdays

LTV7/Tonight - Latvian news in Russian broadcasted on public TV at 18.00 on weekdays

## Out of Sight, Out of Mind

Lithuania has the smallest Russian speaker population among the Baltic countries and Russian channels get half of the share of viewing time compared to Latvia and Estonia. However, it is Lithuania that has made the loudest international headlines suspending broadcasts of several Russian federal channels in its territory due to their coverage of conflict in Ukraine and Lithuania's history. The Radio and Television Commission of Lithuania (LRTK) placed a temporary, three-month suspension of programs produced outside the European Union and broadcast on

Russian-language TV channels *Ren TV Baltic*, *NTV Mir Lithuania* and *PBK*. In April, 2015, LRTK completely banned the rebroadcasting of *RTR Planeta* in Lithuania for three months. LRTK explains that it has taken these decisions because particular broadcasters breached Lithuania's law and disseminated disinformation which is forbidden by its laws. "Naturally, the goal our Commission achieved by suspending those programs was that it stopped incitement to hatred, instigation of war, spreading of disinformation and violation of Lithuania's laws," says Birute Kersiene, head of public and international relations at Lithuania's media regulator.

Table No 5

### Comparison of TV channel Share of Viewing Before and After Imposed Bans

Russian-language TV Channel Viewing Share, %, in Lithuania					
Year	Month	PBK	RTR Planeta	NTV Mir Lithuania	Ren TV Baltic
2014	January	3,3	4,1	5,9	2,2
	February	3,1	3,3	6,1	2
	March	4,2	4	3,9	2,3
	April	4,4	1,2	0,3	2,6
	May	4,8	*	0,4	2,6
	June	4,8	*	1,5	2,5
	July	4,2	2	4,7	2,3
	August	3,9	2,7	5	2,4
	September	3,4	2,6	4,4	2,3
	October	3,6	3,2	5	2,3
	November	3,5	3,2	5,1	2,2
	December	3,4	3,2	4,9	2,3
2015	January	3,3	**	4,8	1,7
	February	3,7	**	5	1,8
	March	3,1	**	4,7	1,6
	April	3,3	**	5	1,7
	May	3,4	**	5	2
	June	3,3	**	5,8	2,3
	July	2,7	**	5,2	1,3
	August	3	**	5	1,2
	September	2,8	**	4,8	1,1

Data: TNS LT; Share, % - share of viewing, the percentage of the total viewing audience watching over a given period of time. Temporary suspension of some programs on a particular channel marked in yellow. The complete ban of channel marked in red.

\*Share of viewing of the TV channel was so low it was not specified.

\*\*Since January, 2015, TNS LT is not measuring the audience of RTR Planeta; it does not mean that people are not watching it.

Opinions differ whether bans are an effective way to solve the problem of Russia's disinformation campaigns, but Lithuania is demonstrating it will not let hate speech or Lithuania's history distortion on Russian TV channels slip away unpunished. Data shows the share of viewing of Russian-language TV channels has diminished during the temporary bans. Yet, once they are lifted, viewers return to their favorite channels.

### The history of imposed bans

**RTR Planeta** – completely banned retransmission from April 13, 2015 to July 12, 2015

**Ren TV Baltic** - temporarily suspended retransmission of some programs from January 18, 2015 to April, 17, 2015

**RTR Planeta** - temporarily suspended retransmission of some programs from April 7, 2014 to July 6, 2014

**NTV Mir Lithuania** - temporarily suspended retransmission of some programs from March 21, 2014 to June 20, 2014

**PBK** - temporarily suspended retransmission of some programs from October 15, 2013 to January 14, 2014

The procedure of suspending either parts of programs produced in Russia or the whole channel had to be taken in accordance with European and Lithuanian laws, since legally *Ren TV Baltic* and *NTV Mir Lithuania* are registered in the UK and accordingly operate under UK jurisdiction, while *RTR Planeta* is registered in Sweden and *PBK* – in Latvia.

Lithuania got a boost for its actions as European Commission said in July that measures taken by Lithuania against *RTR Planeta* were not discriminatory and were proportionate with EU laws to ensure audiovisual media services do not contain any incitement to hatred based on race and/or nationality. Lithuania also has alerted colleagues in OFCOM, the British regulator for communications industries, about the broadcast content of some programs on *NTV Mir Lithuania* and *Ren TV Baltic*, and they've concluded on several occasions the content was in breach of the British Broadcasting Code<sup>5</sup>.

From October 1, 2015, amendments to the Law on Provision of information to the Public, initiated by Lithuania's president Dalia Grybauskaitė to counter hostile propaganda, have come into force. Lithuania now can fine broadcasters and re-broadcasters with a penalty of up to 3% of their annual revenue for publishing war propaganda or information inciting the change of Lithuania's constitutional order through the use of force, instigating attempts against Lithuania's sovereignty, territorial integrity or political independence, or for publishing information that incites war or hatred.

In her state of the nation address in March 27, 2014, Lithuania's president Dalia Grybauskaitė called all media owners and managers, journalists and columnists to help Lithuania's residents "to distinguish lies from truths, to inform society very clearly about the intents directed against our state, and to counter the misinformation and the propaganda of hostile forces". Either because of it or not, but some of Lithuania's media is actively promoting the military. To introduce the audience to the methods used in the Russian propaganda coverages Lithuania's public broadcaster *LRT* was considering a separate program. In the end, though, it was decided not to have a special "anti-propaganda broadcast, as anti-propaganda is very close to propaganda," *LRT* chief Audrius Siaurusevicius told *BNS* in August 2015. "However, we want our content to deconstruct this," he added. According to Siaurusevicius, currently *LRT* is airing Russian language broadcasts produced by other parties, for example, German broadcaster *Deutsche Welle*, *Radio Free Europe* and *the Voice of America*, the first one being funded by the German government, but the latter two - by the US.

<sup>5</sup> [http://stakeholders.ofcom.org.uk/binaries/enforcement/broadcast-bulletins/1519673/Issue\\_290.pdf](http://stakeholders.ofcom.org.uk/binaries/enforcement/broadcast-bulletins/1519673/Issue_290.pdf),  
[http://stakeholders.ofcom.org.uk/binaries/enforcement/broadcast-bulletins/obb284/Issue\\_284.pdf](http://stakeholders.ofcom.org.uk/binaries/enforcement/broadcast-bulletins/obb284/Issue_284.pdf),  
[http://stakeholders.ofcom.org.uk/binaries/enforcement/broadcast-bulletins/obb282/Issue\\_282.pdf](http://stakeholders.ofcom.org.uk/binaries/enforcement/broadcast-bulletins/obb282/Issue_282.pdf)

## Strategic Communications

Overall, the Baltic governments are taking steps in the right direction to contain the dissemination of disinformation, promoted by Russian TV channels. “We have done what we could have with the tools that we got,” says Nerijus Maliukevičius, a lecturer at Vilnius University’s International Relations and Political Science Institute. However, he says there is a need for strategic communications with both – the population and allies. “The grand dilemma is not just about those tactical things you do - create alternatives in Russian language, boost your social immunity to those manipulations, [improve] media literacy. In the end it is about communicating our European values. We are lacking a soft power project for the Russian audiences in the East, an alternative to [president Vladimir] Putin’s Russia,” says Maliukevičius. “It’s not the propaganda that is a threat, but there is a risk of those authoritarian values that are propagated that pose a challenge to ourselves – what values can we offer for those audiences?”

To improve strategic communication, in 2014 NATO Strategic Communications Center of Excellence was opened in Riga. The mission of the Centre is “to contribute to the Alliance’s communication processes in order to ensure that it communicates in an appropriate, timely, accurate and responsive manner on its evolving roles, objectives and missions”. Yet, the first public conference organized by the Centre on August 20-21, 2015, left journalists with nothing as they were allowed only in a designated area, but not allowed to chat with the speakers and participants on the sidelines of the conference to get a better grasp of the strategic communication challenges and the centre’s tasks.

Meanwhile, Anda Rozukalne, associated professor of Riga Stradins University, is concerned that most of the discussions on how to deal with Russia’s disinformation campaign do not involve the Russian audience. “I’m worried that a feeling is created in this discussion about the

smart “us” and “them” – Russians under the influence of propaganda. But there are as many critically thinking individuals in the Russian audience as among Latvians or other Balts,” says Anda Rožukalne.

While a new TV channel in the Russian language might not be the magic wand to solve problems the Baltics are facing to unite their populations of various ethnicities, it might be a step forward. The new Estonian channel will provide a platform for Russian-speakers to express their thoughts and be heard, something they have lacked before, says Ruussaar. *ETV+* editor-in-chief Darja Saar has said that the channel should be regarded as a long-term social project aimed to engage Russian speakers in Estonian social life and strengthen the country. “The concept that you have to first learn a language and then you can participate in the social life – the experience of the last 20 years shows that it does not work,” Darja Saar said in an interview to Latvia’s public radio.

Her counterpart in Latvia, Olga Proskurova agrees. “I’m really sorry that in Latvia there is no support from the Russian-language audience itself. The demand for such a platform should first come from ourselves, because we have to learn to live in the local information space. We don’t know how to do that,” says Russian speaker Proskurova.

# PERSON OF THE YEAR

## Who Is Margus Linnamäe?

By Eliisa Matsalu

In 2015, Estonian pharmaceuticals-salesman-turned-media-tycoon Margus Linnamäe became the sole owner of the leading Baltic media house, *Eesti Meedia*. 51 year-old, serious looking man would not be recognised by many of his own employees, but he now controls a dozen Baltic media enterprises.



**Fantastic Four No More.** Margus Linnamäe (centre) with the founders of *Eesti Meedia* in 2013.  
*Photo: Margus Ansu, Postimees/Scanpix*

According to the list of the 500 richest people in Estonia, compiled by the local business newspaper *Äripäev*, Linnamäe is 7th richest man in Estonia, with assets worth 146.7 million euros in 2015.

He runs the business via *MM Grupp* which via subsidiaries controls Estonian medical wholesale and retail market. His companies also deal with agriculture and catering.

Linnamäe entered media business in 2013 when he helped Mart Kadastik, Toomas Issak, Meelis Luht and Andres Kull to buy *Eesti Meedia* from Norwegian *Schibsted* which was leaving the Baltic market all together to focus on more profitable advertising websites elsewhere. All four were board members of *Eesti Meedia*, but they needed an investor to make management buy-out a reality.

At the time, Linnamäe said that he decided to enter the media field because he was concerned that *Eesti Meedia* will become too gossipy. He was also concerned that the new owner could be *Gazprom Media*, Russia's state-run gas monopoly media arm. To prevent that, he offered Mart Kadastik help.

In September 2013, *Schibsted* signed a deal worth about 30 million euros with Mart Kadastik. The new owner of the company became *Meedia Holding OÜ*. 50% of it belonged to Linnamäe's *UP Invest*, the other half to *Tamm Meedia*, controlled by quartet. Mart Kadastik held 58% of *Tamm Meedia* shares, whereas all the others had 14% of shares each. Kadastik told daily *Postimees* at the time that Linnamäe is a good owner, since he keeps a low profile and most of the time does not give any interviews.

In summer of 2015, former management board sold their shares to Linnamäe's company *UP Invest*.

In-between, in 2014, the low-profile millionaire had already acquired *Baltic News Service (BNS)*: a newswire which its previous owner, Finnish *Alma Media* was looking to sell for years. *Alma Media* sold *BNS* to businessman Ilmar Kompus company *OÜ 24m2* in March 2014. After two months Kompus, who manages several Estonian radio channels, sold *BNS* to Linnamäe's company.

Linnamäe said that buying *BNS* was a logical step because he was already owning several media companies. In 2015, Linnamäe via his *UP Invest* also bought a Latvian newswire *LETA* and sold *BNS* to another Estonian businessman

Arno Mägi, who was previously an insolvency administrator without an evident experience running media. The competing media group, *Ekspress Grupp*, has branded the deal "a smokescreen for the Competition Council" which is tasked with preventing local media forming unhealthy monopolies.

## S-Chemist

Linnamäe loves to stay in the shadows and always builds up schemes when he buys companies, said Meelis Mandel, editor-in-chief of Estonian business daily *Äripäev*. „That's the way he works – he never shows that he is the one standing behind the companies, and it's hard to understand why," Mandel said. To hide his ownership, Linnamäe usually uses other people or his companies that are registered in the Netherlands.

Mandel believes that the story why Linnamäe funded management buyout of *Eesti Media* was invented for the public relations purposes. „For the people working in the media it was clear that Linnamäe went to *Eesti Meedia* as an owner, not a small shareholder. He is a wealthy businessman and it was believed that in a time Kadastik's role in *Eesti Meedia* will decrease and Margus Linnamäe will become the owner of the company. And that is exactly what has happened now," Mandel said.

Mandel described Linnamäe as a clever and lucky entrepreneur, who has made right decisions in his business, yet he thinks Linnamäe should be more open about himself. „We don't really know what he thinks about anything," he said.

He believes that Linnamäe is not charmed by the power of the media business. „Probably he just sees an opportunity to make some money," he explained. Last year *Eesti Meedia* net profit was 5.7 million euro. A year before it was 3.2 million euro.

Although most of *Eesti Meedia* employees have not even seen Linnamäe in person, Mandel says there is a self-censorship risk in having one of the biggest entrepreneurs in a country as an owner. For instance, *Eesti Meedia* newspapers have not dared to write about Linnamäe's other businesses, Mandel claims. "I hope they will do it and write about his businesses even in a critical way, if necessary," Mandel said. He believes *Eesti Meedia* needs to do so to prove their independence.

## Independence VS Impact

Merit Kopli, the editor-in-chief of *Postimees*, *Eesti Meedia*'s biggest newspaper, doesn't agree with Mandel's criticism. „Self-censorship might happen as a first reaction for the situation, but I'm sure that when it really happens, *Postimees* will get over it,“ she said, adding that *Postimees* is strong newspaper only by doing honest and good journalism. „It's also for a sake of the owner himself“. Even more, Kopli doesn't believe that *Postimees* would ever cover Linnamäe's business differently. „Firstly, no respectable journalist would ever agree to do it. Secondly, the public eye keeps an extra eye on us on this point,“ she said. According to her, it is more likely that journalists are trying to be extra-critical towards Linnamäe just to prove their independence.

Kopli said she have met Linnamäe many times after he became the owner of *Eesti Meedia* this summer and she assures that Linnamäe is a businessman with a vision. „He has a sincere wish to evolve *Postimees* and make our newspaper stronger. He has never tried to involve our teams choices or put the pressure on with some topics,“ Kopli claimed.

According to Kopli, Linnamäe has promised to invest enough to continue making good journalism. For example, *Postimees* have had an opportunity to make their editorial staff stronger, Kopli said. „To Linnamäe it is important that our paper edition would maintain its position as the paper with the biggest readership and opinion-leader,“ Kopli added.

Preferring a low-profile isn't problem at all, Kopli believes. „It is Linnamäe's own choice and it doesn't affect anyone.“

### Margus Linnamäe's media empire

#### Estonia

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AS Eesti Meedia  
 AS Postimees  
 AS Ühinenud Ajalehed (Pärnu Postimees, Sakala, Virumaa Teataja, Järva Teataja, Valgamaalane)  
 AS Kanal2  
 Trio LSL Raadiogrupp  
 BNS Group OÜ  
 OÜ Balti Meediamonitooringu Grupp

#### Latvia

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TVNet  
 apollo.tvnet.lv  
 LETA

#### Lithuania

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UAB BNS  
 15min UAB  
 UAB Žurnalų leidybos grupė

Source: *Estonian Business Register, Latvian Competition Council*

## DIGGING DEEPER

### You Are (Not) Free To Speak

By Eliisa Matsalu

#### Delfi loses a landmark case over who is responsible for insulting comments by users

In June 2015, after fighting for nine years, the biggest Estonian news site, *Delfi.ee*, lost a landmark case in the European Court of Human rights (ECHR) over who is responsible for the offending comments by website's users.

Following the court decision, the editor-in-chief of *Delfi* and *Eesti Päevaleht* (a major Estonian daily newspaper) Urmo Soonvald warned that the verdict creates risks for the freedom of speech in all European countries. "I hope they understand the historical meaning of this decision," Soonvald said.

The case began in 2006 when businessman Vyacheslav Leedo complained to the local court about users' comments about him under a *Delfi.ee* article that was describing how ferries destroy the ice road between Estonian islands. Although *Delfi* deleted the comments as soon as Leedo's lawyer contacted the news site, the businessman went to court over the libel.

#### Self- Censorship Or Web Hygiene?

Soonvald said that as a result of the court's final decision media outlets have now become more cautious and they have to constantly think about how to use user comments and organize the jobs of the moderators. Sometimes it means that *Delfi* needs to cut down free speech, he said.

This autumn *Delfi* closed the comment option under articles about refugees, because there was much more hate speech than discussion. All comments are directed to a page where there's always one moderator looking after the discussion, Soonvald explained.

„Yet no one has said that media outlets could not sue the people that bring the hate talk to the commentaries. I'm not saying *Delfi* is planning to do so, but I want people to realize that stupidity, hatred and dirty words are unacceptable to media outlets as well," he said.

#### One Step Forward, Many Back

Karmen Turk, the attorney who defended *Delfi* in court, said that the decision may lead to censorship. She pointed out that the court agreed that deleting the comments as soon as editors are alerted about their defamatory nature in the most cases is sufficient. But the court also decided that *Delfi* has to moderate and edit all the comments on their site which include hate speech or direct threats. „That means that the media outlet has to be 24/7 on guard to find inappropriate comments," she said. "Everyone understands that now the media outlet will delete all the comments even when there's a smallest possibility that the comment might be offensive. And that is called censorship."



**Karmen Turk,**  
lawyer representing  
Delfi in ECRH.

*Photo: from personal archive*

Turk said that now media outlets view user generated comments as a business threat more than ever. „I've got many calls from different European media outlets who ask me where all of this is going,” she said. According to Turk, now media more often choose not to allow users' comments when an article is about a sensitive issue. There are no statistics available to prove it, it is an observation, she said.



**Harriki Harro-Loit,**

*Photo: from personal archive*

Halliki Harro-Loit, an associate professor and the Head of the Institute of Journalism and Communication at the University of Tartu, said that the main issue was not about the freedom of speech, but the responsibility one must take when the freedom of speech is overstepped. „Anonymous comments are allowed as an individual's freedom of speech, but it

must be ensured that the comment doesn't include the hate speech, insults or other issues that are exceptions to freedom of expression,” Harro-Loit explained. Although unedited comments sections brings more clicks - which are very often followed by an advertiser's money - to the website, they are not always rich in content.

## Less Page Views, More Content

In 2014, Estonian business daily *Äripäev* decided to make commenting on their website available only for registred users. Although the person can still keep his identity secret from the other users, the editors of the newspaper still know who is behind the comment, since they have to leave valid email address. The goal was to make comments more content-rich and to get rid of the filth, said Aivar Hundimägi, the deputy editor of *Äripäev*. As the newspaper did not have a lot of user-generated comments before the decision, it was not seen as a big business risk.

Predictably, the page views of *Äripäev* website decreased. For example, comparing January-March in 2014 and the same period in 2015, *Äripäevs* page views have dropped by 13%. Advertisers have not gone away, though. „We just have to focus even more now to have quality content in our page. We believe that in the long run we will win more due to this decision, because now our website has better content,” Hundimägi said.

## Battle Of Giants

Anvar Samost, the head of *BNS* in Estonia and a former editor of *Postimees*, said that the main effect of the *Delfi* court case hit media outlets already a couple of years ago when the first verdict in the Estonian court was announced. „At the time, most of the media outlets decided to edit commentaries much more seriously than before,” Samost said. Some outlets even hired more people to handle user-generated comments. They tried to make comments “personal”, i.e., attributable to a user, and make those more visible than anonymous comments.

Samost believes that media outlets would not lose any money while getting rid of anonymous comments completely. „There are the two biggest competitors – *Delfi* and *Postimees* – and neither of them wants to make the first step. They are afraid that losing anonymous comments will affect their position in the market somehow,” he explained. During Samost's tenure at the *Postimees*, the decision to ban anonymous user-generated comments would have meant a decrease of 30 000 - 60 000 page views per week out of the total 900 000 views, he estimates. „That is not a lot at all,” he said.

Samost believes that in the near future one of the newspapers will make the first step due to the increasing number of conflicts about values within the society. „Anonymous comments are becoming more of a business threat and, to be honest, in most cases these comments don't have any real value, so why keep them in the first place,” he concludes.

# DIGGING DEEPER

## Growing Pains

By Rudīte Spakovska

### In Latvia, the discussions about public broadcaster is where passions ran highest in 2014

Just before the Christmas holidays in 2014, the audiovisual regulator, National Electronic Mass Media Council (NEMMC), made an unexpected announcement. It had appointed a new board for *Latvijas Radio* (Latvian Radio, LR). The radio was to be run by a man who actually never asked for it, Mr Aldis Pauliņš.

2015 started with a new board taking over, not escaping a fair amount of scandals in the process, and a discussion about the spending and effectiveness of *Pieci.lv*, LR 5th channel intended to attract youngsters.

This discussion burst into fresh flames in the summer – when after airing expletives and obscene language on *Pieci.lv*, the public broadcaster was fined a record sum, and Kārlis Dagilis, the creator and head of the channel, resigned.

The profanities aired on *Pieci.lv* were one of the three official reasons for the dismissal of Ainārs Dimants, the chairman of the NEMMC – essentially the head of the electronic media watchdog, after an unprecedented voting session by the Saeima, Parliament of Latvia. Gints Grūbe, the most powerful and knowledgeable voice for the unity of public media, left the council as well to concentrate on his film business.

With great unanimity – 80 votes from 100 – Saeima elected Dace Ķezbere as his replacement. Ķezbere is a former journalist, who marked her start in the job with an appeal to the media to publish more positive news and admitting that she had conducted interviews paid for by the interviewee.



**Aldis Pauliņš,**  
the new head of Latvian Radio.  
*Photo: Latvian Radio*

The dispute between the commercial and public media intensified, with the latter reclaiming top spot in the TV ratings for two months in summer of 2015. *LNT* channel, owned by *MTG* group, sued the *Rīta Panorāma* (*Morning Panorama*) show on the public *LTV1* channel, claiming it had copied the format from their successful morning programme.

Commercial media complained about unfair competition, accusing public media of receiving more state funds while producing commercially competitive programmes. They demanded a guaranteed 15% from the public service remit and the withdrawal of public media from the advertising market. This has already happened in Estonia and Lithuania. The main commercial media lobbyist in the Saeima, MP Artuss Kaimiņš from the Latvian Association of Regions, a party not represented in the government, even got together a task force to produce a supporting report. The work of the task force was described as “investing the time of public media leadership to educate the MP in the basics of how media works” by Aldis Pauliņš, chairman of the board at *Latvijas Radio*, in a public discussion.

When looking at these events as a coherent mosaic, the opinions of experts and those involved are often the same – it’s an attempt to make public media more obedient and sensitive to political winds, wittingly or unwittingly. On the other hand, the complicated financial situation in the media industry means that a piece of the advertising pie is a question of survival for many.

## Surprising Board Of Change

At the turn of the year, the NEMMC call for *Latvijas Radio* board members ended in surprise.

Three members of the board were appointed instead of the single former board member Jānis Siksnis, but to the surprise of a great many people, none of them were radio veteran Siksnis himself.

NEMMC unanimously elected Sigita Kirilka, the former news agency *BNS* chief editor in Latvia, as board member in charge of program development. Uldis Lavrinovičs, a representative of the state Radio and Television Center, became a board member in charge of personnel and technical issues. Sociologist, chief of pollsters *Factum Group*,

Aldis Pauliņš, became the chairman of the board. He hadn’t even applied for this position and didn’t have a lot of experience in the media business.

The lack of transparency in the process was criticized by both media experts and radio employees.

The criticism was exacerbated by the fact that both *SLA Eiro Personāls*, the recruitment company brought in for the occasion, and the members of NEMMC had approved and selected two other candidates for the next round – Siksnis, and one of the founders of *PROVIDUS* centre for public policy and its long-time director, Vita Tērauda. Neither of them could garner majority support from NEMMC in the vote. Pauliņš became the compromise.

Sergejs Kruks, professor at Riga Stradiņš University, pointed out that on a political level Pauliņš’ appointment could indicate the strengthening of Ināra Mūrniece’s (Speaker of the Parliament, National Alliance) position. Kruks emphasized the fact that no criticism of radio works has been heard from NEMMC. It is not clear what changes exactly are expected from the new board, and what the end goals of the council are, except an obvious desire for change, what with appointing people who have not been related to radio before to manage it, Kruks said.

The new board of *Latvijas Radio* hasn’t got to that change just yet though. They have been busy enough reacting to various unplanned and unexpected issues.

## Pieci.lv Under Scrutiny

Like a teenager in the family, the source of the biggest headache for *Latvijas Radio* has been its own *Channel 5*, known also as *Pieci.lv*, since the very day it was conceived.

While founding the channel intended to attract youth audience, scandals abounded – the half a million lats dished out with no tender or competition for the creation and development of the radio station, and the storm of opinions on stripping radio *NABA*, the radio of the University of Latvia, of their frequency and giving it to *Pieci.lv*.

In the end each of the channels got their own frequency, but the controversy certainly didn’t make the first steps of *Pieci.lv* easier. Besides, the MP Artuss Kaimiņš, whose

show *Sunu būda* (Doghouse) was taken off air because of these changes, became one of the loudest critics of *Pieci.lv*. Being member of the Human Rights and Public Affairs Committee with the Saeima (it is responsible for media policy), Kaimiņš has repeatedly and loudly expressed his opinion on the (in)efficiency of *Pieci.lv*.

The first audience measurements for *Pieci.lv* weren't exactly flattering either. In the summer of 2014, only 23 000 listeners had tuned in to the channel at least once in a week. As emphasized in the letter to the Saeima from the Association of Broadcasting Organisations of Latvia (which unites commercial broadcasting organisations), only 8398 of them were in the age group of 12-24. Attracting listeners of this age group was exactly the reason the funding was granted. Besides, the creators of *Pieci.lv* had promised to reach 100 000 listeners aged 15 - 30 on various platforms, not only radio itself.

A year later the number of listeners had almost doubled, but it still was only 2.5% of the audience, while the leader, schlager-playing countryside favourite *Latvijas Radio 2*, reached 360 000 listeners or 21% in the summer. *Pieci.lv* audience is about as big as *SWH Rock* and *Capital FM*.

Table No 1

**Pieci.lv Reach**

	Thousands	%
Summer 2015	43	2.5
Spring 2015	29	1.7
Winter 2015	32	1.8
Autumn 2014	32	1.9
Summer 2014	23	1.3

Source: TNS Latvia; Reach - the total weekly number of the radio station listeners

"I admit that the first ratings are not flattering, and I'm not entirely pleased with them," Jānis Siksnis, the head of *Latvijas Radio* wrote back then. He emphasized the

promise to attain that reach of 100 000 on various platforms and argued that, combining the youtube views, apps and visitors to the radio's website, radio is near the target. "Needless to say, we've reached all that while abiding by the standards of ethics of public media and using no swearwords," said Siksnis.

It's exactly the standards of ethics and swearwords that triggered the next scandal that shook the youth medium, significantly more serious this time. First of all, in a rap battle some uncensored vocabulary got aired. A rival, leader of *Russian Hits*, *Super FM* and *European Hits Radio*, Uģis Polis, complained both to the regulator and the relevant committee of Saeima. MPs getting involved in judging the content of a specific programme of a public broadcaster was labelled by both the journalist trade union and the management of *Latvijas Radio* as interfering with media content and an attempt at editorial pressure.

NEMMC punished the radio with a record fine: a total of 9500 euros for the rap battle profanities and the nighttime airing of several songs of indecent content (including *Uncle Fucker* from *South Park: Bigger, Longer & Uncut*, an animated film for adults).

On August 5, 2014, Kārlis Dagilis, the head of *Pieci.lv*, handed in his resignation, claiming if he remained in the position, the development of the station would be endangered. Even if the board of *LR* claimed it was surprise, they accepted the resignation immediately.

Dagilis wasn't the only one whose job the scandal cost. Driven by personal dislike and considerations, as well as tired of the personality of Ainārs Dimants, the head of NEMMC, and disgruntled by the council members not turning up for the Saeima committee session on radio content and choosing to travel to a workshop instead, the MPs collected the required amount of signatures to file a motion to dismiss NEMMC in no time.



**Ainārs Dimants**, former head of Latvian audiovisual media regulator. Photo: Ieva Čīka, LETA

## NEMMC VS Politicians

The motion to dismiss NEMMC was filed in the Parliament by 11 MPs, both from the coalition and the opposition. In it the MPs gave three reasons why the council has lost its reputation: in their eyes. First, NEMMC had approved the programme of *Radio Skonto Plus*, 60% of which was in Russian. Second, the State Audit had discovered violations in the use of NEMMC funding as well as in the accountancy of government grant for public media. Third, the council had not controlled the work of media, which had resulted in uncensored vocabulary being aired on *Pieci.lv*. Even though the motion sought to sack four members of NEMMC – Ainārs Dimants, Aija Duļevska, Dainis Mjartāns and Ivars Zviedris – the parliament's committee only confirmed dismissing Dimants, the head of the council.

The regulator itself did point out that the reasoning of the politicians doesn't exactly hold water. The true reasons were entirely different, said the four council members while waiting for the vote of confidence. NEMMC had "encountered suggestive hints concerning a particular story on Latvian Television here or a programme on *Latvijas Radio* there". The more bolder the public media became, the more the politicians seethed with discontent with the media watchdog. Reasons can also be found in the attitude of NEMMC toward favouring commercial media instead of public media in distributing public service remit funding. "Commercial media lobbyists have been and are expressing their undisguised outrage at this, and that is the very root of the recent weeks' „scandal“ around the programme on *Pieci.lv*," said the four NEMMC members.

In a letter to the President of Latvia, asking him to submit the appeal to the Constitutional Court ensuring the independence of the public service broadcasters (the law gives this right to very restrictive group of institutions), the Latvian Journalists' Association disproved all three arguments as false or insufficient to warrant the change of an independent regulator. The Chancery of the President rejected the appeal, as Dimants could file an administrative claim against the dismissal. And that's exactly what Dimants did.

## It's All About Money, Stupid

Considering the lengthy inability of the media industry to recover after the economic crisis of 2008-2013, the stagnating advertising income, the challenges of new technology, as well as the increase in public media funding due to fear for Latvia's information space after the annexation of Crimea by Russia, commercial media wanted their part of helping measures, too.

The data provided by the Latvian Advertising Association reveals that the advertising market reached 75.63 million euros in 2014. It is a 3% increase when compared to 2013. The pre-crisis advertising volume (138.2 million euros in 2008) is still far away.

Laws currently allow (instead of compelling) up to 15% of the funding intended for public service remit to be made available to commercial electronic mass media. According to NEMMC, at the moment about 8.2 % of the funds allocated for public service remit or about a million euro have been provided to commercial media. These funds have gone to three regional TV channels which have been criticised all over industry as rather useless spending. According to NEMMC, *Rīga TV24* is producing informative documentary broadcasts, *Re: TV* is covering regional subjects, while *OTV* was entrusted with programmes for children and youth.

Realistically, as Aija Duļevska, deputy chairwoman of NEMMC, admitted to *Latvijas Radio*, what public service remit means to these TV studios is that it pays the transmission fee to have their channels on the free-access broadcast, and for that they produce the programmes required by public service remit. Transmission fee debts were the reason the contract with *OTV* was terminated in the middle of this summer.

To fill the vacancy left by *OTV* on the fifth channel on the free-access broadcast and the must-carry slot in cable TV offers, NEMMC have announced a new tender. It will give free-access broadcast to a TV channel promoting an active lifestyle for 346.6 thousand euros over one year. The winner is expected at the end of 2015.

*Translated from Latvian by Laura Ziemele*

Table No 2

**Advertising Market in Latvia (in million, EUR)**

	Total	Tv	Radio	Newspapers	Magazines	Outdoor	Online	Cinema
2014	75.6	33.2	10.1	5.8	7.7	7.7	10.7	0.5
2013	73.4	32.5	8.6	6.5	7.7	7.6	10.2	0.3
2012	70.0	32.0	7.5	6.4	7.0	6.8	10.1	0.3
2011	68.9	31.1	7.3	7.3	6.7	6.4	9.8	0.3
2010	65.3	29.2	7.5	7.3	5.8	6.6	8.4	0.5
2009	74.9	29.5	9.3	10.7	8.3	8.4	8.3	0.5
2008	138.2	49.4	15.1	25.1	22.1	13.5	12.1	0.9

Source: *Latvian Advertising Association*

Table No 3

**LTV Budget (in thousands, EUR)**

Year	2014	2013	2012	2011	2010	2009
State grant	13 075	12 404	11 075	10 078	10 145	11 891
Total net turnover	17 270	16 257	15 073	14 120	14 646	16 094
State grant, % of turnover	75.7	76.3	73.5	71.4	69.3	73.9

Source: *Latvian Public Television annual reports***Latvijas Radio Budget (in thousands, EUR)**

Year	2014	2013	2012	2011	2010	2009
State grant	7 176	6 019	5 769	5 457	5 415	6 840
Total net turnover	9 176	7 392	6 988	6 940	6 790	8 308
State grant, % of turnover	78.2	81.4	82.6	78.6	79.7	82.3

Source: *Latvijas Radio annual reports*

## LITHUANIA

## DIGGING DEEPER

## No Party At The Local Media

By Audra Čepkauskaitė

### There is something special about the local newspapers in Lithuania

After a two decades long ban on political parties, banks and municipalities owning mass media in Lithuania, this year parliament almost lifted the restrictions regarding politicians.

They have long been vying up possibilities to enter local newspaper market. Six out of ten most popular local newspapers in Lithuania are locals. Their combined coverage is outdone only by most popular daily „Lietuvos rytas“ and a tabloid „Vakaro žinios“.

One of the reasons why local newspapers have been thriving has been the ban on ownership by political parties and municipalities. The effectiveness of this ban in promoting competition is evident from a comparison to neighbouring Latvia. There the lavishly funded, colour-printed municipal papers pay salaries double those of real journalists and take away local advertisers from independent papers, thus contributing to the slow death of the independent regional press.

Lithuania's political parties have long tried to evade the ban, for example, by abusing the provision in the law allowing municipal education and scientific institutions to run their own newspapers.

In the popular resort of Druskininkai, the free weekly *Mano Druskininkai* was formally owned by the

Table No 1

#### What Lithuanians Read

Lietuvos rytas	10.9
Vakaro žinios	9.4
Kauno diena	2.4
Šiaulių kraštas	2.2
Sekundė	1.7
Lietuvos žinios	1.5
Verslo žinios	1.4
Vakarų ekspresas Klaipėda	1.3
Kurier Wileński Šiaulių naujienos	0.7

Data: TNS LT, Readership Survey 2014;  
Cover, % - average percentage of readers in target group for one issue of press edition. Local papers in yellow.

Druskininkai Education Center, a municipal institution. The Inspector of Journalist Ethics investigated and concluded that the de facto publishers were the Council of Druskininkai municipality and the Administration of Druskininkai Municipality. The ethics inspector found that an “obvious and well prepared” political campaign for one political party had been promoted by the weekly.

The Ethics Inspector recommended either to close the weekly or to make it strictly about education. The municipality contested the decision in court and lost the case in April, 2015.

According to Zita Zamžickienė, the former Inspector of Journalist Ethics, free municipal outlets are killers for news media. “If people can choose between a free weekly and one they have to pay for, of course they will choose the free one. If a law can be breached in one municipality, it is a precedent for others”.

Ričardas Malinauskas, the social democrat mayor of Druskininkai, has been in office for 15 years. He won a routine victory in municipal elections this spring and is also heading the Association of Municipalities, a formal club of Lithuanian mayors. Since May 2015 the weekly *Mano Druskininkai* is officially owned by the businessman Darius Gudelis, a former mayor himself.

## Almost There

Originally, the amendments to the Public Information Law (PIL) were prepared to address this type of abuse. In October, 2014, however, the Parliament did not vote on them, citing a need for more time.

The reason most probably was the upcoming municipal elections in March of 2015. The law governing municipalities has been changed, providing for the election of mayors by popular vote and expanding their powers. For example, they can now fire, without consulting anyone, the head of any company in which the municipality has a controlling stake.

“We hear from mayors now: I was elected by the people. They believe all their decisions are legitimate now because of direct elections, even the turnout was low and they were elected by 20-30 percent of eligible voters,” says Vilija Butkuvienė, deputy head of the National Association

of Publishers of Regional and Cities’ Newspapers (NRMLLA). “By accident or on purpose the Parliament created even better conditions for political control of media than before.”

In June, 2015, the Lithuanian parliament voted to lift the ban on political parties to own media in the PIL. Lithuania’s president, supported by local publishers, vetoed it. Dalia Grybauskaitė called the amendments “a threat not only to the quality of public information, but also to media freedom and democracy”.

The only person voting against the amendment in June was the Speaker of Parliament, Mrs Loreta Graužinienė. She is one of the leading politicians of the Darbo partija (DP, Labour party), a political force controlling many media outlets, especially in some regions. There is no law explicitly forbidding party members to own shares in media companies as private individuals.

“We already have a ban on municipalities, banks and their institutions owning media outlets, but as we see it is possible to “go around” it”, “says Deimantas Jastramskis, a head of the Journalism Institute of Vilnius University. “Some politicians control media directly. Others do it via relatives or friends. Some appoint a frontperson. A media outlet doesn’t have to be owned by politicians in order to serve them, to support some group or to sell out to those who pay more”.

On September 22, 2015, Parliament backed down and accepted the president’s veto.

## Hit Hard by the Crisis

According to research by the magazine “Veidas”, about 50 local media outlets went bankrupt during the recession of 2009-2013. Forty-four percent of local journalists and editors say they feel dependent on local oligarchs and only 10-15 local outlets could be considered independent. For financially weak local publishers there is no policy of substantial support or subsidies like in the Northern Europe.

Fragile media players are vulnerable and cheap to buy, Deimantas Jastramskis said on *LRT Radio*, referring to the news content of some local media as “deplorable”.

## How to be Independent

Nida Šulcienė has been an editor-in-chief of a successful local newspaper *Kupiškėnu mintys* for 11 years. About 19 000 people live in Kupiškis. In 2015, the circulation of the newspaper was 2943.

Nomeda Simėnienė, an adviser to the independent MP Povilas Urbšys, a historian with no party affiliation, owns 100 percent of shares of the company. With 7 employees, three of them full time journalists, the newspaper manages to keep annual turnover around 300 000 euros, stable since 2011.



**Nida Šulcienė,**  
editor-in-chief of a  
*Kupiškėnu mintys*.  
*Photo: from personal archive*

Nida Šulcienė is familiar with the pressure from local politicians. Courtesy calls become more frequent. “Although it has never happened with us yet”, Nida Šulcienė told *LRT Radio*. “Local politicians know local media very well, they know to whom to pay a visit and to whom one should rather not.”

Unlike many local publishers, *Kupiškėnu mintys* does not sign agreements

with national news portals allowing them to republish the content of the newspaper. The editor believes it helps to secure readership and advertising. The success of the newspaper is an exception rather than the rule in the local media landscape of Lithuania.

## How to be Controlled

The Municipality of Širvintos is of similar size to Kupiškis, with a population of 18 000. There has not been an independent newspaper for almost a decade. A newspaper *Širvintų kraštas* is owned by the mayor Živilė Pinskuvienė, from the DP, who is a millionaire as well as by her husband, a former Deputy Mayor of the capital Vilnius. Both journalists of *Širvintų kraštas* are members of the DP and also members of the local council.

The newspaper reports a circulation of 2000. With the paper being a single printed source of local news, some readers have no idea that it is owned by the mayor herself. The newspaper tells the story of the main hero, the Mayor, fighting for good causes.

“The relationship between readers and local newspapers is peculiar,” Nida Šulcienė from *Kupiškėnu mintys* says. “Readers trust this information and take it for granted. There is no broader discussion like that in national media with bigger audience and a variety of opinions, no understanding of collective efforts, everything is personal and personalized. This trend is worrying”.

To address it, a group of locals have established an *ad hoc* newsroom in Širvintos and have started the blog [www.sirvis.lt](http://www.sirvis.lt). They bring cameras to the council meetings, record the Mayor saying to the member of opposition party questioning her decision to close a small rural school: „I’m not a Tsarina, I’m just a Queen” and put it on *Youtube*. Some members of this group belong to political parties and are ready to leave them for the sake of impartiality and objectivity.

“Partisan media is not an evil by itself, it’s just a question of transparency” Jastramskis says. “We need to amend laws, but we need to educate society too. It will have results in the long term. We can see some effect already. Over the past years, when the connection between the DP with outlets of the *Balsas* group has been publicly discussed, the audience of those outlets dropped”. For now neither a majority of society nor politicians see the non-transparent political control of the local media as a significant problem.

## TOP 5 NEWSPAPERS IN THE BALTICS AND THEIR FINANCIAL INDICATORS

	Lithuania	Latvia	Estonia
<b>No 1</b>	<b>Lietuvos rytas</b>	<b>МК - Латвия (rus)</b>	<b>Postimees</b>
Frequency	daily	weekly	daily
Cover in 2014	250 000	191 000	174 000
Cover in 2013	292 800	203 000	196 000
Change in Cover 2014 vs 2013	-14,6%	-5,9%	-11,2%
Cover in 2014, %	10,9	11,3	15,6
Cover in 2013, %	12,7	11,8	17,3
Change in the Cover 2014 vs 2013, pp	- 1,8	- 0,5	- 1,7
Circulation in 2014	40 560	47 000	51 400
Circulation in 2013	43 047	47 000	52 500
Publisher	Lietuvos Rytas, UAB	Izdevniecības nams Print Media, SIA	Postimees, AS
Turnover in 2014 (euros)	8 366 295	1 125 036	13 906 000
Turnover in 2013 (euros)	9 623 067	1 119 484	13 746 000
Change in Turnover 2014 vs 2013, %	-13,1%	0,5%	1,2%
Profit/Loss 2014 (after tax, euros)	2 039 313	6 311	499 000
Profit/Loss 2013 (after tax, euros)	83 006	3 899	-136 000
Change in Profit 2014 vs 2013, %	nm	61,9%	nm
Global Ultimate Owner	Benas Gudelis, Gedvydas Vainauskas, Vidmantas Strimaitis, Algimantas Budrys, Algirdas Kumza	Baltijas Mediju Alianse (Alexey Plyasunov, Olegs Solodovs)	Eesti Meedia (Margus Linnamäe)
<b>No 2</b>	<b>Vakaro žinios</b>	<b>Latvijas Avīze</b>	<b>Õhtuleht</b>
Frequency	daily	daily	daily
Cover in 2014	216 600	82 000	158 000
Cover in 2013	264 600	84 000	169 000
Change in Cover 2014 vs 2013	-18,1%	-2,4%	-6,5%
Cover in 2014, %	9,4	4,8	14,1
Cover in 2013, %	11,5	4,9	14,9

Change in the Cover 2014 vs 2013, pp	- 2,1	- 0,1	- 0,8
Circulation in 2014	44 624	19 290	49 600
Circulation in 2013	44 343	20 000	50 000
Publisher	Respublikos Leidiniai, UAB*	Lauku Avīze, AS	SL Õhtuleht, AS
Turnover in 2014 (euros)	3 432 336	4 950 281	7 540 460
Turnover in 2013 (euros)	3 852 536	4 855 529	7 385 319
Change in Turnover 2014 vs 2013, %	-10,9%	2,0%	2,1%
Profit/Loss 2014 (after tax, euros)	61 801	61 093	442 586
Profit/Loss 2013 (after tax, euros)	-120 631	23 140	290 723
Change in Profit 2014 vs 2013, %	nm	164,0%	52,2%
Global Ultimate Owner	Vitas Tomkus, Justinas Tomkus, Rytis Tomkus	Ventbunkers	Ekspress Grupp (Hans H. Luik), Suits Meedia (Janek Veeber)
<b>No 3</b>	<b>Kauno diena</b>	<b>Diena</b>	<b>Maaleht</b>
Frequency	regional daily newspaper	daily	weekly
Cover in 2014	56 100	72 000	143 000
Cover in 2013	68 900	88 000	141 000
Change in Cover 2014 vs 2013	-18,6%	-18,2%	1,4%
Cover in 2014, %	2,4	4,3	12,8
Cover in 2013, %	3,0	5,2	12,5
Change in the Cover 2014 vs 2013, pp	- 0,6	- 0,9	0,3
Circulation in 2014	18 494	31 000	50 000
Circulation in 2013	18 998	31 000	52 100
Publisher	Diena Media News, UAB**	Dienas mediji, SIA	Eesti Ajalehed, AS
Turnover in 2014 (euros)	3 655 873	2 682 785	12 627 336
Turnover in 2013 (euros)	3 903 209	2 789 520	12 678 825
Change in Turnover 2014 vs 2013, %	-6,3%	-3,8%	-0,4%
Profit/Loss 2014 (after tax, euros)	-539 272	-670 829	639 752
Profit/Loss 2013 (after tax, euros)	-787 766	-948 345	1 211 414
Change in Profit 2014 vs 2013, %	nm	nm	-47,2%
Global Ultimate Owner	KŪB Sunra Investments, Dzeraldas Dauksa, Mindaugas Kalnius, Angele Dementaviciute	Rīgas Tirdzniecības Osta	Ekspress Grupp (Hans H. Luik)

No 4	Šiaulių kraštas	Вести сегодня (rus)	Eesti Ekspress
Frequency	daily regional newspaper	daily	weekly
Cover in 2014	51 200	66 000	87 000
Cover in 2013	62 600	74 000	89 000
Change in Cover 2014 vs 2013	-18,2%	-10,8%	-2,2%
Cover in 2014, %	2,2	3,9	7,8
Cover in 2013, %	2,7	4,3	7,9
Change in the Cover 2014 vs 2013, pp	- 0,5	- 0,4	- 0,1
Circulation in 2014	10 596	15 075	29 900
Circulation in 2013	11 358	14 000	31 500
Publisher	Šiaulių kraštas, UAB	Izdevniecības nams Vesti, SIA	Eesti Ajalehed, AS
Turnover in 2014 (euros)	1 562 612	1 614 595	12 627 336
Turnover in 2013 (euros)	1 622 170	0	12 678 825
Change in Turnover 2014 vs 2013, %	-3,7%	nm	-0,4%
Profit/Loss 2014 (after tax, euros)	-20 198	3 652	639 752
Profit/Loss 2013 (after tax, euros)	-103 508	83	1 211 414
Change in Profit 2014 vs 2013, %	nm	nm	-47,2%
Global Ultimate Owner	Vitas Tomkus, Justinas Tomkus, Vladas Vertelis, Alvydas Sedzius	Ludmila Kalašņika	Ekspress Grupp (Hans H. Luik)
No 5	Sekundē	Латвийские Вести (rus)	Столица (rus)
Frequency	daily regional newspaper	weekly	free weekly newspaper of Tallinn City council
Cover in 2014	38 100	66 000	86 000
Cover in 2013	38 100	87 000	90 000
Change in Cover 2014 vs 2013	0,0%	-24,1%	-4,4%
Cover in 2014, %	1,7	3,9	7,7
Cover in 2013, %	1,7	5,1	7,9
Change in the Cover 2014 vs 2013, pp	0,0	- 1,2	- 0,2
Circulation in 2014	21 669	na	27 000
Circulation in 2013	23 840	na	na
Publisher	ON Media, UAB	Zīme SIA***	Tallinn City council
Turnover in 2014 (euros)	735 617	na	1000000****
Turnover in 2013 (euros)	763 042	na	982000****

Change in Turnover 2014 vs 2013, %	-3,6%	na	nm
Profit/Loss 2014 (after tax, euros)	62 276	na	na
Profit/Loss 2013 (after tax, euros)	-741 860	na	na
Change in Profit 2014 vs 2013, %	nm	na	na
Global Ultimate Owner	Ovidijus Lukosius, Nerius Gasparavicius	Jelena Ustinova	Tallinn City council

\* Newspaper's Vakarų Žinios previous publisher Naujasis Aitvaras has been reorganized and merged to publisher "Respublikos Leidiniai".

\*\* Diena Media News is in a restructuring process.

\*\*\* The publisher of the Russian-language newspaper Латвийские Вести is SIA Zīme, a company registered only in February 2015 for which no financial information is available. The previous publisher was a company named SIA Press Distribution Center (its sales in 2014 were 3.228 million euros and it had losses of 136 thousand euros). In the legal address where SIA Zīme is registered more than 150 other companies are registered, thus giving impression that the address only serves as a mailbox. Webpage ves.lv says that it is offering readers the newspaper Латвийские Вести, however, there is not specified who the legal entity who publishes a newspaper is. The owner of SIA Zīme is Jelena Ustinova, who has been involved in publishing of several Russian-language newspapers in Latvia.

\*\*\*\* Tallinn City council spends this amount of money to publish its two free newspapers - Stolitsa in Russian language and Peallinn in Estonian. The city council did not specify how much costs publication of particularly Stolitsa.

Increase in turnover or profit marked in green  
 Decline in turnover or profit marked in red

Sources:	Lithuania	Latvia	Estonia
Cover data	TNS LT	TNS Latvia, National Readership Survey	TNS Emor, Print Media Survey
Period for cover data	Spring 2014	Year 2014 (28.10.2013 - 26.10.2014)	Spring 2014
	Spring 2013	Year 2013 (29.10.2012 - 27.10.2013)	Spring 2013
Cover	average number of readers in target group for one issue of press edition		
Cover, %	average percentage of readers in target group for one issue of press edition		
Circulation data	Ministry of Culture of Lithuania, data unaudited, provided by the newspapers	As disclosed by the newspapers or their publishers	Estonian Newspaper Association
Period for circulation data	Second half of 2014	October 2015	December 2014
	Second half of 2013	September 2014	December 2013
Financial data	Creditreform	Creditreform	Krediidiinfo
na	data not available		
nm	not meaningful to calculate		

## TOP 5 MAGAZINES IN THE BALTICS AND THEIR FINANCIAL INDICATORS

	Lithuania	Latvia	Estonia
<b>No 1</b>	<b>Savaitė</b>	<b>Ieva</b>	<b>Kroonika+nädal</b>
Title in English	Week	Eve	Chronicle+Week
Type of the Magazine	TV listings, household and lifestyle tips	Women	Entertainment, celebrity
Frequency	weekly	weekly	weekly
Cover, 2014	442 200	198 000	77 000
Cover, 2013	351 400	213 000	90 000
Changes in Cover 2014 vs 2013	25,8%	-7,0%	-14,4%
Cover, %, 2014	19,2	11,7	6,9
Cover, %, 2013	15,3	12,4	7,9
Change in the cover 2014 vs 2013, pp	3,9	- 0,7	-1,0
Circulation in 2014	199 576	56 100	35 600
Circulation in 2013	189 451	55 800	34 600
Publisher	UAB Savaitė	Žurnāls Santa, SIA	AS Ajakirjade Kirjastus
Turnover in 2014 (euros)	3 315 463	7 391 905	8 433 796
Turnover in 2013 (euros)	2 972 344	7 438 526	8 041 814
Changes in Turnover 2014 vs 2013, %	11,5%	-0,6%	4,9%
Profit/Loss 2014 (after tax, euros)	600 675	1 180 640	359 444
Profit/Loss 2013 (after tax, euros)	582 347	970 386	282 718
Changes in Profit 2014 vs 2013, %	3,1%	21,7%	27,1%
Global Ultimate Owner	Asta Jelinskiene, Aleksandras Maceina	Santa Anča, Ivars Zariņš	Ekspress Grupp (Hans H. Luik), Suits Meedia (Janek Veeber)
<b>No 2</b>	<b>Žmonės</b>	<b>Privātā Dzīve</b>	<b>Kodu ja Aed</b>
Title in English	People	Private Life	Home And Garden
Type of the Magazine	Celebrities	Celebrities	Home, gardening
Frequency	weekly	weekly	monthly

Cover, 2014	361 300	162 000	73 000
Cover, 2013	378 800	171 000	79 000
Changes in Cover 2014 vs 2013	-4,6%	-5,3%	-7,6%
Cover, %, 2014	15,7	9,6	6,5
Cover, %, 2013	16,5	10,0	7,0
Change in the cover, %, 2014 vs 2013	- 0,8	- 0,4	- 0,5
Circulation in 2014	102 000	42 200	na
Circulation in 2013	113 344	43 200	na
Publisher	Žurnālų leidybos grupė, UAB	Žurnāls Santa, SIA	Ühinenud Ajakirjad AS*
Turnover in 2014 (euros)	7 111 196	7 391 905	1 546 950
Turnover in 2013 (euros)	7 575 398	7 438 526	1 495 777
Changes in Turnover 2014 vs 2013, %	-6,1%	-0,6%	3,4%
Profit/Loss 2014 (after tax, euros)	529 625	1 180 640	-56 645
Profit/Loss 2013 (after tax, euros)	651 999	970 386	58 478
Changes in Profit 2014 vs 2013, %	-18,8%	21,7%	nm
Global Ultimate Owner	Stichting Administratiekantoor Kemplake (Netherlands), Eesti Meedia (Margus Linnamäe)	Santa Anča, Ivars Zariņš	Otavamedia (Finland), A-lehdet (Finland)
<b>No 3</b>	<b>TV Antena</b>	<b>Kas Jauns</b>	<b>Imeline Teadus</b>
Title in English	TV Antena	What's New?	Illustrated Science
Type of the Magazine	TV news	Celebrities	Science
Frequency	weekly; supplement of Lietuvos Rytas Saturday edition	weekly	monthly
Cover, 2014	154 600	135 000	56 000
Cover, 2013	182 300	144 000	64 000
Changes in Cover 2014 vs 2013	-15,2%	-6,3%	-12,5%
Cover, %, 2014	6,7	8,0	5,1
Cover, %, 2013	7,9	8,4	5,7
Change in the cover, %, 2014 vs 2013	- 1,2	- 0,4	- 0,6
Circulation in 2014	90 468	50 500	24 400
Circulation in 2013	100 120	na	25 800
Publisher	Lietuvos Rytas, UAB	Izdevniecība Rīgas vilņi, SIA	AS Äripäev
Turnover in 2014 (euros)	8 366 295	5 790 117	12 907 460
Turnover in 2013 (euros)	9 623 067	5 421 780	11 712 804

Changes in Turnover 2014 vs 2013, %	-13,1%	6,8%	10,2%
Profit/Loss 2014 (after tax, euros)	2 039 313	188 671	1 154 012
Profit/Loss 2013 (after tax, euros)	83 006	169 201	204 268
Changes in Profit 2014 vs 2013, %	nm	11,5%	464,9%
Global Ultimate Owner	Benas Gudelis, Gedvydas Vainauskas, Vidmantas Strimaitis, Algimantas Budrys, Algirdas Kumza	Goswert Impex Limited (Cyprus)	Bonnier Business Press (Sweden)
<b>No 4</b>	<b>Ji</b>	<b>Ievas Stāsti</b>	<b>Imeline Ajalugu</b>
Title in English	Her	Eve's Stories	Illustrated History
Type of the Magazine	Women	Features	History
Frequency	weekly	bi-monthly	monthly
Cover, 2014	131 000	122 000	56 000
Cover, 2013	130 800	130 000	59 000
Changes in Cover 2014 vs 2013	0,2%	-6,2%	-5,1%
Cover, %, 2014	5,7	7,2	5,1
Cover, %, 2013	5,7	7,6	5,2
Change in the cover, %, 2014 vs 2013	0,0	- 0,4	- 0,1
Circulation in 2014	46 097	45 700	26 300
Circulation in 2013	52 768	46 200	28 300
Publisher	Žurnālų leidybos grupė, UAB	Žurnāls Santa, SIA	AS Äripäev
Turnover in 2014 (euros)	7 111 196	7 391 905	12 907 460
Turnover in 2013 (euros)	7 575 398	7 438 526	11 712 804
Changes in Turnover 2014 vs 2013, %	-6,1%	-0,6%	10,2%
Profit/Loss 2014 (after tax, euros)	529 625	1 180 640	1 154 012
Profit/Loss 2013 (after tax, euros)	651 999	970 386	204 268
Changes in Profit 2014 vs 2013, %	-18,8%	21,7%	464,9%
Global Ultimate Owner	Stichting Administratiekantoor Kemplake (Netherlands), Eesti Meedia (Margus Linnamäe)	Santa Anča, Ivars Zariņš	Bonnier Business Press (Sweden)
<b>No 5</b>	<b>Prie kavos</b>	<b>Ievas Virtuve</b>	<b>Naisteleht</b>
Title in English	With Coffee	Eve's Kitchen	Women's paper
Type of the Magazine	Women	Recipes	Women
Frequency	weekly	monthly	weekly
Cover, 2014	109 800	96 000	56 000

Cover, 2013	72 500	108 000	79 000
Changes in Cover 2014 vs 2013	51,4%	-11,1%	-29,1%
Cover, %, 2014	4,8	5,7	5,1
Cover, %, 2013	3,1	6,3	7,0
Change in the cover, %, 2014 vs 2013	1,7	- 0,6	- 1,9
Circulation in 2014	40 000	40 100	27 300
Circulation in 2013	37 000	43 000	25 950
Publisher	UAB SS Leidyba	Žurnāls Santa, SIA	Presshouse OÜ
Turnover in 2014 (euros)	1 350 104	7 391 905	1 881 963
Turnover in 2013 (euros)	1 043 539	7 438 526	1 964 484
Changes in Turnover 2014 vs 2013, %	29,4%	-0,6%	-4,2%
Profit/Loss 2014 (after tax, euros)	69 399	1 180 640	-48 893
Profit/Loss 2013 (after tax, euros)	104 221	970 386	194 994
Changes in Profit 2014 vs 2013, %	-33,4%	21,7%	nm
Global Ultimate Owner	Regina Sudakoviene	Santa Anča, Ivars Zariņš	Markko Märtin, Janis Kaal, Gert Rohtia

\* The previous publisher of the magazine Kodu ja Aed, A-meediagrupp OU, in 2014 merged with another magazine publisher Uhinenu Ajakirjad AS, with the new merged company called Uhinenu Ajakirjad AS.

Increase in turnover or profit marked in green  
 Decline in turnover or profit marked in red

Sources:	Lithuania	Latvia	Estonia
Cover data	TNS LT	TNS Latvia, National Readership Survey	TNS Emor, Print Media Survey
Period for cover data	Spring 2014	Year 2014 (28.10.2013 - 26.10.2014)	Spring 2014
	Spring 2013	Year 2013 (29.10.2012 - 27.10.2013)	Spring 2013
Cover	average number of readers in target group for one issue of press edition		
Cover, %	average % of readers in target group for one issue of press edition		
Circulation data	Ministry of Culture of Lithuania, data audited, provided by the newspapers	As disclosed by the publishers of magazines (numbers reflect printed, not sold copies)	Estonian Newspaper Association
Period for circulation data	Second half of 2014		December 2014
	Second half of 2013		January 2014
Financial data	Creditreform	Creditreform	Krediidiinfo
na	data not available		
nm	not meaningful to calculate		

## TOP 5 INTERNET MEDIA WEBSITES IN THE BALTICS AND THEIR FINANCIAL INDICATORS

	Lithuania	Latvia	Estonia
<b>No 1</b>	<b>delfi.lt</b>	<b>delfi.lv</b>	<b>delfi.ee</b>
If the Internet Media Website a Part of Other Media Outlet	No	No	Part of the content comes from Ekspress Grupp newspapers
Visitors, Real Users, December 2014	1 198 737	725 632	513 609
Reach, %, December 2014	63,3	57,73	62,2
Reach, %, December 2013	58,5	51,6	65,0
Changes in reach, pp, 2014 vs 2013	4,8	6,1	- 2,9
Owner	Delfi, UAB	Delfi, AS	Delfi, AS
Turnover in 2014 (euros)	8 260 068	2 478 217	4 814 965
Turnover in 2013 (euros)	7 689 141	2 338 599	3 876 147
Changes in Turnover 2014 vs 2013, %	7,4%	6,0%	24,2%
Profit/Loss 2014 (after tax, euros)	961 344	-1 784	449 667
Profit/Loss 2013 (after tax, euros)	777 111	97 943	222 529
Changes in Profit 2014 vs 2013, %	23,7%	nm	102,1%
Global Ultimate Owner	Ekspress Grupp (Hans H. Luik)	Ekspress Grupp (Hans H. Luik)	Ekspress Grupp (Hans H. Luik)
<b>No 2</b>	<b>15min.lt</b>	<b>tvnet.lv</b>	<b>postimees.ee</b>
If the Internet Media Website a Part of Other Media Outlet	No	No	Part of the content comes from the newspaper Postimees
Visitors, Real Users, December 2014	1 003 522	703 768	417 966
Reach, %, December 2014	53,0	55,99	50,58
Reach, %, December 2013	44,5	43.56*	na
Changes in reach, pp, 2014 vs 2013	8,5	nm	na
Owner	15 min, UAB	TV NET, SIA	AS Postimees
Turnover in 2014 (euros)	2 477 452	1 940 899	13 906 000
Turnover in 2013 (euros)	1 768 157	1 156 623	13 746 000

Changes in Turnover 2014 vs 2013, %	40,1%	67,8%	1,2%
Profit/Loss 2014 (after tax, euros)	311 953	-147 016	499 000
Profit/Loss 2013 (after tax, euros)	-449 992	-124 643	-136 000
Changes in Profit 2014 vs 2013, %	nm	nm	nm
Global Ultimate Owner	Eesti Meedia (Margus Linnamäe)	Eesti Meedia (Margus Linnamäe)	Eesti Meedia (Margus Linnamäe)
<b>No 3</b>	<b>lrytas.lt</b>	<b>kasjauns.lv</b>	<b>ohtuleht.ee</b>
If the Internet Media Website a Part of Other Media Outlet	Part of the content from the newspaper Lietuvos Rytas	Part of the content from the magazine Kas Jauns?	Part of the content from the tabloid Õhtuleht
Visitors, Real Users, December 2014	836 267	314 877	250 892
Reach, %, December 2014	44,1	25,1	30,4
Reach, %, December 2013	39,6	21,9	31,5
Changes in reach, pp, 2014 vs 2013	4,5	3,2	-1,2
Owner	Lrytas, UAB	Izdevniecība Rīgas Vilņi, SIA	SL Õhtuleht, AS
Turnover in 2014 (euros)	2 550 430	5 790 117	7 540 460
Turnover in 2013 (euros)	2 139 188	5 421 780	7 385 319
Changes in Turnover 2014 vs 2013, %	19,2%	6,8%	2,1%
Profit/Loss 2014 (after tax, euros)	409 430	188 671	442 586
Profit/Loss 2013 (after tax, euros)	280 951	169 201	290 723
Changes in Profit 2014 vs 2013, %	45,7%	11,5%	52,2%
Global Ultimate Owner	Benas Gudelis, Gedvydas Vainauskas, Vidmantas Strimaitis, Algimantas Budrys, Algirdas Kumza	Goswert Impex Limited (Cyprus)	Ekspress Grupp (Hans H. Luik), Suits Meedia (Janek Veeber)
<b>No 4</b>	<b>alfa.lt</b>	<b>diena.lv</b>	<b>tv3play.ee</b>
If the Internet Media Website a Part of Other Media Outlet	Part of the content from TV channels LNK and Info TV	Part of the content from the newspaper Diena	Content from TV3
Visitors, Real Users, December 2014	533 362	221 333	81 990
Reach, %, December 2014	28,1	17,6	9,9
Reach, %, December 2013	23,7	15,0	9,1
Changes in reach, pp, 2014 vs 2013	4,5	2,6	0,8
Owner	Alfa Media, UAB	Dienas Mediji, SIA	AS TV3
Turnover in 2014 (euros)	771 306	2 682 785	12 579 034
Turnover in 2013 (euros)	670 582	2 789 520	11 506 413
Changes in Turnover 2014 vs 2013, %	15,0%	-3,8%	9,3%
Profit/Loss 2014 (after tax, euros)	-194 532	-670 829	-1 205 531

Profit/Loss 2013 (after tax, euros)	-245 386	-948 345	-1 192 917
Changes in Profit 2014 vs 2013, %	nm	nm	nm
Global Ultimate Owner	MG Baltic Media (Darius Mockus, Amber Trust (Luxembourg))	Rīgas Tirdzniecības Osta	MTG Broadcasting (Sweden)
<b>No 5</b>	<b>balsas.lt**</b>	<b>la.lv</b>	<b>jt.ee</b>
If the Internet Media Website a Part of Other Media Outlet	No	Part of the content from the newspaper Latvijas Avīze	Part of the content from regional newspaper Järva Teataja
Visitors, Real Users, December 2014	518 043	211 865	73 472
Reach, %, December 2014	27,3	16,9	8,9
Reach, %, December 2013	32,5	6,8	na
Changes in reach, pp, 2014 vs 2013	-5,1	10,0	na
Owner	E. naujienos, UAB	Lauku Avīze, AS	Ühinenud Ajalehed
Turnover in 2014 (euros)	392 302	4 950 281	5 221 000
Turnover in 2013 (euros)	466 885	4 855 529	4 932 000
Changes in Turnover 2014 vs 2013, %	-16,0%	2,0%	5,9%
Profit/Loss 2014 (after tax, euros)	-4 640	61 093	318 000
Profit/Loss 2013 (after tax, euros)	13 660	23 140	303 000
Changes in Profit 2014 vs 2013, %	nm	164,0%	5,0%
Global Ultimate Owner	Vytenis Maziulis	Ventbunkers	Eesti Meedia (Margus Linamae), OÜ Pressinvest

\* June 2013 data includes only data for tvnet.lv, which was merged with apollo.tvnet.lv from June 2014.

\*\* Balsas.lt was bought by UAB Tele-3 in 2015 and has become tv3.lt.

- Increase in turnover or profit marked in green
- Decline in turnover or profit marked in red

Sources:	Lithuania	Latvia	Estonia
Audience data	Gemius	Gemius	Gemius
Reach	The percentage of visitors (real users) who generated at least one page view on the monitored web site within the given time period to the total number of internet users within a given time period.		
Visitors (real users)	The number of individuals who generated at least one page view on the monitored web site (or a group of sites) within a given time period. This number represents the reach of the web site and shows the actual number of people – not computers or cookies – who visited the web site. In this way, it is possible to determine the socio-demographic profile of these people in the study.		
Financial data	Creditreform	Creditreform	Krediidiinfo
nm	not meaningful to calculate		

## TOP 5 RADIO STATIONS IN THE BALTICS AND THEIR FINANCIAL INDICATORS

	Lithuania	Latvia	Estonia
<b>No 1</b>	<b>M-1</b>	<b>Latvijas Radio 2</b>	<b>Vikerraadio</b>
Reach, 2014	735 200	406 000	294 000
Reach, 2013	846 700	416 000	327 000
Changes in Reach 2014 vs 2013, %	-13,2%	-2,4%	-10,1%
Reach, %, 2014	30,6	23,3	28,3
Reach, %, 2013	35,2	23,5	30,8
Changes in Reach, pp, 2014 vs 2013	- 4,6	- 0,2	- 2,5
Owner	M-1, UAB	Latvijas Radio, VSIA	Eesti Rahvusringhääling
Turnover in 2014 (euros)	2 635 754,75	9 176 443,00	29 371 098
Turnover in 2013 (euros)	2 210 196,65	7 391 658	30 469 556
Changes in Turnover 2014 vs 2013, %	19,3%	24,1%	-3,6%
Profit/Loss 2014 (after tax, euros)	888 529,31	147 877	-1 019 184
Profit/Loss 2013 (after tax, euros)	650 710,73	4 822	791 427
Changes in Profit 2014 vs 2013, %	36,5%	nm	nm
Global Ultimate Owner	Ramune Grusnyte	Public Media	Public Media
<b>No 2</b>	<b>Lietus</b>	<b>Radio Skonto</b>	<b>Raadio Elmar</b>
Reach, 2014	620 600	264 000	242 000
Reach, 2013	648 900	264 000	250 000
Changes in Reach 2014 vs 2013, %	-4,4%	0,0%	-3,2%
Reach, %, 2014	25,8	15,1	23,4
Reach, %, 2013	27	14,9	23,6
Changes in reach, pp, 2014 vs 2013	- 1,2	0,2	- 0,2
Owner	Radijo Stotis Ultra Vires, UAB	Radio Skonto, SIA	Aktsiaselts Trio LSL
Turnover in 2014 (euros)	554 189,93	1 657 612	2 321 115
Turnover in 2013 (euros)	503 248,67	1 114 691	2 252 387
Changes in Turnover 2014 vs 2013, %	10,1%	48,7%	3,1%
Profit/Loss 2014 (after tax, euros)	107 996,12	100 134	127 216

Profit/Loss 2013 (after tax, euros)	113 776,65	-60 657	166 040
Changes in Profit 2014 vs 2013, %	-5,1%	nm	-23,4%
Global Ultimate Owner	Ruta Grusniene, Giedre Grusnyte	Baiba Ābele, Ivars Laimonis Embrenks, Guntis Indriksons, Edijs Akolovs	Eesti Meedia (Margus Linnamäe)
<b>No 3</b>	<b>LRT Radijas</b>	<b>Latvijas Radio 1</b>	<b>Sky Plus</b>
Reach, 2014	545 900	207 000	241 000
Reach, 2013	693 500	218 000	256 000
Changes in Reach 2014 vs 2013, %	-21,3%	-5,0%	-5,9%
Reach, %, 2014	22,7	11,9	23,3
Reach, %, 2013	28,9	12,3	24,2
Changes in reach, pp, 2014 vs 2013	- 6,2	- 0,4	- 0,9
Owner	Lietuvos Nacionalinis Radijas Ir Televizija	Latvijas Radio, VSIA	Taevaraadio OÜ
Turnover in 2014 (euros)	22 234 170	9 176 443	382 755
Turnover in 2013 (euros)	20 914 622	7 391 658	205 001
Changes in Turnover 2014 vs 2013, %	6,3%	24,1%	86,7%
Profit/Loss 2014 (after tax, euros)	176 306	147 877	92 112
Profit/Loss 2013 (after tax, euros)	434 840	4 822	395 339
Changes in Profit 2014 vs 2013, %	-59,5%	nm	-76,7%
Global Ultimate Owner	Public Media	Public Media	Harald Tehver
<b>No 4</b>	<b>Radiocentras</b>	<b>Star FM</b>	<b>Star Fm</b>
Reach, 2014	454 100	197 000	207 000
Reach, 2013	561 900	189 000	195 000
Changes in Reach 2014 vs 2013, %	-19,2%	4,2%	6,2%
Reach, %, Autumn 2014	18,9	11,3	20
Reach, %, Autumn 2013	23,4	10,6	18,4
Changes in reach, pp, 2014 vs 2013	- 4,5	0,7	1,6
Owner	Radiocentras, UAB	Star FM, SIA	AS Mediainvest Holding
Turnover in 2014 (euros)	571 303,87	842 798	1 558 717
Turnover in 2013 (euros)	478 556,53	748 449	1 298 339
Changes in Turnover 2014 vs 2013, %	19,4%	12,6%	20,1%
Profit/Loss 2014 (after tax, euros)	292 439,47	128 227	108 981
Profit/Loss 2013 (after tax, euros)	217 324,20	188 093	35 205
Changes in Profit 2014 vs 2013, %	34,6%	-31,8%	209,6%

Global Ultimate Owner	Achemos Grupe (Lyda Lubiene, Viktorija Lubyte), Mindaugas Pleskevicius	MTG RADIO (Sweden)	MTG RADIO (Sweden)
No 5	M-1 Plus	EHR (European Hit Radio)	Raadio 4 (rus)
Reach, 2014	342 500	190 000	169 000
Reach, 2013	338 300	199 000	151 000
Changes in Reach 2014 vs 2013, %	1,2%	-4,5%	11,9%
Reach, %, 2014	14,3	10,9	16,3
Reach, %, 2013	14,1	11,2	14,2
Changes in reach, pp, 2014 vs 2013	0,2	- 0,3	2,1
Owner	M-1, UAB	Super FM, AS	Eesti Rahvusringhääling
Turnover in 2014 (euros)	2 635 754,75	150 426	29 371 098
Turnover in 2013 (euros)	2 210 196,65	234 368	30 469 556
Changes in Turnover 2014 vs 2013, %	19,3%	-35,8%	-3,6%
Profit/Loss 2014 (after tax, euros)	888 529,31	57 148	-1 019 184
Profit/Loss 2013 (after tax, euros)	650 710,73	18 799	791 427
Changes in Profit 2014 vs 2013, %	36,5%	204,0%	nm
Global Ultimate Owner	Ramune Grusnyte	Uģis Polis, Eduards Zaks, Jevgēņijs Līvšics, Ričards Zakss, Jakovs Maņkovs, Dainis Vizbelis	Public Media

Increase in turnover or profit marked in green  
 Decline in turnover of profit marked in red

Sources:	Lithuania	Latvia	Estonia
Audience data	TNS LT, Radio Audience Survey	TNS Latvia, Radio Audience Survey	TNS Emor, Radio Audience Diary Survey
Reach	the total weekly number of the radio station listeners, thousands		
Reach, %	the total number of the radio station listeners, average of a week in per cent		
Period 2014	01.09.2014 - 30.11.2014	12.05.2014- 26.10.2014	03.09.2014 - 02.12.2014
Period 2013	02.09.2013 - 01.12.2013	13.05.2013 - 27.10.2013	04.09.2013- 03.12.2013
Financial data	Creditreform	Creditreform	Krediidiinfo
nm	not meaningful to calculate		

## TOP 5 TV CHANNELS IN THE BALTICS AND THEIR FINANCIAL INDICATORS

	Lithuania	Latvia	Estonia
<b>No 1</b>	<b>TV3</b>	<b>TV3</b>	<b>Kanal 2</b>
Free or Paid	Free	Paid	Free
Share, %, 2014	17,2	11,8	15,8
Share, %, 2013	16,8	13,4	15,0
Change in share, pp, 2014 vs 2013	0,4	-1,6	0,8
Broadcaster	TELE - 3, UAB	TV 3 Latvia, SIA	Kanal 2, AS
Turnover in 2014 (euros)	22 517 294	16 621 373	11 089 220
Turnover in 2013 (euros)	23 069 009	15 085 817	10 621 202
Changes in Turnover 2014 vs 2013, %	-2,4%	10,2%	4,4%
Profit/Loss 2014 (after tax, euros)	2 172 357	3 079 054	-512 090
Profit/Loss 2013 (after tax, euros)	2 827 226	1 240 480	-1 256 986
Changes in Profit 2014 vs 2013, %	-23,2%	148,2%	nm
Global Ultimate Owner	MTG Broadcasting (Sweden)	MTG Broadcasting (Sweden)	Eesti Media (Margus Linnamäe)
<b>No 2</b>	<b>LNK</b>	<b>Первый Балтийский Канал (rus)</b>	<b>ETV</b>
Free or Paid	Free	Paid	Free
Share, %, 2014	17,1	9,6	15,5
Share, %, 2013	16,7	9,8	14,6
Change in share, pp, 2014 vs 2013	0,4	-0,2	0,9
Broadcaster	Laisvas ir nepriklausomas kanalas, UAB	Pirmais Baltijas Kanāls, SIA	Eesti Rahvusringhääling
Turnover in 2014 (euros)	21 186 284	2 593 301	29 371 098
Turnover in 2013 (euros)	18 421 281	2 647 597	30 469 556
Changes in Turnover 2014 vs 2013, %	15,0%	-2,1%	-3,6%
Profit/Loss 2014 (after tax, euros)	1 274 328	14 413	-1 019 184
Profit/Loss 2013 (after tax, euros)	322 057	17 549	791 427
Changes in Profit 2014 vs 2013, %	295,7%	-17,9%	nm

Global Ultimate Owner	MG Baltic Media (Darius Mockus, Amber Trust (Luxembourg))	Baltijas Mediju Alianse (Alexey Plyasunov, Olegs Solodovs)	Public Broadcaster
<b>No 3</b>	<b>LRT Televizija</b>	<b>LTV1</b>	<b>TV3</b>
Free or Paid	Free	Free	Free
Share, %, 2014	8,8	9,2	12,2
Share, %, 2013	7,7	9,4	12,9
Change in share, pp, 2014 vs 2013	1,1	-0,2	-0,7
Broadcaster	Lietuvos nacionalinis radijas ir televizija	Latvijas Televīzija, VSIA	TV 3, AS
Turnover in 2014 (euros)	22 234 170	17 270 325	12 579 034
Turnover in 2013 (euros)	20 914 622	16 257 096	11 506 413
Changes in Turnover 2014 vs 2013, %	6,3%	6,2%	9,3%
Profit/Loss 2014 (after tax, euros)	176 306	-132 941	-1 205 531
Profit/Loss 2013 (after tax, euros)	434 840	1 362 980	-1 192 917
Changes in Profit 2014 vs 2013, %	-59,5%	nm	nm
Global Ultimate Owner	Public Broadcaster	Public Broadcaster	MTG Broadcasting (Sweden)
<b>No 4</b>	<b>BTV</b>	<b>LNT</b>	<b>Первый Балтийский Канал(rus)</b>
Free or Paid	Free	Paid	Paid
Share, %, 2014	7	9,1	6,9
Share, %, 2013	6,7	10,5	7,9
Change in share, pp, 2014 vs 2013	0,3	-1,4	
Broadcaster	Laisvas ir nepriklausomas kanalas, UAB	Latvijas Neatkarīgā Televīzija, AS	Pirmais Baltijas Kanals, SIA
Turnover in 2014 (euros)	21 186 284	8 478 743	2 593 301
Turnover in 2013 (euros)	18 421 281	8 069 007	2 647 597
Changes in Turnover 2014 vs 2013, %	15,0%	5,1%	-2,1%
Profit/Loss 2014 (after tax, euros)	1 274 328	-1 701 454	14 413
Profit/Loss 2013 (after tax, euros)	322 057	-2 745 475	17 549
Changes in Profit 2014 vs 2013, %	295,7%	nm	-17,9%
Global Ultimate Owner	MG Baltic Media (Darius Mockus, Amber Trust (Luxembourg))	MTG Broadcasting (Sweden)	Baltijas Mediju Alianse (Alexey Plyasunov, Olegs Solodovs)

No 5	TV6	HTB Мир Baltic (rus)	HTB Мир (rus)
Free or Paid	Free	Paid	Paid
Share, %, 2014	4,4	7,7	5,1
Share, %, 2013	4,3	6,8	5,0
Change in share, pp, 2014 vs 2013	0,1	0,9	0,1
Broadcaster	TELE - 3, UAB	Baltijas Mediju Alianse, SIA	Baltijas Mediju Alianse, SIA
Turnover in 2014 (euros)	22 517 294	13 614 132	13 614 132
Turnover in 2013 (euros)	23 069 009	15 510 228	15 510 228
Changes in Turnover 2014 vs 2013, %	-2,4%	-12,2%	-12,2%
Profit/Loss 2014 (after tax, euros)	2 172 357	74 090	74 090
Profit/Loss 2013 (after tax, euros)	2 827 226	85 560	85 560
Changes in Profit 2014 vs 2013, %	-23,2%	-13,4%	-13,4%
Global Ultimate Owner	MTG Broadcasting (Sweden)	Alexey Plyasunov, Olegs Solodovs	Alexey Plyasunov, Olegs Solodovs

■ Increase in turnover or profit marked in green  
■ Decline in turnover or profit marked in red

Sources:	Lithuania	Latvia	Estonia
Audience data	TNS LT	TNS Latvia	TNS Emor
Share, %	share of viewing, the percentage of the total viewing audience watching over a given period of time.		
Period 2014	01.01.2014 - 31.12.2014		
Period 2013	01.01.2013 - 31.12.2013		
Financial data	Creditreform	Creditreform	Krediidiinfo
nm	not meaningful to calculate		

