

VERNETZUNG UND EXPORT: MUSIK-STRATEGIE IN ESTLAND

NETWORKING AND EXPORT: MUSIC STRATEGY IN ESTONIA

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MUSIC
ESTONIA 

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"Head Out Of The Water" by NOEP

ABOUT ME

- **Director and Member of the Board of Music Estonia**
- Former Executive Director of Jazz Estonia
- Head of the Exhibition Department at the National Library of Estonia
- Guest author and radio host at Estonian Public Broadcasting, Klassikaraadio
- First Estonian Ambassador for Keychange
- Member of the Council of Advisers at the Tallinn School of Music and Ballet (MUBA)
- Member of the advisory board of Tallinn UNESCO City of Music
- Member of the Music Endowment committee of Cultural Endowment Estonia
- General Secretary on the board of EMEE (European Music Exporters Exchange) since 2024

MUSIC ESTONIA 



ESTONIA

Population: 1,366,491 million (2024)

Language: Estonian

GDP per capita: 37.7 billion euros

Music industry revenue: 196,5 mln (2019)

Biggest cities: Tallinn, Tartu, Narva

Tallinn Old Town is included in the UNESCO World Heritage List

Neighboured countries: Finland (north), Sweden (west), Latvia (south), Russia (east)

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COUNTRY SPECIFICS

Cultural movements which have influenced musical scenery:

Former SU's western frontier status as the “Soviet abroad”, Singing Revolution, underground dance parties and raves, Perestroika-era punk, Rock Summer festivals that featured relevant Western acts, John Peel’s visit in 1992

Our niche, what’s making us unique:

Proximity between, North, East and West, openness to genre-crossing and defying currents, strong global communities, tech-savviness, strong alternative experimental music, the highest collection of written folk songs in the world – 133 000, #1 in Europe in number of unicorns per capita, first country to offer e-Residency (2014)

Export success stories:

Tommy Cash, Kerli Kõiv, Shelton San, Duo Ruut, Puuluup, Mart Avi, Ajukaja, Maarja Nuut, Curly Strings, Trad.Attack!, Sander Mölder, NOËP, Maria Minerva, Mari Kalkun, Talbot, Madison Mars, Ewert and the Two Dragons, Syn Cole, Pia Fraus, Maria Faust, Kirke Karja, Kadri Voorand, Kristjan Randalu, Helena Tulve, Estonian Philharmonic Chamber Choir, Collegium Musicale, Ansambel U:, TUMA

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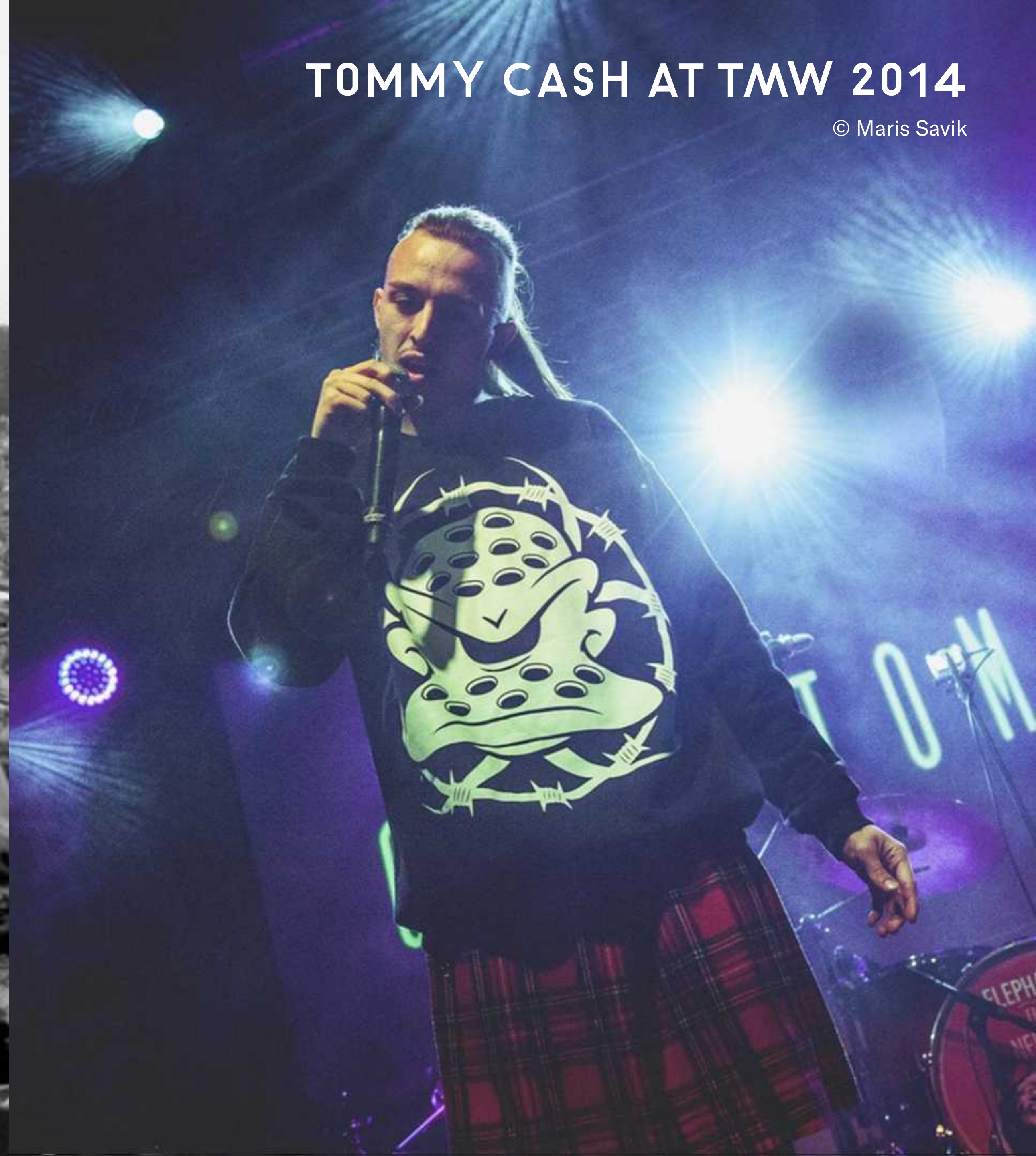
ROCK SUMMER 1988

© Kari Kuukka



TOMMY CASH AT TMW 2014

© Maris Savik



MAIN STRATEGIES

- An overarching [Culture 2030](#) strategy, which also includes a chapter on music, handled by the Ministry of Culture
- A [Tallinn City of Music Strategy](#) 2022–2025 (not part of an official city strategy document)
- An [innovation strategy](#) (2021–2035), which is a collaboration between the Ministry of Education as well as the Ministry of Economic Affairs. No music chapter, but also describes export activities

GENERAL FACTS & FIGURES

Expenditure on music in Estonia between 2018 and 2020:

	2018	Change 18→19	2019	Change 19→20	2020
Using musical works (Author’s rights, music publishing)	€2,925,037	13.64%	€3,324,091	-17.05%	€2,757,431
Expenditure on recorded music	€10,618,945	-7.80%	€9,790,411	35.42%	€13,257,692
Expenditure on live music	€21,750,607	41.65%	€30,810,497	-55.52%	€13,704,080
Other artist income, creative work, grants etc.	€1,545,359	17.19%	€1,811,081	56.81%	€2,840,024
Various structural and other support	€14,495,476	19.89%	€17,378,079	8.32%	€18,824,384
KOKKU	€51,335,424	22.94%	€63,114,159	-18.59%	€51,383,611

The total revenue from core music sectors in 2019 was 108 million, and when combined with related sectors, it reached 184.8 million (compared to 86 million and 141.4 million in 2015, representing an increase of 25% to 30%).

MUSIC ESTONIA

Music Estonia is a music industry development centre and export office in Estonia.

The mission of Music Estonia is to support the professional development of the competitive music industry.

The vision states that Estonia has a viable music industry and music entrepreneurship is valued in society as a value-added and internationally competitive business sector.

Represents over 100 music companies, including live, recording, publishing, and management. Team of 6, plus outsourced resources, with a budget of over half a million (state funding approximately 1/3).

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Music Estonia is a member of EMEE, IAMIC, Live DMA, and EMMA, and a partner in European projects.

Music Estonia has two branches – Music Estonia Live and Music Estonia Managers.

[→ more info](#)

FORMULATION & TIMELINE

- 2009: Start of Tallinn Music Week, an Estonian showcase festival and conference
- 2009/10: First attempts to create a development center for the music industry in Estonia
- 2014: Creation of Music Estonia by 23 music companies
- 2019: Creation of the first branch, Music Estonia Live (then Live Music Estonia)
- 2020: Change of leadership
- 2021: Updated strategy and constitution, including the management of the organization
- 2023: Opening of the second branch, Music Estonia Managers, and rebranding

STRATEGIC GOALS

- Estonian music companies have the necessary skills, knowledge and contacts to operate effectively in the field and to develop entrepreneurship.
- The Estonian music industry is well networked internationally and music companies are successful in foreign markets.
- The voice of the Estonian music sector is heard in society and the field is developed on the basis of knowledge.

ACTIVITIES

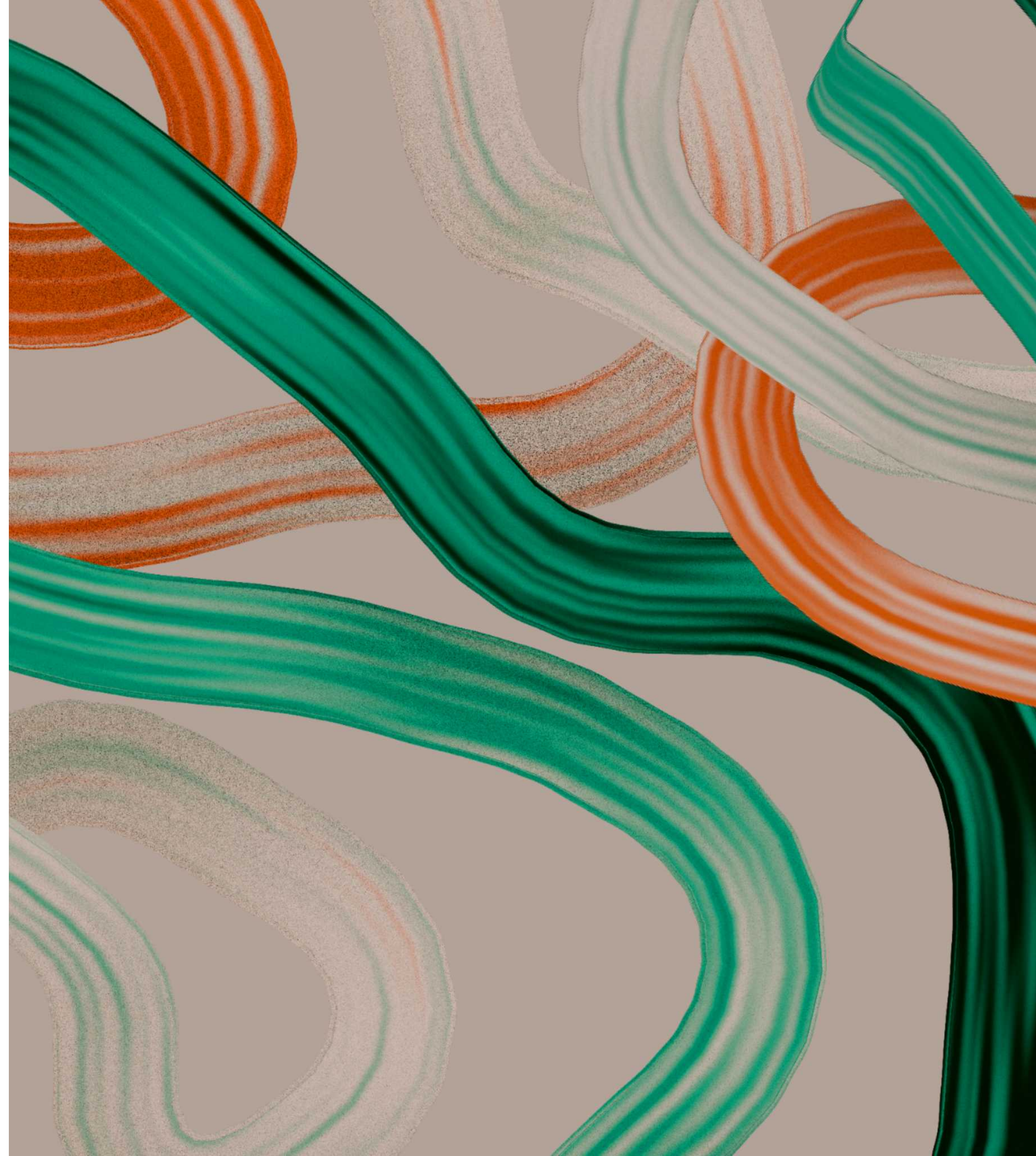
- Offering support to Estonian-based music businesses and musicians
- Representing them at international trade events
- Developing the international network and collaborations
- Organizing seminars, development programs, and workshops
- Organizing the music industry award ceremony
- Contributing to surveys in the field
- Engaging in political lobbying for the industry

THE BEST ENTRY POINT: TALLINN MUSIC WEEK

- Leading showcase of “tomorrow’s music, arts, and ideas” in the Baltic-Nordic region since 2009.
- TMW is valued internationally for its diverse program, vast variety of genres, and high artistic level, as well as the strong representation of the international music industry.
- The festival includes various stage promoters from the Estonian music industry, and abroad.
- The festival is attended by an audience of about 15,000 people and 1,000 industry players each year.

More info: tmw.ee

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TALLINN MUSIC WEEK

© Andrea Forlani

OTHER INSTITUTIONS

Collecting Societies:

[Estonian Authors Society](#) (~5000 members)

[Estonian Performers Association](#) (~1500 members)

[Estonian Association of the Phonogram Producers](#) (~500 members)

Competence centres:

[Estonian Traditional Music Centre](#)

[Jazz Estonia](#) (also an union)

[Heavy Music Estonia](#)

[Estonian Centre for Contemporary Music](#)

[Estonian Music Information Centre](#)

Unions:

[Estonian Composers Union](#)

[Association of Estonian Professional Musicians](#)

[Estonian Music Council](#)

Partners / funders:

[Ministry of Culture of the Republic of Estonia](#)

[Estonian Business and Innovation Agency](#)

[UNESCO City of Music Tallinn](#)

Schools:

[Tallinn School of Music and Ballet \(MUBA\)](#)

FUNDING BODIES



Eesti
Autorite
Ühing

Export fund for artists and professionals to showcase festivals and conferences (by Estonian Authors' Society and Music Estonia, ongoing)



Cultural Endowment of Estonia, Music Endowment (state budget, mainly from taxes, quarterly)



REPUBLIC OF ESTONIA
MINISTRY OF CULTURE

Estonian culture around the world (by Ministry of Culture in Estonia, twice a year)



Estonian Business and Innovation Agency, offers grants for companies to support their development and expansion into foreign markets (follows European funding periods)

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INTERNATIONAL NETWORKS

European Music Exporters Exchange (EMEE), 2024 Forum in Tallinn about sustainable and inclusive export

The International Association of Music Centres (IAMIC)

Live DMA, a European network of live music associations

European Music Managers Alliance (EMMA)

Other networks:

Music Cities Network and European Music Business Task Force (EMBTF)

Cindy & Kate, a collaborative and trust-based informal network between a group of grassroots cultural spaces, venues and Baltic promoters

Various European projects:

The Hub for the Exchange of Music Innovation (HEMI)

Europe in Synch (EINS)

Music Industry Resilience Acceleration Program (MI-RAP)

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IDEAS FOR FUTURE

- Building strategic collaboration with Nordic and Baltic regions
- Reaching other markets outside of Europe (intl. trade missions)
- Partnering in long-term European projects and having structured government support
- Investing in cross-sectoral collaboration (synch, tech, etc.)
- Keeping emphasis on export matters and encouraging investment in it (mobility funding)
- Assisting in obtaining comprehensive music industry data
- Getting more strategic and long-term support from the government for the organization
- Encouraging and supporting more music businesses and Estonian talent by providing them with tailor-made advice, development and mobility programs, and access

ADVICE TO THE INDUSTRY

- First, build your business or career in your country and around your neighboring countries.
- Choose your markets and strategy wisely and according to your audience's interests; for markets outside of Europe, plan for long-term investments.
- When exporting, look to nearby countries to create sustainable ways of mobility or selling services, like smaller countries.
- Be open to cross-sectoral collaborations.
- Work with your local export office.

AITÄH! DANKE SCHÖN!

More info: musicestonia.eu

Estonian market report: [https://
www.europeanmusic.eu/resource-centre/](https://www.europeanmusic.eu/resource-centre/)