



EUROPEAN  
MUSIC  
EXPORTERS  
EXCHANGE

# Developing Music Export in Europe

# ESTONIA

Virgo Sillamaa  
2025

This report is created as one of the deliverables of the project  
**“Developing European Music Export Capacity”**.  
The project is co-funded by the European Commission.



**Funded by  
the European Union**

Author: **Virgo Sillamaa**

Language editor: **Alice Kattago**

The author expresses gratitude to all who granted their time and expertise, including Ave Sophia Demelemester (ME), Brigitta Davidjants, Britt Randma (ME), Greete Paršin (ME), Marii Reimann (ME), and Marili Randla (ME).

This report was created in November 2024 - February 2025

|  |           |
|--|-----------|
| <b>Preface</b>   | <b>4</b>  |
| <b>1. Music Export Development in Estonia at a Glance</b>            | <b>7</b>  |
| 1.1. General context   | 7         |
| 1.2. Main activities and resources                                   | 8         |
| 1.3. Overview of the main gaps                                       | 10        |
| <b>2. Music Export Development in Estonia in detail</b>              | <b>11</b> |
| 2.1. Introduction to Estonia   | 11        |
| 2.2. Estonian music export ecosystem                                 | 11        |
| 2.3. Music policy in Estonia   | 15        |
| 2.4. Music Estonia – organisational profile                          | 19        |
| <b>3. Activities for Developing Music Export Capacity in Estonia</b> | <b>25</b> |
| 3.1. LEARN   | 25        |
| 3.2. GROW  | 29        |
| 3.3. CROSS & RISE  | 35        |
| 3.4. EXCHANGE  | 41        |
| 3.5. MEASURE   | 44        |

# Preface

This report provides insights into how music export capacity is developed in Estonia. It's part of a series of country profiles, following the first reports "Developing Music Export in Europe" with volume 1 providing a comparative overview of 29 European music export organisations (MEOs) as well as defining key terms and concepts; and volume 2 outlining the European Music Export Strategy framework which is used to profile the activities of music export development in this series of country profiles. These country profiles are first and foremost aimed at the need of MEOs to gain deeper and more detailed insights into how other MEOs work and are drawing from one of EMEE's core missions of providing best practice analysis to its members. Therefore, the chapters contain at times quite detailed, even technical, information about programmes. Still, the reports might also be insightful for anyone with an interest towards how music export is developed in European countries.

The **European Music Export Strategy** (EMES) is a framework first outlined in a study commissioned by the European Commission as part of the Music Moves Europe initiative, published in 2020. The framework, though actively championed and developed by EMEE – the European Music Exporters Exchange network, is not owned by any single organisation, but rather provides a basic structure that helps to coordinate actions and align policies on regional, national and European levels among the various actors involved in music export development, including the music exporters themselves – the artists, professionals and entrepreneurs working to build international careers and businesses – as well as MEOs, local, regional and national governments as well as European institutions. EMES, at its simplest, provides six strategic objectives that need to be addressed when developing music export (see figure 1). Each objective will require various activities to be done and these differ depending on the type of the actor. These country profiles will focus on the MEO as the central organisation in a country or region focusing on developing the music export capacity of artists, professionals and entrepreneurs in their area. The particular activities of the MEO in focus are organised according to EMES' six themes.

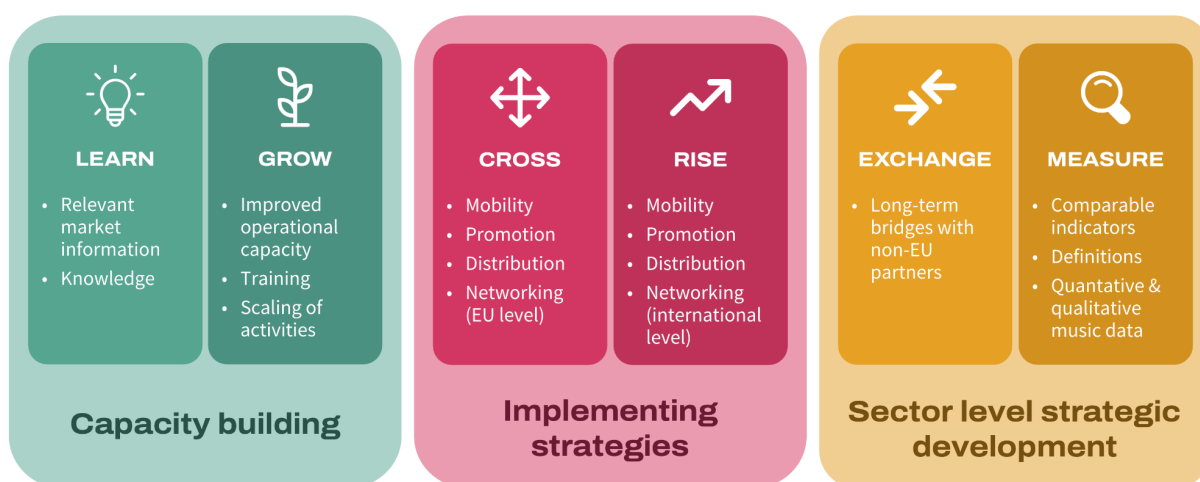


Figure 1. European Music Export Strategy (EMES) – six themes.

However, given that MEOs are “intermediaries between public policy and the music industry”<sup>1</sup>, basic insights are needed into the broader sector and policy context the MEO operates in to understand the specific profile of the MEO in a given country or region.

The report is therefore organised broadly into two parts. Chapter 1 provides a concise overview while chapters 2 and 3 go into more depth and detail of how music export is being developed in Estonia. The report relies on publicly available data and resources, from policy documents to organisational strategies, and interviews with the MEO staff as well as other relevant sector professionals.

Some of the core concepts are explained and developed in the “Developing Music Export in Europe” volume 1 report, but short definitions can be found below.

**Music ecosystem** – can be defined as “*the network of music sector actors, their environment, their interdependencies and interactions through the production, distribution and consumption of music so that value is created for the system itself, and for the systems it is part of*”.<sup>2</sup> In this report the phrase refers casually to the broadest range of actors involved in developing music export in a country or a region.

**Music export** – “... is a widely used catchphrase to refer to a range of practices and outcomes of artists, creators, music companies and other music organisations aiming to work internationally, which means crossing borders to reach new audiences, creative and market opportunities”<sup>3</sup>. Music export can be defined narrowly as the economic outcomes (export revenue) of cross-border activities; or broadly as any other kind of international practice where music is in some way involved and moves across borders. While the narrow definition is precise and matches well with the general trade-related notion of export; the broader more vague definition describes more fully the range of activities and their context that MEOs engage with.

**Music export capacity** – “can be defined as both the resources available as well as the knowledge, skills and ability to make use of them to create and grow international careers and businesses in an environmentally, economically and socially sustainable way”.<sup>4</sup>

**Music export organisation (MEO)** – there is no clear definition nor model for a music export organisation, they come in a wide variety and reflect the particular context and needs of the country or region. However, all these organisations strive towards providing artists, and (in most cases) professionals and music companies, the support and services they need to develop their careers and businesses on an international level.

**Music export development** – as used in these reports, refers to all activities and policies in a country or region that aim to improve the conditions for artists, professionals and entrepreneurs to plan and carry out their music export strategies and achieve results, whether in the narrow or broad terms of

---

<sup>1</sup> Michaël Spanu & Virgo Sillamaa (2025). [European music export organizations as hybrid policy instruments: navigating cultural, trade and soft power agendas](#). *International Journal of Cultural Policy*.

<sup>2</sup> Frank Kimenai & Carsten Winter (2025). [The European Music Ecosystem](#). Commissioned by the Creative Europe programme of the European Commission.

<sup>3</sup> Virgo Sillamaa (2023). [Developing Music Export in Europe, vol 1](#). EMEE.

<sup>4</sup> Virgo Sillamaa (2024). [Developing Music Export in Europe, vol 2](#). EMEE.

music export. Several factors create the conditions for developing music export. A landscape of organisations with an international dimension, the way different music scenes and industries have organised themselves, the local market conditions as well as policy environment. MEOs are key actors in developing these conditions, connecting both private and public resources, making use of their professional networks and designing programmes and support schemes. There are, of course, other actors playing a role, such as industry conferences and showcase or sometimes regular festivals, arts councils and other funders, ministries and sector organisations. The institutional and organisational landscape of each national or regional music ecosystem is structured in specific ways.



# 1. Music Export Development in Estonia at a Glance

## 1.1. General context

Developing music export capacity has made significant strides in Estonia over the past 15 years. The Organisations most systematically involved have been **Tallinn Music Week** since 2009 and **Music Estonia** since 2014.

Internationalisation and to some degree export development are fairly salient themes in the cultural policy of the government, expressed in the "Culture development plan 2021-2030". However, funding instruments are limited. The budget of the Ministry of Culture for music is roughly €18 million annually, but it's been subject to cuts in 2025 and these will continue in the next few years. A significant portion of this budget (about 71%) goes to structural support for established, state-founded organizations, leaving less for project based funding of more independent actors. Public funding for music export development can be estimated to be around €490 000 annually, with around half of it as structural support and half project support. The Estonian Author's Society (CMO) also funds an export funding scheme in collaboration with Music Estonia. A major overall challenge is the reliance on short-term project-based funding, which limits flexibility as well as longer-term strategic planning for artists, companies and organisations in the sector.

**Music Estonia** (ME) is the central organisation for music export development in Estonia. Established in 2014, ME is a non-profit, partially publicly funded organization with a mission to support the professional development of a competitive music industry.

ME's strategic goals are to:

1. Provide music companies with the necessary skills and knowledge.
2. Help the Estonian music industry build international networks and succeed in foreign markets.
3. Ensure the music sector's voice is heard in society and policy-making.

ME's funding model is diverse but heavily reliant on project grants, with about 80% of its budget being project-based and short-term (1 year or less). This structure inhibits financial flexibility and longer-term strategic planning. As a membership organization, ME represents the interests of its members, but its activities, including advocacy, are generally open to and representative of the entire music ecosystem.

## 1.2. Main activities and resources

|  |  |
|--|--|
| <p><b>LEARN</b></p> <p>Relevant and up-to-date information and knowledge on music markets and industry trends</p>                | <p><b>Music Estonia</b> has limited activities directly related to creating and curating information on music markets and industry trends (the LEARN objective). These include:</p> <ul style="list-style-type: none"> <li>• disseminating information about Estonian music through newsletters (in Estonian and English) and social media.</li> <li>• developing an informal database of artists' international activities that can be shared with international professionals.</li> <li>• maintaining a directory of more than 100 member companies on its website.</li> <li>• maintaining a resource collection with external reports and information, but not creating any learning materials itself (currently accessible only for members, but will be open access in the future)</li> </ul> <p><b>In general</b>, there's a lack of a comprehensive overview and information of Estonian music life for international audiences. Estonian Music Information Centre collects and disseminates information about classical and contemporary music, but beyond that there is no other organisation with a comparable mission, competence or capacity to do similar work for other music scenes regularly and systematically. Therefore, in general, there is no comprehensive information about all Estonian artists and music companies available.</p> <p>With very few exceptions, learning materials or educational resources in Estonian and aimed at Estonian music professionals are very rare and arguably it's not cost-effective to produce them, given the limited size of the audience.</p> |
| <p><b>GROW</b></p> <p>A supportive environment to grow knowledge, skills, experience and capacity in every European country.</p> | <p><b>Music Estonia</b> is very active in capacity building, organising a diverse range of seminars, workshops, mentoring schemes, and business development programmes like AMP and TechTrack. These activities cater to various target groups, from beginners to advanced professionals, and cover topics ranging from music industry fundamentals to export strategies and music technology.</p> <p><b>In general</b>, the music business is a new field in formal education. There is a 1-year vocational curriculum in the Tallinn Music and Ballet School from 2019 and the BA and MA programmes in Cultural Management provide some insights as well. On the informal education side, there are now also some music companies and organisations providing workshops and seminars, but Music Estonia is the main centre for capacity building for music industry and especially music export development themes. Tallinn Music Week and the more recent Estonian Music Market Focus Day are important events for informal learning as well.</p>   |
| <p><b>CROSS/RISE</b></p>   | <p><b>Music Estonia</b> supports Estonian artists and companies in crossing borders through various activities, including:</p>   |



|  |  |
|--|--|
| <p>Crossing borders in Europe and rising to the global level</p>                       | <ul style="list-style-type: none"> <li>• Limited funding for attending showcases and conferences from a small music export fund (in cooperation with Estonian Author's Union (EAÜ).</li> <li>• Regularly attending key European events like ESNS, Reeperbahn Festival, jazzahead!, WOMEX, and Classical:NEXT, sometimes curating a dedicated Estonian presence or collaborating with a Baltic focus.</li> <li>• Organising occasional trade missions to specific markets.</li> <li>• Collaborating with Tallinn Music Week to invite international delegates and facilitate networking opportunities for Estonian artists and professionals.</li> </ul> <p><b>In general</b>, funding for export projects is very limited and ME's capacity to be present at more events, especially outside of Europe, is also very limited. Due to the small professional population, standalone trade missions are rare as there are mostly not enough professionals at any given time interested and able to invest in a particular market warranting a focused mission. This can be improved through joint European missions.</p> |
| <p><b>EXCHANGE</b></p> <p>Strategic international partnerships on a sectoral level</p> | <p><b>Music Estonia</b> actively participates in European cooperation projects to create opportunities for Estonian artists and professionals as well as strengthen its own international networks. Notable past and ongoing projects include Finest Sounds, Music Moves Interns, HEMI, SMA!, SAFEPLACE, Europe in Synch, and MI-RAP.</p> <p><b>In general</b>, Estonian cultural diplomacy system is small with six representatives in Belgium, Finland, France, Germany, UK and US and a limited budget. Estonia does not have an actively functioning cultural institute. Developing relationships and partnerships in the music sector beyond Europe is challenging and will require European cooperation for sufficient scale.</p>  |
| <p><b>MEASURE</b></p> <p>Well-organised data collection, analysis and research</p>     | <p><b>Music Estonia's</b> activities related to MEASURE are currently limited to producing a music market report for Estonia and contributing expertise to data collection initiatives. ME is also working to relaunch Estonian music charts. Specifically music export statistics are not compiled.</p> <p><b>In general</b>, a comprehensive system for music sector data collection and analysis is still lacking. However, there have been regular creative industries mappings every four years with the latest carried out in 2025. These mappings face the typical methodological challenges and data quality issues from the inadequacy of the national and European statistical categories (NACE), but still provide a broad overview. In 2024, a pilot project was launched by the Estonian Ministry of Culture to create a music data dashboard, linking all publicly available relevant data sources as well onto a single overview. The project is ongoing.</p>   |

## 1.3. Overview of the main gaps

There are structural and conditional challenges: the small size of the market and population as well as the geographically somewhat distant position from European markets cannot be helped, but many other conditions can be mitigated or improved upon by policies, support services, and developing an overall better enabling ecosystem. While much is being done with good results, there are gaps in the current arrangement of music export development.

- **Data & Information:** A lack of comprehensive data collection and analysis hinders evaluating development and informed decision-making. This includes developing a robust system for tracking music industry activity, export revenue, and establishing music charts. Additionally, readily available information in English about the Estonian music sector beyond classical and contemporary music scenes is still lacking.
- **Funding:** Securing sustainable and flexible funding for both artists and companies as well as support structures such as Music Estonia is still a challenge. Artists and companies struggle to access sufficient funding for export activities, particularly for follow-up and market development after initial networking. Furthermore, export grants for creative industries often have thresholds too high for music companies to be eligible. Music Estonia itself relies heavily on project-based funding, which hinders strategic planning and responsiveness to sector needs.
- **Nordic-Baltic regional collaboration:** In spite of recurring initiatives to improve the touring circuits and other collaboration in the Baltic music sectors and more broadly in the Baltic-Nordic region, progress is slow and limited. It is still very difficult for most Estonian artists to organise a tour spanning from Lithuania to Finland, Sweden or beyond.
- **Reaching Beyond Europe:** While networks within Europe are growing stronger, reaching farther markets presents challenges. Limited funding on the one hand and few artists and companies with established traction in more distant markets on the other make it difficult to provide flexible and needs-based support and services.
- **International Collaboration:** While participation in European cooperation projects has increased and, for example, makes up for an important share of Music Estonia's budget and activities, the limited structural capacity to develop and participate in such projects, alongside co-financing challenges, limits access to valuable resources and networks.

# 2. Music Export Development in Estonia in detail

## 2.1. Introduction to Estonia

Estonia, located in North-Eastern Europe, has a population of 1,37 million and shares borders with Latvia to the south and Russia to the east. Finland lies 80 km across the bay.

Estonia has always had a vibrant music culture, especially the long tradition of choir singing which played an important role in the independence movement in the late 1980s and early 1990s. Since regaining its independence in 1991, the music sector has gradually developed and professionalised. While there always were some artists finding their way across the border, the starting point of a more systematic capacity development towards the music sector, including a focus on music export, can be placed in 2008-2009. In 2008, the first creative industries development programmes were launched<sup>5</sup> providing funding for sector-specific development centres and activities. In 2009, the Estonian Music Development Centre (EMDC) was formed and Tallinn Music Week, by now one of the largest showcase festivals and conferences in the Nordic-Baltic region, was launched. In its early years TMW organised many activities besides the main event that would usually be done by an export organisation. EMDC also organised various internationalisation events and training. In 2014, Music Estonia was launched and many music export development activities were consolidated under this initiative. Other organisations and events had and still are engaged in activities with international dimensions. For example, Jazz Estonia (the international brand name for the Estonian Jazz Union set up in 2005) curated an Estonian presence at Jazzahead! before Music Estonia taking over the lead. The Viljandi Traditional Music Centre used to curate Estonian presence at WOMEX. Festivals such as Jazzkaar, Estonian Music Days, Viljandi Traditional Music Festival and others have regularly invited international guests, often journalists, but sometimes other professionals to attend their events to discover Estonian music talent. By 2025, the impact of more than 15 years of efforts can be seen in a new generation of artists, professionals and music entrepreneurs for whom crossing borders is a real, if always challenging, outlook.

## 2.2. Estonian music export ecosystem

As many other Eastern European countries, the music industries and markets in Estonia have now had more than thirty years to shift and adapt to a more open market model. While in some music scenes,

---

<sup>5</sup> These were and still are funded from the European Regional Development Fund. See more information (in Estonian): <https://www.kul.ee/kunstid-ja-loomemajandus/loomemajandus/loomemajanduse-arendamine>.

i.e. classical music, there is a strong institutional legacy, others have had to organise and innovate only in the recent years.

### **2.2.1. Institutional and organisational landscape**

Similar to many other countries with a similar past, in Estonia the institutional aspect of the music ecosystem is most developed in the classical and contemporary music scenes as many organisations have their roots in the Soviet times or even in the first republic. The jazz and traditional music scenes have gradually developed strong organisations since the beginning of the 21st century, while most other music scenes have started to organise only in the past decade if at all.

The organisation most systematically engaged with music export development in Estonia is [Music Estonia](#), a non-profit and partly publicly funded organisation (see 1.3), cooperating closely with [Tallinn Music Week](#), the biggest Nordic-Baltic music conference and showcase festival. Estonia has had a cultural institute, the [Estonian Institute](#), but the organisation seems to have ceased active operations in 2022.

Other consistently active organisations with regards to international cooperation and networks include [Jazz Estonia](#), conducting regular international artist exchange; [Estonian Composers Union](#), organising joint projects with partners in the Baltic, the UK and elsewhere; [Estonian Centre of Contemporary Music](#), [Estonian Choral Association](#), the [Traditional Music Centre](#). Major festivals such as [Jazzkaar](#), [Estonian Music Days](#) and [Viljandi Folk Music Festival](#), are also important actors regularly inviting international guests to discover Estonia and Estonian talent.

Naturally, there are publicly structurally funded organisations active internationally, such as the [Estonian Philharmonic Chamber Choir](#), [Estonian Festival Orchestra](#), [Vox Clamantis](#) or the city funded [Tallinn Chamber Orchestra](#), who have carried Estonian music and performers across the world. In addition, the [Estonian Music Information Centre](#) publishes, rents and sells scores by Estonian composers and makes available information about the classical and contemporary music scene in Estonia. [Arvo Pärt Centre](#) combines the composer's archive with opportunities for international residencies. Since 2021, Tallinn has been the [UNESCO City of Music](#) and this has also brought an important international dimension.

In general, the capacity of Estonian music sector organisations to engage in international cooperation is relatively modest. National structural funding to the non-governmental music organisations is limited, restricting their co-financing capacity for international projects. Adding the general lack of staff and the high risk of not landing a project grant after a costly development and application process has been a structural obstacle. Still, over the past decade, there has been an increase in cross-border cooperation. Music organisations are professionalising, developing robust European networks and the Ministry of Culture has, amid general cuts in 2025 and beyond, increased the size of the fund supporting participation in European cooperation projects. These projects are a specific instrument and cannot be a substitute for providing the structural development and support services needed for the Estonian music sector broadly, but they can serve as a platform for knowledge exchange, networking and collaboration opportunities for Estonian music organisations, and through them for artists and professionals.

## 2.2.2. Music market and industry

According to the Estonian music market report,<sup>6</sup> the total expenditure<sup>7</sup> of the Estonian society<sup>8</sup> on music in 2023 was approximately €86,26 mln, of which *ca* €24 mln (*ca* 28%) is public support. The main source of steady growth seems to be increased private expenditure on recorded music, especially digital services, but also a strong recovery of the live music sector after the COVID crisis. However, it must be noted that these are aggregated and approximate estimates and it's not clear how these market earnings are distributed, including between the local sector and imports.

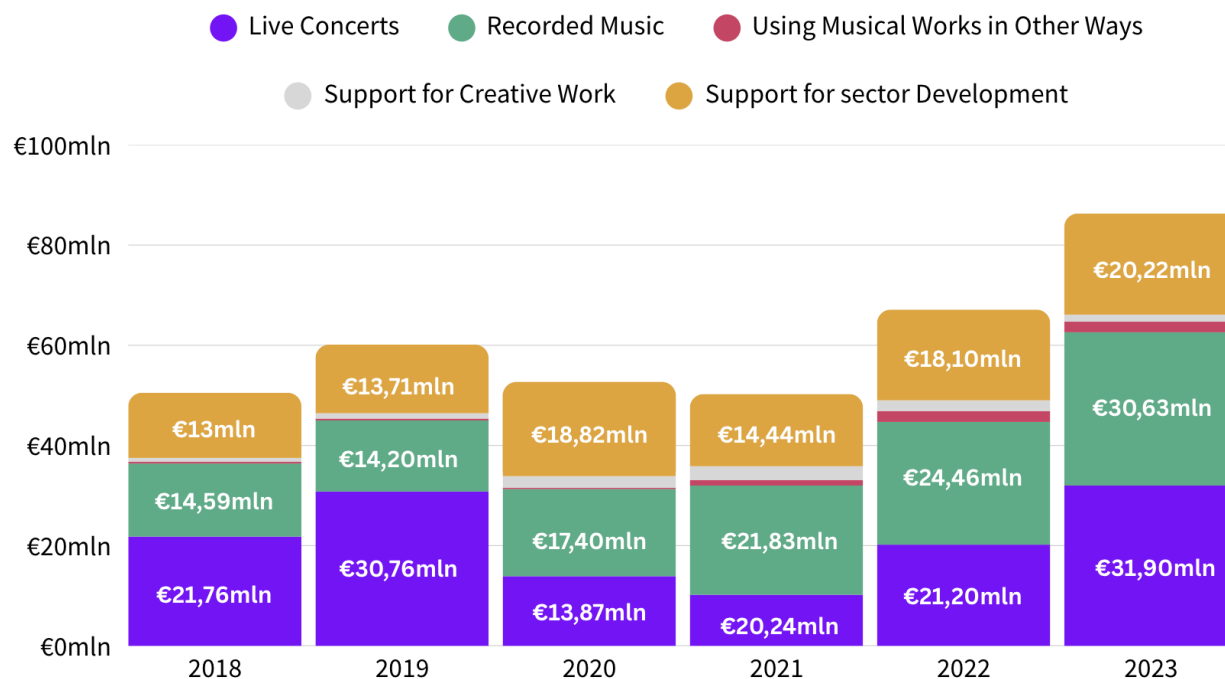


Figure 2. The total expenditure of the Estonian society on music in € mln, 2018-2023. Source: Music Estonia.

<sup>6</sup> The report is commissioned by and available at the Music Estonia website:

<https://www.musicestonia.eu/andmed> (in Estonian).

<sup>7</sup> It's important to emphasise that, in addition to public support ("expenditure" by the state), expenditure refers to what consumers and businesses pay for tickets, services, licenses, etc., including all the added services fees, taxes, etc. that make up the final market prices. This shouldn't be equated with what the sector actors receive as revenue.

<sup>8</sup> The methodology is based on adding up the private expenditure as well as public support as both constitute income in the budgets of the sector organisations. This can be seen as the total "societal" expenditure.

| Expenditure (in € mln) on...      | 2018          | 2019          | 2020          | 2021          | 2022          | 2023          |
|-----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Live concerts                     | €21,76        | €30,76        | €13,87        | €10,24        | €21,20        | €31,90        |
| Recorded music                    | €14,59        | €14,20        | €17,40        | €21,83        | €24,46        | €30,63        |
| Using musical works in other ways | €0,33         | €0,38         | €0,24         | €1,09         | €2,17         | €2,11         |
| Support for creative work         | €0,80         | €1,07         | €2,34         | €2,77         | €2,15         | €1,40         |
| Support for sector development    | €13,00        | €13,71        | €18,82        | €14,44        | €18,10        | €20,22        |
| <b>TOTAL</b>                      | <b>€50,48</b> | <b>€60,13</b> | <b>€52,68</b> | <b>€50,37</b> | <b>€68,08</b> | <b>€86,26</b> |

Table 1. The total expenditure of the Estonian society on music in € mln, 2018-2023. Source: Music Estonia.

There is no comprehensive data on the value of music export. The latest creative industry mapping provides an estimation of total music export revenues in 2023 at €21,8 mln, up from €16,1 mln in 2019. Of that, €4,1 mln comes for so-called core<sup>9</sup> and €17,7 mln from ancillary music sectors, but it must be kept in mind that many music companies do not differentiate between export and local revenues in their financial reports, therefore, the real figure might be somewhat larger.<sup>10</sup>

The Estonian music market is small and only the most popular artists are able to earn revenues that could, if needed, serve as investment for export development. However, many locally popular artists, with some remarkable exceptions, i.e. Tommy Cash or NOËP, are singing or rapping in Estonian and don't focus on international markets. It's mostly the artists working in niche scenes that are seeking to expand their careers across borders from an early phase. This is as much by necessity of the limited domestic market as the sometimes more global nature of the scenes. Given the limited audiences and places to perform for such niches in Estonia, internationalisation is essential, not just optional for many artists and music companies working with them. This is a double-hurdle: not only is there less investment that can be earned, there are less opportunities to gain experience in front of audiences to achieve artistic maturity as performers and build a robust local fan base that could serve as a foundation for a step to foreign markets.

While there have been privately operating music entrepreneurs since Estonia regained independence in 1991, they have mostly been focused on the domestic market or promoting international artists in Estonia. The local knowledge, capacity and networks to be able to consistently take Estonian artists and creators to international markets has been very limited. With a small market, managers, labels and other service providers are few and therefore most Estonian artists are self-managed, -produced, -released and -published. Over the past 15 years, however, a new generation of music professionals, entrepreneurs and companies have grown, many of whom also focus on the international dimension.

There are three collecting management organisations in Estonia: Estonian Authors' Society (EAÜ), Estonian Association of the Phonogram Producers (EFÜ), and the Estonian Performers Association

<sup>9</sup> The "core" and "ancillary" categories rely on the national statistics. The "core" categories include the revenues of authors, performers, record producers, studios, publishers as well as concert and festival organisers.

<sup>10</sup> The reports (in Estonian with English summaries available for some) can be found on the Ministry of Culture's website: <https://www.kul.ee/uuringud#loomemajandus>.

(EEL). All collect and distribute royalties also from abroad and while these make up only a small part of the collection, the international revenue for EAÜ has grown over the years (€347 225 in 2023<sup>11</sup>).

## 2.3. Music policy in Estonia

The legal basis for cultural policy in Estonia can be found already in the preamble of the Constitution of the Republic of Estonia, which states that the Estonian State “must guarantee the preservation of the Estonian people, the Estonian language and the Estonian culture through the ages, ...”.<sup>12</sup>

The most important legislative acts are:

- [Copyright Act](#)
- [Creative Persons and Artistic Associations Act](#)
- [Performing Arts Institutions Act](#)

### 2.3.1. Cultural policy and internationalisation

Internationalisation, and more specifically export development, are fairly salient topics in the Estonian cultural policy. While the ambitiously and broadly articulated policy goals are backed up by a limited set of instruments with modest funding, these have been put to good use in the music sector. The broader notion of internationalisation, with its links to cultural diplomacy and international cultural relations themes, has been supplemented with the more recent creative industries policy focus on export development. Creative industries as a policy concept was taken up in Estonia actively from 2008 onwards.<sup>13</sup>

The main cultural policy agenda is the “Culture development plan 2021-2030”, or “Culture 2030” for short.<sup>14</sup> It sets the transversal strategic goals and also includes sectoral objectives. Internationalisation is linked to several key themes. It's seen as crucial for developing a vibrant and globally connected cultural scene, enabling Estonian artists to thrive internationally while also enriching the domestic cultural landscape with a diverse cultural offer. Internationalisation is also tied to cultural diplomacy, enhancing Estonia's image abroad and fostering international cooperation. Furthermore, it's connected to the competitiveness of the creative industries and attracting cultural tourism. Finally, participation in international organisations and EU programs is viewed as essential for promoting Estonian culture on a global scale. The Ministry of Culture assumes responsibility for promoting the

---

<sup>11</sup> Source: EAÜ transparency report 2023 (in Estonian), <https://eau.org/wp-content/uploads/EAU-labipaistvusaruanne-2023-3.pdf>.

<sup>12</sup> The Constitution of the Republic of Estonia, available here: <https://www.riigiteataja.ee/en/eli/521052015001/consolide>.

<sup>13</sup> More information on the creative industry policy can be found at the Ministry of Culture website (in Estonian): <https://kul.ee/kunstid-ja-loomemajandus/loomemajandus>.

<sup>14</sup> The full version with all documents in Estonian is available at: <https://kul.ee/kultuur2030>. An executive summary in English is available at: <https://kul.ee/sites/default/files/documents/2023-06/Culture%202030%20executive%20summary.pdf>.



internationalisation of Estonian culture, developing cultural relations with and diplomacy towards other countries.<sup>15</sup>

These wide-ranging and ambitious goals have limited instruments to achieve them. As of 2025, Estonia has six cultural representatives – in Belgium, Finland, France, Germany, the US and the UK.<sup>16</sup> There is no publicly available cultural diplomacy strategy. The main programme for independent artists, collectives, professionals and organisations for international activities is “[Estonian Culture Abroad](#)”, managed directly by the Ministry of Culture. It’s open to all fields of culture, but has a limited budget, recently increased to €700 000 per year, but in the recent cuts to all public spending, again downsized to €545 700 for 2024 and beyond.

Other funding sources include [Cultural Endowment of Estonia](#), an arm’s length foundation funded by the gambling, alcohol and tobacco taxes and distributing funds to all main cultural sectors. The foundation is set to distribute close to €50 mln in 2025.<sup>17</sup> In 2023, €3 mln was distributed to music projects, of which an unverified but in general small part also includes international activities.

In 2018 the [Baltic Culture Fund](#) was created to “promote cultural cooperation between Baltic States, in order to strengthen the internationalisation of Estonian, Latvian and Lithuanian culture through joint cultural events”. Since 2019, the fund has supported several cooperation projects between Estonian, Latvian and Lithuanian music organisations for joint delegations to music fairs such as WOMEX, Jazzahead!, etc.

### 2.3.2. Music policy

The “Culture 2030” strategic plan also includes sectoral sections, including 14 goals for music. These address internationalisation in several ways:<sup>18</sup>

- **Promoting Estonian music internationally** by supporting efforts to showcase Estonian musicians, composers, and musical works on the international stage. This includes facilitating cross-border collaboration and supporting their participation in international events and networks.
- **Hosting international music events**, including organising high-level international music competitions and providing opportunities for Estonians to experience the best of world music culture within their own country.
- **Fostering international exchange and collaboration**, such as active engagement of Estonian music professionals in international dialogue, cooperation networks, and organisations.
- **Supporting music export and business development**, aiming to develop a competitive and diverse music industry that can successfully operate internationally. This includes supporting organisations, festivals, venues, and music businesses in their internationalisation efforts.

---

<sup>15</sup> See more about international cooperation at the Ministry of Culture website (in English):

<https://www.kul.ee/en/ministry-news-and-contact/international-cooperation-and-european-union/international-cooperation>.

<sup>16</sup> More information in Estonian is available here: <https://www.kul.ee/eesti-kultuuriesindajad>.

<sup>17</sup> The budget for 2025 is €48,3 mln, a 2,5% increase from the previous year. Annual budgets and activity reports are available in Estonian: <https://www.kulka.ee/meist/kultuurkapitalist>.

<sup>18</sup> “Culture 2030” annex 5: sectoral sections, available (in Estonian): <https://kul.ee/sites/default/files/documents/2022-03/Lisa%205.pdf>.

The theme of export development is also echoed in the separate section of non-sector-specific creative industries goals, highlighting the need to grow the export capacity of the cultural and creative sectors through targeted measures that take into account the specific characteristics of the sector. This can be achieved by, among other things, facilitating networking and participation in international fairs and showcases, and developing the capacity necessary for international activities.<sup>19</sup>

In terms of implementation, there have been four music specific funding programmes<sup>20</sup> at the Ministry of Culture, but these are not focused on international activities *per se*.

In 2025, the coalition agreement for the current government included developing a “cultural export strategy” with further developments hoped in 2026.

### 2.3.3. Culture and music budgets

Due to the sluggish economic growth over the past years, the current government has set to cut expenditure across all areas. The Ministry of Culture has had to cut on average 10% from the culture budget for the years 2025-2027.<sup>21</sup> The culture budget for 2025 is €334 mln, less than 2024 (€359 mln) and 2023 (€362 mln). The annual music budget of the Ministry of Culture is roughly €18 mln, including the tax transfers to the Cultural Endowment of Estonia (table 1). This does not include all music related public expenditure. First, the creative industries programme with a budget of €2,7 mln in 2025 (compared to €1,8 mln in 2024 and less before), implemented by Enterprise Estonia, the Estonian business and innovation agency, through various cross-sectoral calls, does include some project grants to music companies and organisations (most importantly Music Estonia). Second, this budget does not include grants to music projects from “Estonian Culture Abroad”, the main cross-sectoral internationalisation programme (€545 700 in total in 2025). Third, local governments also spend on culture, but there is not sufficient data to break down these sums by sector.<sup>22</sup> The bigger cities naturally spend more on culture, including music. For example, Tallinn spent €4,8 mln on music related organisations and support in 2023.<sup>23</sup> Finally, the National Opera “Estonia” with a budget of ca €10 mln annually is categorised under performing arts and not music.

---

<sup>19</sup> *Ibid.*

<sup>20</sup> These were focused on music festivals, collectives and concert organisers, commissioning new works, and music competitions. However, in 2026 the two programmes for large festivals and music competitions will not be opened. More information at the Ministry of Culture website (in Estonian): <https://www.kul.ee/muusika-valdkonna-rahastamine>.

<sup>21</sup> Ministry of Culture (25.09.2024). “2025. aasta kultuurielarve aitab hoida valdkonna põhiülesannete täitmist keerulises kokkuhoiulukorras”. Available online: <https://www.kul.ee/uudised/2025-aasta-kultuurielarve-aitab-hoida-valdkonna-pohiulesannete-taitmist-keerulises>.

<sup>22</sup> The local governments spent roughly €291 mln on culture, leisure time and religion in 2023. There is a separate line for music organisations (€4,7 mln), but this is accounting for only a few municipal organisations, not project support, etc. Source: Ministry of Finance, <https://www.fin.ee/finantskorraldus#eelarved-ja-eelarves>.

<sup>23</sup> More information in the Tallinn Music Policy Analysis (currently only available in Estonian): <https://muusikalinntallinn.ee/muusikapoliitika-analuus/>.

|                                     | 2020               | 2021               | 2022               | 2023               | 2024               | 2025               |
|-------------------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Music programmes (MoC)              | €1,119,000         | €1,199,800         | €1,119,000         | €1,285,000         | €1,285,000         | €1,150,450         |
| Cultural Endowment (music)          | €2,783,600         | €2,949,545         | €3,125,181         | €3,699,889         | €3,887,000         | €4,040,900         |
| Structural support to organisations | €12,196,064        | €10,976,891        | €11,687,815        | €13,258,174        | €13,298,795        | €12,788,756        |
| COVID crisis support                | €3,649,560         |                    | €624,501           |                    |                    |                    |
| Other support                       | €0                 | €191,300           | €36,000            | €98,000            | €1,000             | €1,000             |
| <b>Total MoC music budget</b>       | <b>€19,748,224</b> | <b>€15,317,536</b> | <b>€16,592,497</b> | <b>€18,341,063</b> | <b>€18,471,795</b> | <b>€17,981,106</b> |

Table 2. Ministry of Culture music budget, 2020-2025. Source: MoC budgets, <https://kul.ee/asutus-uudised-ja-rahastamine/kultuuriministeerium/majandusteave-ja-varahaldus>.

As is common in Europe, the public music budget is largely made up of structural support to various organisations. €12,8 mln (71%) of the MoC budget are such operational grants and €10,5 mln out of that (82% of the total structural grants) is granted to the state founded, though privately operated, foundations “Eesti Kontsert”, the national concert agency, Estonian National Symphony Orchestra, and Estonian Philharmonic Chamber Choir.<sup>24</sup>

#### 2.3.4. Private funding for music

Estonia does not have any tax exemptions nor other regulative incentives for private supporters of culture. While Estonia lacks major private foundations and a strong tradition of philanthropy, individual and organizational support for culture exists. A 2024 Ernst & Young study<sup>25</sup> reveals that Estonian companies do provide financial support to the cultural and sports sectors, though the amounts are small and the number of participating companies is limited. Fewer than 10% of companies declare financial support, despite a growing trend in declared amounts. The sports sector receives significantly more support than the cultural sector, particularly from larger companies. Support typically takes the form of monetary donations and sponsorships, although in-kind contributions (products and services) were also observed. While companies also cite a sense of mission and the importance of transparency as contributing factors, the primary motivators are still marketing objectives. An important, though limited source of private funding are the Collective Management Organisations (CMOs).

#### 2.3.5. Funding for music export development

Specifying how much public or private support is allocated to **music export development** is difficult, but these are the main elements:

<sup>24</sup> Adding to it other orchestras, collectives and organisations broadly connected to the classical / contemporary music scene, it amounts to ca 94% of structural funding. This is broadly in line with other countries and major cities in Europe. Source: Ministry of Culture budgets, own calculations.

<sup>25</sup> The EY (2024) study “Eraraha kaasamine kultuuri ja spordi valdkondades” is only available in Estonian: <https://kul.ee/sites/default/files/documents/2024-03/Eraraha%20kaasamine%20kultuuri%20ja%20spordi%20valdkondades.pdf>.

- Music Estonia has been structurally supported by the from Ministry of Culture (€99 750 in 2025, after cuts from €105 000 since 2019). ME has since 2015 also made use of Enterprise Estonia's grant to developing support structures for creative industries. These multi-year projects vary in size, but can be averaged to roughly €100 000 per year over the past 10 years, though there have been gap years.
- Structural support to Tallinn Music Week (€142 500 in 2025, after cuts from €150 000 since 2023).
- "Estonian Culture Abroad" programme also funds a limited number of music projects (*ca* €200 000 in 2024).
- The Music Committee of the National Cultural Endowment funds projects with international dimension, such as touring or concerts abroad (roughly €30 000-€40 000 annually).
- Enterprise Estonia provides export development grants for creative industries, however, music companies rarely apply and even less often receive that support.

Therefore, a very rough estimation is that public funding for developing music export in Estonia amounts to €250 000 structural and €240 000 project grant funding annually.

## 2.4. Music Estonia – organisational profile

Music Estonia (ME) is a music sector development organisation and export office in Estonia. It is membership based with currently 106 members, though most of its activities are open to all, even if some with limited space have a competitive application process. ME also has two branches, Music Estonia Live and Music Estonia Managers, and is a member of four international networks: EME, Live DMA, and EMMA.

### 2.4.1. A brief history

Music Estonia was founded in 2014 by 23 Estonian music companies, but it was preceded by two attempts at building a music export office: the Estonian Music Export Association (EME), founded by the Estonian Authors' Society (EAÜ) and the Estonian Music Development Center (EMDC), both now closed. The roots are in the broader wave of the creative industries policy that was introduced to Estonia in 2008. This included the first funding programmes aimed at developing awareness, capacity and boost export activities in all "creative" sectors. In 2009, Tallinn Music Week was launched and the Estonian Music Development Center (EMDC) was founded, which brought together very different partners in the music sector with a goal to, among other things, "create an Estonian music export structure". EMAK successfully secured funding from the first rounds of the creative industries support programme and in 2014 was on the verge of expanding when an abrupt change in the management of the association led to a new direction, effectively excluding members from "non-academic" music fields. This resulted in a paradoxical situation where privately operating music industry actors were not involved in developing music entrepreneurship and export as part of the public creative industries policy. Music Estonia was founded specifically as a membership organisation for music companies in

the broadest sense to remedy that situation.<sup>26</sup> From 2015 onwards Music Estonia has successfully competed for the creative industries grants as well as received structural support from the Ministry of Culture.

## 2.4.2. Strategy

Music Estonia's mission, vision and strategic goals are clearly articulated in the organisation's strategy and available also publicly on their website. Both the mission and vision are focused on music entrepreneurship. This reflects the origins of the organisation within the context of the creative industries policy which in Estonia was narrowly targeting economic results while focused on export development.

*The **mission** of Music Estonia is to support the professional development of the competitive music industry. In order to carry out its mission, Music Estonia acts as a central representative and development organisation in the field of music, effectively standing for the interests of music entrepreneurs and amplifying their activities both locally and internationally.*

*The **vision** is: Estonia has a viable music industry and music entrepreneurship is valued in society as a value-added and internationally competitive business sector. In order to carry out its vision, Music Estonia is shaping a comprehensive and coordinated ecosystem in the field of music, with an aim of creating excellent conditions for Estonian music companies to develop their creative and market potential.<sup>27</sup>*

### **Strategic goals**

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

The current strategy for 2024-2027<sup>28</sup> provides indicators of success for each objective. These include the numbers of events, services provided, participants as well as their satisfaction. Also growth in export revenues of Estonian music companies (based on Music Estonia's members) is an indicator.

The strategy also outlines main lines of activity for each objective. A more detailed **annual action plan** is then created internally. The action plan for 2025 consists of 61 activities organised into 16 sub-categories each connected to one of the strategic goals. Naturally, some activities can be connected with several goals.

---

<sup>26</sup> Today, the membership also includes, for example, the state founded and funded, though privately operating, foundations "Eesti Kontsert" and Estonian Philharmonic Chamber Choir.

<sup>27</sup> See the ME website for more information: <https://www.musicestonia.eu/en/strategy>.

<sup>28</sup> An English version is also available:

<https://admin.musicestonia.eu/wp-content/uploads/2024/03/Music-Estonia-strategy-2024-2027.docx-1.pdf>.

Strategic planning is an essential part of any organisation, but for ME it's also an important component of the relationship with the Ministry of Culture who has articulated the **funder's expectations**. These are broadly in line with ME's own strategic objectives, specifying the overall goals, activities and indicators. The document also outlines how the results will be monitored and reported, including self-evaluations. In addition to principles of cost efficiency in financial management, the document asserts as a quality management principle that ME must "operate openly across the entire music ecosystem, without setting genre or stylistic boundaries".

In addition to reporting to various funders, ME needs to remain informed about the **perceived needs among the music sector**. This is done in various ways. First, ME collects feedback from participants in delegations, programmes, events, etc. Second, ongoing informal conversations with the sector actors. Finally, ME has collected fairly detailed annual feedback from its members since 2022. The latest report<sup>29</sup> reflects a plethora of themes, concerns and suggestions, as is to be expected from the highly diverse membership. The most important roles of ME, as seen by the members, are first and foremost representing the music sector on a cultural policy making level, developing strategic networks internationally, collecting and sharing knowledge and information with the sector, and bringing the various sector actors together for discussions, learning and networking.

In sum, ME has developed a fairly comprehensive approach to strategic planning that is receptive to both the needs and expectations of the music sector as well as the various funders. What is still lacking is a fuller statistical overview of the whole music sector, its local and export revenues.

### 2.4.3. Institutional profile

Over the past decade Music Estonia has grown a **staff** of 8 people, some part time, adding up to 5,2 FTE. In 2025, the team is structured as follows:

- Director, full time – Ave Sophia Demelemester (since 2020)
- Project managers, three full time – Marii Reimann, Marili Randla and Greete Paršin
- Communication manager, part-time (50%) – Britt Randma
- Music Estonia Live branch manager, part-time (50%) – Silvia Käsk
- Music Estonia Managers branch manager, part-time (10%) – Thea Zaitsev
- Assistant, part-time (10%) – Hanna-Liina Einard
- Project Manager of Estonian Music Industry Awards EMEA, part-time for 6 months a year – Taavi Esperk. Also a coordinator similarly for 6 months – Deelia Kurg
- An accountant, service agreement – Reidi Strandberg

With the exception of the Director who also has management experience from other cultural fields, the team has a working background in the music industry.

As a membership organisation, ME's highest decision making body is the **General Assembly** who elects a new representative board every two years. Referred to as **Council**, it has five members and serves a dual role. First, as the legal representative of the membership with a mandate to review and approve the budget and financial reports as well as activity plans and reports. Second, the Council

---

<sup>29</sup> The latest report was published in February 2025 and reflects feedback collected in 2024 about 2023. The report (in Estonian) is available:

[https://admin.musicestonia.eu/wp-content/uploads/2025/02/Summary\\_2024\\_A4\\_250212-Final.pdf](https://admin.musicestonia.eu/wp-content/uploads/2025/02/Summary_2024_A4_250212-Final.pdf).

also serves as an Advisory Board with the members actively involved and lending their competence where needed. The day to day management, including the legal rights to represent the organisation in all other affairs, is delegated to the Director.

Most of the **activity lines** will be described more thoroughly in chapter 3, but in addition to programmes and services relevant to music export development, Music Estonia has a portfolio of locally oriented activities, such as organising the Estonian Music Industry Awards; developing Estonian music charts; contributing to music and cultural policy making; conducting various kinds of research projects, from Estonian music market analysis, mapping of venues, music listening habits, etc.; and organising meetups with the sector and consultations with various sector stakeholder groups.

#### 2.4.4. Target groups

As referred to above, Music Estonia has first and foremost been focused on music companies (legal entities) as its main **target group**. This has to be understood in the particular Estonian context. First, such focus was a requirement from the Estonian Business and Innovation Agency (EIS) who is implementing the government's creative industries policies and manages the various grant programmes. The eligibility criteria for beneficiaries of services and activities that Music Estonia provides with funding from EIS requires all to be registered legal entities, now limited liability companies.<sup>30</sup>

Second, while there is a self-employed legal status (FIE), it's not widely preferred among freelancers. Setting up a limited liability company in Estonia is very easy and therefore many freelancers, including artists and professionals in the music sector, operate through an LLC (OÜ in Estonia). Therefore, the funder's strict requirement actually didn't exclude that many from the target audience. Since then, ME's funding has diversified and there are also activities not funded by EIS, but, for example, by European cooperation projects that don't have such participation restrictions. Naturally, ME organises many open events, such as seminars, workshops, meetups, etc. where there might be no limitations for participation other than competitive registration for limited slots. All in all, the focus on music companies and music industry might strike as narrow for those coming from a different discourse where the differentiation between artists and the industry is much starker, even oppositional. In Estonia, a focus on the music industry does not communicate the exclusion of artists and creators as the latter operate mostly as entrepreneurs when it comes to administering their affairs and as such are part of the industry.

Almost all ME's services and programmes are open to all for participation or at least application, in case it's a competitive process for limited space. This is captured in the ME's mission and vision which are addressing ambitiously the whole sector. It has also been a requirement of both EIS and the Ministry of Culture. All the while, ME has been looking for a model where ME's membership would also be valuable. This would be good for a better connection with the sector and their needs, but also for legitimacy as a representative body.

Music Estonia has since its beginning taken a neutral stance towards different music scenes and genres and committed, in principle and as much as possible in practice, to being open and receptive to everyone who is looking to develop their professional capacity and export potential. Naturally, there

---

<sup>30</sup> Initially, non-profit organisations were also allowed. The self-employed status (FIE) was never eligible.



are music scenes that are more or less actively engaged, but over the decade of providing various services and programmes, there has been something for most music scenes. The main constraint to developing specific programmes for all music scenes where at least some are internationally oriented is the lack of sufficient funding.

## 2.4.5. Funding

Music Estonia's funding is diverse, drawing from various public and private sources as well as having limited own revenue. As mentioned, EIS' creative industries development programmes have been a crucial element as well as the structural support from the Ministry of Culture, both available since 2015. To create further opportunities and supplement the budget, ME has always been actively involved in various European projects, both as a partner as well as a leader.

| INCOME GROUP                                    | SUM             | SHARE |
|---|-----------------|-------|
| Public funding                                  | €281 819        | 54%   |
| European funds (projects, other)                | €123 597        | 24%   |
| Collecting societies (projects)                 | €17 400         | 3%    |
| Own revenue (various)                           | €108 528        | 15%   |
| Other private funds                             | €21 152         | 4%    |
| <b>TOTAL</b>                                    | <b>€522 506</b> |       |
| <b>COST GROUP</b>                               |                 |       |
| General costs (staff, overhead, etc.)           | €298 543        | 58%   |
| Grant programmes (funds directly redistributed) | *               |       |
| Project activities                              | €216 841        | 42%   |
| <b>TOTAL</b>                                    | <b>€515 384</b> |       |

Table 3. Music Estonia 2024 budget (real costs and incomes). Source: Music Estonia.

\* Since 2022, Music Estonia has operated a small export fund in cooperation with EAÜ, the Estonian Author's Society. EAÜ provides the funding and ME is administering the programme. The fund is constantly open and operates on a rolling basis (until the funds last). The budget in 2023 and 2024 was €45 000 and €50 000 for 2025. The fund is aimed at professionals and artists participating at music conferences and showcase festivals. The funding is paid out directly by EAÜ to beneficiaries so it never passes through EMEE's balance sheet.

The public funding consists of the structural grant from the Ministry of Culture, €105 000 in the previous years, but cut to €99 750 for 2025; and project grants, such as from the "Estonian Culture Abroad" (ca €100 000 in 2024 for various trade fair and conference delegations), Tallinn UNESCO City of Music, National Culture Endowment, and Ministry of Culture's co-financing support for European projects. The European projects include several Creative Europe and an Interreg projects, but also the

EIS funding which is drawn from the EU structural funds to Estonia. The CMO funding is from various small scale projects. Of the own revenue, €23 000 is from membership fees and the rest from various services (seminars, etc.) and ticket revenue from the Estonian Music Industry Awards event. Other private funds are essentially various project based sponsorships.

The main characteristic of Music Estonia's financial management is that about 80% of its funding is project-based, with half being short-term (secured for a year or less) and the other half coming from European projects (lasting 2 to 4 years). Participation in various cooperation projects always have co-financing requirements which is a challenge as earning own revenue from these projects is not allowed or otherwise not possible in practice, and there is mostly no surplus revenue from other projects that could be allocated to this. The co-financing fund at the Ministry of Culture is a much-needed instrument, but even after increasing its volume is not enough to cover the real needs in the sector. Running many adjacent projects with strictly regulated public funding involved creates a highly compartmentalised budget structure that lacks the needed resilience and flexibility to deal with uncertainties. Ideally, the share of a more stable, longer-term and more flexibly usable structural funding should be larger to provide the organisation the basis to secure more project funding.

# 3. Activities for Developing Music Export Capacity in Estonia

In these sections, music export development activities, resources and conditions in Estonia are organised around the six strategic objectives of the European Music Export Strategy. After a few general remarks about broader context, the sections focus on describing Music Estonia's activities.

## 3.1. LEARN



### 1. LEARN

#### Strategic objective

Relevant and up-to-date information and knowledge on music markets and industry trends is available for all European music professionals to LEARN and make active use of it.

#### 3.1.1. Current state and challenges in achieving the goal

##### Learning materials

The Estonian music industry is small. The number of actively professionally and productively engaged employees, freelancers and entrepreneurs in the core areas of the music industry is very likely in the hundreds at any given time.<sup>31</sup> This does not warrant investment into ambitious and thoroughly composed passive or interactive learning materials in Estonian about the current state of the music industry or more specifically export development. Especially, as the content is aging fast. The only recent MOOC (massive open online course) created in Estonian focuses on Copyright and related rights

---

<sup>31</sup> The most recent creative industries mapping reflecting 2025 data suggests that there are 1876 legal entities and 2331 employees or otherwise engaged persons in the music sector. However, this includes many entities that are not that active. The data is from KantarEmor (2025) and available at the MoC website: <https://kul.ee/uuringud#loomemajandus>.

for creative professionals.<sup>32</sup> The resulting course includes animated mini-lectures, interviews clips with artists and professionals and many practical examples.

### Market studies

For the same reasons of a limited target audience and lack of resources there has been no market studies about international music markets made specifically for Estonians.

### Information about the Estonian music sector

There is no single source for all kinds of information about the Estonian music sector in the broadest sense. There is only one organisation in Estonia whose main mission is to collect, organise and disseminate information about Estonian music life – Estonian Music Information Centre ([EMIC](#)) – but their focus is solely on classical and contemporary music. EMIC has been publishing a magazine “[Music in Estonia](#)” launched by the Estonian Music Council in 1997. It features articles by musicians, music scholars and other experts focused on the contemporary and classical music scene. It is published irregularly with the latest edition in 2022. EMIC also collects and provides information about classical and contemporary musical works, composers, recordings and other aspects. EMIC’s Estonian music directory contains lists of various music organisations, collectives, including a selection of companies, but with a focus on the classical and contemporary music scene. Finally, EMIC also maintains a database of manuscripts and an online music store for sheet music, recordings, books, etc. In many ways, EMIC operates as a publisher for the vast majority of Estonian composers without a publisher.

Systematic collection of information about other music scenes, as done by EMIC about classical / contemporary music, is missing as there is no organisation with the resources, competence and capacity to take it up. There has been a palpable sense of an overall decline in in-depth **music journalism**, marked among other things with one of the most prolific independent online music media platforms “Rada7” closing in 2019 after 20 years of operation.<sup>33</sup> However, the scope and variety of perspectives in writing about music has arguably improved over the past years. There are quite a few writers dedicated to covering and analysing music in several cultural publications, such as “[Sirp](#)”, “[Müürileht](#)”, “[Muusika](#)”, [ERR](#) (Estonian Public Broadcasting), and others, though the long-term sustainability of doing such work can still be seen as an issue. In sum, while there is writing about music in Estonia, it’s largely in Estonian and more synthetic overviews of various music scenes in English are rare.

In the past **research** in musicology and music sociology in Estonia has been focused on the “Western” classical and contemporary music, though there are now a few scholars producing new work on subcultures and pop culture more broadly.<sup>34</sup>

There is no **database** of Estonian artists, professionals or music companies, whether in general or those active internationally. Music Estonia’s website contains a database of their more than 100

---

<sup>32</sup> The MOOC has two slightly different versions, one for the general gymnasium/highschool programme and one for higher education students or professionals. The second version also contains an additional chapter on music. The course, in Estonian, can be accessed: <https://sisu.ut.ee/autorioigus-loovisikutele/>. The project was managed by the Tartu University Viljandi Cultural Academy and funded by EUIPO in 2021-2022.

<sup>33</sup> “Rada7” archive of writings from 1999-2019 is still maintained at <https://www.rada7.ee/>.

<sup>34</sup> For example [Brigitta Davidjants](#) (Estonian Academy of Music and Theatre); [Madis Järvekülg](#) (Tallinn University).

members, but this is not a comprehensive overview of the sector. The main ways for international professionals to learn more about emerging Estonian talent is attending festivals such as TMW or others in Estonia.

### 3.1.2. MEO profile: Music Estonia

Music Estonia has a limited selection of activities that can be associated with the LEARN objective. Out of the 61 activities planned for 2025, five can be linked with collecting, creating and disseminating information about music and the music ecosystem in Estonia, both locally and internationally. In addition, there are regular communication activities as part of the core functions of the organisation.

## 1. LEARN

### NEWS, NEWSLETTER, MAILOUTS & SOCIAL MEDIA

Music Estonia sends a regular newsletter in Estonian every other month. This contains information about ME's delegations and Estonian artists performing at showcases, seminars, programmes, events, publications, open calls from other organisations, and reminders on deadlines of relevant grant programmes in Estonia and elsewhere. In addition, there are needs-based mailouts with specific information about calls, programmes, etc. Finally, there are several social media groups focused on either ME full membership or the live and management branches.

ME is also launching a new email newsletter in English for international professionals featuring information about Estonian artists as well as other relevant activities, including Tallinn Music Week.

### ARTIST DIRECTORY & ARTIST ON TOUR INFO

There is no artist directory providing a fairly representative overview of Estonian artists, or those active internationally. Music Estonia has in the past tested such an approach on previous versions of its website, but it wasn't a viable solution. There is a form for Estonian artists to inform ME about their international activities, but this approach does not work reliably. Currently, ME has an informal and internal database with information about Estonian artists' international activities, such as performances at showcases, tours, etc. There are plans to make this information collection more robust and systematic and start to share it with international professionals.

### MUSIC BUSINESS DIRECTORY & MUSIC SECTOR OVERVIEW

Music Estonia's website provides a [searchable database](#) for ME's members. This contains entries on music companies, also artist companies, providing a brief overview and basic information. There is no comprehensive overview of the Estonian music ecosystem, outlining main companies and organisations in the different areas of the sector.

Music Estonia website also has a [searchable map](#) for live music venues and festivals in Estonia. The resource is being updated continuously.

## EDUCATIONAL RESOURCES & EXPORT MARKET PROFILES

ME does not create original educational resources, such as guides, courses, etc. However, it has built a resource collection with various external reports and sources for their members (in the future it's planned to be made publicly available). This resource collection also includes information about EMEE's small (physical) library of books about music business and research that can be borrowed.

ME has not created international market profiles, but is disseminating EMEE's profiles in the resource collection.

## PLAYLISTS

Together with Tallinn Music Week, the ME Head of Communication is putting together an export playlist featuring artists who are currently active internationally, which will be launched in 2025. Several other playlists are also being compiled for showcase festivals, e.g., for WOMEX – see [here](#).

### 3.1.3. Summary of gaps

- No regular and systematic information collection and dissemination about other music scenes than classical / contemporary (by EMIC) readily available in English.
- No business directory of music companies nor database of artists. Limited information about Estonian artists active internationally. Collection and updating of such information has practical difficulties.
- While there are very few learning materials about the music industry aimed at specifically Estonian audiences, it remains to be analysed whether it would be practical to create them due to the fast pace of sector development and the limited target group.

## 3.2. GROW



### 2. GROW

#### Strategic objective

Artists, creators and entrepreneurs find a supportive environment to GROW their knowledge, skills, experience and capacity in every European country. This is made possible as the music ecosystems in Europe are well developed, constantly improving and providing artists, creators and music companies with the needed support to realise their full international potential.

### 3.2.1. Current state and challenges in achieving the goal

#### Formal education

There is a 1-year advanced vocational programme for **Music Business** in [MUBA](#), Tallinn College of Music and Ballet. The programme has been running since 2019 and enrolls about 12-14 students every year. The curriculum provides a practical hands-on approach with many practicing music professionals and entrepreneurs as guest lectures, serving thus not only as a source for knowledge, but also for a valuable professional network.

There are three degree programmes in **Cultural Management**, a [BA programme](#) in [Viljandi Culture Academy](#) (University of Tartu), an [MA programme](#) in the [Estonian Academy of Music and Theatre](#) in cooperation with the [Estonian Business School](#), and an [MA programme](#) in [Tartu University](#). These are ranging across all cultural and creative sectors, but to some degree music specific courses or content is available.

#### Informal education

The main organiser of training, workshops and seminars, whether focused on music export development or more broadly music industry themes, is Music Estonia. In the past years, however, there have been other training events organised by music companies, such as [Tier Music](#) and [FAAR Music](#). The [Estonian Phonographic Producers' Association](#) (EFÜ) offers support for training if the target groups include producers. All three CMOs, especially the Estonian Author's Society regularly train various audiences about copyright and related rights. All in all the overview is at best limited as no organisation collects information nor keeps track of such informal education activities.

#### Programmes

In the recent years, the two leading Estonian music publishers [Tier Music](#) and [FAAR Music](#) organise a series of seminars [From Beats to Business](#) focusing on music publishing, synch and other topics.

The Estonian state concert agency "Eesti Kontsert" runs a mentoring programme "[LIFT](#)" for young classical musicians (instrumentalists and singers) aged 18-26. It offers educational and inspiring sessions with music professionals covering topics like concert planning, career strategy, media, artist branding, and self-care. The programme runs for one season and offers a scholarship of €2000 and a solo concert for each of the three participants, which will be professionally video-recorded.



## **Incubation**

There is no music industry incubator in Estonia, but the [Tallinn Creative Incubator](#) has hosted a few music companies. Music Estonia launched a programme for music tech companies “TechTrack” (see below).

## **Conferences**

[Tallinn Music Week](#) – founded in 2009, TMW is the biggest music conference and showcase festival in the Nordic-Baltic region. TMW’s conference programme has always served as a knowledge development and networking platform, preceding Music Estonia by five years. In recent years, TMW and ME also organise a local event the [Estonian Music Market Focus Day](#), an event gathering music industry professionals for presentations, discussions, and networking.

### **3.2.2. MEO profile: Music Estonia**

Activities aimed at various forms of capacity development contributing to the GROW objectives are one of the core areas of Music Estonia. Out of the 61 activities planned for 2025, nineteen, nearly one third, can be linked to GROW. These include seminars, workshops, webinars, mentoring, advice, business development programmes, and networking. ME has also organised and tagged all its activities according to the target groups: beginner, advanced, professional or simply interested.

The scope of themes is broad due to the very diverse target audiences, including all parts of the music ecosystem and both local and international dimension of interests. ME is regularly collecting feedback and input, formally and informally, from its members, partners and music sector actors at large about what topics and formats are needed and tries to adjust its offer accordingly. ME has prioritised capacity building on all levels and has over the past decade aimed to map and fill all major gaps of knowledge in the sector.

The main challenge in maintaining a consistent and well balanced programme is the limited resources available. While seminars and workshops are easier to organise and require less resources, most programmes require a specific project funding and if this comes from a European project, some amount of co-financing is also needed. An important funder for ME has always been EIS (Enterprise Estonia), channeling European structural funds into creative industries programmes. EIS (European) funded projects always require contribution from the beneficiaries, which is why they always come with participation fees. However, EIS funds such activities usually through large multi-year framework programmes which makes it less flexible and restricts ME’s ability to react quickly to changing needs or opportunities. European projects, whether Creative Europe, Interreg, or Erasmus+, are a crucial source of funding for ME, but developing these cross-border projects takes time and capacity, draining resources from organisations’ limited capacity, while success rates are very low (with Creative Europe often <10%).

Another specificity that needs to be taken into account is that in a small country such as Estonia, there are only relatively few internationally active artists and music companies at any given period and their needs can be highly idiosyncratic. Developing programmes that meet the needs of small target groups can be a challenge in terms of allocating resources and time reasonably. ME’s approach has been open to experiments and many learnings have been gleaned from both successes and failures.

# 1. GROW

## SEMINARS & WORKSHOPS

Music Estonia is organising a diverse range of seminars, aimed at both emerging and established music entrepreneurs, artists, and musicians. In 2025, as an example, the programme contains the following:

### **Seminars for Emerging Music Entrepreneurs**

- Basic training courses introducing music entrepreneurship are planned in four areas: recorded music, live music, publishing, and copyright.
- Additionally, a seminar on the fundamentals of the music industry will be organized in collaboration with the Tallinn Business Incubator, and a seminar on music technology in collaboration with TalTech.
- Regional music industry days called MUSIC SPOT are planned in the cities of Tartu, Pärnu, and Viljandi, targeting local emerging entrepreneurs.

### **Preparatory Seminars for Delegations**

ME will conduct pre-event seminars for all its coordinated showcase festival delegations, introducing the festivals, explaining the potential benefits of participation, and guiding delegates with limited prior experience in setting goals and planning their festival participation. Mentoring and assistance with export strategy planning will be provided as needed.

### **Masterclass: "Future Technologies and Strategies for Artists"**

The masterclass is aimed at artists, musicians, and producers who wish to enhance their creative process with modern technological solutions and develop their careers in the music industry. The primary focus is on the use of artificial intelligence and automated tools, as well as developing artist branding and artist-manager relationships.

### **Seminars for Advanced Professionals**

- In 2025, seminars are planned focusing on strategies for reducing digital waste, export strategies, and collaboration between the music and gaming sectors.
- In collaboration with Enterprise Estonia (EIS), the "Music x Gaming" seminar will be organised, followed by a music industry mission to the Gamescom event.

There is also a set of seminars planned as part of the **TechTrack** programme (see below).

## MENTORING, CONSULTING AND ADVISING

Music Estonia has over the decade developed and tested various mentoring formats. The need for a more personalised approach became clear already in the early years after noting how seminars and workshops, while useful for sharing knowledge and also peer learning, still leave a gap for applying insights to particular careers and businesses. ME developed its first mentoring programme "[VOLÜÜM](#)" in 2016 and ran four successful editions. "VOLÜÜM" joined international mentors with

artist-manager teams or self-managed artists for 5 sessions over half a year period and also brought everyone together for networking and collective learning at Tallinn Music Week. The programme was funded by EIS and had a participation fee of €500.

Over the past three years ME has provided an on-demand [mentoring service](#), but this has seen less take-up by the sector so far. It seems a concrete programme structure and a cohort-based approach mobilise motivation and engagement better.

In 2025, ME plans to launch two new mentoring programmes, one including Estonian and another international mentors:

1. [The Estonian mentorship program](#) is built on the premise that those only beginning their entrepreneurial journey in music don't have to start with an international mentor, but have much to be gained also from local more experienced professionals. The Estonian mentors will be recruited from the alumni of the AMP Focus programme (see below) and the programme will have space for 5 companies.
2. [The international mentorship program](#) focuses on supporting already internationally active Estonian companies by bringing in new knowledge and skills through international mentors. The programme involves 5 companies and up to 5 international mentors, who are selected based on the needs of the participating companies.

Music Estonia does not provide **formally structured advice and consulting**, however, the team is regularly available and advises many Estonian artists and professionals informally, whether via emails, calls or meetings at ME office. On average, there are 40-50 such encounters per year.

## BUSINESS DEVELOPMENT PROGRAMMES

One of the most advanced and recent business development programmes for music companies is AMP, which in its current edition runs as two distinct programmes: [AMP Development](#) and [AMP Focus](#).

**AMP Development** is a 12-month programme designed to guide music companies that are taking their first steps into the export market. The programme is built around the idea of providing a solid foundation for sustainable growth, focusing on strategic development and service enhancement. Participants begin with a comprehensive company diagnostic, which leads to a tailored development plan. This plan serves as a roadmap, guiding the company through the programme and beyond. The main value offer contains:

- Personalised mentorship from international experts.
- Contact trip to an international market (Finland in 2024 edition) for market insights.
- Support for integrating a part-time employee.
- Specialised seminars on key industry topics.
- A bursary up to €5000 in funding for export activities foreseen in the export plan, such as artist performances at showcase festivals, participation in conferences, fairs, or business delegations, hiring PR support, etc.

Programme participation fee in 2024 was €375 per month (12 months), totaling €4500, which is a 30% contribution to the total value of the programme, estimated to be more than €15 000.

**AMP Focus** is a 6-month program tailored for experienced music entrepreneurs who already have a clear export plan and a target market. This program aims to accelerate international expansion by providing access to specialised knowledge and networks. Participants are paired with foreign consultants who offer in-depth market insights and facilitate personalized contact trips to their target markets. The program also provides up to €5000 in funding to support further export-related activities. A significant aspect of AMP Focus is its emphasis on knowledge sharing within the Estonian music community. Participants are expected to contribute by sharing their export experiences, acting as mentors in future programs, and participating in regional music business seminars. The program also includes access to specialised seminars on sustainability, digital waste, and mental wellbeing. The main value offer contains:

- Access to foreign consultants for targeted market insights.
- Personalised contact trips to target markets.
- Up to €5000 in funding for export activities.
- Emphasis on knowledge sharing and community contribution.
- Specialised seminars on key industry topics.
- One session of mentorship from a mental health well-being expert.

The programme fee for participants is €500/month for 6 months (€3000 in total), but the programme provides value for €10 000, so the participation fee can be seen as a 30% self-financing.

Music Estonia's newest programme is [TechTrack](#) bridging the music and technology sectors to develop innovative solutions for the music industry. While Estonian is a well known digital technology hub, the music tech scene is still in its early stages. The motivation behind the programme is to kickstart the growth and development of a vibrant music technology ecosystem. This workshop based programme guides participants from brainstorming innovative solutions to building functional prototypes, all with expert guidance.

Key features of TechTrack include international keynotes with experts sharing insights on music tech trends, AI applications, and investment opportunities; hands-on workshops focused on idea generation, concept development, prototyping, and pitching; mentorship, networking, and prizes: top projects gain access to an incubator program with international mentorship, training, and participation in industry events like Wallifornia Music Tech Summit and Latitude59. The final pitching session will take place at Tallinn Music Week 2025. The TechTrack programme is part of a European cooperation project funded by the Interreg programme, thus co-financed by the European Union and also supported by UNESCO Tallinn City of Music.

In the past, Music Estonia has also organised programmes such as [BUUSTER](#) dedicated to artist managers, [SÜNKROON](#) focusing on collaboration between music and audiovisual sector, [Baltic Artists in Development](#), aimed at self-managing artists and independent artist managers, and the internship programme [INTRO](#), among others.

Music Estonia is currently, and constantly, developing several new programmes, including an International Residency program for young music professionals (Gen Z) to tackle industry challenges with their digital skills and fresh perspectives.

## OTHER

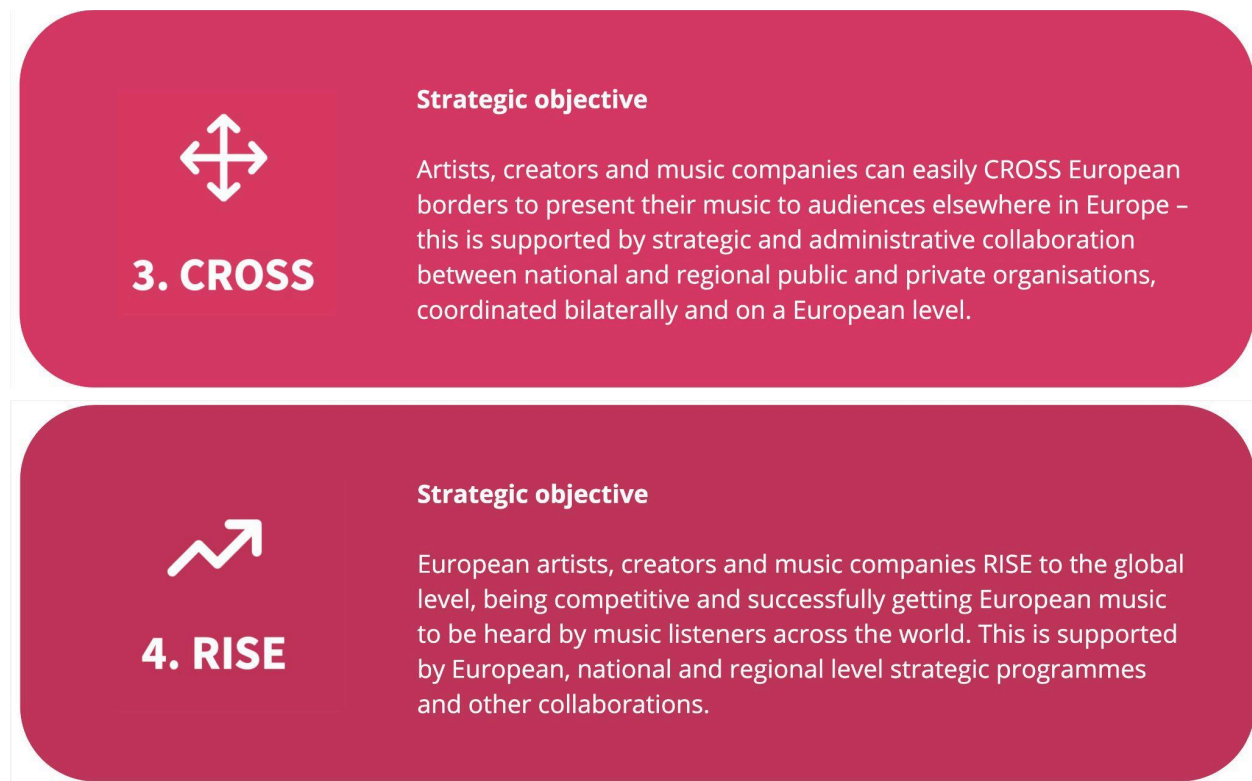
Music Estonia also organises and contributes to several events with a significant professional development and networking dimension:

- Co-organising the Estonian Music Market Focus Day, an event gathering music industry professionals for presentations, discussions, and networking. It aims to share insights from music listening research and analyse market trends, followed by the Estonian Music Business Awards gala (also organised by Music Estonia).
- Contributing to shaping the Tallinn Music Week Conference Program by providing input on topics, curating seminars, inviting experts, and promoting the event.
- Planning to offer annual internship opportunities at Music Estonia, particularly around major events like Tallinn Music Week, to provide practical experience in the music industry.
- Supporting music business education by partnering with schools like MuBA, offering expertise, guest lecturers, and networking opportunities. ME also plans to hold joint seminars for students from different schools.
- Organising the Industry Networking Event "Jutt & Jook" (Chat and Drinks) hosted by Music Estonia regularly to bring together industry professionals for idea exchange and collaboration. ME also holds regular member meetups, including for the ME Live and ME Management branches. The former hosts larger meetings biannually, while the latter meets quarterly or more often.

### 3.2.3. Summary of gaps

- Lack of sufficient funding to maintain a well-rounded capacity building offer for the sector. Most ME GROW related activities are funded from various projects with high administrative burden and risk involved in securing them. This in turn draws on the organisation's limited organisational capacity.
- A small number of internationally active artists and music companies with highly diverse needs at any given time provide a challenge for finding effective as well as cost-effective ways to deliver the needed capacity building activities.
- No higher education degree for music business, but it remains debatable whether it would be necessary for Estonia.

### 3.3. CROSS & RISE



#### 3.3.1. Current state and challenges in achieving the goal

There is no comprehensive **overview** of how many Estonian artists cross borders every year and with what results or what are the aggregated export revenues of music companies. The creative industries mapping, done every four years, provides a general number of €3,9 mln for export revenues in the core areas of the music sector for both 2015 and 2019. This is possibly too low as many companies do not differentiate export from general revenues in their financial reporting.<sup>35</sup> It is possible in principle to trace a number of activities through the results of the few funding programmes supporting international activities, but this would also remain partial as there are many artists and music companies who don't get, nor perhaps try to get any public support.

Music Estonia is making efforts to track and trace **international activities** of artists in its radar. Intuitive estimates of the ME team suggest that every year there might be 10-20 Estonian artists actively performing internationally. In recent years, with the development of modern music publishing companies, a few Estonian authors and producers have also started to work with international artists and clients. In addition, there are several Estonian contemporary composers whose works are

---

<sup>35</sup> These numbers are unreliable for other reasons to do with the inadequacy of the NACE codes to capture an accurate sample of companies to represent the sector.

performed and recorded internationally, most famously Arvo Pärt. All in all, EAÜ's results show that royalties for Estonian authors from abroad are modest, with close to €350 000 in 2023.<sup>36</sup>

The above suggests that while there has been visible progress over the past 15 years, the export of Estonian music and artists is still only developing. Aside from the capacity issues of knowledge, there are several **structural and contingent challenges** facing Estonian artists, creators and music companies in export development:

- The **small local market** presents a double challenge: first, it forces artists to cross borders early in their careers to reach enough audiences for anything like a viable career; second, it means that raising sufficient investment for international development from the domestic market is severely limited.
- Lack of **regional cooperation** in the Nordic-Baltic markets. The reasons why it is still a challenge for Estonian and other regional artists to build tours spanning the region are not clear and efforts to improve the situation are fairly regular, but progress is slow.
- **Insufficient international market knowledge**, expertise, and networks in the local music ecosystem leaves Estonian artists with few qualified professionals to support their international ambitions. This necessitates self-reliance, which, while viable within Estonia, poses a considerable obstacle for cross-border endeavors.
- A persistent **lack of investment**, especially for distant markets, confines international activities to *ad hoc* efforts, hindering proper development and follow-up. Internationalisation suffers from severely limited public and private funding.
- **Far-away markets are out of reach**, most focus on Europe and neighbouring countries especially. This might constitute unrealised opportunities.
- The **limited number of artists** and **music companies** working internationally at any given moment and their diverse needs and target market preferences make it difficult to build a comprehensive set of support and development measures, though there has been some progress.

Some of these limits are structural and cannot be helped, such as the size of the market. Others can be remedied through policy, support, development services, and cooperation with European and international partners. Addressing these issues to the degree possible is at the heart of Music Estonia's mission and also Tallinn Music Week. There are a few other music organisations also involved in international projects, some creating opportunities for artists and creators, such as [Jazz Estonia](#) (international artist exchange) and [Estonian Composers' Union](#) (collaboration projects in the Baltics and the UK) among others, but it is not their main focus.

## Funding

There are two main sources of public funding that are aimed at or including internationalisation as a goal: The "[Estonian Culture Abroad](#)" programme at the Ministry of Culture, and the [Cultural](#)

---

<sup>36</sup> It has to be noted that it doesn't include Arvo Pärt who is registered with GEMA in Germany. It's not known whether other internationally active Estonian artists and authors are registered with CMOs in other countries.



[Endowment of Estonia](#), which has a music committee. Also, since 2019 The [Baltic Culture Fund](#) has supported cooperation projects between Baltic partners that often have an international aim. Additionally, there is a small fund at the Ministry of Culture for projects undertaken as part of bilateral cultural cooperation agreements that have been to some degree also used for music related projects. Music Estonia operates a small [music export fund](#) together with the Estonian Authors' Society (who provides the funding). Finally, the cultural representatives of Estonia have small budgets to organise cultural events. There is no precise overview of how much funding is available for the independent music sector every year for (project based) international development, leaving out the structurally funded institutions, but a rough estimate would be between €200 000-€300 000 for the entire music sector. There have been rare cases of music companies accessing the significantly larger creative industries export grants, but in general the current thresholds are too high in terms of eligibility criteria and expected results for most music applicants.

### **Tallinn Music Week**

[TMW](#) is “one of the most acclaimed new music and city culture festivals and key networking events for music and creative industry professionals across Europe, held annually in the capital of Estonia, Tallinn since 2009”. TMW’s mission is to contribute to a “better society through tomorrow’s music, arts and ideas”. The festival consists of three main programme parts: music festival, conference and city festival. The festival presents a highly diverse range of music, ranging from metal, Hip-Hop, to choir music, jazz and everything in between. Artists are selected from an open application process by a broad-based team of Estonian and international curators. The festival audience is around 20 000 and the conference is being attended by about 1000 industry professionals from around the globe.

In the early days before Music Estonia was launched, TMW team initiated and led many activities beyond the event itself, such as organising Estonian showcase events and receptions at other showcase festivals and supporting Estonian artists with additional visibility and promotion. Since the start of Music Estonia in 2014, ME and TMW have been strategic partners on organising the main event, but also the more recent Estonian Music Market Focus Day.

While TMW is the main event in Estonia for international music professionals to gather, there are a few other larger festivals such as [Jazzkaar](#) and [Viljandi Folk Music Festival](#) who also invite international guests, often media, but not only, to attend their events and see Estonian talent. This is supported by EIS.

### **3.3.2. MEO profile: Music Estonia**

In contrast to many other music export organisations in Europe, Music Estonia is not (mainly) a funder. Therefore, it has always had to find other ways to support the sector. Attending showcase festivals to support and promote Estonian artists, curating Estonian presence at trade fairs, organising trade missions and working with Tallinn Music Week to invite professionals to Estonia are all among ME’s repertoire to support Estonian artistic and entrepreneurial talent to achieve their international ambitions. In 2025, ME plans to do 14 activities connected to the CROSS and RISE objectives.

One of the main challenges is to decide the focus events, countries and music scenes to focus on every year, given the limits of funding available. ME has to raise project funding for all international activities and therefore it is difficult to build a longer-term strategy. Also, there are a few main events in Europe

that ME, as well as most other MEOs, attend, such as ESNS, Reeperbahn Festival, Jazzahead!, WOMEX, Classical:NEXT, etc. This raises the issue of path dependency and locked-in resources – are there other events, markets, music scenes that are missing out because of lack of opportunities? These and other considerations are regularly addressed by the ME team when setting their yearly agenda.

Another key challenge is the overall limited amount of funding and investment available for Estonian artists, creators and music companies to develop international ambitions in a strategic way. This means that while ME might successfully help open doors for artists and professionals, only few have the sufficient capacity and resources to follow through and make initial investments and efforts pay off.

## 3./4. CROSS / RISE

### EXPORT FUNDING

Music Estonia operates a small music export fund (€45 000 in 2024, €50 000 in 2025) in cooperation with Estonian Authors' Society (EAÜ) who provides and manages directly the funding, while ME manages the programme. The fund supports artists and professionals attending international showcase festivals, conferences, and other key events. The fund covers expenses for participation in showcase festivals, concerts, tours, and industry conferences, but not (until now, changing in 2025) songwriting camps. Funding is based on a flat-rate system, with artists receiving up to €1400 for European events and €1900 for events elsewhere, depending on the size of their traveling party. Music professionals can receive €500 for European and €700 for non-European events. Applicants must be Estonian citizens or residents, and artists must have confirmation of their showcase selection. Evaluation criteria include the event's importance for career development, clear objectives, readiness, communication plan, budget, and potential impact on royalties.

### SHOWCASES, CONFERENCES & TRADE FAIRS

Music Estonia regularly attends European events such as ESNS, Reeperbahn Festival, Jazzahead!, WOMEX, and Classical:NEXT. Every year a few other events might be added, depending on whether Estonian artists are in the programme or for a specific focus event on Estonia or the Baltics. For example, in 2025, there will be a Baltic focus at Ireland Music Week. In 2023 there was a Baltic MoMENT at the MENT Ljubljana Festival and in 2024 a Baltic reception at Zandari Festa in South Korea. In the last few years, ME has collaborated with Latvian and Lithuanian partners in setting up a combined trade fair area at Jazzahead! And WOMEX.

As mentioned, there are currently five events that ME attends every year and resources to add others are limited. This raises the question of resource lock-in and lack of support for other music scenes who perhaps don't have equally established networking events or simply operate differently and thus would need alternative approaches. On the other hand, consistency and continuance also pays off with some professionals building their networks over the years of attending that one event for their scene every year.

A recent example of a successful mission was the Estonian stage at Reeperbahn Festival in 2024 with

four Estonian artists performing.<sup>37</sup> While ME has been attending Reeperbahn Festival for years and there have been Estonian artists in the programme, this was the first time ME organised an Estonian stage. The ME team and delegation consider this a success due to the added value of building an integrated programme of several events in one, such as the showcase with four artists, networking and a reception. This concentrated focus and the whole Estonian delegation each with their own networks can create multiplier and spilloff effects. Such endeavours can be expensive and the so-called pay-for-play approach has raised discussion among the music export development community for a long time. However, if the partnership is shaped in a well-balanced way, the artists presented are ready for international steps and the delegation is willing to pool their network resources, it can pay off.

## TRADE DELEGATIONS AND OTHER NETWORKING TRIPS

Music Estonia organises few standalone trade missions. One reason is the limited funding – almost no standalone funding for such activities is available, unless it's built into a broader project. In 2024, ME organised a delegation trip to Belfast together with Tallinn UNESCO City of Music office to meet another music city and local music professionals. Another reason for few delegations is that there are only few music professionals and entrepreneurs at any given time at the point in their international development ready and able to invest. Delegations are justified if those involved have the means to follow through on their own afterwards. Delegations are also more effective with a well-defined focus, such as for publishers, labels, managers, etc. It is difficult to provide a good networking programme for a group with too diverse interests. Here European missions can offer valuable added opportunities to go to markets to which ME on its own would never be able to organise a delegation.

## LOCAL EVENTS AND INCOMING DELEGATIONS

A major event in Estonia for inviting international professionals is **Tallinn Music Week**. Music Estonia is a strategic partner of TMW, collaborates on curating the conference programme and also funds additional international delegates. TMW is perhaps quite uniquely programmed in a decentralised way: every showcase has its own team and is responsible for selecting the artists and can also suggest relevant delegates to be invited. Still many delegates are invited centrally, including in connection with curating the conference programme.

ME has used multiple methods and formats to provide networking opportunities for Estonian artists and professionals during the event, such as speed meetings, group mentoring (45-60 minute sessions for groups of five plus a mentor on a certain topic), networking receptions, etc. At least during the first ten years TMW organised pre-meetings for Estonian artists and professionals to share insights about how to best use TMW as an event.

---

<sup>37</sup> More info on that mission: <https://www.musicestonia.eu/en/news/rp-estonishing24>.

## CO-CREATION FORMATS

In 2016 Music Estonia and TMW organised the first songwriting camp in Estonia together with the national song contest “Eesti Laul”, the pre-contest for the Eurovision.<sup>38</sup> The new format was accepted among the Estonian artists, songwriters, and producers quickly and the same team organised further songwriting camps also in the following years. ME also organised a songwriting camp with Estonian, Finnish, and Japanese participants as part of the Finest Sounds project (funded by Interreg) in 2019. There were concrete results in terms of songs released and achieving local popularity as well as sparking international partnerships, some of which are still ongoing. In 2023, ME piloted a small grant programme in partnership with Tallinn UNESCO City of Music for organising camps. Since 2020, EAÜ (Estonian Author’s Society) provides support for either participating in or organising songwriting camps. In 2022 ME organised a programme for female songwriters and producers with partners in Sweden which also included a songwriting camp.

In sum, the format took root in Estonia fairly fast and now co-writing sessions are a regular occurrence, organised by publishers, labels, and managers. Therefore, the initial mission has been achieved and ME is not actively organising such events at the moment.

## PROMOTION & VISIBILITY

ME amplifies the visibility of Estonian artists at international showcases through newsletters and social media. Also through seeking international press coverage for Estonian showcases abroad.

### 3.3.3. Summary of gaps

Given the structural and contingent challenges facing Estonian artists, creators and music companies in export development, the main gaps are mostly connected with funding.

- **Limited funding for export activities.** There are now several helpful measures for artists and professionals to attend conferences and showcase festivals, useful for network development and getting artists in front of international delegates also elsewhere. However, this is only the first step in export development. Following through and realising the potential thus accumulated requires further investment. Earning it as revenue from the domestic market is severely limited due to the small market. Public funding is equally scarce with only a few funding programmes available. The requirements of the creative industries export programme on the other hand are too demanding for most music companies to be eligible. There is therefore a significant gap in development funding, especially for those artists and music companies who already have established the needed contacts and need additional investment to follow through.
- **Short-term and project-based funding for structural development.** Both Music Estonia and the organisation behind Tallinn Music Week receive structural funding from the Ministry of

---

<sup>38</sup> More info in English:

<https://www.facebook.com/tallinnmusicweek/posts/tmw-music-estonia-and-estonian-pre-contest-for-the-eurovision-sc-estoni-laul-will/10153751921715240/>.

Culture. However, all the delegations, including to the main events in Europe, are funded as projects from regular funding programmes (such as “Estonian Culture Abroad”). This means that longer-term strategic plans cannot be made with sufficient confidence as at any given decision round the project might fall through.

- **Music Estonia cannot reach beyond Europe** in a consistent and strategic way. While it’s also a funding issue, it’s also because there are only few artists and professionals with traction in some markets at any given time. Justifying regular actions by ME at far-away markets requires bigger groups of beneficiaries and Estonia is too small to maintain such activities on its own. Building a delegation around one or two professionals and artists is not feasible. European collaboration and coordination and longer-term planning horizons are needed to achieve results.

## 3.4. EXCHANGE



**5. EXCHANGE**

**Strategic objective**

European music organisations develop long-term bridges and partnerships with non-EU partners through EXCHANGE of experiences, best practices and business contacts. This will also provide ways to invite key players to visit Europe and discover our talent.

### 3.4.1. Current state and challenges in achieving the goal

As part of formal cultural policy, Estonia has bilateral cultural cooperation agreements with nearly 50 other states from across the world. These serve as a basic framework, however general, for international cultural cooperation on the policy level and the Ministry of Culture has a modest budget for activities. In addition, Estonia has 6 cultural representatives in Belgium, Finland, France, Germany, UK and US. All in all, this cultural diplomacy apparatus has a limited capacity to support particular artists and professionals, though the cultural representatives are doing great work in those countries.

Estonia has a cultural institute – Estonian Institute, a non-governmental organisation founded in 1988, however, since 2022 most of its operations have effectively ceased. A small number of music organisations are active in European cultural cooperation and other projects. Most directly relevant for music export development have been Music Estonia’s past and ongoing projects (see below).

All in all, the main vehicle for European collaboration are European cooperation projects. Tallinn Music Week and a few other music festivals serve as platforms to invite professionals to Estonia, including from outside of Europe. However, there are no robust collaboration frameworks and partnerships

between Estonian music organisations and non-European partners that would consistently facilitate music export development.

### 3.4.2. MEO profile: Music Estonia

European cooperation projects have always played an important role in Music Estonia's strategy and action plan. The main challenge is that developing projects and partnerships takes time and capacity, but success rates at all these programmes are very low. This is a drain on the already scarce core organisational capacity in terms of team workload and budget. Finding partners and developing ways to collaborate in far-away countries is beyond the capacity of Music Estonia and most Estonian organisations and therefore European coordination, as provided by EMEE, is the main way to fill that gap. Another challenge is the secure sufficient co-financing for the projects. ME's own structural funding is limited and the main source is a small funding programme at the Ministry of Culture specifically aimed at providing co-financing for Creative Europe funded cooperation projects. This does not extend to, for example, Interreg, etc. In the last years, an important partner in that regard has been the Tallinn UNESCO City of Music office providing additional local support to ME's participation in European projects.

ME is a member of several European networks: EMEE, Live DMA, EMMA, and ESNS Exchange.

## 5. EXCHANGE

### LONG-TERM COLLABORATION PROJECTS

Music Estonia has participated in the following European cooperation projects:

[Finest Sounds](#) (2016-2019, Interreg) – a Finnish-Estonian cross-border cooperation initiative in the music sector. The objective was to bring more high quality Finnish and Estonian music to Japan. The partners were Tampere University of Applied Sciences (LP), Music and Media Finland, HUMAK - Finnish University of Applied Sciences and Arts, Tallinn Music Week, Tallinn University, Baltic Film, Media, Arts and Communication School, and Music Finland.

[Music Moves Interns](#) (2019-2020, Music Moves Europe) – piloted an international internship programme focused on connecting young professionals and established companies in the music industry with a goal to facilitate a wholesome and useful internship experience. Partners included Factory92 and Why Portugal.

[HEMI](#) (2020-2024, Creative Europe) – supported the professionalisation & internationalisation of CSEE music artists and professionals to help them meet current market needs and future challenges, developed innovative business models between consortium partners, networks and the beneficiaries of the programme, and co-produced and co-promoted new events / products to benchmark the music sector of the region. The partners were: Technopolis City of Athens, SoundCzech, Tallinn Music Week, Athens Music Week, Majdnem Híres Rocksuli, Password Production, Taksirat Festival, KBF, Wianki w Krakowie, Tak Brzmi Miasto, Mastering the Music Business, Exit Festival, Sigic, MENT Ljubljana, Budapest Showcase Hub.

[SMA!](#) (2021-2024, Creative Europe) – aims to support small boutique music festivals in peripheral areas of Europe. The project’s goal is to create a sustainable cross-border development model by diversifying and improving festival management and relationships with stakeholders.

[SAFEPLACE](#) (2022-2024, Erasmus+) – through specifically developed capacity-building activities, SAFEPLACE gathered best practices in a pilot program, designed to subsequently share the outcome with the community of event organizers. Project speaks with the next generation of European festival organizers and professionals, about values, empowerment, inclusivity, accessibility and the positive madness needed to create the extraordinary. Partners: Ypsigrock Festival (IT), Halder Pop (DE) and Taksirat (MK), APS Nous (IT), BJCEM (BE) and Vitatiim (EE).

[Europe in Synchron](#) (2023-2026, Creative Europe) – aims to connect creatives from the audiovisual industries and arts, particularly by offering know-how in the quickly developing fields of synchronization, music licensing and music supervision. EinS wants to establish new networks and a better understanding of the needs and opportunities of the different industries that work with (licensed) music. Partners: AMAEI (Portugal), Copenhagen Film Music (DK), Thag’s Agent (DE), Ink Music (AT), Rebel Studios (HR), Eastaste Music (HU), and SIGIC (SI).

[MI-RAP](#) (2023-2026, Interreg) – involves cities and music industry organisations operating in the Baltic Sea region to find solutions for developing cooperation between neighboring countries. Project partners are: Hamburg Music Business (LP), Leuphana University Lüneburg, MØST (NO), Gothenburg & Co, Open Creative House (FI), Latvian Music Export Office, Lithuanian Academy of Music and Theatre, Music Innovations Study Centre (LT) and Municipal Center for Culture in Bydgoszcz (PL).

**Empowering small music venues in Finland and Estonia through network building, research, engaging and strategic communication** (2021-2022, Preparatory Action Music Moves Europe: Boosting European Music Diversity and Talent, Co-Operation of Small Music Venues) – This project focused on empowering small live music venues in Estonia and Finland through: network building, research, engaging key stakeholders, and strategic communication. The research report is [here](#).

## STRATEGIC PARTNERSHIPS

Music Estonia doesn’t have any formal strategic partnerships with European or international organisations beyond the cooperation projects and networks.

### 3.4.3. Summary of gaps

- Limited structural capacity to develop projects and apply for grants.
- Limited co-financing for cooperation projects.



## 3.5. MEASURE



### 6. MEASURE

#### Strategic objective

The international success of European talent can be MEASURED through a well-organised system of music data collection, analysis and publication of research.

### 3.5.1. Current state and challenges in achieving the goal

There is no comprehensive collection system for music export or more broadly sector related data, nor compilation of statistics. The most relevant overviews of the Estonian music sector are:

1. **Estonian music market report** – compiled and published by Music Estonia and available currently for 2018-2023, this overview provides a general picture of how much the Estonian society spends on music, from private households and enterprises to the public sector (mainly support). The report is available at the Music Estonia website: [Muusikaturu andmed](#) (in Estonian). The report is based on available aggregated data, such as the transparency reports of the CMOs and the public information of public funding programmes. It also includes aggregates about the Estonian recorded music market from the Finnish office of IFPI who collects, but does not publish this data on their own (beyond the annual IFPI report). Using these sources, the figures are calculated to reflect how much consumers and enterprises are paying for music and the public sector is providing support. The Estonian music market report was created in 2021, providing the compiled figures for 2018-2020 and renewed in 2024, adding figures for 2021-2023.
2. **Estonian Creative Industries' mapping** – commissioned by Enterprise Estonia, the mappings have been conducted every five years since 2009. These reports reflect statistics based on the data from the NACE classification of economic activities. This report also contains export revenue estimates for each sector, but due to limited data quality, these are not very reliable. The reports (in Estonian with English summaries available for some) can be found on the Ministry of Culture's website: [Uuringud | Kultuuriministeerium](#) (in Estonian). A new mapping was conducted in 2025 with the results yet to be published.

The main challenges are in part similar to other countries' challenges: there is no comprehensive conceptual framework for music-related data collection, the national statistics relying on the NACE code system is inadequate for capturing a precise-enough picture of the music or any other creative sector. The issues mostly remain also after the 2024 revision (rev2.1) of the NACE system, though in



Estonia several national sub-categories<sup>39</sup> were created which creates a basis for a more accurate sector statistics in the future. Another challenge with this approach is that most music companies (depending on the definition) earn revenue from multiple sources, while most of this information (the breakdown of revenue according to all main types of income) is not provided in the financial reports. It's also common not to outline the export share of the revenue and there is no agreed upon method of doing it.

An alternative approach to creating statistics of the music sector would be to collect data directly from the music companies. In Estonia, there are no music industry trade associations. The CMOs do not collect survey data about music companies' revenues beyond what they generate from their own operations and Music Estonia, essentially the trade association for all music companies, has not got a large nor comprehensive enough membership base to build such a system.

There is an ongoing pilot project at the Ministry of Culture to map the data needs of, among others, the music sector and develop a model for improvement. The project seeks to create a dashboard bringing together all publicly available data sources and where possible integrate also private sources (like CMOs, ticketing platforms, etc.).

There is no music charts system in Estonia as of 2025, but there are ongoing efforts by Music Estonia to restart the project.

### 3.5.2. MEO profile: Music Estonia

## 5. MEASURE

### ANNUAL REPORTS

Music Estonia only creates an internal annual activity report that is used for reporting to funders. These reports also include information on various indicators previously agreed in the funders expectations and project plans. These indicators are both quantitative (i.e number of participants, contacts made, etc.) as well as qualitative (satisfaction). No funder specifically requires reporting and claims about complex impact and outcomes, such as the impact of ME's activities on the growth of Estonian music industry's aggregate revenue, etc. This would be unfeasible given the poor state of baseline data and the conceptual complexity of making adequate claims about any broad impact.

While there is no public report, the ME website provides ample information about the activities, programmes, also in the past. Also, a thorough overview of annual activities is provided in the formal financial report which is in principle publicly available (from the business registry).

### MEASURING EXPORT REVENUE

---

<sup>39</sup> These are: 59201 – Audio recording service, including music recording, 59202 – Music production, distribution and music publishing, 90112 Musical composition activities, 90202 – Stage performance of musicians. Source: [https://ariregister.rik.ee/eng/emtak\\_search](https://ariregister.rik.ee/eng/emtak_search).

Music Estonia does not collect any comprehensive data about music companies activities and revenues, including export revenue.

### **3.5.3. Summary of gaps**

- Lack of a regular and systematic data collection and statistical analysis of the music sector in Estonia. This has been noted also in the Ministry of Culture Work Programme and the ministry has launched a pilot project to analyse the data needs of the sectors.
- There are currently no digital nor radio music charts in Estonia which is a gap in relevant market knowledge.