

ESTONIA MARKET PROFILE

An EMEE Music Market Study

2023

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1. General country overview



Population

1 330 932

(World Bank 2021)

Tallinn 437 817

Tartu 95 776

Pärnu 40 228

Narva 53 955

Viljandi 19 515

Administrative organisation

Estonia is a parliamentary democracy with a head of government (prime minister) and head of state (president). Its government (Riigikogu) consists of 101 members elected by popular vote for a four-year term.

Population age structure

The median age of Estonia's population is 41.8.

Here's how Estonia's total population breaks down by age group:

- 5,3% is between the ages of 0 and 4.
- 8,7% is between the ages of 5 and 12.
- 5,7% is between the ages of 13 and 17.
- 6,7% is between the ages of 18 and 24.
- 12,3% is between the ages of 25 and 34.
- 14,4% is between the ages of 35 and 44.
- 13,6% is between the ages of 45 and 54.
- 12,6% is between the ages of 55 and 64.
- 20,7% is aged 65 and above.

Source: [Datareportal](#).

Society

Official language(s): Estonian

Other important language(s): Minority language: Russian

Recommended language to communicate with local professionals: English. People in Estonia, especially in the music industry, tend to speak English very well.

Currency: €

Living cost (PPP) in relation to EU average: PPP (2022): 0.569. EU average (2022): 0.649. Measured in terms of local currency per USD. Source [OECD](#).

Economy

GDP (nominal), in comparison with EU av	31 030 million USD. 34th in Europe. According to The International Monetary Fund. 36.039 billion USD as of 2021. (Wikipedia).
GDP per capita, in comparison with EU av	27 281 USD. 24th in Europe. According to The World Bank as of 2021. 26 470 USD as of 2021. (Wikipedia).
YOY growth, in comparison with EU av	8% annual GDP growth as of 2021 (The World Bank)
Minimum and average wage, in comparison with EU av	Average gross monthly wage 1741€ (WikiWand). Monthly minimum wage: 725€ (as of 2023)
VAT rates	20%, 9%, 5% and 0% (EC Europa).

Communication & Digital

Cellular mobile connections and change

"A total of 1.94 million cellular mobile connections were active in Estonia in early 2023, with this figure equivalent to 146.8% of the total population. The number of mobile connections in Estonia increased by 70 thousand (+3.7%) between 2022 and 2023."

Source: [Datareportal](#)

Internet users and change

"There were 1.22 million internet users in Estonia at the start of 2023, when internet penetration stood at 92.3%."

Source: [Datareportal](#)

Active social media users and change

"Estonia was home to 1.07 million social media users in January 2023, equating to 80.8% of the total population. More broadly, 87.5% of Estonia's total internet user base (regardless of age) used at least one social media platform in January 2023."

- "Data published in Meta's advertising resources indicates that Facebook had 690.4 thousand users in Estonia in early 2023. Figures published in Meta's own tools indicate that Facebook's potential ad reach in Estonia increased by 4,800 (+0.7%) between 2022 and 2023. Facebook's ad reach in Estonia was equivalent to 52.1% of the total population at the start of 2023.
- Updates to Google's advertising resources indicate that YouTube had 1.07 million users in Estonia in early 2023. The company's own data suggests that YouTube's ad reach in early 2023 was equivalent to 80.8% of Estonia's total population at the start of the year. Data published in Google's own ad planning tools show that YouTube's potential ad reach in Estonia increased by 20 thousand (+1.9%) between the start of 2022 and early 2023.
- Numbers published in Meta's advertising tools indicate that Instagram had 476.5 thousand users in Estonia in early 2023. The company's recently revised figures suggest that Instagram's ad reach in Estonia was equivalent to 36.0% of the total population at the start of the year. Data published in Meta's planning tools show that Instagram's potential ad reach in Estonia decreased by 27 thousand (-5.4%) between 2022 and 2023."

Source: [Datareportal](#)

According to a report conducted by Music Estonia in tandem with Norstat, Youtube is still the most popular platform for music streaming with Spotify as a close second. Spotify's usage is growing amongst the younger generation though ([Music Estonia, 2021](#))

1.5. Tax & legal

1.5.1. Artist status and business identity management

Forms of business entities

Conducting business activities in Estonia is easy and hassle-free. Most processes are digitised and there is little bureaucracy compared to other European countries. According to the Commercial Code, there are five forms of business entities in Estonia:

- [private limited company \(OÜ\)](#).
- [public limited company \(AS\)](#).
- [general partnership \(TÜ\)](#).
- [limited partnership \(UÜ\)](#).
- [commercial association \(ühistu\)](#).

In addition to the possibility of establishing a business entity, one can also register as a [sole proprietor \(FIE\)](#). A non-profit organisation (NGO) is a voluntary association governed collectively. The activity of a non-profit association is regulated by the [Non-profit Associations Act](#).

Foreign companies can offer their goods or services by establishing a local [branch](#). The branch must be registered in the Estonian Commercial Registry and it is important to note that a branch is not a business entity and the foreign enterprise is liable for obligations arising from the activities of the branch.

Estonia's most common forms of business entities are a private limited company (OÜ) and a public limited company (AS). Detailed information about other company types is available in the [Commercial Code](#).

e-Residency

Estonia was the first country to offer e-Residency, starting in 2014. The e-Residency of Estonia is a government-issued digital identity which gives global entrepreneurs remote access to the world's most digital country and the ability to start a 100% online company from anywhere in the world. It provides the possibility to securely authenticate one's self online and sign documents using secure and efficient electronic signatures. Find more information here: [e-Residency](#).

Freelancers

The number of freelancers in the cultural sector in Estonia is estimated to be around 10,200 people as of 2021. This number exceeds the number of members of artistic associations (6,600), however, the approach somewhat expands the meaning of who is a creative person engaged in the cultural sector from what is meant in the Creative

Persons and Artistic Associations Act and takes into account that not all creative persons are freelancers or belong to artistic associations.

The current social security system does not sufficiently support the wider target group of freelancers. The income of freelancers is irregular, which is the main cause of issues related to their social protection. Find more information here: [Freelance artists, their models for economic coping and access to social guarantees](#) | Praxis

1.5.2. Copyright law and collective licensing

In Estonia, authors' rights, neighbouring (related) rights and the collective management of rights are regulated by the Estonian Copyright Act. For an English translation see: [Copyright Act–Riigi Teataja](#).

“The author of a work is guaranteed a number of moral and economic rights. For example, the author has the right of authorship, right of the author’s name, right of integrity of the work, right to disclosure of the work, etc. The author also has the right of reproduction, distribution, alteration, public performance, and communication of the work, the right of making the work available on the Internet, etc.”¹

In addition, performers are guaranteed a number of moral and economic rights (see Chapter 8 of the Estonian Copyright Act for neighbouring rights).

The following organisations have been established for collective management of music in Estonia:

- [Estonian Authors’ Society](#) (EAÜ)
- [Estonian Performers Association](#) (EEL)
- [Estonian Association of the Phonogram Producers](#) (EFÜ)

1.5.3. Visa and other mobility info

Nationals of the EU/EEA and Schengen Area can travel to Estonia visa-free and stay for up to 90 days. Citizens of third countries and holders of diplomatic, service, official and special passports can also enjoy short-term visa-free travel. More information on visas can be found on the website of the [Ministry of Foreign Affairs](#).

¹ Excerpt from and further info: [Protection of intellectual property](#) | Eesti.ee

Restrictions on accepting visa applications for Russian and Belarusian citizen

The Government of the Republic of Estonia has approved a sanction imposing a restriction on citizens of the Russian Federation and the Republic of Belarus applying for an Estonian visa.

More information: [Who does not need a visa to visit Estonia? | Välisministeerium](#)

2. Music Ecosystem

2.1. Music sector general overview

2.1.1. General facts & figures

Expenditure on music in Estonia between 2018 and 2020.²

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

According to the creative industries research, the revenue from core music sectors in 2019 was 108 million, and when combined with related sectors, it reached 184.8 million.

2.1.2. Music industry professional events

[Tallinn Music Week](#) (TMW), is an international music showcase festival and industry conference bringing together circa 1000 artists and music professionals from around Europe to connect, learn from each other, and network (see more in 2.2.2).

[Estonian Music Market Focus Day](#) (Eesti muusikaturu fookuspäev), which is a smaller industry event catered towards the local market, organized in collaboration with TMW and Music Estonia.

2.1.3. Music sector organisations

Export Organisations

[Music Estonia](#) (ME), Estonian music industry development center and export office. ME has around 100 members of local music industry professionals and companies. The organization is focused on representing the Estonian music sector globally and developing the local market. ME is also an active member of several international projects and associations including the European Music Exporters Exchange (EMEE), the International Association of Music Centres (IAMIC), Europe in Synch, and Live DMA.³

² Music Estonia website (in Estonian). Muusikaturu andmed (2021). <https://www.musicestonia.eu/andmed>

³ Music Estonia website (2023) Strategy. Available at: <https://www.musicestonia.eu/en/strategy>.

Competence Centers

[Estonian Traditional Music Centre](#)

Is an open and innovative non-government organisation which supports and organises traditional music hobby education and promotes live traditional music performances across the country. It is located in Viljandi in a contemporary cultural centre where concerts, performances, training sessions, seminars, etc. are organised all year round. The NGO organises one of the biggest music festivals in the Baltics – Viljandi Folk Music Festival.

[Jazz Estonia](#)

The aim is to develop and advance Estonian jazz music both at home and abroad. Jazz Estonia organises concerts and thematic events, collects and shares information about Estonian jazz music and musicians, organises cooperation between musicians and organisations and, searches for financial resources for developing jazz music.

[Estonian Centre of Contemporary Music](#)

brings together key organizations in the field of contemporary music and helps invigorate the professional discourse on creative and performative aspects of contemporary music through lectures, concerts, workshops, and public discussions.

[Estonian Composers Union](#)

Is a creative union, associating Estonian professional composers and musicologists. ECU aims for the free development and distribution of Estonian music and musicology, protecting freedom of creative freedom and ECU's members' interests. Since 2005 Estonian Composers Union is a member of the International Society of Contemporary Music (ISCM).

[Association of Estonian Professional Musicians](#)

The objective of the association is to promote the creative sector and support the artistic activities of its members; develop and value Estonian classical interpretation art; advocate for the creative interests of Estonian interpreters; strengthen the connections among Estonian interpreters; and foster international collaboration.

[Estonian Music Council](#)

Is an Estonian non-governmental organization which deals with questions related to Estonian classical music. For example, to enhance cooperation between Estonian and international music organizations. EMC is also giving out its own music prize. The prize is given out on International Music Day, which is organized by International Music Council.

[Estonian Music Information Centre](#)

The priority of EMIC is to promote Estonian classical and contemporary music both in Estonia and abroad, by providing and sharing information about Estonian composers and their works, music organisations and their activities, musicians and musical life in general. Member of the [International Association of Music Information Centres \(IAMIC\)](#).

[Heavy Music Estonia](#)

(*Eesti Raskemuusikaliit*) is an NGO that brings together heavy music professionals in Estonia, providing support, resources, and a platform for collaboration. It's a community where musicians, producers, engineers, and other industry professionals can come together to share knowledge, network, and support one another.

Collecting Societies

[Estonian Authors Society](#)

The Estonian Author's Society was founded in 1991 and represents more than 6,000 copyright holders from Estonia and 4 million copyright holders worldwide. The EAÜ belongs to GESAC and CISAC networks, which unite authors from 119 countries.⁴ The EAÜ protects its members' rights and grants licenses for using registered works for live public performances, radio and TV broadcasting, public distribution, reproduction and synchronisation.⁵

[Estonian Performers Association](#)

The Estonian Performers Association (EEL) administers and promotes performers' rights, collecting and distributing remunerations to their 1500 members. The EEL is a member of the Societies Council for the Collective Management of Performers Rights (SCAPR).⁶

[Estonian Association of the Phonogram Producers](#)

The Estonian Association of the Phonogram Producers (EFÜ) was established in 1998 and represents local and international phonogram producers. Currently, there are around 500 members. The association serves the legal interests of phonogram producers and distributes royalties among its members. EFÜ has contacts with similar international organisations as well as the International Federation of the Phonographic Industry (IFPI).⁷ EFÜ acts as a mediator between the master rights holders and music users when it comes to the public performance of works in various public spaces.

⁴ EAÜ Website. About Us. Available at: <https://eau.org/en/about-us/organisation/estonian-authors-society/>

⁵ Eesti Autorite Ühing (2022) Transparency Report for 2022. p 4. [Available here](#)

⁶ EEL website. <http://www.eel.ee/en/>

⁷ EFÜ website. About us. Available at: <https://www.efy.ee/en/about-us/>

2.2. Live music Sector

2.2.1. *The size and overall structure of the live music market*

The Estonian live music market boasts a diverse music scene that offers something for everyone. There are around 100 festivals happening throughout the year and the capital Tallinn has around 40 music venues. The second largest city Tartu has over a dozen venues and there are some good-sized music venues hosting regular events in other smaller cities as well.

The festival landscape in Estonia includes a significant number of outdoor events that are mostly organised during the warmer months of the year, from May to September. During the colder months, festivals move to indoor clubs, concert halls, and other venues. While larger venues typically serve as rental spaces and rarely curate their own program, there is a vibrant collection of grassroots venues that are smaller in scale and offer their own multifaceted music program. Grassroots sometimes also work with other venues to co-book an artist.

2.2.2. *Music festivals*

Estonia is renowned for its vibrant music festival scene, with a wide range of events catering to different genres and musical tastes. There are festivals catering to various genres such as classical, jazz, folk, rock, electronic, and pop music.

Distances between major towns in Estonia usually do not exceed a 3-hour drive, making it very easy to build a tour between the cities. Additionally, many festivals collaborate with Baltic or Nordic neighbouring countries, making it logical to try to build a tour that extends to both or either regions.

Tallinn Music Week

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. The festival consists of three main programme parts: music festival, conference, and city festival.

Audience size: The festival gathers an audience of around 20,000 music lovers and 1,000 industry professionals from around the globe.

Timing: Tallinn Music Week is held every year in springtime (usually during April or May).

Applications: Artists can submit their applications to perform during the festival.⁸

⁸ <https://tmw.ee/about>

Jazzkaar

Tallinn International Festival Jazzkaar, the biggest jazz festival in the Baltic states, has been held annually since 1990. Over the years, it has become Estonia's most popular festival, attracting over 3,000 foreign artists from 60 countries. The Spring 2017 Jazzkaar festival set an all-time attendance record with 25,000 music lovers in attendance. In addition to the flagship ten-day spring festival, MTÜ Jazzkaare Sõprade Ühing also organizes Jõulujazz (Christmas jazz), a two-week intimate festival that takes place in churches, concert halls, and clubs at the end of November and beginning of December. Furthermore, the team is responsible for organizing the Winter Jazz Season (Talvejazz) and Autumn Jazz Season (Sügisjazz).

Audience size: around 18 000 visitors from all over Estonia and abroad.

Timing: main festival every April, others throughout the year.⁹

Notable international acts: Bobby McFerrin (2011), Angie Stone (2009), Chick Corea (2012, 1994), Dianne Reeves (2010, 2017), Jan Garbarek (2012, 2003, 1997), Richard Bona (2014, 2011, 2003, 2002), John Scofield (2015, 2004), Charles Lloyd (2013, 2005, 1997, 1967), Bill Frisell (2014), Gregory Porter (2015, 2013), Pat Metheny (2014) and many others.

Viljandi Folk Music Festival

The renowned folk festival features four days of folk music celebration, with five outdoor stages, three indoor stages, over 75 concerts, and additional programs such as workshops for playing, dancing, and singing. It showcases nearly 50 artists from Estonia and around the world.

Audience size: around 20 000 visitors from all over Estonia and abroad.

Timing: every July.¹⁰

Notable international acts: This year's more exotic guests are Djely Tapa, a Malian singer-storyteller, El Khat, a group from Israel with their impressive range of self-made instruments, Tęgie Chłopy, a Polish folk music ensemble who keeps the local dance music traditions alive, Júlia Kozáková who presents her new album with some of the most renowned Roma musicians from Slovakia, and Flook, an English-Irish group of virtuosos, familiar to Viljandi Folk Music Festival audience from 15 years ago.

Intsikurmu

Intsikurmu is a distinctive two-day festival held in August amidst the enchanting woods of Põlva. It combines vibrant music, art, nature, and a community of creative individuals, all nestled within the towering trees of the Intsikurmu forest.

⁹ <https://www.jazzkaar.ee/en/info/what-we-do/>

¹⁰ Viljandi Folk Festival website (2023). Introduction. <https://www.viljandifolk.ee/festival/festival-2019/introduction>

Audience size: The festival brings together around 10 000 people

Timing: the beginning of August

Notable international acts: Efterklang, Django Django, Chris Noah, Ghostpoet

[Võnge Festival](#)

Estonia's only travelling cultural festival is held in a different location every year. It showcases a multitude of intriguing artists from Estonia and around the globe, performing on stages set amidst the heart of nature. In addition to music, the festival also offers a variety of different experiences from art and culture, yoga, and kids' activities.

Audience size: The festival brings together around 5000 people.

Timing: The two-day festival is held yearly at the beginning of July

Notable international acts: L'Impératrice, HONNE, Kid Francescoli, Annael, Evergreen, Cédric Hanriot and many more.

[Station Narva](#)

The music and city festival Station Narva was first held in 2017 in the easternmost Estonian city of Narva. The festival brings people together for music from near and far and multiple genres, sightseeing, art experiments, and new discoveries across Narva's urban space and its outskirts, business networking, and a look towards the future of the post-industrial Ida-Viru region.

Audience size: The festival brings together around 3000 visitors.

Timing: The two-day festival usually takes place in September

Notable international acts: Onuka, Red Snapper, Jacque Falchetti, Acid Arab, Bazzookas, Deki Alem, Ivan Dorn.

[Hard Rock Laager](#)

Hard Rock Camp is the oldest running and international heavy music festival in Estonia that was not even phased by the pandemic. Hard Rock Laager has been taking place since 2002 in beautiful nature in Vana-Vigala. The festival is known for its close-to-nature setting and friendly atmosphere, ensuring that both seasoned festival goers and first-time rock-metal festival visitors enjoy a pleasant time in the midst of world-class music.

Timing: The two-day festival takes place at the end of July.

Notable international acts: Carcass, Dark Funeral, I Am Morbid, Katatoni, Arcturust, Asphyx, At The Gates, Borknagar, Batushka, Cruachan, Blaze Bailey, and many more.

Mägede Hääl

Mägede Hääl (Mountain Voice) is a music festival that takes place on Kauksi Beach. Various live artists and DJs perform on Estonia's longest sandy beach.

Timing: The two-day festival is usually organised at the beginning of July

Notable international acts: Jaakko Eino Kalevi, Oko Ebombo, Prins Emanuel, Inre Kretsen Group, Raime, Zolaa, Poly Chain, James Holden, Margaritas Podridas, Benedek

Saund

Every summer, Saund Festival brings a wide selection of electronic and experimental music artists and DJs from Estonia and abroad to Hiiumaa. During the festival, you can enjoy all types of music from house to rock.

Timing: end of July

Notable international acts: DJ Nigga Fox, RS Produções, Memotone, Mother, Raf Reza

Üle Heli

Experimental music festival Üle Heli has changed over time. The festival was first brought to life in 2015 when the Sonic Festival already hosted international guests. The festival travels from venue to venue and sometimes even changing the city where the events take place.

Notable international acts: Gum Takes Tooth, Guy Andrews, Nene Hatun, Ya Tosiba, Benoit And The Mangelbrots, Eva Mitreikina & Marcin Polak, Jimi Tenor, Jimmy Winkles, Koray Tahiroglu, Shelly Knotts and many more.

Beach Grind

2023 marks 10 years since the first electronic dance music festival Beach Grind in Estonia. The highly anticipated music event will take place in Pärnu promising an even grander experience both by the size of the festival area and the diversity of its programme. This year, Beach Grind will open a new stage dedicated to house and techno in the courtyard of Villa Ammende.

Audience size: The festival brings together around 5000 visitors each day.

Timing: The summer festival is usually held at the beginning of July in Pärnu.

Notable international acts: This year's (2023) Beach Grind hosted Alan Walker (NOR) with Alesso (SWE), Acraze (USA), Luude (AUS) and many others to the lineup. In previous years, the festival has hosted artists like Dimension (UK), Netsky (BEL), Showtek (NL), Don Diablo (NL), Dub FX (AUS)¹¹

¹¹ Visit Estonia (2023). Beach Grind. <https://www.visitestonia.com/en/beach-grind>

I Land Sound

I Land Sound brings together the best of what music, art, social gatherings and the Estonian summer have to offer, all happening on the beautiful island of Saaremaa. Here, the time dimension disappears and every awakening is significant as international musicians, composers, performers and DJs unite with the local community for an enriching experience.

Timing: the middle of July

Notable international acts: Ale Castro (AR), DoublingThomas (FR), Guy From Downstairs (RO), Acid Pauli (GER), Barac (RO), Funky Loffe (SW), Mosaic Man (NL), Traumer (FR) and many more.¹²

Flex Fest

Flex Fest has been organised since 2022. It is a two-day hip-hop festival that has already gained popularity among the crowds.

Audience size: The festival brings together around 6000 visitors.

Notable international acts: Central Cee, Asena, Mura Masa, Bladee, Käärijä, Mikael Gabriel, Isac Elliot, Yund Lean, bbno\$ and many more.

Dark Side of the Moon

In the middle of August techno club HALL hosts an electronic and experimental music festival called Dark Side of the Moon. The three-day-long festival brings together the techno community to enjoy the end of the summer with international and local artists performing.

Notable international acts: Luke Slater, Acronym, Black Anthem Restore, Andrey Pushkarev, Channel37, D-Leria, Ecan Baggs Gigi FM, Inverse Element.¹³

Viljandi Guitar Festival

Since 2008, the Viljandi Guitar Festival has showcased the art of improvisational and cross-genre guitar playing. Festival-goers can hear guitarists improvising in a variety of music styles and learn more about different playing techniques and types of guitars. The event brings together guitarists from both Estonia and abroad, developing international cooperation between musicians, which is one of the festival's main goals. Another important part of the festival includes artist-led workshops for students. Over the years, the tradition of dedicating the first half of the festival week to students from various Estonian and European universities and the second half to Estonian and foreign musicians, has developed.

¹² Feeder (2023) 32 Essential Electronic Festivals in Europe. <https://www.feeder.ro/2023/03/29/festivals-europe-2023/>

¹³ Kultuur ERR (2022): Klubis Hall Toimuv festival The Dark Side of the Moon avalikustas esinejad.

<https://kultuur.err.ee/1608642274/klubis-hall-toimuv-festival-the-dark-side-of-the-moon-avalikustas-esinejad>

Audience size: The festival brings together around 1000 people every year

Timing: Middle of October

Notable international acts: Chris Thile (US), Kurt Rosenwinkel (US), Jon Gomm (UK), Pedro Martins & Daniel Santiago (BR), Jostein Gulbrandsen (NO), Mikko Iivanainen (FI) and many more.

[Song and Dance festival](#)

The song and dance party is a unique tradition of Estonian culture and an integral part of the Estonian national identity. As the common property of the people, the festival must remain free of politics and commercialism. The song and dance party traditionally includes the general Estonian song and dance party as well as the Estonian youth song and dance party. Over the span of a decade, Estonia hosts four national song and dance festivals, with the Youth Party occurring in the 2nd and 7th years, and a general song and dance party in the 4th and 9th years. The 2023 Youth Festival brought together 50 000 spectators and 23 000 singers.

[Estonian Music Days](#)

Music written by Estonian composers has found admirers all over the world. Since 1979, the Estonian Composers' Union has organized the festival Estonian Music Days (EMD), the visiting card of contemporary Estonian music. An abundant amount of new commissions each year has made it the most established festival focusing on Estonian contemporary music. The artistic directors of the festival are internationally renowned Estonian composers Helena Tulve and Timo Steiner. In 2019, the 40th anniversary of Estonian Music Days was celebrated grandiosely as an international contemporary music festival, held in conjunction with the World Music Days. In 2021, the Estonian Composers' Union, in collaboration with the Latvian and Lithuanian Composers' Unions, initiated the Baltic Contemporary Music Network and introduced a new traveling festival called Baltic Music Days.

Timing: End of April

Notable international acts: In 2023, the festival featured world premieres by notable Estonian composers such as Tatjana Kozlova-Johannes, Evelin Seppar, Jonas Tarm, Marianna Liik, Ekke Västriik, Sander Saarmets,¹⁴ Age Veeroos, Arash Yazdani, Margo Kõlar, Liisa Hirsch, Märt-Matis Lill, Ülo Krigul, Liina Sumera, and many more. In 2021, during World Music Days, selected works by guests from Sweden (including Norrbotten NEO), Defunensemble from Finland, Latvian Radio Choir, and many others were performed, alongside musicians from all around the world.

[Leigo Järvemuusika festival](#)

Leigo Lake Music is a classical music festival that has also inspired the performing arts. Leigo has two lake stages and a stage in the theatre forest on the shore of a mystical pond. Since 2015, the main goal of Leigo Lake Music has been to popularize classical music. The festival exemplifies the notion that classical music can be enjoyed not only in a formal concert hall setting but also in the open air, where attendees can lounge on the deck while listening to the music. At Leigo, even those who don't listen to it every day can enjoy classical music! The festival has been organised since the end of the 90s and has evolved into a valued classical music festival over the years.

[Sõru jazz](#)

In addition to exciting music, the Sõru jazz festival offers a cosy atmosphere and a natural experience in the boathouse of the Sõru harbour and in the summer, pleasant fun around it. Concerts will also take place in Orjaku Harbour and in Emmaste church. Sõru jazz usually hosts mostly Estonian artists but some international names have been invited like Ricardo Padilla, Jason Hunter, Petteri Hasa etc.

Timing: the middle of June.¹⁴

[Birgitta Festival](#)

The Birgitta Festival seamlessly blends the unique atmosphere of the convent's location with a program that intertwines music and performing arts. Birgitta Festival is a part of Tallinn's UNESCO City of Music. Since 2005, the Tallinn Philharmonic Society has organised the Birgitta Festival in the opera house built in the ruins of Piritä Convent. It is a musical theatre festival that combines the dark charm of a mediaeval convent with state-of-the-art modern musical theatre. Over the years, operas, ballets, staged oratorios, modern dance performances, musicals, and other musical theatre genres have been performed at the Birgitta Festival. Until 2016, the founder and artistic director of the festival was maestro Eri Klas.

Timing: August

Audience size: 10,000 people gather in the ancient river bend every year to immerse themselves in the magical world of powerful sounds and spectacles for just a few days. They are attracted by the festive atmosphere, many happy meetings, and unique lighting solutions.¹⁵

¹⁴ Kaunis Muusika. Sõru Jazz. <https://kaunismuusika.ee/soru-jazz/galerii/>

¹⁵ Filharmonia. Brigitta Festival. <https://www.filharmonia.ee/en/birgitta>

Saaremaa ooperipäevad

Kuressaare Opera Days have been happening since 1999. The central venue of the festival has become a well-known and valued attraction of Western Estonia, the mediaeval Kuressaare Castle, with a summer opera house with a capacity of approximately 2,000 spectators placed between the garden and the fortress walls. The festival has cooperated with both Estonian opera theatres (Vanemuine) and the Estonian National Opera, as well as opera houses around the world.

Notable international acts: José Cura, Karita Mattila, Paata Burtšuladze, Soile Isokoski, Lilli Paasikivi, Ain Anger, Matti Salminen, Jaakko Ryhänen, Jorma Hynninen

International Contemporary Music Festival AFEKT

The purpose of the festival is to keep a finger on the pulse of what is happening in Western Europe and to show that Estonia is not a province, but a competitive promoter of contemporary music. In 2022 AFEKT celebrated its XXlth edition and tried to synchronise world contemporary music with the local cultural scene, bringing here high-level and recognized composers, conductors, and performers. Socio-political messages and extended voices permeated the entire festival as themes that came out perfectly in the program selection. One of AFEKT's traditions and missions is to nurture new audiences and future contemporary music performers.

Timing: The end of October.¹⁶

Nargenfestival

Nargenfestival started in 2006 under the leadership of conductor Tõnu Kaljuste, who has been the artistic director of the festival since its foundation. The festival is named after the German form of Naissaare's name because initially, a large part of the festival's concerts and performances took place on the island. By now, however, the annual summer festival, which lasts from May to September, reaches many places in Estonia. The traditional events of the festival are the Kreeg days in Haapsalu and the Pärt days. Among the composers, Veljo Tormis has also been in focus throughout the years. Apart from Tormis's many concert performances, Tormis' cycles "Estonian women's songs", "Estonian men's songs" and "Birth Words" have been staged in the Kaljuste-Jalaka tandem in different seasons as part of the Nargenfestival. From 2021, another series of organ concerts called "Organ Magic " has been launched, the concerts of which take place in the chapel of St. Mary in Naissaare.¹⁷

¹⁶ Saaremaa Opera. Festivalist. <https://saaremaaopera.com/festivalist/>

¹⁷ Information from festival organiser Kai Kutman

Promfest

PromFest is the most unique opera music festival in Estonia because the entire festival program is entirely created by the organisers themselves, not by combining existing projects (productions) as in normal practice festival programs are prepared. The main goal of the festival is to discover new talented opera singers and to popularise the art of opera among the younger generation by offering them modern opera experiences. As part of PromFest, the only international competition for young opera singers takes place in Estonia, which is also, according to known information, the only international-scale competition that gives the previous winners the opportunity to fulfil their dreams and choose the opera role they would like to perform at the next festival. The choice of the new opera is up to the previous winner of the Klaudia Taev Competition for Young Opera Singers, which was first held in 1996 and is still the main event of the festival.

Recent productions include “Aida” by Verdi (2015), “La Traviata” by Verdi (2017), “I Capuletti e I Montecchi” by Bellini (2019) and “Il Turco in Italia” by Rossini (2021). Every new opera project is created with young singers, with the aim of attracting the attention of young audiences.

Timing: the middle of September in the city of Pärnu.¹⁸

Pärnu Muusikafestival

The Pärnu Music Festival is one of the most renowned international classical music festivals in Estonia, combining the Järvi Academy and workshops for young musicians. With the Estonian Festival Orchestra, Paavo Järvi has created a top-class resident ensemble which has also toured throughout Asia and Europe, making history as the first Estonian orchestra to perform at the BBC Proms in London. The week-long festival takes place in various locations throughout the town including the church of St Elizabeth. Children’s concerts take place in one of the numerous spa hotels where families gather after long days on the beach and the main festival concerts take place in the elegant 1000-seater concert hall, built in 2002 and widely regarded as having one of Estonia’s best acoustics.¹⁹

Haapsalu Vanamuusikafestival

Founded in 1994, Haapsalu Early Music Festival has established itself as one of the leading festivals of historically informed performance practice in the Baltic region. Each summer renowned European and Estonian musicians meet in inner-city churches and other venues of Haapsalu, a charming seaside resort on the Estonian West coast, to rejuvenate the music of the past centuries. The festival projects bring together the best musicians from Estonia and the rest of Europe – together, they aim to revive the music

¹⁸ Promfest. About the Festival. <https://www.promfest.ee/en/about-festival/>

¹⁹ Pärnu Music Festival website (2023). Programme. <https://parnumusicfestival.ee/en/programme/>

of many past centuries and offer unforgettable experiences to the audience. Haapsalu Dome Church from the 13th century is an excellent place to do so, but concerts are also held in Jaani Church, Resort Hall, and elsewhere in Haapsalu.

Timing: the end of July.²⁰

[Viljandi Vanamuusika festival](#)

Viljandi Old Music Festival is the oldest such festival in Estonia. It first took place in 1982 and has been combining the beauty of the ancient town with centuries-old music ever since. The festival usually takes place in churches and different concert venues all over the city of Viljandi.

Timing: the beginning of July

Notable International Acts: Paolo Pandolfo, Jane Gingell, Trio Mediaeval, Egidius Quartet, Conrad Steinmann, Paul Hillier, the Eric Ericson Chamber Choir, Tõnu Kaljuste, Andres Mustonen and Hortus Musicus.²¹

[Klaaspärlimäng](#)

Festival Glasperlenspieli has got its inspiration from the novel by Hermann Hesse. It is certainly a leading musical event in Estonian summer where music lovers can enjoy performers like Glasperlenspiel Sinfonietta, Chamber Orchestra of Covent Garden, Tokyo Philharmonic Chorus, Quintet of Berliner Philharmoniker, Gidon Kremer, Vadim Repin, Järvi “dynasty”, Christoph Eschenbach and many more.

Timing: first week of July.²²

[Tallinna Kitarri festival](#)

Tallinn Guitar Festival has become a traditional and much-loved event for lovers of guitar music. The initiator and artistic director of the festival is one of the best guitarists in Estonia, Tiit Peterson. The festival offers guitar music of all styles, performed by various musicians. The Tallinn Guitar Festival was first organised in 2006.

Timing: July

Notable international acts: Roland Dyens, Jaime Velasco, Sergio Bastos, Matthew McAllister²³

More information about music festivals [can be found here](#). There is also a [Live map](#) where you can see the locations and basic information about music festivals and venues.

²⁰ Studio Vocale website (2023). About. <https://www.studiovocale.ee/en/about/>

²¹ Visit Estonia (2023). [Viljandi Old Music Festival](#)

²² Festivals webpage (2023). Glasperlenspiel Music Festival. <http://www.festivals.ee/836>

²³ Visit Tallinn website (2023). Tallinn Guitar Festival. <https://visittallinn.ee/eng/visitor/see-do/events/events/10353>

In addition to music festivals, there are some international music competitions happening in Estonia. The most well-known is an international choir festival called “TALLINN” which is organised by [the Estonian Choral Association](#) (ECA) every other year usually in the middle of April.

2.2.3. Venues and clubs

Estonia has a significant number of concert venues that cater to various types of performances and events. While the exact count may fluctuate, there are approximately 150 concert venues in Estonia. These venues range from small clubs and intimate halls to larger auditoriums and open-air arenas. They are spread across the country, with a concentration in major cities like Tallinn, Tartu, Pärnu, and Narva. These concert venues host a wide array of performances, including classical concerts, live music shows, theatre productions, and cultural events. Estonia's diverse concert venue landscape provides ample opportunities for both local and international artists to showcase their talent and entertain audiences.

*also operates as a promoter

Tallinn

Large venues (2000+)

[Tallinna Lauluväljak \(Tallinn Song Festival Grounds\)](#)

Tallinn Song Festival Grounds holds the title of the largest fenced concert area in the Nordic countries. It is an extraordinary venue that fascinates both artists and audiences. At Tallinn Song Festival Grounds there are 5 areas for small and large-scale outdoor events.

Annually they have more than 200 000 visitors attending the outdoor events each year.

Notable international acts: Bryan Adams, Michael Jackson, The Rolling Stones, Metallica, Tina Turner, Iron Maiden, Elton John, Bon Jovi, Eros Ramazzotti, a-ha, 50 Cent, Madonna, Thirty Seconds to Mars, Red Hot Chili Peppers, Lady Gaga, Robbie Williams, David Guetta, Armin Van Buuren, The Prodigy, Rammstein, Andrea Bocelli. Capacity: Tallinn Song Festival Grounds is the biggest outdoor venue in Estonia able to host around 70 000 people. In addition to the outdoor areas, there are also multifunctional indoor areas that can hold around 1000 visitors. A virtual tour of the festival grounds, indoor rooms, and the backstage area can be found on [their website](#).

[Unibet Arena](#)

Unibet Arena is a unique and well-known indoor venue for organising events. It is possible to organise both large and small events with very different goals and content. Unibet Arena has the hall with the largest capacity for visitors in Estonia, as well as a number of smaller seminars, parties, and restrooms.

Capacity: 10 000 is the capacity for the whole arena. More about the capacity and technical information can be found [here](#).

Notable international acts: Kraftwerk, Bryan Adams, Nightwish, Iron Maiden, Deep Purple, Manowar, Sabaton, Maneskin, Bastille, Sting, Imagine Dragons, Hurts, Mariah Carey and many more.

Medium venues (from 1000–2000 capacity)

[Alexela Kontserdimaja](#)

Alexela Concert Hall was opened in 2009 and it is located next to the Solaris shopping center. The concert hall with excellent natural acoustics accommodates 1,829 seats.

Capacity: Seating for 1,829: A certain amount of seats can be removed, creating space for more people.

Notable international acts: Budapest Gypsy Symphony Orchestra, Andrey Makarevich, Verka Serduchka, Kings of Convenience, KOVACS, ZAZ, and many more.

[Estonia kontserdisaal](#)

Estonia Concert Hall was designed and constructed as part of the Estonia Theatre building by Armas Lindgren and Olivia Mathilda Lönn. The first concert in the newly opened concert hall of the Estonia Theatre building took place on 7.09.1913. On 9 March 1944, the Estonia Theatre building was destroyed during a bombing raid. Reconstruction work commenced within the same year, led by architect Alar Kotli. The Estonia Theatre building was re-completed in 1946. In the summer of 1997, Estonia Concert Hall was thoroughly renovated by Estonian Concert (*Eesti Kontsert*).

Capacity: There are 871 seats in the hall (on request the hall can fit 973 people). Additional technical information about the concert hall can be found [here](#).

[Club Hollywood](#)

Club Hollywood is one of the oldest nightclubs in Estonia with 27 years of experience, located in the Old Town. The club has a nice trendy look and it's a popular place to go for local people and also for tourists.

Capacity: The capacity of the club is 1400 people and it has a state-of-the-art sound system and lightning technique. There is also a big VIP area with tables and a separate VIP bar.

Notable international acts: Sub Focus, Sigma, DJ Fresh, Matisse & Sadko, Sam Feldt, Valentino Khan, Sikdope, Nghtmre, Sofi Tukker, Oh Wonder, Little Big, Dimitri from Paris, Syn Cole, London Elektricity, Fred V & Grafix, Elliphant.

[Helitehas](#)

HELITEHAS is a concert and party hall, which opened in 2019 and can accommodate up to 1,500 people and can be used for concerts, parties, corporate events and birthday parties. It has a large VIP area with two balconies and separate VIP bars. Helitehas is equipped with a first-class sound system from L'Acoustic, a quality that is world-renowned and appreciated.

[Cathouse Concert Hall](#)

Cathouse hosts both club parties and concerts. It is also possible to organise private events or public parties on the club's premises.

[Tallinn Creative Hub](#)

The Creative Hub is one of the most unique creative and event spaces in Northern Europe. Approximately 300 events take place at the Hub every year which are attended by 200,000+ people. There are eight halls in the Creative Hub and a total of 16 rooms with an inspiring industrial atmosphere. Whether you're putting on a conference, a concert, a trade fair, a play, an exhibition, a seminar, a party or a festival, you're sure to find the perfect space. The biggest of them, the Black Box, has room for 550 seats.

[Noblessner Foundry](#)

The Noblessner Foundry, completed in 1914, is the most famed historical industrial building in Noblessner. It has unique acoustics that result from its architecture. The premise has been the venue for a number of world-class concerts and recordings over the past ten years. All of Arvo Pärt's and Heino Eller's symphonies have been performed here, as well as several performances. After more than a year of renovations, the PROTO Invention Factory of all-family centre and the Nobel Hall, an ideal venue for corporate and cultural events, are opened in the Foundry.

Notable international acts: Michael Kiwanuka, Calum Scott, Loreen, Moderat

Small venues (less than 1000 capacity)

[Sveta Bar](#): live and club nights venue, member of Liveurope *

An open-minded inclusive venue which prides itself on its diverse programming and offers a platform to support a wide variety of subcultures.

Genre: Alternative

[Philly Joe's Jazz Club](#) *

Jazz club Philly Joe's was born in January 2014, to be an Estonian jazz music incubator and bring musicians and audiences together in a setting appropriate for jazz. Venue of the year 2020.

Genre: Jazz

[Fotografiska](#): exhibition space, live and club nights venue *

A world famous museum, which has an event hall to host events and expands the community.

Genre: Various

[Club HALL](#): nightclub *

HALL is a platform, offering a safe space and a stage for local and international electronic music and visual arts.

Genre: Techno, house, electronic and occasionally live.

[Club Studio](#): nightclub

Club Studio is composed of two halls on two floors. The upstairs area is filled with energy and electricity, while the downstairs area features dim Hip-Hop and R'n'B bass notes and soulful rhythms.

Genre: EDM

[Erinevate Tubade Klubi](#): live venue

The Club of Different Rooms is a space offering alternative experiences hand in hand with elementary commodities and professional technical solutions.

Genre: various

[Barbar](#): live venue*

The Rockclub Barbar offers live rock & metal shows each Friday & Saturday and different events within the week. They host both local and international artists and support newcomers.

Genre: Rock, metal

[Klubi Tapper](#): live venue *

Rock Club Tapper is an important site in the local rock scene. The black-box club and bar, specially designed as a concert hall, can accommodate up to 500 guests.

Genre: Rock

[Kinomaja Bar & Stage](#): live venue

Kinomaja hosts concerts for a wide range of genres. The concert hall is connected to a cosy bar.

Genre: Various

[D3](#): live and club nights venue *

D3 has furnished industrial premises offering visitors a diverse program in both party series and concerts.

Genre: EDM

[Uus Laine](#): live and club nights venue, community nights *

Social club, which is dedicated to community and openness. They host different events, like new music nights, DJ programmes, quiz nights and concerts.

Genre: Alternative

[KUMU](#): art museum, space for special events

The main activity of the museum as the mediator of art and culture is supported by an auditorium that seats 245 people and is equipped with modern sound, video, film and lighting technology, plus an easily adjustable stage.

[Paavli Kultuurivabrik](#): the newest magnet on Tallinn's cultural map

The program curated by the Culture Factory is an incubator for local cultural creators, organisers and artists. Their goal is to intensify cooperation between local artists, to offer them a platform and experience unforgettable emotions to the audience.

Venues in Tartu

[Tartu laululava](#) outdoor Song festival grounds

The Tartu Song Stage is a concert venue for up to 15,000 people, which was opened with the 125th Jubilee Song Party in 1994. Up to 20 events take place there every year.

[Genialistide Klubi](#): venue and performance space, alternative music and culture *

Tartu's subculture house, a club for special and open people and a meeting place where theatre, music, cinema and joy intertwine.

[Club Rock'n'Roll](#): live venue, punk and alt-rock

A pub and concert venue in Tartu, oriented to the presentation of live music and to keep the spirit of Rock & Roll.

[Estonian National Museum](#): various spaces, incl. indoor black box and outdoor summer stage

The Estonian National Museum is an immense facility just outside the centre of Tartu that serves as both the country's primary history museum and a cutting-edge culture/event center.

[Aparaaditehas](#): various spaces including the indoor Armastuse Saal and the outdoor middle square

The centre is known for its vibrant cultural scene and we host a variety of events and activities, including concerts, theatre performances, film screenings, art exhibitions, and markets.

[Naiiv](#): live and club nights venue on a boat *

In the evening, the daily cafe becomes a bar, where different DJs and a diverse program drive the crowd crazy during weekend dance parties.

[Tartu New Theatre](#): theatre, live venue

Tartu Uus Teater is a research theatre centre born in 2008, which constantly tries to develop the theatre world, touching the boundaries both artistically and socially.

[Kultuuriklubi Salong](#): live and club nights venue *

A cultural club that hosts parties, concerts, film nights, quizzes, exhibitions and lectures for everyone, regardless of age or other characteristics.

[Vanemuise kontserdimaja](#): concert venue, modern conference centre, multigenre, operated by [Eesti Kontsert](#)

The most festive events in Tartu take place in the Vanemuise concert hall, where in addition to beautiful music, smart thoughts and rich knowledge also find a good place to grow.

Venues in Other Towns

[Art Club Ro-Ro \(Narva\)](#): live and club nights venue, alternative

Ro-Ro hosts both Estonian musicians and foreign artists on the club's stage, bringing together a brilliant cultural program and picturesque view of the Narva River.

[Kära Kants \(Rakvere\)](#): live venue, alternative

Kära Kants is the oldest Rock Pub in Rakvere. For more than 20 years, Kära Kantsi has played music whose audience can undoubtedly be classified from wall to wall.

[Kultuuriklubi BAAS \(Rapla\)](#): live venue, multigenre, Särin festival

Concert place in Rapla. They organise and host concerts in different sizes and genres. Their main event is the cultural festival SÄRIN, which takes place once a year.

[Valga Rockiklubi \(Valga\)](#): live venue, rock

[Pubi Juudas \(Tõrva\)](#): live venue, rock, alternative

Mainly rock and alternative music from both Estonian and foreign bands. In addition to concerts, all kinds of other events are also organized, such as poetry evenings, book presentations, film evenings, etc.

[Wunderbaar \(Pärnu\)](#): live and club nights venue, multigenre

Interior is furnished with an industrial theme for nearly 200 people in the most modern way. Venue of the year 2022.

[Pärnu kontserdimaja \(Pärnu\)](#), concert hall operated by [Eesti Kontsert](#)

Traditionally, the most festive events in Pärnu are held in Pärnu Concert Hall, including receptions of the Mayor and New Year's Eve celebrations.

[Jõhvi kontserdimaja \(Jõhvi\)](#), concert hall in Ida-Viru County, operated by [Eesti Kontsert](#)

A wide variety of events can be organized in the Jõhvi concert hall: conferences, seminars, exhibitions, fairs, formal receptions, classical concerts, ballet performances, balls, rock concerts, etc.

[Sillamäe Kultuurikeskus \(Sillamäe\)](#), the cultural center serves as a venue for various concerts and events, and banquet and conference rooms are also available for rental

The Sillamäe Cultural Center building, built in 1949, has been recognized as an architectural monument, which in addition to the beautiful architecture is a venue for various concerts and events.

[Vabalava \(Narva\)](#), unique theater and performing arts center.

Vaba Lava is a unique theater and performing arts center. Our daily goal is to create international projects involving creative people from Estonia and abroad.

[Mulks \(Viljandi\)](#), live venue, multigenre

Vinoteek Mulks offers a cozy atmosphere in the heart of the old town of Viljandi. On weekends there is live jazz music and parties.

[Viljandi Pärimusmuusika Ait \(Viljandi\)](#), live venue, multigenre

The non-profit organisation Estonian Traditional Music Center is an open and innovative non-government organisation which supports and organises traditional music hobby education and promotes live traditional music performances across the country.

2.2.4. Promoters, producers and agents

[Live Nation Estonia](#): multigenre; major artists

Live Nation Estonia is a part of the world's leading live entertainment company. Starting from club concerts packed with energy until powerful big-stage outdoor shows.

[Damn.Loud agency](#): alternative, focused also on Baltics

Damn.Loud is an independent concert & festival promoter and booking & production agency from Tallinn, Estonia. The main are artists with independent backgrounds - everything from jazz to stoner rock, from synth-pop to death metal.

[Shiftworks](#): multigenre; organiser of Tallinn Music Week and Station Narva festivals

Shiftworks specialises in event production, music-based and artistic content promotion as well as initiation and execution of marketing, communication and creative projects on an international, national and regional scale.

[Funk Embassy](#): funk, soul, disco

The aim is to unite the local funk, soul, disco, Latin and jazz community. The ambassadors' means on this mission are a weekly radio show on the national broadcast station Raadio 2; booking services, concert and DJ party production for local and international acts.

[Smuuv](#): multigenre

Smuuv operates as an event organiser, concert agency, artist management and record company. Smuuv Records is also a subsidiary of Warner Music Baltics.

[UCE Agency](#): alternative, focused on Baltics

UCE Agency is the realisation of a lifelong passion for alternative music, with roots in the nu metal and hardcore scene, that has evolved into a specialised agency for the promotion and production of alternative shows in Estonia, and overall Baltics.

[Monster Music](#): pop; organiser of various mainstream festivals

Monster Music is an event managing company, focusing mainly on concerts and music festivals for different target audiences.

[Piidivarbik](#): electronic; organiser of I Land Sound festival

I Land Sound is an environmentally friendly experience festival, bringing together the best that music, art, gatherings and the Estonian summer has to offer.

[PS Music Events](#): electronic; organiser of Grind, Beach Grind, SUME Festival, Hospitality and Liquicity Estonia

The agency specialises in event and festival organising, artist booking and local talent management.

[Macadam Music](#): multigenre, private and public events

Artist agency and event promoter with nearly 25 years of experience worldwide from Europe to Asia to the USA to Australia. Work with both public events and private/corporate clients. Besides program solutions, they also offer full technical solutions, consulting, and tech project management.

[Disco Tallinn](#): disco, funk, soul

A series of parties and concerts curated by Tom Lilienthal and Widenski, glorifies disco and always wants to surprise, taking place mainly in Tallinn, but sometimes in other special places in Estonia.

[Estonian Concert Agency](#): classical

The musical scope of Eesti Kontsert encompasses symphonic and chamber music, jazz, choral music, electronic acoustic music and music for children.

[Warner Music Live](#)

Warner Music Live Estonia is home to a wide variety of the most popular and influential domestic artists, as well as new developing acts.

[L Tips Agency Estonia](#)

L Tips Agency organises concerts throughout the Baltics and beyond.

2.2.5. How to get booked for a show or organise a tour?

Know Your Audience

Booking a gig or a festival depends largely on the artist's overall popularity and audience in Estonia. For larger artists who already have a following in Estonia, this is easier of course, and they will only need to do a little marketing to attract an audience. Smaller artists will have to do a lot more work and since the market in Estonia is small then they will need to calculate if it makes sense to even perform a headline show. In some cases, it might be better to just perform as part of a music festival, like Instikurmu, Flex Fest, Võnge or others, or to do a showcase at Tallinn Music Week.

Find the Right Venue

It is also important to find the right venue for the artist. Some venues, like Sveta Bar, for example, have a strong reputation and are able to draw people in no matter who is performing.

Work with a Local Promoter

Foreign artists can also get in touch with Estonian promoters and pay them to do the necessary marketing and promotion activities for their gigs. A list of local promoters can be found in 2.2.4.

Have a Marketing Strategy

If however, the artists and their manager want to do the marketing themselves, then Hendrik Ehte, head of an independent label, Funk Embassy, advises artists to get the contact of relevant radio and TV show hosts and ideally get onto those hosts' programmes to talk about their music. It's also important to have targeted social media ads running a few weeks or months before the gig. The venues themselves might also have their own newsletters and lists of contacts to whom they can send a reminder about your gig. Overall, a good marketing strategy consists of tackling multiple areas at once, social media, radio, TV, print and more. Nevertheless, it is important to stress the small size of the market and calculate whether all of these marketing efforts are financially justified.

2.3. Recorded music sector

2.3.1. The size and overall structure of the recorded music market

Although the Estonian recorded music sector is small and still developing, it has experienced substantial growth and professional development. All three major labels, Universal Music, Warner Group, and Sony Entertainment have offices in Estonia and represent several local acts. There is also a strong network of independent labels (mentioned in paragraph 2.3.6).

The most recent study on the overall size of the Estonian recorded music market shows that, in 2020, people spent a total of €13,257,692 on recorded music in Estonia, with €5,752,727 coming from digital consumption (DSPs) and €6,720,000 from physical (CDs, vinyl). This study was conducted by the Estonian Music Export organisation, Music Estonia, and relied on data from The Estonian Phonogram Producers' Society (EFÜ) and IFPI. According to IFPI analysts, record producers in Estonia earn approximately 55% of the total amount spent on music. This is based on IFPI Finland's analysis of digital charts, for which IFPI obtains data from relevant service providers in each country.²⁵

2.3.2. The digital music market – structure and main trends

As mentioned, the consumption of recorded music in the digital format amounted to €5,752,727 in 2020, making it a prominent part of the market.²⁶

A study conducted on the listening habits of Estonian residents showed that the most popular digital music platforms are YouTube and Spotify, with YouTube being the most popular. 61% of the participants said they use Youtube and 31% Spotify. According to the report, Spotify tends to be used more by younger audiences and in more urban areas. Other platforms that are used less often include Apple Music, SoundCloud, and iTunes, respectively.²⁷

Estonia also has its own streaming platform Fairmus, which aims to make music streaming more artist-friendly by utilizing a user-centric payout model rather than the pro-rata model employed by larger streaming platforms like Spotify.

In addition to streaming, many people also listen to music on the radio and on online radio stations. In fact, 43% of the respondents in the 2021 study reported listening to music on the radio from their car daily. Other popular channels for listening to music were the phone, computer, TV, regular radio, and digital radios.²⁸

²⁵ Music Estonia (2022). Eesti ühiskonna kulutused muusikale 2018-2020. [Available here.](#)

²⁶ Music Estonia (2022). Eesti ühiskonna kulutused muusikale 2018-2020. [Available here.](#)

²⁷ Nordstat (2021). Eesti elanike muusikakuulamise harjumused.

²⁸ Ibid

It's also important to mention that there are no regional Spotify playlist editors or editorial playlists in Estonia or in the Baltic region at all for that matter. There are local playlist curators who showcase new Estonian music but these are geared towards local artists. Likewise, there also aren't any independent playlist curators with large followings. This is something that international artists should be aware of when planning their export strategy to Estonia.

2.3.3. The physical music market – structure and main trends

Similar to other markets, music in physical format has become more of a merchandise item rather than a medium for listening. Nevertheless, physical formats are popular in Estonia, with €6,720,000 of the recorded music revenue in 2020, coming from physical album sales. Hendrik Ehte, founder of Funk Embassy, advises international artists to sell their CDs and vinyls at their shows and if they so wish to bring a few copies to local record stores and introduce the store owners to the artist. Record shop owners in Estonia tend to be open to receiving new music and might agree to sell the CDs or vinyl at their shop. Artists can employ this tactic as a part of the overall marketing strategy and use it to generate social media content (i.e. creating a post about where fans can find their physical albums).

Some record stores in Estonia include:

- [Terminal Records](#) (Tallinn)
- [World Clinic Record Shop](#) (Tallinn)
- [Tallinn Old Town Records](#) (Tallinn)
- [Psühhoteek](#) (Tartu)
- [Viljandi Plaadimees](#) (Viljandi)
- [Apollo](#) (Tallinn)
- [Rahva raamat](#) (a chain around Estonia)
- [Raamatukoi Kauplus](#) (Tallinn)

Estonia has its own vinyl plant, [Tartu Vinyl Plant](#), which was the only one in Northern and Eastern Europe until 2020. In Latvia, there is the pressing house [Semikols Record Pressing](#), and in Lithuania, there is the newly opened [Green Lakes Pressing](#).

2.3.4. What kind of (recorded) music are audiences listening to?

Although no official data is available on which music genres are listened to the most in Estonia, some trends can be seen in the music that makes it into the top charts (like Top50 on Spotify). The music that occupies those charts tends to be music from local artists, often in Estonian. Similarly to the current music trends in the world, other popular genres include rap and hip-hop, as well as pop, rock, and electronic music.

2.3.5. Do I need a local label for distribution and promotion?

International artists seeking to expand their audience in Estonia, do not necessarily need a local label to handle their distribution and promotion, however, it can be helpful to at least have a local partner. Artists affiliated with major labels, can get in touch with their label's Estonian office and inquire about possibilities in which they might work together.

Independent artists or artists under indie labels can instead get in touch with an Estonian label and inquire about working together. Independent labels are usually open to this type of collaboration, particularly if they like the artist's music and envision a way in which they might work together. Many labels might have their own radio programmes or playlists where that can offer a suitable platform for international artists. Labels can also advise on the right people to reach out to and recommend venues that might suit the artists. If there is a match, then they can also propose a collaboration between their own local artists and the international artist. Head of indie label, Funk Embassy, Hendrik Ehte says that he has received emails from international artists and has played the music of some of these artists on his radio programme and added them to his public Spotify playlist (Funk Embassy Radio Playlist).

2.3.6. Some of the main recorded music companies, major and indie

All major labels, Universal Music, Warner Group and Sony Music Entertainment have an active office in Estonia and represent several local artists as well as their international catalogue. Some of the major labels also work in partnership with local labels, such as SMUUV Records with Warner and Made in Baltics with Sony. There are also several independent labels that represent a more niche roster of artists.

- [Seksound](#): shoegaze, dreampop
- [Porridge Bullet](#): alternative electronic, avant-pop
- [Õunaviks](#): global, alternative folk, outsider music
- [Funk Embassy](#): funk, soul, RnB
- [TIKS](#): pop, RnB, altpop
- [Trash Can Dance](#): cassettes-only, experimental
- [MIDA](#): IDA Radio's label, alternative, electronic
- [Legendaarne Records](#) rap and hip-hop

There are also several recording studios and creative spaces in Estonia in which international artists can meet like-minded professionals. Some of these also organize artist residencies.

- [Ö Studio](#): creative space in Tartu, recording, mixing, mastering, and video production.
- [Muusa](#): recording studio for various needs, including sound creation for film and theatre.
- [Clockwork Studio](#): recording studio with various rooms, technology, and instruments.
- [Faar Music studios](#): specialised in electronic music, and mixing.
- [Sudu Mixing and Mastering](#): mixing and mastering.
- [Prosound Studio](#): mixing and mastering.
- [Lauri Liivak mastering](#): mastering, 24x Estonian Music Award winner.
- [Studio89](#): recording, mixing, mastering, Dolby Atmos, 7.1, 5.1.; TMW's Ukrainian sound residency.
- [Eesti Raadio helistuudiod](#): legendary studios where many historic Estonian tracks have been recorded.
- [Kaarel Tamra studio](#): recording, mixing, mastering.
- HALL: techno, open for residencies

2.3.7. CMOs for neighbouring rights

Estonian Association of Phonogram Producers (EFÜ) and Estonian Performers Association (EEL).

2.4. Music publishing & sync sector

2.4.1. The size and overall structure of the music publishing and sync market

The music publishing and sync sector in Estonia is still relatively new and developing compared to larger and more established European markets. Hence, there also is not a lot of data on the overall market. The data that is available is through the Estonian Author's Society (EAÜ) where it can be seen that in 2022, the society distributed 6,34 million euros in payouts. This includes payouts both for music as well as other copyrighted works such as audiovisual works. In terms of music, 1 134 973 was earned in royalties from digital recording (DSPs) and 616 759 from the mechanical rights of background music.³⁰

The EAÜ also collectively licenses their members' music to film and TV through predetermined set tariffs for each usage type. The society publishes reports annually where the total amount collected via sync (through EAÜ) can be seen. Last year the EAÜ sent out invoices for sync in the total amount of 26 551,13€ of which 18 902,39€ was due to authors. The breakdown of these invoices was as follows:

- 13 090,24€ (9259,02€ for authors) came from TV
- 6639,91€ (4742,79€ for authors) came from feature films
- 5066,15€ (3646,15€ for authors) came from documentaries and short films
- 1754,83€ (1254,43€ for authors) was from other uses (video clips, company programmes, cultural announcements etc.).³¹

The EAÜ does not licence music for advertisements, thus advertising agencies must contact the artist directly in order to get permission and obtain a licence. In this case, the fee is also set through negotiation between the rights holder and the advertiser.³² Finding this kind of data for advertisers, who do not licence through EAÜ, can be more challenging. Based on the experience of professionals who deal with sync in Estonia, the fees for using music in a typical advertising campaign can be anywhere from 300-5000€ or more. Compared to more established markets, this is relatively small and thus many companies opt to use library music. Some of the more popular ones in Estonia are Apollo Music and to a lesser extent Artlist, Epidemic Sound, and others.

³⁰ EAÜ (2022) Transparency Report 2022, page 15

³¹ EAÜ (2023). Ettepanek uute sünkroniseerimis tariifide kehtestamiseks. *Unpublished report*.

³² EAÜ Website. Use of Musical Composition in an Audiovisual Work. <https://eau.org/en/for-the-user/use-of-a-musical-composition-in-an-audiovisual-work/>

2.4.2. Do I need a local publisher and/or sync agent?

Since the publishing sector in Estonia is quite small, having a local publisher or sync agent should not be necessary. The local CMO, EAÜ, can collect all necessary royalties and distribute them to your national CMO. Likewise, if an international artist has their own publisher, then they can also easily get in touch with Estonian publishers should it be necessary. International artists or songwriters could also join a songwriting camp in Estonia, which would provide a good way to meet local artists, and publishers and get their foot in the door.

Regarding sync, since the budgets for sync in Estonia are rather small, it is not yet a lucrative market for foreign artists wishing to sync their music. Sometimes advertisers or film/TV producers will have a specific song in mind from a foreign artist, and in that case, they will contact that artist or their representative to clear the rights.

2.4.3. Some of the main music publishing and sync companies

As of now (2023) there are only two official music publishing companies in Estonia, [Tier Music Publishing](#) and [FAAR Music](#). Both were established in the last five years. Nevertheless, the sector has undergone rapid development in the past few years. For example, the annual Estonian Music Awards added a new category for Best Music Publisher this year and several industry professionals are looking to establish music publishing companies in the new future or to develop the publishing side of an existing label/management service with 360 deals.

The two music publishing companies that exist currently only represent local songwriters and producers, developing their careers and finding co-writing sessions with other artists both locally and abroad. Both publishers have also organized several international songwriting camps bringing in writers, producers, and artists from across Europe to Estonia.

Tier Music Publishing has also established a sync agency side, representing a catalogue of a dozen local artists, pitching their music to sync projects and developing the Estonian sync sector through. There are also a few companies that create sound designs and jingles for sync, such as [Royal Mystery](#), [KUKA Sound](#), as well as some music libraries like [Apollo Music](#). Local labels and artist managers also occasionally clear syncs as well as pitch their artists' music to audiovisual projects.

2.4.4. CMOs for author's rights

The Collective Management organization in Estonia is the Estonian Author's Society (EAÜ), for publishing rights.

The EAÜ licenses its members' work to various types of films (feature films, documentaries, short films) and TV programmes (broadcasting and VOD). To obtain a synchronisation authorisation, an application needs to be submitted via EAÜ's website, upon which the EAÜ will issue an invoice and then the music can be utilized in an audiovisual work.

The EAÜ operates based on set licenses and tariffs for various categories of music usage in audiovisual works. The tariffs are based on the fee per second of usage and apply to the licensing of existing works. Regardless of the track, the fee per second remains the same. In the case of TV broadcasting, the fee also depends on the territories where the work will be shown. As for commissioning original tracks, the music users will need to get in contact directly with the composer and this is not mediated by EAÜ.

The Estonian Association of Phonogram Producers distributes blanket licenses to TV and radio stations for using musical recordings. EFÜ does not give out licenses for film, advertisement, or VOD content producers. These must be negotiated directly with the master rights holders.

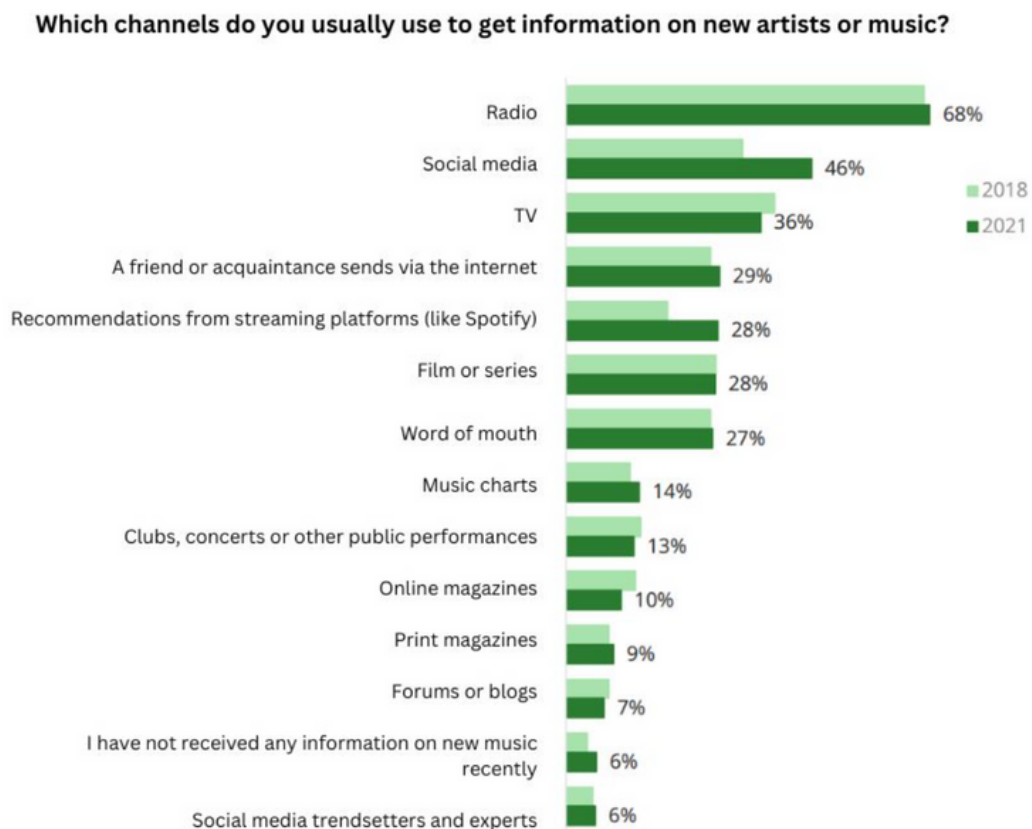
2.5. Media

2.5.1. How do audiences discover music?

The way audiences discover music in Estonia is similar to other countries. The main sources of music discovery tend to be streaming platforms (mainly Spotify or Youtube) and the radio.

The latest study on music listening habits in Estonia showed that the majority of people (in this questionnaire) discovered new music through the radio, social media, TV or streaming, film or TV, or through word of mouth. Less than 15% discovered music through charts, live concerts, music blogs/magazines/journals, or tastemakers (figure below).

Youtube still remains the most popular platform for listening to music, with 61% saying they use it often and 31% saying they use Spotify.



Answers based on participants who listen to music at least once a month (791 people)

Figure 1. How do listeners find new artists and songs ³³

³³ Music Estonia (2021) Eesti elanike muusikakuulamise harjumused. Nordstat.

2.5.2. The Radio Landscape and Audiences

Radio is still listened to by a large percentage of the population, particularly in the car and it is still a way for people to discover new music. Due to this, it can be useful for international artists to work with a radio or PR person to get their music into a radio playlist or to be featured on a radio programme. Some relevant radio stations include:

Estonian Public Broadcasting FM stations

- [Raadio 2](#): new music from pop to alternative with a variety of influential specialist music shows; member of EBU
- [Klassikaraadio](#): classical music, specialist shows on a wide variety of crossover and alternative music

Commercial FM stations

- [Sky Plus](#): pop, adult contemporary, the most popular national private radio in Estonia
- [Rock FM](#): dedicated rock radio station
- [Power Hit Radio](#): electronic, pop, TOP40

Online radios

- [IDA Radio](#): an online community radio based in Tallinn & Helsinki;
- music shows from jazz to grime, topics from subcultures and environment to literature

2.5.3. Music press, blogs and webzines

According to Ingrid Kohtla, PR and communication specialist for Tallinn Music Week and Shiftworks, there are several music press sites (like Postimees Kultuur and ERR Kultuur), however, it seems that their success comes mainly from sharing the content on social media. In general, the importance of traditional media is declining and depends on how much the content is shared on social media. The role of tastemakers and music journalists has also changed and has morphed into more of that of a curator or a reactor. Nevertheless, being featured in a well-respected music magazine, column, or news outlet, can provide credibility and help reach industry professionals.

Some notable music press outlets in Estonia are:

- [Eesti Ekspress Areen](#): culture pages of the biggest national weekly; features album and live reviews and various music-related features; runs the most influential “Album of the Year” selection by the publication’s contributors
- [Postimees Kultuur](#): culture pages of the biggest Estonian daily, features culture & music news, long-read articles and interviews and culture podcast
- [ERR Kultuur](#): culture online of Estonian Public Broadcasting, features daily news, weekly album and single spotlights, runs the second most influential “Album of the Year” selection by the publication’s contributors
- [Müürileht](#): national monthly with content covering alternative music, pop culture, societal and environmental topics
- [Edasi](#): “A quality pastime” quarterly, focusing on long-read culture critique and thematic issues along with its online publication of culture & music news, reviews and special features

2.5.4. Social media

The relevant social media platforms in Estonia are similar to those in other European countries, with Facebook and Instagram dominating the market, although the use and importance of TikTok have been growing steadily.

Data from the 2022 Datareportal study shows that 80.8% of the total population in Estonia uses at least one social media platform, with the most popular being Facebook and Instagram. Facebook’s ad reach in Estonia was equivalent to 52.1% of the total population at the start of 2023, Instagram’s was 36%, and YouTube’s was 80.8%.

Ingrid Kohtla also mentioned how the importance of Twitter seems to be growing particularly amongst music journalists/commentators and younger artists who are focused on international markets.

2.5.5. Music in TV

Getting an artist to perform or have an interview on TV does not hold the same importance as before. The audience who watches TV tends to be older so it might not be the audience that comes to artists’ gigs.

2.5.6. What would a good PR & marketing strategy be like?

The PR and marketing strategy for foreign artists promoting a gig or their music in Estonia varies depending on the music genre. Half of the work consists of finding the right venue, promoters, and potentially local artists to collaborate or perform with. Ingrid Kohta, PR and Communication Specialist for Tallinn Music Week and [Shiftworks](#) advises international artists to team up with local artists and local promoters. Local promoters will have the necessary contacts to reach out to the radio, media, and social media. Performing with a local artist who has a similar audience can help attract more people to the show. It's also essential to choose the right venue for you as an artist.

Ingrid notes that it can be tough to organize solo gigs for midsize artists in Estonia since Estonia's population is so small. Even if an artist has a decent fanbase globally, the number of listeners in Estonia, who are also willing to come to a concert, might be very small. Therefore, one option might be to either perform with a local artist, in the lineup for a music festival or as part of Tallinn Music Week's showcases. The latter can be a good platform for emerging artists seeking to build an audience in Estonia. There are a few success stories of artists who gained a following in Estonia after Tallinn Music Week and went on to perform at other summer festivals. However, whether Tallinn Music Week acts as a good platform depends on who the audience is at the artist's showcase - whether it is mainly foreign delegates or whether there are locals in the audience as well.

Ingrid Kohta also mentions that there is a benefit to being new and performing in Estonia for the first time. If this is marketed right, then the novelty can draw people in.

In terms of PR specialists dedicated to music, there are not too many and the ones who do focus operate in this field are typically busy. Fortunately, promoters are usually willing and able to write and send out press releases and communicate with the media (see list of promoters in 2.2.4).

2.6. Case studies

A Japanese rock duo Moja, performed at Tallinn Music Week a few years ago and subsequently went on to have other gigs in Estonia, growing their audience.

2.7. Genre snapshots

Several genre-based associations operate in Estonia, such as Jazz Estonia, Heavy Music Estonia, the Estonian Centre for Contemporary Music, and the Estonian Traditional Music Centre (refer to 2.1.3). When organizing international missions, Music Estonia always involves the competence centre in the respective genre through its export office.