

EVALUATION OF HUMAN GEOGRAPHY AND POPULATION STUDIES IN ESTONIA

1995 - 2000

Institutions evaluated:

§ Chair of Human Geography - Institute of Geography, Faculty of Biology and Geography, Tartu University

§ Estonian Institute for Population Studies - Tallinn Pedagogical University

Evaluation dates: 13-18 November 2001

Expert team:

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1. Approach to the evaluation

The evaluators followed the Principles and Criteria for Evaluation of Research and Development Institutions (approved by the regulation of the Government of the Republic of Estonia No.83 of 21st of April 1998) and Guidelines to Experts for the Research Evaluation.

The team had obtained a Self assessment report of human, social and economic geography, 1997-2001 (Tartu, 2001, 23 pp.) and a Self evaluation report for the scientific evaluation of population research, 1991-2001 (Tallinn, 2001, 166 pp.) a month in advance.

The team arrived in Tallinn on 13 November 2001. At the beginning of the visit an orientation meeting at the Estonian Higher Education Accreditation Centre (EHEAC) took place and instructions were given by the Head of the EHEAC, Dr Tiit Laasberg. The team was also given 'A Vision of an evaluation report', materials about research and development in Estonia, 1996-2001 and the working schedule. After the orientation meeting the team was transferred to Tartu in the same evening.

The Chair of Human Geography at the Institute of Geography, Faculty of Biology and Geography, Tartu University was visited on 14 November. In the evening the same day the team was transferred back to Tallinn. The Estonian Institute for Population Studies was visited on the following day.

The team found it necessary to merge some of the principal directions of research at the Chair of Human Geography into four broader profiles which, together with the three research areas at the Estonian Institute for Population Studies were evaluated using the four point scale (excellent, good, satisfactory, unsatisfactory). The following criteria were used:

- the quality of research in international comparison;
- the overall capability of research unit/sub-unit;
- success in educating new PhD and MSc students;
- novelty of past and ongoing research activity;
- success in applying for funds and grants;
- the implementation opportunities for the research results and their importance for Estonian society.

Geography is not formally taught elsewhere in Estonia even though there is a full programme for Geoecology at the Tallinn Pedagogical University, where there is a certain basic geography content in the undergraduate curriculum. It has not been considered relevant at the present time to discuss that programme and the research of that PhD programme in this context, as this is being evaluated in the field of ecology.

The grades are based on the importance of the results as well as on the publication records.

During the site visit the evaluators received additional materials, particularly 'Synthesis of Contemporary Human Geography Issues at the University of Tartu' and 'Summary of the evaluation performed by Research and Development Council of Estonia in higher education establishments and research institutions in the Direction: Social sciences and Humanities – 8) Demography'.

Evaluators found the self evaluation reports and presentations during the site visits well prepared and informative. The institutions were also quite well aware of their strong and weak points. Discussions with PhD and MSc students in both institutions were very useful. The evaluators particularly wish to commend the Estonian Institute for Population Studies for its comprehensive report.

During the last two days of the evaluation visit the evaluation team was provided with the necessary materials to prepare the Report at the premises of the EHEAC.

2. Human geography in Estonia

2.1. Current situation

Geographical research and undergraduate teaching at Tartu university was more or less completely reorganized in 1992 after the reestablishment of independence of the country. Previously, human geography under Soviet rule was restricted to a limited field, in line with other social sciences and the humanities. In the case of human geography, studies of settlement and population were of growing importance together with studies of various social issues. The traditions of the 1920s and 1930s, when internationally famous names in geography such as Johannes Gabriel Granö and Edgar Kant taught at the department in Tartu and when research in a number of fields gained wide recognition, also in other fields of research, were discontinued at the Soviet occupation and geography at Tartu was mainly aimed at teaching school teachers for Estonia. There was no PhD programme and those interested in getting a doctoral degree in the geographic sphere had to go to Moscow for supervision and examination. Only a small number of the academic staff of geography in Tartu up to the end of the Soviet period obtained this Soviet PhD degree. From 1992, the Institute of Geography is organised in three parts, or chairs, of which one is Human Geography and the other two are Physical Geography including Landscape Ecology and Geoinformatics and Cartography.

We have mainly been concerned with the Chair of Human Geography here, although there are some aspects of the development of this body which also concern the other chairs and their respective fields of research. As PhD student research is an important part of the total quantity of research being undertaken at the chair, we have decided to discuss the PhD programme at some length in this report and to give some general recommendations concerning this, while the different defined research themes, which also to some extent contain PhD student research, are evaluated separately.

Thus, the period since 1992 has been one of almost complete change within the field of Human Geography in Tartu. Ties to the proud traditions of Granö and Kant have been revived and the present staff has to a large extent been recruited after 1992. A research student programme in Human Geography has been launched and is working successfully with so far four finished PhD degrees and more than a dozen research students working full time to obtain their degrees in the next 2-4 years. Apart from this, one research student of the programme has finished his PhD in Helsinki university and yet another defended his thesis in physical geography in Tartu, being involved with landscape ecology, which is a field spanning almost the whole of the geographical arena.

Human Geography is today the most popular PhD programme of the Institute of Geography, annually recruiting two or three new research students. This is a reflection of the relative popularity of Human Geography within the undergraduate programme, where about two-thirds of the students specialise in this field towards the end of their studies, which also contain courses in the other fields of the institute. There is a requirement for an MSc degree to enter graduate studies, although not all PhD students have an MSc in Human Geography. PhD studies formally last for four years, of which 25% is supposed to be composed of course work and participation in conferences and the like, while 75% forms the independent research task. The individual study plan for each PhD student is discussed annually with the supervisor, who advises and also is responsible for the contents of this plan.

There seemed to be no basic PhD research training in the form of courses at the department so the PhD students either take courses in other departments in Tartu or go abroad for courses, conferences and workshops. The different supervisors organise groups for discussion of ongoing research and there is a higher general geography seminar meeting regularly and where for example guest researchers present their work. PhD students are supposed to present their ongoing work annually. According to the replies we got when talking to a group of PhD and MSc students, they were quite satisfied with the present situation of graduate tuition at the Chair.

The impression we got from the PhD students we talked to, was one of general enthusiasm and content concerning their research work and supervision, but that funding of their graduate studies, and the facilities at the institute are very limited. The restrictions in terms of office and library space are obvious, and even though there are plans to double the space next year, this will not render it possible for all PhD students to have a working space in the institute. The library, and also the general library resources for human geography in Tartu are such that research students try to find funding for brief

visits abroad during which they copy as many relevant papers and books as is possible. This is not a satisfactory situation for many reasons and we recommend, although being fully aware that resources are extremely limited, that a basic supply of especially electronically available important journals should be included in the library. There are support programmes from different publishers going on for universities in the transitional Central and Eastern European countries which, judging from the information gained from PhD students, seemed not to be fully utilised.

The finished PhD research work shall consist of three accepted papers in peer review journals, but obviously over the last years PhD students have also been stimulated to write up their research in the form of a monograph, which has been defended at the public act with a formal opponent normally coming from abroad, and an evaluation committee. The demands for the PhD seem reasonable, although it could probably be discussed whether it is sensible within the restricted time of funding for the PhD programme also to write a monograph, published in the local series and in local language. A more effective allocation of time would be to write up the results - if this is considered appropriate - in monograph form after the PhD has been obtained and try to publish this internationally.

We were a little worried about the strong reliance on a sole supervisor within the PhD programme (even though this was not perceived a problem by the PhD students we talked to), and the fact that there is no common research training in the form of courses of the graduate students within the chair. We believe that some kind of reorganisation of the PhD programme should be considered, where basic human geography research training is offered annually, that a system of assistant supervisors could be discussed when appropriate and that a group of research supervisors form a steering body of the PhD programme. There are possibilities of going abroad and also to get funding for the participation in courses, workshops and conferences and this should continue to be an important part of the individual PhD student's programme together with longer visits – more than three months duration – to other departments abroad. According to the information we got at our site visit, about half of the present PhD students have been abroad for longer periods. For a small research environment this is crucial and especially for a unit which has been built up during a relatively short period of time, experiences and ideas from outside play an important role also for research students and we believe that the aim for the chair should be to establish possibilities for all PhD students to spend a few months abroad during their graduate studies.

Funding of the PhD programme is a problem. PhD students do receive funding, but the amount of this funding is too small, which means they will have to do other work during their graduate studies, not necessarily connected with the academic activities of the Institute of Geography. Research students were also supposed to teach within the undergraduate geography programme, but they did not get any extra payment for this. We were informed, however, that it was in principle possible to supplement the basic PhD funding of 1,800 EEK per month with means from research projects but that there were plans also to reduce the basic funding in such cases where supplemental funding had been found. We would like to recommend strongly that PhD student basic funding is

improved, so that it is in principle possible to survive on that. It is a good idea that PhD students teach, within reasonable limits, in the undergraduate programme, but it would seem reasonable that they are paid separately for such important efforts.

At our site visit, there seemed to be some worry about a coming change in the curriculum of geography, which would supposedly affect the present situation of human geography and in particular the recruitment to higher studies. University curricula will be changed in the next few years so that a basic degree will contain 120 credits, a MSc will comprise 80 credits and PhD studies another 160, in total a compulsory nine years of study up to graduation. The BSc curriculum relevant for the Chair in Human Geography from next year will be natural science with a specialisation in geography and a possibility to further specialise into the human field. However, internationally, human geography is normally considered a social science or humanities subject and we believe that in order to ensure a good continued recruitment to higher studies in geography, it will be necessary also to find other ways into the MSc and PhD programmes, involving for example courses in economics, political science or history. Even though nobody seemed to consider a transfer of the Chair of Human Geography to another faculty, which would involve a split of the Institute of Geography, we believe that there should be a possibility for students of social sciences to specialise in human geography within their normal curricula.

In general, the Chair of Human Geography is staffed by people who have come in during the last five-six years, mainly as graduated PhD students, employed as lecturers or researchers. The age structure of the senior staff is split into two parts, those being close to retirement, and those who have recently completed their PhD work and are just now establishing their positions internationally, for example through visiting research institutes abroad for longer periods of time. An exception to this rule is Professor J. Jauhiainen, who has been partially employed by the department since 1996, and who is still to some degree working at the chair, even though he is a full professor of urban geography at the university of Helsinki. The dominance of younger people is positive and there seemed to be a certain degree of optimism and trust in the future in the staff which, combined with the enthusiasm expressed by the research students, could form the basis for a continuation of the development of the last decade.

Considering the relative smallness of the staff and the vulnerability of the various research themes based only on one or two of the more junior researchers, who are spending time abroad and on their own careers, we find it quite important that the Chair is given also other means for stability. We recommend that more such contacts as those with Professor J. Jauhiainen are sought for, even though we realise that this may not be simple, and has to be based on established or new research contacts. When the older members of the staff will retire in the not too distant future, it is important that they are replaced by senior people and that strong efforts are made to recruit not only from inside the domain of the Chair of Human Geography.

In the self-assessment report and the various documents submitted in context with that by the Chair to the evaluation committee, a number of research themes have been defined. However, since research in these various themes was limited to one or two researchers

and without very strictly defined boundaries, and since there was substantial overlap between some of these themes, the evaluation committee has decided to discuss in terms of the four more substantial groups of research we could distinguish within the research framework of the Chair.

2.2. Evaluation

2.2.1. Population geography, migration and the Estonian diaspora

Principal researchers: Hill Kulu, Tiit Tammaru

This has been traditionally the most significant field of research in the Department over a long period, dating back to the pre-Soviet era. The group working in this field currently includes T. Tammaru, and H. Kulu, and three MSc students. There are currently no PhD students. During the last five years the research carried out by the group has mainly been concerned with ethnic return migration to Estonia, the migration of Russian-born Estonians in Estonia, and inter-urban migration within Estonia. These themes are important in relation Estonia's current situation, and of wider interest to the international academic community. It thus seems entirely appropriate that the group should have directed most of its energy to analysing these processes.

The publication record of this group is impressive, especially given the fact that both leading researchers obtained their PhDs since 1996 and one is still aged under 30 years. During the period 1998-2000, five papers have been published in international peer-reviewed journals (and a sixth is already accepted). In addition, there have been several other publications.

Successful international collaboration has taken place with Ö. Sjöberg at the Stockholm School of Economics (Sweden), resulting in four papers (two in international peer-reviewed journals).

In addition to using some of the target funding granted by the Ministry of Education under the general theme of 'Estonia between the EU and Russia', several project grants have been awarded during the period 1996-2000. These include a grant of 25,000 EEK from the Estonian Science Foundation (ESF) for project on Estonian return migration during the 1990s, and a grant of 50,000 EEK from the ESF for a project on the internal migration of Russian-born Estonians in Estonia. Funding has also been attracted from the Swedish Council for Research in Humanities and Social Sciences and the Swedish Royal Academy of Sciences.

The group is housed in accommodation provided by the Tartu University in the building of the Museum of University History. Although this is some distance from the rest of the Department, the quality of the accommodation is excellent. The group is also charged with managing an archive and information centre relating to the Estonian diaspora, and

maintaining contact with Estonians living abroad. Formerly an assistant was employed to carry out this task, but since the departure of the assistant, the task of management has fallen on the researchers, and is a drain on their research time. It may be that the Estonian diaspora archive would be more appropriately managed in an independent institute funded centrally.

The group's future research plans would seem to involve a continuation of their current activities. More thought needs to be given to developing a future research agenda that will allow the group to fulfil its obvious potential. The lack of PhD students is also a problem: it would be highly desirable to recruit two or three in the next year or two. We are, however, encouraged by the collaboration (which has just begun) with researchers at the Max Planck Institute for Demographic Research in Rostock (Germany) on the statistical analysis of the determinants of migration using Estonia's excellent set of individual-level surveys carried out during the 1990s. In addition to this, it is suggested that there is good potential for collaboration with the Estonian Interuniversity Population Research Centre in Tallinn, where work on these surveys using event history methods is also being carried out by A. Puur.

It is also proposed to extend the collaboration with Ö. Sjöberg (at the Stockholm School of Economics) by applying for a further grant from Sweden.

Overall, this is a small but talented group of researchers who have clearly developed a high reputation internationally. It should be a priority of the department to try to find the resources to build on their expertise.

Rating. Research activities EXCELLENT TO GOOD. Overall capability EXCELLENT.

2.2.2 Urban and regional geography and regional policy

Principal researchers: Jussi Jauhiainen, Hill Kulu, Garri Raagmaa, Tiit Tammaru

PhD students: Anneli Kährik, Kaur Lass, Ülle Marksoo, Andres Rõugas, Veiko Sepp

This research theme has been growing in importance during recent years. In terms of numbers of people, it is the largest group in the Department. Researchers working on this theme include J. Jauhiainen, T. Tammaru, G. Raagmaa, H. Kulu, A. Kährik, five PhD students and more than 12 MSc Students. The topics studied include post-socialist urbanisation and urban planning and housing, Estonia's regional policy in a European Union context and, more recently, the geography of tourism. These themes are individually relevant and important to Estonia at this time, and we agree with the emphasis placed upon them.

The group has maintained a steady publication record during the last four years, including more than 12 articles in international refereed journals, and numerous other publications. Three PhD theses have been defended since 1999 by members of the group.

International collaboration by the group has been chiefly with Finland, and most importantly through J. Jauhiainen, who has been working in Finland and Estonia throughout the period 1995-2000 and who now holds a full time position at the University of Helsinki and a part-time position within the Department in Tartu. There is scope for further international collaboration, for example on the geography of tourism, where there is considerable experience in other European countries such as the UK.

Funding for this theme has come mainly from the Ministry of Education through target funding, though some money has been forthcoming from the ESF. The salary of J. Jauhiainen was at least partly funded by the Academy of Finland during the period 1995-99 and entirely funded from Finland from 1999 onwards. There is clearly more scope for obtaining funding from international sources (e.g. from the EU 6th Framework) for research into the economic geography of Estonia in an EU context, and attention should be devoted to seeking out and applying for such funding in the near future.

During the last few years, the group has received nine small grants for applied studies and development activities from various public and private Estonian sources (e.g. SEI Tallinn, Minister of Population Affairs) and from international sources in Finland and Germany. These activities are important and useful, yet it would seem that they have been seen as rather separate from the academic research activities of the Department. Rather than being a distraction, however, there is the potential to integrate them more fully, for example by using them as case studies in academic publications. This has already been successfully done in one example (the re-use of former military housing) and consideration should be given to other possibilities.

The group's future research agenda is rather unclear. Indeed, research leadership is likely to be a problem, for the amount of time J. Jauhiainen can devote to leading research in Tartu will be limited, now that he is employed full time in the Helsinki University. This issue was discussed in our general introduction. Even if research leadership can be secured, the future of the group will be dependent on the development of successful research agendas by those who have recently received, or who are working towards, PhDs.

Rating. Research activities GOOD. Overall capability GOOD.

2.2.3 Cultural and political geography and history of Estonian geography

Principal researcher: Ott Kurs

PhD students: Üllas Ehrlich, Jüri Gordeev, Urmas Kase, Heno Sarv

Affiliated: Ülle Liiber, Uudo Praagi

Though these two research themes might appear best treated separately, since they involve the same personnel it makes sense to treat them together. The group is led by O. Kurs, and includes Ü. Liiber and U. Pragi. Additional contributions have been made by Hill Kulu and Eiki Berg (PhD defended 1999). Four PhD students and several MSc students are currently attached to the group. The research encompasses a range of topics which are subsumed under the general theme of Estonia as a part of the Baltic cultural community with cultural relations with neighbouring European countries and Russia. Important additional themes are the spatial organisation of the Finno-Ugric people in Russia at the end of the Soviet period and frontiers and frontier regions in the development of human society. An important international conference is being organised in Tartu in August 2002 on the work of the Estonian geographers Granö and Kant.

The group has published widely and prolifically during the period 1995-2000 in the form of monographs, more than 20 international journal or colloquium articles, several contributions to international collections of essays and numerous journal articles within Estonia.

Although the results of the research have been widely disseminated at international conferences, there is rather limited evidence of international collaboration by this group on the research itself. Such collaboration as there is has been with universities in Finland and Spain. While it is arguable that the research topics pursued by the group do not lend themselves readily to international collaboration, the group is encouraged to seek out potential collaborators in other countries, including Russia.

Much of the funding for this group has come from the Ministry of Education through target funding, but grants have also been awarded by the ESF (45,000-65,000 EEK per year for the study of frontiers and frontier regions and 45,000 EEK for the study of Finno-Ugric political spaces in Russia). Some funding has been obtained from the Institute of Migration in Finland. It seems likely that some of the topics being pursued by the group could potentially attract funding from EU sources.

A potential threat to research on this theme is that most of the output is, in fact, due to the activities of O. Kurs, who is likely to retire within the next five years. Much interesting and important work has been done, but, given the nature of the topics, it is likely to be difficult to recruit researchers from outside Estonia. Unless some of the current PhD students attached to this group can be persuaded (and funded) to continue as academic researchers, the long-term future of the research programme under this theme must be in doubt.

Rating. Research activities GOOD. Overall capability SATISFACTORY.

2.2.4 Landscape and environment research

Principal researcher: Hannes Palang.

PhD students: Helen Alumäe, Egle Kaur, Helen Sooväli.

Landscape studies have a strong tradition in Estonian geography, since the days of Johannes Gabriel Granö. During the Soviet period, most of the landscape studies, however, consisted of landscape ecology and could be classified mainly as natural science. In later years, a strong interest also in the human geographical or cross-scientific field of landscape studies has been recreated and developed among Estonian scientists and Hannes Palang some years ago decided to redirect his interests of research into the domain of the Chair of Human Geography, even though he has his PhD from the physical geography or landscape ecology field. Today, this small research group at the Chair consists also of three younger PhD students, Egle Kaur, Helen Sooväli and Helen Alumäe, the last of whom however studies within the Physical Geography PhD programme. The group at the Chair are connected with a number of other Estonian landscape researchers from different disciplines and some of the project work is carried through in cooperation also with other representatives of the Institute of Geography.

The research group has published several peer review articles over the evaluation period. Dr Palang has been involved in five of these, although some of them can be seen more as part of his previous connection to the landscape ecology theme of Physical geography. The current publication activity seems to be high in the group and they participate actively in conferences in their field.

The landscape and environment group has developed an extensive international contact network which enables the research students to go abroad for courses and conferences and will in 2002 host the bi-annual Permanent European Conference for the Study of the Rural Landscape, which has been meeting since 1957. In 2001, the research group was partly in charge of a joint Stockholm-Tartu landscape ecology conference. The research group form part of a network project aimed at studying 'Nordic Dimensions in Cultural Landscapes', based also in Norway, Sweden and Finland and funded for three years by the Norwegian Research Council. Some other research grants are or have been connected with the research group, mainly through funding from the Estonian Science Foundation. The group is to a substantial extent supported also by target funding through Dr Palang's post as senior researcher and the PhD students' scholarships.

A series of applied research projects have been carried through over the last two years by Dr Palang in cooperation with undergraduate and PhD students and concerning an assessment of valuable landscapes in different counties of Estonia, to be set aside as protected areas by county authorities. This will, together with the project on reflections of historical landscapes of Estonia, form an important basis of knowledge in a field that has hardly been cultivated since World War II. It is important that results of this research are published internationally and one can assume that this will form an important part of the publication activities of the research students in the group. It could also form an important way of recruiting new MSc and PhD students which will be important in order to secure a continuity of active researchers after the present generations.

It might be profitable for the group also to try develop both a more long-term research plan and a strategy for even tighter contacts with landscape researchers abroad which could enable them to apply for further joint grants on an international level.

Rating. Research activities GOOD. Overall capability GOOD.

2.3. Recommendations

1. When the older members of the staff will retire in the not too distant future, it is important that they are replaced by senior people and that strong efforts are made to recruit not only from inside the domain of the Chair of Human Geography. We recommend that the possibility of an arrangement such as that with Professor Jauhiainen be considered, even though we realise that this may not be simple, and has to be based on established or new research contacts.

2. We recommend, although being fully aware that resources are extremely limited, that a basic supply of (especially) electronically available important journals should be included in the library. There are support programmes from different publishers going on for universities in the transitional Central and Eastern European countries which, judging from the information gained from PhD students, seemed not to be fully utilised.

3. We recommend that PhD students write up their results in the form EITHER of three international-level papers with an introduction and conclusion OR a monograph which could be published internationally, but not both. Doing both is not an effective allocation of time.

4. We believe that some kind of reorganisation of the PhD programme should be considered, where basic human geography research training is offered annually, that a system of assistant supervisors could be discussed when appropriate and that a group of research supervisors form a steering body of the PhD programme.

5. It will be necessary also to find other ways into the MSc and PhD programmes, involving for example courses in economics, political science or history. We believe that there should be a possibility for students of social sciences and the humanities to specialise in human geography within their normal curricula.

6. We recommend that the results of the landscape and environment research group's research on valuable landscapes and reflections of historical landscapes of Estonia are published internationally. This would form an important part of the publication activities of the research students in the group. It could also form an important way of recruiting new MSc and PhD students which will be important in order to secure a continuity of active researchers after the present generations.

7. More thought needs to be given to developing a future research agenda that will allow the population geography and migration group to fulfil its obvious potential. It would be highly desirable to recruit two or three PhD students for this group in the next year or two.

8. There is scope for further international collaboration, for example on the geography of tourism, where there is considerable experience in other European countries such as Sweden or the UK.

9. There is clearly more scope for obtaining funding from international sources (e.g. from the EU 6th Framework) for research into the economic geography of Estonia in an EU context, and attention should be devoted to seeking out and applying for such funding in the near future.

3. Population studies in Estonia

3.1. Current situation

Demographic studies started in Estonia after World War I when Estonia got its independence. Demographic analysis was based mainly on data collected by the Estonian Statistical Office. A special focus was given to studies in historical demography. This period ended with the incorporation of Estonia into the USSR and occupation during the World War II by Nazi Germany.

Germans were replaced by Russians after the war and the position of demography became identical with its position in the Soviet Union. Practically all demographic data were classified and so closed for any research. It could be said that demography as a research and university discipline was, up to the end of Soviet rule, non-existent.

A few specialists worked in the field of historical demography within the Department of History at Tartu University and on themes close to demography in the field of human geography at the same university and in the Institute of Experimental and Clinical Medicine. Several publications appeared also in demographic statistics within the Tallinn Technical University, Statistical Office and other institutions (Mereste, K.Laas).

The real start of population studies in Estonia can be dated only in the beginning of 1990s, when the Estonian Interuniversity Population Research Centre was created. It was created from the beginning not only as a research but also as a teaching institution. This was in the line with efforts to overcome the separation of research and teaching, which was traditional in the socialist system and which was considered in the new democratic society as inefficient and harmful for both research and pedagogical work at the university level. Recently this concept was completed by creating the Estonian Institute for Population Studies within the Tallinn University which took over the pedagogical duties.

Both institutions, the Estonian Interuniversity Population Centre and the Estonian Institute for Population Studies, are formed practically of the same academic staff. The institute has a good strategy to cope with the future problems. Greater concentration on research at the beginning is gradually being accompanied by pedagogical duties. Academic activities started with doctoral studies, than switched to Masters-level studies. The Institute expects to introduce study courses at Bachelor level in the near future.

Over the period 1995-2000 the research of the Institute has been concentrated in three main fields:

- 1) Estonian population development in Baltoscandian and European context;
- 2) Historical demography;
- 3) Population data methodology and national statistics.

Funding sources for population research have been steadily growing during the whole period since 1991 and especially since 1995. Grants from the Estonian Science Foundation have been available since 1994 and target funding since 1998. The Institute was successful in getting international support from MacArthur Foundation, Research Support Scheme of Open Society Fund, International Research and Exchange Board, United Nations Fund for Population Activities/United Nations Development Programme, World Bank, European Commission and the Population Studies Centre, University of Michigan.

The total amount of money received has almost doubled from 668,000 EEK in 1995 to 1,264,000 EEK in 2001. This fact reflects also growing importance of population studies in Estonia and favourable acceptance of achieved results.

3.2. Evaluation

3.2.1. Estonian population development in Baltoscandian and European context

Theme director: Kalev Katus.

Members: Allan Puur, Asta Põldma, Luule Sakkeus

Affiliated: Dmitri Mihhailov, Alur Reinans, Jüri Viikberg

The list of publications published in the frame of this theme is impressive. The are mostly peer-reviewed and annotated in the world bibliographic demographic journals - Population Index (published by Princeton University) and POPLINE (maintained by Johns Hopkins University). The research under this theme could be divided into two main topics: long term trends after World War II which continues into population projections; and migration, including the specific problems of national minorities and population heterogeneity. The societal implications mentioned in the report are mostly broader topics involving neighbouring disciplines such as economics and sociology.

The modern characteristic approach in long-term demographic studies is cohort analysis. The research copes well with this requirement. Another important feature is the periodisation of demographic development and the specification of the most important periods of demographic changes, i.e. demographic revolution / first demographic transition and theoretical reasoning about the character of demographic processes

afterwards, especially the post-war baby boom and the so called 'second demographic transition'. Satisfactory attention was devoted to both these problems in several publications from both a theoretical and an empirical view.

Another important topic covered is research into the heavy human losses during World War II and due to political repressions under communist rule. It was not possible to fill the gap in our knowledge in this field and research has to continue. However, it will become more and more the subject matter of historical demography than the analysis of long-term population trends. This shows the close connection of historical demography with studies of contemporary trends.

It should be noted that the majority of studies concerning these topics (migration, national minorities, population ageing) were produced in close international cooperation with Baltic countries and other European countries represented in the European Population Committee, in the UN Economic Commission of Europe and in the European Demographic Observatory. In this context, the intensive international cooperation should be stressed. This was demonstrated by participation of researchers in many international conferences and by many common publications.

Many research results touched important political issues, such as emigration and immigration policy, and the integration of immigrant and foreign-born sub-populations. Recognition of the current situation is of great importance for any political decisions and it gives to the research a practical dimension, which should not be undervalued, even in an assessment of the academic background of the research itself. Also the societal implications of population development have important political relevance, notably the process of population ageing and consequently the growing number of old and 'old old' people, and the increasing societal burden on the economically active population. Population ageing was studied in the frame of Integrated European Population Studies and in the frame of Population Policy Acceptance Survey (second round started in 2000).

Rating. Research activities EXCELLENT. Overall capability EXCELLENT.

3.2.2. Historical demography

Theme director: Heldur Palli

Members: Veiko Berendsen, Margus Maiste

Affiliated: Jaak Rand, Juri Vesterblom

Research in historical demography has roots in the 1920s. After a break it revived in the end of 1960s. The results of the research performed in the Institute of History and Faculty of History at Tartu University are well known not only among historians and demographers of the former Soviet Union but also abroad.

In the Estonian Research evaluation performed in 1994, it was stressed that studies in historical demography should be continued. The conditions in the Institute of History were evaluated as unfavourable. Integration of studies in historical demography with the Estonian Interuniversity Population Research Centre was pointed out as a possible solution.

During the second half of the 1990s research in historical demography became institutionally more and more concentrated at the Estonian Institute for Population Studies. The strengthening of research in the field of core demography allowed the establishment of closer links with bordering disciplines, including historical demography.

Closer cooperation with archives started as well, involving the development of databases for the needs of historical demography. V. Berendsen does full-time teaching at Tartu University.

Current research activities are covering three main directions:

- systematisation of the results of earlier studies;
- development of a case-study approach and modern techniques of analysis using newly available data sources;
- harmonisation of the concepts and definitions between historical case-studies and contemporary population research.

The main results include two monographs published by H. Palli and a monograph in Estonian published by V. Berendsen and M. Maiste. Four electronic databases have been created including individual records of more than 100,000 persons.

The contribution of historical population studies has been particularly important for the comparative study on national minorities and immigrant populations in Europe, coordinated by European Population Committee, Council of Europe.

This research field is affected by limited funding. During the 1990s the available resources were invested mostly in data collection. There is a need for more trained people to be involved to continue data collection, data entry, record linkage and analysis. The group suffers from a lack of senior staff.

There is a clear demand for greater involvement of PhD and MSc students in the research field of historical demography. Efforts should be activated to apply for international funding. The principal researchers should put an emphasis on the publication of research results in international editions.

Rating. Research activities EXCELLENT TO GOOD. Overall capability SATISFACTORY.

3.2.3. Population data methodology and national statistics

Theme director: Allan Puur

Members: Kalev Katus, Enel Pungas, Asta Põldma, Luule Sakkeus

Affiliated: Anne Herm, Kalmer Kollom, Ulna Kull, Tiina Metsalu

The restoration of national independence in 1991 led to a need to eliminate a half-century gap in the development of an internationally compatible national statistical system. The establishment of the National Population Institute, which collaborates closely with the Central Statistical Bureau and other institutions became an important task.

In the conclusions of the Estonian Research evaluation performed in 1994, it was stressed that an important problem was the absence of a national institute of population studies. During the period from the mid 1990s up to now the functions of such an institution are realised by Estonian Institute of Population Studies, which is affiliated with the Tallinn Pedagogical University.

Integration of the Estonian Institute of Population Studies with the Tallinn Pedagogical University would help to solve partially the problems of space for staff, training of a students on all levels of study programmes, library development, etc.

Research under this theme has been divided between two subthemes:

- population data harmonisation;
- development of an integrated survey statistics system and an Estonian population data bank.

The programme data harmonisation programme aims to reintroduce international definitions, standards and classifications, to build consistent time series, and to secure comparability at regional level and integration of vital, census and survey statistics. Those tasks are carried out exclusively by the Estonian Institute of Population Studies through specifically focused sub-projects. Harmonised population data are assembled into an Estonian Population Databank, maintained and operated at the Institute, and disseminated to national and international users.

The Estonian Institute of Population Studies collaborates actively with the main institutions responsible for methodological coordination in the field of population data – United Nations Population Division, UNESCO, Eurostat, ILO Statistical Office, European Population Observatory, as well as with national statistical bureaus and population research centres. The principal national cooperation includes the Statistical Office, National Archives, Institute of Experimental Medicine, county governments, etc.

The Institute has initiated the establishment of a Governmental Commission for Population and Social Statistics (1993-1998) and served as a methodological coordination unit for national surveys. Research and activities united under this subtheme have been a driving force to re-build the national statistical system. A unified model for publishing the results of national surveys, covering methodology and coordination procedures with government institutions and National Archives has been developed by the Institute.

Methodological experience accumulated in the process of rebuilding the national statistical system has been shared with the three Caucasian countries – Armenia, Azerbaijan and Georgia. The needs of population statistics and research in the transition countries, discussed in the Institute's research papers, have been brought to wider international consideration, including the European Population Committee.

The Institute has been invited to several expert missions by international organisations, among others Council of Europe/EU census mission to Macedonia and Expert group to FYROM, Eurostat mission to harmonise labour force statistics in Bulgaria and the World Bank mission to Georgia to prepare a national report on reproductive health.

E. Pungas is to be congratulated on receiving the Cochran-Hansen prize of the International Association of Survey Statisticians.

Rating. Research activities EXCELLENT TO GOOD. Overall capability EXCELLENT.

3.3 Recommendations

1. In a situation where the Estonian Institute for Population Studies is the only demographic research institution in the country, it should develop the essential demographic topics. This has been the policy of the Institute up to now and it should continue in the future. This task is of course limited by the number of researchers, which should be increased, given sufficient funding and the availability of qualified personnel. Young researchers should be looked for among MSc and PhD students.
2. Because of the small size of the Estonian population, it will never be possible to cover all demographic topics with a sufficient number of researchers. International collaboration emerges as one possible solution. The Institute has made good progress in this direction in the past and a continued effort along these lines is highly recommended.
3. The publication activity of the Institute can be considered as very impressive and is evaluated with high marks. The Institute has its own series of publications, copies of which are distributed free of charge to interested institutions, but the results have also been published in different national and international scientific journals. This policy should continue with increased effort and a preference for publishing abroad.
4. The assistance provided by the Institute to the government statistical services with data harmonisation and on methodological questions is important but it should not be allowed to interfere with ongoing research into substantive demographic issues.

5. It is highly recommended that the Institute should build the teaching curriculum in developing population studies at Tallinn Pedagogical University. All three levels of academic teaching are needed. It could be suggested that at Bachelor level demography could be taught in combination with some other disciplines such as economy, sociology, social geography or anthropology (as introductory lectures such as introduction to demography itself, sources of demographic data, population development of Estonia, world population development). Specialisation in demographic analysis and theoretical demography could be concentrated mainly at MSc level.

6. It is strongly recommended that research in the field of historical

demography is supported both by funding and personnel. Historical demography has a long and recognised tradition in Estonia but the present situation does not give satisfactory conditions for its development.

4. General recommendations

1. We strongly recommend that PhD students' basic funding in Estonia should be increased, so that it is in principle possible to survive on it alone. It is a good idea that PhD students teach, within reasonable limits, in the undergraduate programme, but it would seem reasonable that they are paid separately for such important efforts.

2. In a nation where 10-15 % of the population are living abroad it is reasonable that considerable cross-scientific research effort is aimed at issues connected to this diaspora. A small office attached to the Chair of Human Geography at Tartu University is hardly the best way to undertake this task of research and documentation, and we recommend that consideration be given to managing the Estonian diaspora archive in an independent institute funded centrally

3. Further collaboration between the population geography and migration group and the Estonian Interuniversity Population Research Centre in Tallinn on the subject of analysis of survey data using event history methods would be a good idea.

4. We feel that it would seem enormously positive to merge institutions of the former Estonian Academy of Sciences and university institutions. As a further step the creation of the full Tallinn University on the basis of Tallinn Pedagogical University seems very appropriate. It could complete the range of university studies in Estonia by concentrating specifically on disciplines which do not exist or are not very developed at Tartu University. Our knowledge is not sufficient and we cannot and will not list these disciplines, but demography is surely one of them. However, it is not the task of the expert team to recommend changes in the overall structure of academic organisations of Estonia and therefore this point should be taken as our personal view.

Tallinn, 18 November 2001

Andrew HINDE

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Juris KRUMINS

Zdenek PAVLIK