



CHAPTER

3 Media Ownership and Concentration in Belgium

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Abstract

This chapter, first in the book's section of country reports and the first of the sections on Europe, examines media ownership and concentration in Belgium. Following an overview of the Belgian media landscape, the remainder of the chapter focuses on print media (newspapers, book publishing, magazine publishing), audiovisual media (radio, broadcast television, multichannel TV platforms, video channels, film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers, search engines, online news market). The limited number of media groups and high levels of cross-ownership are typical for Belgian media markets. Most media groups have developed a varied portfolio of media products in different markets or segments, but none of them are capable of dominating multiple market sectors at the same time. A severe division of the countries content media exists along the line of the two major language communities. Telecom is dominated by the incumbent Belgacom. In cable television, the major firm is Telenet.

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Introduction

Belgium's borders the Netherlands, Germany, Luxembourg, and France which reflects the eth- no-linguistic divisions present in its politics, culture, and media markets. In 2008, Belgium had a population of approximately 10.7 million people living in three distinct Communities and three regions.¹ Flanders, which has historical and linguistic ties to the Netherlands, is the heart of the 6.2 million strong Flemish Community that comprises 59% of the population. Three and a half million Belgians (31% of the population) reside in Wallonia, a historically French-speaking area recognized as the French Community of Belgium. There is also a German Community, which is the smallest officially recognized community in Belgium, with fewer than 100,000 inhabitants. The remaining 10% of the population reside in the capital region, Brussels-Capital. Slightly under a million foreign nationals reside in Belgium, of which about a third reside in Brussels-Capital. Therefore, there are four linguistic regions: one for Dutch/Flemish speakers, one for speakers of Belgian French (plus three Walloon dialects, which are related to French), one for German speakers in the "East Cantons," and the multilingual Brussels-Capital Region.²

The linguistic, cultural, economic, and ideological differences in the country—especially between Flanders and Wallonia—have led several waves of federalization since 1970, with increased autonomy for regional authorities. As a result, the country is characterized by a complex political system, with a delicate balance among the federal and regional institutions. Between 2010 and 2011, this was underlined by the fact that no national government was able to form for over 500 days following elections, but the regional governments kept functioning, and in doing so demonstrated the reduced relevance of Brussels–Capital’s central authority in the federal system. Although recent developments have spurred debates about partitioning the country apart, the movement for partition has not gained sufficient traction to force the question.

Due to these linguistic and cultural differences, the Belgian media landscape is quite unique within Europe. Different media markets can be distinguished that run parallel to the country’s officially recognized Communities, that is, the Flemish Community in the north, the French Community in the south, and the much smaller German Community in the east. As a small country with three official languages that achieved statehood relatively recently (the country only came into being in its present form in the 1830s, as a constitutional monarchy), Belgium has long been deeply influenced by the culture and languages of its neighbors. This is especially the case not only for the small German Community, but also for the French-language markets, which are strongly oriented toward France and French television channels.³ In Flanders, before the introduction of commercial television, audiences relied mainly on channels broadcast from the Netherlands. But since Dutch and Flemish are substantively distinct from one another, the Flemish-language market rapidly turned to Belgian commercial channels as soon as these were introduced.⁴

As part of the federalist compromises with the Communities, authorities at the federal and regional levels share oversight authority for the media sector. During the first state media reforms of the 1970s, around the time Belgium officially became a federal state, regulation of radio and television broadcasting was transferred to the regional level as part of the cultural domain. As a result, commercial broadcasting fell under the exclusive powers of the Flemish, French, and German-language Communities. The Belgian Constitutional Court has ruled that these broadcasting powers cover not only substantive issues like the organization of public broadcasting, licensing, programming requirements, and advertising rules, but also technical aspects such as distribution.⁵ It has also ruled that these broadcasting powers do not cover on-demand services offered via digital television platforms, mobile networks, or the Internet. Freedom of the press, journalists’ contracts, film, telecom, Internet media, consumer protection, intellectual property rights, and competition law are dealt with at the federal level. The partition of powers over the media sector is a contentious issue that, as a result of 30 years of Belgian Constitutional Court rulings, has led to the formation of a number of legal gray zones in which the overlapping of federal and regional powers remains unresolved.⁶

Each linguistic Community is recognized as a political entity and has a media regulator in charge of supervising the audiovisual sector (radio and television) on its respective territories: the Vlaamse Regulator voor de Media (VRM) for the Flemish-language market, the Conseil Supérieur de l’Audiovisuel (CSA) for the French-language market, and Medienrat for the German-language market. Only the audiovisual sector has Community-based regulatory bodies. The VRM monitors concentration indices and publishes the results in annual reports, while the CSA is not only authorized to monitor these indices, but also to take regulatory action if it determines that the market is becoming too concentrated.⁷

Media groups’ operations tend to follow the north–south divide between the Flemish-language market in Flanders and the French-language market in Wallonia, although in recent years some have also developed activities in both Communities.

Linguistic divisions determined media ownership in Belgium for many years.⁸ This has changed—resulting in stronger cross-language participations—after 2005. In 2006, the Flemish newspaper publisher Corelio took an interest in, and (eventually, in 2008) bought out, the Walloon media group, Mediabel. Also the country’s leading (and formerly independent) financial dailies, *De Tijd* (with a 4.1% market share among Dutch-language newspapers) and *L’echo* (which has a 3.7% market share among French-language newspapers) belong to a single cross-language consortium after their take-over in 2005 by Mediafin, a 50–50% consortium of the Dutch-language De Persgroep and the French-language Rossel.⁹ Concentra, another Dutch-language publishing company, and Rossel together publish the free daily *Metro*. Concentra merged in 2013 with Corelio into the firm Mediahuis.

Because media markets in Belgium follow the country's language borders, the markets are not very large compared to those in France, the Netherlands, or Germany. As a result, high concentration levels are inevitable in Belgian media markets. Since the regulatory authorities have accepted this as the norm, there are hardly any ownership restrictions in media legislation, and no takeovers or mergers in the media sector have ever been prohibited by the Competition Authority. The Authority, however, has attached certain conditions and obligations to its approval in recent cases, such as the takeover in Flanders of the only pay-TV provider, the Belgian division of the French Canal + Group, by Telenet in 2003, and the takeover of Wallonia's leading pay-TV provider, *BeTV*, by Tecteo (VOO) in 2008. In those cases, the Competition Council, a body within the Competition Authority, imposed access and nondiscriminatory obligations on the cable operators, prohibiting them from acquiring exclusive broadcasting rights. Even the controversial merger and ownership ruling involving *De Tijd* and *L'Echo* resulted in the Mediafin consortium eventually gaining sole control over these newspapers, although Rossel and De Persgroep are barred from offering bundled products to subscribers and advertisers.¹⁰

p. 38 A more recent case is that of the takeover of the commercial broadcaster SBS Belgium's *VT4* and *VijfTV* channels from ProSiebenSat.1 (Germany) by De Vijver Media in 2011, which was a consortium composed of Sanoma Oyj (Finland), the Corelio Group, and Waterman & Waterman (each of which has a 33.3% stake the consortium).¹¹ The transaction led to a higher concentration of crossownership in the Flemish TV broadcasting sector.¹² Although SBS Belgium was not active in other media markets or segments, its owners had developed activities in TV production (via Waterman & Waterman's successful TV production house Woestijnvis) and print media (Sanoma and the Corelio Group being leading publishers of newspapers and weekly magazines in Belgium) in previous years. In 2014, Belgian cable operator Telenet bought a 50% stake in De Vijver Media (a.o. through the purchase of Sanoma's shares). The European Commission approved the transaction in February 2015.

Print Media

Newspapers

The Belgian print media landscape is divided into Flemish- and French-language markets (there is also a German-language market, but it is extremely small and data for it is unavailable). Print companies active in the Flemish north are not necessarily active in the Walloon south and vice versa, although most communitywide and some regional newspapers are available throughout the country. Since the end of World War II (1939–1945), dozens of titles have disappeared in the course of concentration and, more recently, as a result of reduced sales and advertising revenues.¹³ The number of independent media firms has shrunk from a high of 34 after the war to just five today: De Persgroep, Mediahuis (Concentra & Corelio), Rossel, IPM, and Tecteo/Editions d'Avenir. Mediahuis is active in both language Communities, while the others are focused on single Community.

De Persgroep, Corelio, and Concentra dominate the paid-subscription Dutch-language newspaper market; Rossel, Tecteo (*Les Editions de l'Avenir*) and IPM dominate the paid-subscription French-language newspaper market. Together with two other print publishers who are active throughout the country—Mediafin, publisher of the financial newspapers *l'Echo* (French-language) and *De Tijd* (Dutch-language), and Mass Transit Media, publisher of the multilingual free daily *Metro*—these publishing groups combined offer eight Dutch/Flemish-language newspapers in Flanders and seven French-language newspapers in Wallonia.

p. 39 Since 2001, De Persgroep has been the largest newspapers publisher in Flanders (Table 3.1), with a 40% paid-subscription market share for its popular titles *Het Laatste Nieuws* and *De Nieuwe Gazet* (a regional variant of *Het Laatste Nieuws* for the Province of Antwerp) and *De Morgen*, which holds a 6% Flemish-language market share.¹⁴ *Het Laatste Nieuws/De Nieuwe Gazet* is the best-selling title in all of Belgium, with a circulation of 345,000 copies reaching more than one million readers daily as of 2007. Together, these newspapers have a relatively stable market share of 30% for the paid newspaper market, though this falls to and 27.5% when taking into account the free daily *Metro*.

Table 3-1. Flanders Daily Newspapers (Market Shares by Circulation), 1999–2010

	1999	2000	2002	2004	2006	2008	2010
De Persgroep	36.9	38.5	37.2	36.2	37.0	37.5	37.0
VUM (Corelio Group/Mediahuis)	41.6	40.3	35.5	36.0	33.9	33.0	33.0
Concentra (including De Vlijt NV), after 2013 part of Mediahuis	21.4	21.2	27.3	27.9	29.1	29.6	30.0
Total Circulation (1,000)	1,200	1,220	1,260	1,300	1,250	1,250	1,240
Total Revenue (mil euros)					492	553	525
Total Revenue (mil US\$)					620	813	698
C3	100	100	100	100	100	100	100
HHI	2,196	3,556	3,389	3,378	3,364	3,365	3,358
<i>N</i> (>1%)	3	3	3	3	3	3	3
Noam Index	1,268	2,053	1,957	1,950	1,942	1,942	1,938

Source: Centrum voor Informatie over de Media (CIM), Studiedienst van de Vlaamse Regering, Vlaamse Regulator voor de Media (VRM), National Bank of Belgium. Concentra and Corelio merged in 2013 into Mediahuis.

De Persgroep's joint ownership of *De Tijd* and *L'Echo* has helped the company win a greater market share, firmly establishing its leadership in the Flemish newspaper market. That said, the market share of *De Tijd* has fallen in the last ten years from 5% to 4%.

The second largest Flemish-language newspapers publisher is the Corelio Group, which used to be the market leader until 2002, but has now seen its market share continually decline over the past decade. It publishes the daily *De Standaard* and two other popular titles, *Het Nieuwsblad* and *De Gentenaar* (a regional variant of *Het Nieuwsblad* for the Province of Ghent). Together, they form the second largest popular title in Flanders. Its main title, *Het Volk*, ceased publication in 2008. In 2006, Corelio was able to acquire the French-language Mediabel. This group publishes ten regional newspapers and several free dailies.

The third Flemish newspaper group, Concentra, publishes two regional titles: *Het Belang van Limburg* and, via its subsidiary De Vlijt NV, the *Gazet van Antwerpen*. Concentra and Rossel together publish *Metro*, in two language versions. The popularity of *Metro* has grown significantly since its launch in 2002. In 2009, it reached a market share of 11% in Flanders. The increase in Concentra's overall market share from 2002 on is primarily due to the success of *Metro*. In 2013, Concentra and Corelio merged and became Merdiahuis.

p. 40 By far, the largest newspapers publisher in Wallonia is Rossel, which is 100% owned by the Hurbain family (Table 3.2).¹⁵ Rossel controls ~ 60% of the market with the various titles that it publishes via Rossel & Cie and *Sud Presse*, plus its joint ventures of Mediafin and Mass Transit Media. Rossel & Cie manages *Le Soir*, which is still the leading paid-subscription daily in the French-language market, even though its market share has declined from 18% to 15% in the last ten years. Rossel also publishes popular regional titles under the *Sud Presse* imprint (*La Meuse*, *La Capitale*, *La Nouvelle Gazette*, *La Province*, *Nord Eclair*), which together represent 22% of the French-language market. It holds 50% of Mediafin, the consortium that controls *L'Echo* in Wallonia and *De Tijd* in Flanders, and 49% of Mass Transit Media, the company that publishes the free daily *Metro* publisher.¹⁶ In Wallonia, *Metro* has done quite well since its launch in 2002, having acquired 18.7% of the French-language market share.

Table 3-2. Wallonia Daily Newspapers (Market Shares by Circulation), 1999–2010

	1999	2000	2002	2004	2006	2008	2010
Rossel (Hurbain Family)	58.5	57.7	59.1	59.4	59.9	61.0	59.4
IPM	24.8	25.4	24.4	24.4	24.3	22.2	22.8
<i>Les Editions de l'Avenir</i> (Corelio Group until 2014, then Tecteo)	16.7	16.8	16.5	16.2	15.8	16.8	16.6
Others	0.0	0.1	0.0	0.0	0.0	0.0	1.2
Total Circulation (1,000)	4,520	3,950	3,270	3,170	3,110	3,060	2,950
Total Revenue (mil euros)			279	296	307	292	335
Total Revenue (mil US\$)			262	367	387	492	446
C3	100	100	100	100	100	100	100
HHI ¹	4,316	4,256	4,360	4,386	4,428	4,496	4,325
<i>N</i> (>1%)	3	3	3	3	3	3	3
Noam Index	2,492	2,458	2,517	2,532	2,557	2,596	2,497

Source: Centrum voor Informatie over de Media (CIM), Conseil Supérieur de l'Audiovisuel (CSA), National Bank of Belgium.

1 HHI in here deviates from the HHI calculated by the CSA for the newspapers sector because the CSA bases its calculations on Rossel and IPM only.

The second, much smaller newspaper group in Wallonia is IPM, which controls less than a quarter of the market.¹⁷ It publishes two titles: *La Libre Belgique*, a conservative daily with a market share of 8.5%, and the popular *La Dernière Heure/Les Sports*, the second largest paid-subscription daily in Wallonia, although it is also facing declining market shares, falling from a market share of 16% in 2002 to 14.3% by 2010.

The regional titles of the Corelio Group, used to fall under the imprint of *Les Editions de L'Avenir*. *Les Editions*'s nine regional titles (including *L'Avenir du Luxembourg*) represent approximately 16% of the French-language newspapers market.¹⁸ In 2013, these papers were acquired by the cable operator Tecteo.

All three groups, IPM, Corelio/Mediahuis, and Rossel, have—via the Audiopresse consortium—a minority share (34%) in RTL Belgium, which controls three television broadcasting channels (*RTL-TVi*, *Club RTL*, and *Plug RTL*) through the Luxembourg-based RTL subsidiary of CLT-UFA (Table 3.3).

Table 3-3. Aggregated Daily Newspapers (Market Shares by Circulation), 2006–2010

	2006	2008	2010
Corelio Group/Mediahuis	27.6	26.8	26.6
VUM	21.6	21.2	20.1
<i>Les Editions de l'Avenir (after 2013, Tecteo)</i>	6	5.6	6.5
Rossel (Hurbain Family)	21.4	21.4	23.1
De Persgroep	23.6	24.1	22.6
Concentra (after 2013, Mediahuis)	18.6	19	18.3
IPM	8.8	8.7	8.9
Others	0.0	0.0	0.5
Total Revenue (mil euros)	771	860	860
Total Revenue (mil US\$)	972	1,264	1,144
C4	91.2	91.3	90.6
HHI	2,200	2,194	2,166
Corrected HHI ¹	3,681	3,732	
Noam Index	984	981	969
<i>N (>1%)</i>	5	5	5

1 Estimated on the basis that Flanders and Wallonia are two separate markets.

p. 41 **Book Publishing**

Despite the small size of the language-specific markets for books the Belgian book publishing industry is very diverse and involves over 150 (though sometimes small) Belgian publishing houses.¹⁹ They are active both in the “nice to have” segment (of general books – including fiction, non-fiction, youth and children’s books—and comic books; hereafter: “A-books”) and in the “need to have” segment (of educational and school books, scientific books, and professional/informative books; hereafter: “S-books”).²⁰ Few data are available on their activities, so we have been unable to calculate concentration indices for this sector. A scientific report from 2011 estimates the annual turnover in the Flemish book publishing sector between about 0.8 and 1.2 billion euros.²¹

For the so-called A-books, foreign publishers are the market leaders in Belgium, with French firms leading the French-language market and Dutch publishing houses dominating the Flemish market. However, Belgian publishing houses are gaining stronger positions at international level. In 2010, the 100-year old Flemish publishing house Lannoo acquired the renowned Dutch publishing house Meulenhoff, and became the third largest publisher in Flanders.²² Flemish children’s and youth literature is also becoming very popular abroad, as demonstrated by the successes that Flemish authors and illustrators booked at the Bologna Book Fair 2013.²³ ZNU (Zuidnederlandse Uitgeverij), established in the Antwerp region, is the largest publisher of children’s books both in Flanders and in the Netherlands. It also owns Standaard Boekhandel, the leader in book distribution, with a 55% market share in a market valued at US\$293 million (211 million euros) in 2011.

One area in this sector in which Belgian publishers cooperate with foreign publishers is in comic books/graphic novels, a prominent example of which is Hergé's long-running and internationally syndicated *Tintin* series. The Belgian comic book industry is characterized by cross-ownership among the different communities. For example, the Dargaud-Lombard-Dupuis Group belongs to the Franco-Belgian publisher Média-Participations and produces more than one-third of the company's overall turnover through comic book sales, including the *Asterix* series (which, like *Tintin*, is internationally syndicated). In the Flemish market, WPG Uitgevers België (formerly Standaard Uitgeverij) is the leading book publisher and has a significant stake in the comic book market, with series such as *Luke & Lucy* (in Dutch: *Suske & Wiske*; in French: *Bob & Bobette*), *The Kiekeboes* (in Dutch: *De Kiekeboes*), *FC The Champions* (in Dutch: *FC De Kampioenen*), *The Smurfs* (in Dutch: *De Smurfen*), and the *Red Knight* (in Dutch: *De Rode Ridder*).²⁴

Apart from international companies like Amazon's amazon.fr for the French-language market and bol.com for the Dutch/Flemish-language market, the Belgian sites proxis.be and azur.be (both owned by Medio since 2010) dominate the e-book market, though so far e-books have only won a 1.2% audience share in this sector.

Magazine Publishing

p. 42 In the Flemish market the three main actors are the Roularta Media Group (*Trends*, *Knack*), Sanoma Oyj of Finland (*Flair*, *Humo*, *Libelle*, *↳ Story*, *TeveBlad*), and De Persgroep (*Dag Allemaal*, *TV Familie*, *Joepie* and *Blik*). Roularta is also active in Wallonia with *Tendance*, the French-language version of the business magazine *Trends* and the popular *Le Vif/L'Express*.

Audiovisual Media

Radio

As in most of Europe, radio broadcasting was a public monopoly in Belgium until the 1980s. The first commercial FM stations began broadcasting in the early 1980s as "pirate radio," but they were soon legalized in 1982. Since then, the radio sector in the north has developed differently than in the south, because of the divergent policy approaches of the Flemish and French Communities. Whereas the Flemish frequency plan promotes a plurality of small, local FM radios (regulators introduced radio licenses that covered all of Flanders only in 2001), the French Community authorized the creation of communitywide radio networks in 1997. Both VRT, the Flemish public broadcaster, and the French-language public broadcaster RTBF are allowed to carry advertising.

The public service broadcaster VRT is the leading player in the Flemish-language market and offers five radio channels: Radio 1, focusing on the news; Radio 2, a family station; MNM, a pop music channel; Studio Brussel, which offers alternative music programming; and Klara, a classical music and jazz station. An increasing number of local radio channels have been integrated within the larger Flemish networks in the past decade (e.g. Radio Contact, Club FM, Top Radio).

The second main player is the VMMA Group, which acquired one of the two Flanders-wide market licenses for commercial FM radio in 2001 for its QMusic station and bought the second commercial FM license in 2007 for its Joe FM channel (formerly 4FM). VMMA is a joint venture between De Persgroep (50% stake) and the Roularta Media Group (50%).

Other radio stations have a limited geographic scope or only distribute their program via cable networks such as Nostalgie and Be One, which are provincial FM stations, and *Radio Contact* and *Top Radio*, which are community radio consortiums.

The channels of the public service broadcaster have lost audience shares over the years, especially since the launch of two commercial Flanders FM radio stations in 2002. VRT, however, remains the market leader, holding a stable 60% market share since 2006.

As there are just two main players (VRT and VMMA/Medialaan), it is also useful to calculate the C2 ratio. For the past decade, the C2 and C4 ratios have been nearly equal. The HHI, however, shows that the relation between the two major groups has changed: HHI fell from 7,356 in 2002 to 4,332 in 2010, a drop that can be explained by the growth in VMMA's market shares (Table 3.4).

Table 3-4. Flanders Radio Groups (Audience Shares), 2002–2010

	2002	2004	2006	2008	2010
VRT (public)	85.3	72.9	63.6	62.4	61.7
<i>Radio1</i>	11.6	11.4	7.8	8.2	8.7
<i>Radio2</i>	35.3	32.8	32.0	30.8	30.1
<i>MNM/Radio Donna</i>	29.3	18.5	15.2	12.3	9.5
<i>Studio Brussel</i>	6.6	7.5	7.1	9.5	11.5
<i>Klara</i>	2.5	2.7	1.5	1.6	1.9
VMMA/Medialaan (De Persgroep, Roularta Media Group)	4.7	16.7	23.3	24.1	21.9
<i>Qmusic</i>	3.6	11.0	16.4	18.2	14.3
<i>JoeFM</i> ¹	1.1	5.7	6.9	5.9	7.6
<i>Nostalgie</i>				1.8	5.9
<i>Be One/ExquiFM</i>				0.8	0.4
<i>TopRadio</i>	1.1	0.6	0.8	0.9	0.8
<i>Radio Contact</i>	1.6	1.6	0.7	0.8	
Others	7.3	8.2	11.6	9.2	9.3
C4	90.0	89.6	86.9	89.1	90.3
C2	90.0	89.6	86.9	86.5	83.6
HHI	7,356	5,695	4,771	4,564	4,322
<i>N (>1%)</i>	5	4	3	3	3
Noam Index	3,289	2,847	2,754	2,635	2,495

Source: Centrum voor Informatie over de Media (CIM), Studiedienst van de Vlaamse Regering, Vlaamse Regulator voor de Media (VRM), National Bank of Belgium

1 Acquired by VMMA in 2007.

In contrast to the Flemish radio market, Wallonia's has been characterized by a very strong commercial broadcasting presence, which commands a majority audience share in the French-language sector (Table 3.5). In the last ten years, the public broadcaster RTBF's audience shares stood at one-third of the market, whereas VRT still attracts more than 60% of the Flemish audience share. RTBF's stations include the generalist stations Vivacité (14.5% audience share in 2010) and La Première (7.9%), the rock station Classic 21 (7.4%), the pop and rock station Pure FM (3%), and the classical station Musiq'3 (1.8%).²⁵

Table 3-5. Wallonia Radio Groups (Audience Shares), 2002–2010

	2002	2004	2006	2008	2010
RTBF (public)	32.7	33.2	26.8	31.4	34.6
RTL Group (Bertelsmann AG, Germany)	37.5	33.6	36.6	35.9	33.8
<i>INADI (Bel RTL)</i>	19.9	18.3	20.3	18.8	17.2
<i>COBELFRA (Radio Contact)</i>	14.8	12.6	15.1	16.1	16.6
<i>Joker FM (Mint)</i>	2.8	2.7	1.2	1.0	
NRJ Group (France)	11.1	14.2	16.1	15.0	14.5
<i>Nostalgie</i>	6.7	8.1	9.9	10.0	9.9
<i>NRJ Belgique</i>	4.4	6.1	6.2	5.0	4.6
FM Développement (FUNRadio)	3.8	3.2	3.5	2.6	3.8
RMP (Sud Radio)	1.0	1.2	1.5	1.1	1.1
Groupe IPM (Twizz Radio)			0.8	0.2	
Others	13.9	14.6	14.7	13.8	12.2
Total Revenue (mil euros) ¹		283		279	
Total Revenue (mil US\$)		351		410	
C4	85.1	84.2	83	84.9	86.7
HHI	2,614	2,445	2,332	2,508	2,566
Corrected HHI ²		4,519		3,820	
<i>N (>1%)</i>	5	5	5	5	5
Noam Index	1,255	1,188	1,139	1,206	1,213

Source: Centrum voor Informatie over de Media (CIM), Conseil Supérieur de l'Audiovisuel (CSA); National Bank of Belgium.

- 1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.
- 2 Estimated on the basis that Flanders and Wallonia are two separate markets.

The RTL Group, a subsidiary of Germany's Bertelsmann AG, is the strongest group in the private radio sector, with audience shares consistently comparable to or slightly exceeding those of RTBF. It controls the two leading commercial stations, Bel RTL and Radio Contact. The RTL Group's Belgian arm, which operates as Radio-Télé Luxembourg (RTL) out of Luxembourg, is the French-language market leader in Belgian radio.

p. 43 The NRJ Group (France) owns 50% of the music station Nostalgie Wallonie (with a 10% audience share), which plays popular music from the 1970s, 1980s, and 1990s, and NRJ (with a 4–5% audience share), which caters to a younger audience. The Belgian firm Mediabel S.A. is the other 50% shareholder in Nostalgie.

Other private stations include Fun Radio (with a 3.8% audience share), Sud Radio (with a 1.1% audience share), and Twizz (with a 0.2% audience share). Concentration indices have remained relatively stable over the past decade (Table 3.5).

Broadcast Television

Terrestrial broadcasting (first analog, and now digital) has always been limited to the public service broadcasters. Cable is now the most common distribution platform for television programming in Belgium, with 95% of all households connected to a cable network via either Internet Protocol television (IPTV) or traditional cable TV (CATV).

The public service broadcasters have enjoyed a market share of almost 100% in their respective communities for terrestrial broadcasting since their inception, which is why we have not calculated concentration indices for broadcast television in this section.

p. 44 In Flanders, VRT broadcast on its own analog terrestrial network until the analog switch-off to digital terrestrial television (DTT) was completed in November 2008. Subsequently, the operations of the new digital network were sold off to Norkring Norking (Norway), a subsidiary of the Norwegian state telecom provider Telenor, which acquired the license to develop a digital terrestrial network (DVB-T) in Flanders and, as “common carrier,” offers transmission services to package distributors. So far, Norkring has only concluded an agreement with one distributor, Telenet, which launched its Teletenne platform in June 2012 but stopped it again in 2014 due to lack of success. VRT’s programming is available to CATV/IPTV users for free via DVB-T. VRT still attracts large audience shares in the audiovisual sector (40% for TV, 70% for radio) and competes fiercely with the two largest commercial broadcasters: VMMA/Medialaan, which offers seven TV channels (VTM, 2BE, Vitaya, Vitaliteit, Jim, Anne, and VTMKzoom), and SBS Belgium (controlled by Telenet), which offers two TV channels (Vier and Vijf, formerly VT4 and VijfTV).

p. 45 In Wallonia, terrestrial broadcasting has also always been limited to public broadcasting, both in analog and digital modes. Since November 2007, RTBF has been broadcasting its three main TV channels (La Une, La Deux and La Trois), its five radio stations (La Première, Vivacité, Musiqu’3, Pure FM and Classic 21), as well as *Euronews* and the two radio stations run by the German-language public broadcaster BRF, for free on DVB-T. The provisions for digital broadcasting by RTBF stem from its universal service obligation enacted in the 2007–2011 contract it has with the state. Currently, about 95% households in the French Community are covered by DTT. RTBF analog services were terminated in March 2010.²⁶ The other primary broadcast television channels viewed in Wallonia are offered by leading French media groups: France 2 and France 3 of the public broadcaster France Télévision have a combined 15% market share, and the TF1 Group’s commercial TV channels TF1 (with a 17% audience share) and BTV, which is co-owned by the French groups TF1 and AB with a 5% audience share, are also popular.

Multichannel TV Platforms

Satellite TV is not a significant platform in the Belgian market, so there are no data available to analyze for concentration. As noted earlier, CATV is the near-exclusive distribution channel for TV, with around 95% of Belgian households using it. Cable operators also offer voice-telephony, triple and quadruple play packages, and Internet services. Therefore, there are several market overlaps between cable and wireline telecom providers.

For Internet Protocol television (IPTV) and digital TV services, the state-owned (50% + 1 share), major Belgian telecom company Belgacom faces fierce competition from cable operators, especially from the Internet service provider (ISP) and telecom operator Telenet, which expanded its operations into digital TV in 2005 with Telenet Digital TV. Telenet is the leading CATV operator, with a 2009 market share of 54%. Competitive conditions for TV distribution still differ significantly in Flanders and Wallonia because CATV is offered by different regional cable operators: namely Telenet in Flanders, Tecteo and Brutélé in Wallonia (offering their services under a common brand ‘VOO’), and Numericable (formerly Coditel) in Brussels-Capital.

In 2011, the Community media regulators in Belgium, together with the Belgian Institute for Postal Services and Telecommunications (BIPT), adopted a number of resolutions in which they set regionally delineated markets for TV transmission and forced the monopolistic cable providers in the communities to open their networks up to other networks. Cable operators lodged an appeal against the decision, which they lost in November 2014.²⁷ Mobile operator Mobistar is expected to launch alternative TV packages via the cable in 2015. Its competitor, Base, who had launched an alternative TV package via Belgacom's network under the name *Snow* in February 2013, announced in December 2014 that it will stop its TV service in 2015 and migrate its clients to Belgacom's Scarlet service. CATV/IPTV operators Telenet, Tecteo and Belgacom are also active as pay-TV operators offering premium channels (Table 3.6).

Table 3-6. Multichannel Video Platforms: Cable MSOs, DBS, IPTV (Audience Shares), 2005–2009

	2005	2009
Telenet (Liberty Global, US)		54.6
VOO & Coditel		29.3
Belgacom (public)		16.2
Total Revenue (mil euros)	605	807
Total Revenue (mil US\$)	720	1,122
C3	100	100
HHI		4,094
<i>N</i> (>1%)	3	3
Noam Index		2,364

Source: CLEC, 2010.

Video Channels

As noted earlier, CATV is the most common TV distribution platform in Belgium, with over 95% of households connected to the system and subscribing to either CATV or IPTV. Channels included in the basic subscription package of CATV and IPTV providers are “free to air” as a result. The term “pay-TV channel” is reserved for channels that are offered for a premium fee in Belgium, such as sports and film channels. Pay TV has not developed a substantial market share in Belgium because so much content is available “free to air.”

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In Flanders, there are three major TV groups. VRT, the public broadcaster, offers three channels: Eén, Canvas, and Ketnet (until 2012 Ketnet was part of Canvas). VMMA/Medialaan offers seven channels: VTM, 2BE, Jim TV, Anne, VTMKzoom, Vitaya, and Vitaliteit, the two latter of which were formerly owned by Media ad Infinitum.²⁸ Finally, there is SBS Belgium, a subsidiary of De Vijver Media, which offers two channels, Vier and Vijf. In 2014, Telenet acquired 50% of SBS Belgium, with 25% each for Corelio and W&W.

These major groups offer both linear channels and on-demand services via third party cable and satellite platforms, as well as via the internet and their own mobile application *Stievie*. Besides them, ..., there are a significant number of small “free to air” digital channels offered by either small independent TV companies, such as Actua TV, or companies owned by large multimedia groups, such as Belgian Business Television, which is owned by Roularta.

Before the launch of commercial television, the Flemish audience could only turn to foreign channels, namely those of the Dutch public broadcaster NPO. However, after the commercial broadcaster VTM was established in 1989, the NPO channels (Ned1, Ned2, and Ned3) started rapidly to lose market share. VTM has also successfully won significant audience shares away from VRT. When VMMA launched a second channel in 1995—in reaction to the establishment of VT4 (which broadcast from London in the United Kingdom to circumvent VTM's Flemish-Community advertising monopoly)—VRT saw its audience shares fall to 23%. Since 2000, however, VRT has gradually regained audience shares, and since 2002 it has regained its place as the largest player. In 2010, its 43% audience share exceeded the combined 38% audience shares of VMMA, Medialaan SBS Belgium, and Media ad Infinitum.

There are ten regional TV stations in Flanders. First established in 1992, they have a semipublic status and are funded by advertising, as well as by state subsidies. They have been successful in attracting viewers, but advertisers and public authorities have been less eager to finance them and, as a result, several of them now face severe financial difficulties.

Filmnet (Richmond-Rupert) was the first pay-TV operator in Flanders, but it never managed to break even in the market. The Canal + Group acquired it in 1996, and it ultimately became part of the CATV operator Telenet's operations in 2003 (Tables 3.7 and 3.8).

Table 3-7. Flanders Combined Video Network Industries: Broadcast TV Networks, TV Syndicators, Cable Channels, Pay-TV (Market Shares by Revenue), 1992–2010¹

	1992	1995	1998	2000	2002	2004	2008	2010
VRT (public)	31.0	23.0	30.0	31.0	36.0	39.0	40.0	43.0
VMMa (Medialaan)	37.0	41.0	33.0	35.0	31.0	28.0	27.0	25.0
SBS Belgium ²⁹ (De Vijver Media) (a) (after 2014, 50% by Telenet, 25% Corelio)	0.0	6.0	9.0	8.0	6.0	8.0	11.0	10.0
Media ad Infinitum	0.0	0.0	0.0	0.0	1.0	2.0	4.0	3.0
NPO (public) (Netherlands)	9.0	6.0	5.0	5.0	5.0	4.0		
Others	23.0	24.0	23.0	21.0	21.0	19.0	18.0	19.0
C4	77	76	77	79	78	79	82	81
HHI	2,411	2,282	2,095	2,275	2,319	2,389	2,460	2,583
<i>N</i> (>1%)	3	4	4	4	5	5	4	4
Noam Index	2,078	1,650	1,514	1,568	1,380	1,375	1,395	1,472

Source: Centrum voor Informatie over de Media (CIM), Studiedienst van de Vlaamse Regering, Vlaamse Regulator voor de Media (VRM), National Bank of Belgium.

1 C4 and HHI are based on the audience shares of the TV companies, not individual channels.

Table 3-8. Flanders Combined Video Network Industries: Broadcast TV Networks, TV Syndicators, Cable Channels, Pay-TV (Audience Shares), (Market Shares by Revenue), 2005–2010

	2005	2006	2007	2008	2009	2010
VRT (public) (including Een/TV1, Canvas, Ketnet and TV2) ¹	52.2	51.4	49.5	49.4	49.7	47.9
VMMa (Mediaaan) (including VTM, 2BE and KA2) ²	30.0	26.4	27.0	27.3	26.7	29.2
SBS Belgium (De Vijver Media) ³⁰ (b) (After 2014, 50% Telenet, 25% Corelio)	9.3	10.1	10.8	10.2	9.0	10.1
Belgacom Skynet (public)	3.3	6.7	6.8	7.6	8.6	8.8
MTV (US)	2.4	2.5	3.1	2.8	3.1	1.9
Media ad Infinitum	1.1	1.3	1.3	1.3	1.3	1.4
Bites Europe	0.0	0.0	0.0	0.0	0.2	0.3
Belgian Business Televisie	0.8	0.7	0.6	0.4	0.3	0.2
TVgas	0.0	0.0	0.0	0.0	0.1	0.2
Euro1080	0.8	0.8	0.9	1.0	1.0	0.0
Event TV Vlaanderen	0.1	0.0	0.0	0.0	0.0	0.0
Life!TV	0.0	0.1	0.1	0.0	0.0	0.0
Total Revenue (mil euros)	726	846	868	893	879	893
Total Revenue (mil US\$)	908	1,066	1,189	1,313	1,222	1,188
C4	94.8	94.6	94.1	94.4	94.0	96.0
HHI	3,730	3,496	3,352	3,355	3,348	3,330
N (>1%)	6	6	6	6	6	6
Noam Index	1,521	1,427	1,368	1,370	1,367	1,359

Source: Centrum voor Informatie over de Media (CIM), Studiedienst van de Vlaamse Regering, Vlaamse Regulator voor de Media (VRM), National Bank of Belgium

- Both state subsidies and revenues from advertising and merchandising activities are taken into account for VRT's revenue share.
- For VMMa, revenue includes both TV and radio.

Wallonia's public broadcaster RTBF has always had to cope with fierce competition from French channels, both public (France Télévisions) and private (TF1). The largest operator in the French-language market is RTL Belgium, which was the first commercial television broadcaster to obtain a license in Wallonia (in 1987), and it then launched its first channel RTL/TVi two years later. Its owners are the RTL Group's subsidiary CLT-UFA, with a 66% stake, and Audiopresse, a Wallonian print media cooperative, with a 34% stake. In 1995, RTL launched Club RTL, targeting younger demographics, and in 2003, RTL started broadcasting PlugTV, which also focuses on music and youth programming.

p. 48 Until recently, RTL provided its services under a double license: one from the authorities in Wallonia, and another from Luxembourg, where content and investment requirements are less stringent than they are in Belgium. In 2005, RLT decided not to ask for a renewal of its Belgian license and instead opted to continue its operations exclusively under its Luxembourg license taking advantage of the country-of-origin principle outlined in the Audiovisual Media Services Directive.³¹

Wallonia has 11 regional TV stations that are allowed to broadcast advertising. Part of their financing comes from state subsidies, however.

The Canal + Group started a pay-TV channel in 1989, Canal + Belgique. RTBF purchased a 26% stake in the venture, which it sold back to Canal + in 2000 for US\$19 million (20.6 million euros). Later, Canal + Belgique became independent and changed its name to BeTV, and the CATV operator Tecteo (VOO) acquired it in October 2008 (Table 3.9). Since September 2014, the video streaming service Netflix is also available in Belgium. Belgacom struck an agreement to offer the Netflix application also via its digital TV decoders.

Table 3-9. Wallonia Combined Video Network Industries: Broadcast TV Networks, TV Syndicators, Cable Channels, Pay-TV (Audience Shares by%), 2000–2010

	2000	2002	2004	2008	2010
RTBF (public)	19.7	18.9	19.6	20.1	20.4
RLT Group (Bertelsmann AG, Germany)	23.3	24.7	25.6	26.0	27.6
TF1 Group (France)	16.6	15.7	17.5	17.1	16.6
France Télévisions (France)	17.1	14.3	14.9	15.2	15.4
AB Group (France)	3.7	5.9	5.7	5.3	5.6
Tecteo (VOO)	0.8	0.8	0.4	0.4	0.3
Others	18.8	19.7	16.3	15.9	14.1
Total Revenue (mil euros) ¹			1,020	1,018	
Total Revenue (mil US\$)			1,264	1,496	
C4	80.4	79.5	83.3	83.7	85.6
HHI	1,866	1,841	1,866	1,884	1,920
Corrected HHI ²			2,190	2,255	
N (>1%)	5	5	5	5	5
Noam Index	834	823	834	842	859

Source: Centrum voor Informatie over de Media (CIM; www.cim.be); Conseil Supérieur de l'Audiovisuel (<http://www.csa.be/pluralisme/audience/secteur/3>); National Bank of Belgium.

- 1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.
- 2 Estimated on the basis that Flanders and Wallonia are two separate markets.

Film

The Belgian film industry is dominated by foreign entities, predominantly US-based Hollywood majors like Universal and Warner Brothers. French productions from such studios as Pathé are extremely popular in Wallonia, and, to a lesser extent, Dutch productions are present in the Flemish market. The German Community in the Eastern Cantons gravitates to the German market, though the market is quite small.

p. 49 Distribution is also led by international enterprises. Therefore, public subsidies are available to support Flemish and French-language productions in country. Due to the small size of the market, statistically relevant market shares for domestic movie production companies are not kept by public sources.

Belgium was one of the first European countries to adopt the US model of multiplexes, and the country has a total of around 120 cinemas. The Kinopolis Group, with a 50% audience share of 2.2 million theatergoers, dominates the exhibition market by a wide margin. The group is also active in other countries, such as France and Spain.

Wireline Telecom

Unlike the print and audiovisual sectors, the Belgian telecommunications market is nationally operated and regulated. The Belgian Institute for Posts and Telecommunications (BIPT) is the federal telecom regulator and is responsible for regulating bilingual broadcasting activities in Brussels-Capital.

The telecommunications market is structurally similar to most other European countries. Former state monopolists have been privatized but still have leading, if not dominating, market shares. The former public monopolist Belgacom /Proximus still dominates the wireline market, with a market share 71.4% in 2009.³² The fixed-line telephony market is smaller than the mobile market, although subscriptions for wireline services are still valued at US\$5.6 billion (4 billion euros) in 2009, largely because these services are used by ISPs (Table 3.10).

Table 3-10. Wireline Telecom (Market Shares by Revenue), 2001–2009

	2001	2009	2012 ¹
Belgacom (public) ³³	77.0	71.4	63.1
Telenet (Liberty Global, US)	23.0	16.5	29.3
Mobistar (France Telecom)		5.5	4.3
VOO & Coditel		5.5	
KPN Belgium		1.1	
BT Belgium//Versatel			
Others			3.3
Total Revenue (mil euros)		4,032	~ 4,024 ²
Total Revenue (mil US\$)		5,605	~ 5,173
C4		98.9	96.7
HHI		5,435	4,859
<i>N</i> (>1%)		5	3
Noam Index		2,431	2,805

1 2012 data added by editors. Belgium Telecommunications Report – Q3 2014. London: Business Monitor International, 2014.ProQuest.

2 Industry revenue approximated from Belgacom Financial Reports for FY2012.

Wireless Telecom

A majority of Belgian households do not own fixed telephone lines anymore, and the wireless market is characterized by an average of slightly more than one mobile device per capita. With its mobile brand Proximus, Belgacom leads the wireless market with close to 50% of the market share. Its two main competitors are Base, owned by the Dutch operator KPN, and France Telecom's Mobistar. KPN has tried, so far unsuccessfully, to restructure its Belgian properties, having been unable to sell off Base or merge its German mobile brand e-plus with the Spanish telecom major Telefónica. Both Base and Mobistar have recorded slight gains in recent years at the expense of Proximus (Table 3.11).

Table 3-11. Wireless Telecom (Market Shares by Revenue)

	2005	2006	2007	2008	2009	2011 ¹
Proximus (public) (Belgacom Mobile)	51.7	49.3	48.7	47.5	46.1	41.7
Mobistar (France Telecom, France)	35.3	36.3	36.7	37.1	37.7	32.0
Base (KPN, Netherlands)	13.0	14.4	14.6	15.4	16.3	19.0
Others						7.3
Total Revenue (mil euros)	4,178	4,289	4,163	4,112	4,162	4,800
Total Revenue (mil US\$)	5,223	5,404	5,703	6,045	5,785	6,700
C3	100	100	100	100	100	92.7
HHI	4,085	3,953	3,933	3,869	3,806	3,124
<i>N</i> (>1%)	3	3	3	3	3	3
Noam Index	2,358	2,282	2,270	2,234	2,197	1,804

Source: National Bank of Belgium.

- 1 Data added by editors. Data from Marketline. "Wireless Telecommunication Services Industry Profile: Belgium." (2012). Wireless Telecommunication Services Industry Profile: Belgium, 1–30.

Internet Media

Internet Service Providers (ISP)

Wireline telecom networks are now dominated by data and Internet connections. Cable operators, offering triple and quadruple play services, also have significant market shares. Belgacom is the country's largest ISP, with a market share of 47% in 2010, while Telenet holds a growing 36% market share. Belgacom's leading position led the European Commission to express concern over the existence of a *de facto* monopoly. Table 3.12 defines the ISP market without taking into account voice services, which when taken into account would leave Belgacom with a 61% market share, followed distantly by Telenet with just a 14% market share, while smaller players like France Telecom's Mobistar would each hold less than 5%.

Table 3-12. Internet Service Providers (Market Shares by Revenue), 2005–2010

	Access	2005	2006	2007	2008	2009	2010
Belgacom DSL (public)	DSL	48.5	47.6	46.6	46.1	48.3	47.1
Tiscali Belgium (Italy)	DSL	0.0	0.0	0.0	0.0	0.0	0.0
Scarlet	DSL	0.4	1.3	1.1	0.3	0.0	0.0
Tele2 (Sweden) (including Versatel)	DSL	2.7	4.3	0.0	0.0	0.0	0.0
Mobistar (France Telecom, France)	DSL	0.0	0.5	0.9	0.8	1.2	1.7
Tele2 (Sweden); Base (KPN, Netherlands)	DSL	0.0	0.0	4.7	4.9	4.8	3.2
Telenet (Liberty Global, US)	Cable	31.0	30.8	33.1	33.8	34.4	36.0
Chello	Cable	1.8	1.7	0.0	0.0	0.0	0.0
Brutele@Home (VOO)	Cable	2.1	2.6	2.5	2.5	2.4	2.8
Teledisnet	Cable	1.5	1.5	1.5	3.8	3.6	4.7
Others	Cable, DSL	12.0	9.6	9.4	7.8	5.3	4.6
Total Revenue (mil euros) ¹		551				648	
Total Revenue (mil US\$)		689				900	
C4		84.3	85.3	86.9	88.6	91.1	91.0
HHI		3,331	3,247	3,300	3,313	3,559	3,557
<i>N</i> (>1%)		6	7	6	5	6	6
Noam Index		1,360	1,227	1,347	1,482	1,453	1,452

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

In terms of subscriptions, the gap between the DSL-based market leader Belgacom and the cable operator Telenet is closing (Table 3.13).

Table 3-13. Number of Belgian Broadband Subscribers (1,000), 2010–2011

	2010	2011
Belgacom (public)	1,536	1,567
Telenet (Liberty Global, US)	1,115	1,209
Teledisnet	143	165
Tele2 (Sweden)	154	100
Brutele@Home	79	100
Mobistar (France Telecom, France)	42	66
Total Subscribers (1,000)	3,069	3,207

In 2011, Belgacom had a fixed broadband market share of 46% and a 52% market share for its DSL wireline services. This is well below the European average of 76% in this sector, in part because cable broadband distribution is much higher in Belgium than it is in the rest of the European Union, a situation that is closely related to the near absence of satellite TV distribution that frequently goes along with separate subscriptions for fixed lines. Cable broadband service is not identical with ISP service, although this cross-network situation clearly exists and is cause for concern among Belgian regulators.

Search Engines

As in most other European countries, Google (US) has a near-monopoly in the search engine market, with a 90% market share. Statistically significant data do not exist for other providers, either foreign or Belgian.

p. 51 **Online News**

Like the newspapers market, the online news market is also divided into Walloon and Flemish sectors. The leaders in the Dutch online media are hln.be (*Het Laatste Nieuws*), standaard.be (*De Standaard*), and nieuwsblad.be (*Het Nieuwsblad*). HLN is part of De Persgroep, and the latter two are part of the Corelio Group's *VUM*.

p. 52 The most successful news site in the French-language market is lesoir.be of Rossel. The website of the public broadcaster RTBF, rtbf.be, is the second most visited news site in the market. The third leading portal is dhnet.be, of IPM's Francophone *La Dernière Heure*. ↴

p. 53 **Conclusion**

The limited number of media groups and high levels of cross-ownership are typical for Belgian media markets. Most media groups have developed a varied portfolio of media products in different markets or segments, but none of them are capable of simultaneously dominating multiple market sectors. The figures in Table 3.14 illustrate this clearly for Flemish media groups.

Table 3-14. Flemish Media Cross-ownership

	Radio Broadcasting	Radio Distribution	Television Content	Television Broadcasting	Television Distribution	Newspapers	Magazines	Online News	ISPs
Alfacam	X	X	X					X	
Belgacom (public)			X	X	X			X	X
Concentra	X		X			X	X	X	
Coreilo	X		X			X	X	X	
De Persgroep	X		X	X		X	X	X	
Roularta	X		X	X			X	X	
Sanoma Oyj (Erkko Family, Finland)			X				X	X	
SBS Belgium (De Vijver Media)			X	X				X	
Telenet (Liberty Global, US)		X	X	X	X		X	X	X
VRT (public)	X		X	X				X	

Although international investments in/by Belgian media groups are a relatively new phenomenon, a growing number of Belgian media groups have developed international ambitions, in search of economies of scale. Examples include the Roularta Group which has expanded its interests in the magazine market toward the French market. De Persgroep has invested in the Dutch newspaper market: after buying the title *Het Parool* from the large Dutch media group PCM in 2003, it acquired a majority share of PCM in 2009 (and controls since then also popular periodicals such as *de Volkskrant*, *NRC Handelsblad*, *Trouw*, and *Algemeen Dagblad*). The Dutch media regulator permitted this acquisition on the condition that De Persgroep seek a buyer for NRC Media, publisher of *NRC Handelsblad* and *NRC.next*.³⁴

The Belgian situation makes clear that the definition of concentration depends strongly on how the focus is set. If one describes wireline and cable distribution as separate entities, for example, one finds monopolistic trends for Belgacom. If service is generally defined across different technical distribution means, then there is a near duopoly. However, with different services offered by several companies plus the existence of Belgium's three distinct communities, any representation of a specific market will neglect some dimensions of the media landscape.

Belgium, with its strong market divisions along linguistic lines, faces the challenge of small markets: either there is pressure from internationalisation, with foreign groups dominating some sectors, or domestic near-monopolies form because necessary investments in expensive infrastructure for such small audience shares serve as a high entry barrier. However, a number of domestic media players have managed to secure investments in local production by either expanding themselves to neighbouring territories or by striking alliances with international groups. In light of growing European integration, this "heartland of Europe" and its political and administrative center of Brussels-Capital serve as an example of how media pluralism can be achieved in taking on a cross-border perspective.

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BELGIUM IS A MULTILINGUAL country, but so are several other countries in our 30-nation world—Switzerland, Canada, India, China, Spain, Israel, South Africa, Russia, and increasingly the United States (Table 3.15). What is unusual in Belgium is that content media and their regulations are separated along linguistic lines. Of the top five companies, only Belgacom and Liberty Global operate in both the French- and Dutch-speaking regions of Belgium. Belgian media industries have high concentration indices that are caused by the limited number of media groups within each region. On the other hand, the Dutch, German, and French-language markets are relatively small and open to investment and media flows from neighboring countries. The percentage of foreign ownership of Belgian media is 33.0%—a number that would be higher if not for the public company Belgacom’s telecom market share, which gives it control of 48.8% of the platform media market (Table 3.17). Belgacom, far and away the largest media company in Belgium by power index and market share, controls nearly half of Belgium’s wireless market and almost three-fourths of its wireline, in addition to smaller ISP and multichannel operations. It is also active in the online-based Belgacom-TV. Belgacom’s national market share has decreased as Liberty Global’s Telenet cable service and Base (owned by the Dutch company KPN) have gradually increased their wireless operations. Mobistar (Owned by Orange) showed no change in percentage of shares of the overall National Media Market.

Table 3-15. National Media Industries Concentration in Belgium

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Belgacom—(public)	2,796	45.1	1,859	36.4	-6.7	-1.8
Mobistar (Orange, France)	421	13.6	380	13.0	-2.0	-0.1
Telenet (Liberty Global, US)	231	9.7	473	13.3	20.9	0.7
VRT (public)—Flanders	95	3.8	87	3.8	-1.6	0
KPN (Netherlands)	56.5	4.7	132.4	7.1	26.9	0.5
VOO & Coditel	49.7	3.4	52.8	1.9	1.3	-0.3
Corelio/VUM (with Concerta, now Mediahuis)—Flanders	46.7	1.7	44.2	1.7	-1.1	-0.01
Persgroep (incl. Mediafin)—	34.1	1.4	31.9	1.4	-1.3	-0.01
VMMA/Mediaaan—Flanders	23	1.9	27.1	2.1	3.6	0.05
Rosel—Wallonia	28.1	1.3	33.3	1.4	3.8	0.03
Concentra (now Mediahuis)	21.2	1.1	20.9	1.1	-0.3	0
Bertelsmann, (Germany)—Wallonia	36.7	2.4	41.1	2.6	2.4	0.04
RTBF (public)—Wallonia	23.9	1.9	25.7	2.1	1.5	0.02
IPM—Wallonia	4.7	0.5	4.9	0.6	0.8	0.003
Bouygues Group (France)—Wallonia	14.3	1.4	12.7	1.4	-2.2	0.01
France Télévisions (France) Wallonia	10.1	1.2	11.1	1.3	1.9	0.02
Murdoch Group (US)	1.4	0.1	0.4	0.04	-15.0	-0.01
Media Concentration Index			2004/5	2011 or Most Recent	% Change Annual Average	
Total Revenue: Nat'l Media Industry (mil US\$)			15,853	18,325	3.1	
Total Voices (<i>n</i>)			36	45	5.0	
Net Voices (<i>n</i>)			32	41	5.6	
Public Ownership (%)			1.9	2.1	0.03	
Foreign Ownership (%)			4.9	33.0	2.0	

C4 Average—Weighted	92	89	-1.0
C1 Average—Weighted	53	45	-1.0
HHI Average—Weighted	3,969	3,389	-2.9
Noam Index Average—Weighted	807	1,013	5.1
Pooled Overall Sector C4	73.0	69.8	-0.6
Pooled Overall Sector HHI	2,385	1,769	-5.2
Pooled Overall Sector Noam Index	120	91	-4.8
Market Share of Top Ten Companies: Nat'l Media Industry (%) (Pooled C10)	88.1	84.1	-0.8
National Media Power Index	3,929	3,393	-2.7

Table 3-17. Top Platform Media Companies in Belgium

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
Belgacom	3,689.1	59.2	2,511.8	48.8	-6.4%	-2.1
Mobistar (Orange, France)	542.4	15.4	704.1	18.7	6.0	0.7
Telenet (Liberty Global, US)	246.7	11.7	559.8	16.6	25.4%	1.0
Base (KPN)	74.6	6.2	179.4	9.6	28.1%	0.7
Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average			
Public Ownership (%)	0	0	0%			
Foreign Ownership (%)	27.6	37.9	2.1%			
C4 Average—Weighted	99	95	-0.1%			
C1 Average—Weighted	61	51	-2%			
HHI Average—Weighted	4,673	3,815	-3.7%			
National Power Index	4,601	4,004	-2.6%			

Belgium has one of the highest rates of multichannel penetration in the European Union. That market is relatively unregulated due to the lack of a national authority. In the multichannel platforms market, Liberty Global dominates with 54.6% market share, after having bought out Telenet in 2012. Liberty Global also operates an ISP service in Belgium, and it has recently moved into Belgian wireline telecom as well, increasing its platform market share by 4.9% from 11.7% in 2004 to 16.6% in 2008 (Tables 3.16 and 3.17). ↵

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Table 3-16. Top Content Media Companies in Belgium

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)
VRT—Flanders (public)	389.2	15.6	318.8	13.9	-3.6	-0.3
Telenet	183.5	3.4	219.9	4.0	4.0	0.1
Corelio—Flanders (now Mediahuis, with Con centra) & Wallonia	192.1	7.0	161.5	6.1	-3.2	-0.2
Persgroup—Flanders	140.5	6.0	116.6	5.2	-3.4	-0.2
VMMA/Mediaaan—Flanders	94.5	7.8	99.0	7.8	1.0	0.0
Rossel—Wallonia	115.5	5.4	121.8	5.3	1.1	-0.03
Con centra (now Mediahuis)—Flanders	87.3	4.7	76.5	4.2	-2.5	-0.1
VOO & Coditel	52.9	1.8	63.4	2.2	4.0	0.1
Group RTL—Wallonia (Germany)	150.8	9.9	150.4	9.6	-0.1	-0.06
RTBF—Wallonia (public)	98.3	7.9	94.1	7.5	-0.9	-0.1
Belgacom	16.1	1.0	19.3	1.2	4.0	0.04
Murdoch Group (US)	5.9	0.3	1.3	0.1	-15.5	-0.04
Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average			
Public Ownership (%)	7.9	7.5	-0.1%			
Foreign Ownership (%)	25.3	23.9	-0.3%			
C4 Average—Weighted	73	74	0.3%			
HHI Average—Weighted	1,777	2,098	3.6%			
C1 Average—Weighted	27	30	0.01%			
National Power Index	1,790	2,113	3.6%			

Notes

1. Valcke, Peggy, and Lievens, Eva. *Media Law in Belgium*. Alphen aan den Rijn: Kluwer Law International BV, 2011, 21.
2. Flemish, as a language, is very similar to Dutch, but there are a number of differences, most importantly with respect to pronunciations and vocabulary. Belgian French is by far the most common French-derived language in the country, and it is distinct from the dialects of Wallonia that are related to French but like Flemish are fairly distinct in their own right.
3. Franck, Aline. “Belgique: regards croisés sur deux paysages audiovisuels.” *Régulation* 41 (2009), 18.
4. This switchover was also helped by the fact that the legislative framework for commercial broadcasting initially allowed for compulsory shareholding by local press outlets over commercial TV stations. These localized interests help explain why Flanders has some quite successful local channels, while in the French-language market France’s leading commercial channels, such as *TF1*, are still very popular.
5. Valcke, Peggy, and Lievens, Eva. *Media Law in Belgium*. Alphen aan den Rijn: Kluwer Law International BV, 2011, 152.

6. The right to reply on radio and television, for instance, is at the same time regulated both in a federal act [the Act of 23 June 1961, On the Right of Reply (*Wet van 23 juni 1961 betreffende het recht tot antwoord*)] and in the Flemish Broadcasting Decree of 2009 (*Decreet van 27 maart 2009 betreffende radio-omroep en televisie*), which has been amended several times since.
7. CSA. "L'offre de médias et le pluralisme en Fédération Wallonie-Bruxelles." CSA, 2013. 10 Jan. 2013. <<http://www.csa.be/pluralisme>>; Valcke, Peggy, and Lievens, Eva. *Media Law in Belgium*. Alphen aan den Rijn: Kluwer Law International BV, 2011.
8. Raeymaeckers, Karen, De Bens, Els, Paulussen, Steven, Deprez, Annelore, and Tenret, Yannis, *Media landscape: Belgium*. European Journalism Centre, 8 Nov. 2010. 10 Jan. 2013; <http://ejc.net/media_landscapes/belgium>; Lund, Anker Brink, Raeymaeckers, Karen, and Trappel, Josef, "Newspapers: Adapting and Experimenting." in Trappel, Josef, et al. (eds). *Media in Europe Today*, Bristol/Chicago: Intellect, 2011.
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10. Valcke, Peggy, and Lievens, Eva. *Media Law in Belgium*. Alphen aan den Rijn: Kluwer Law International BV, 2011.
11. Briel, Robert. "Sanoma pays €1.225 billion for SBS channels." *Broadband TV News*, 20 Apr. 2011. 9 Jan. 2013. <<http://www.broadbandtvnews.com/2011/04/20/sanoma-pays-e1-225-billion-for-sbs-channels/>>.
12. Sanoma Media Belgium. "Competition Authorities approve the partnership structure of the SBS TV operations in Belgium." *sanoma.com*, 9 Sep. 2011. 9 Jan. 2013. <<http://www.sanoma.com/about-us/sanoma-media-belgium2/news/competition-authorities-approve-the-partnership-structure-of-the-sbs-tv-operations-in-belgium>>.
13. For example, the popular daily *Het Volk* was acquired by VUM/Corelio in 1994 and integrated in *Het Nieuwsblad/De Gentenaar* in 2008. In 1998, De Persgroep acquired the daily *De Morgen*, and in 1999 VUM/Corelio acquired a majority and then, by 2006, 100% of Mediabel's assets.
14. Raeymaeckers, Karen, et al. *Media landscape: Belgium*. European Journalism Centre, 8 Nov. 2010. 10 Jan. 2013. <http://ejc.net/media_landscapes/belgium>.
15. Raeymaeckers, Karen, et al. *Media landscape: Belgium*. European Journalism Centre, 8 Nov. 2010. 10 Jan. 2013. <http://ejc.net/media_landscapes/belgium>.
16. It also has a share of the German title, *Grenz Echo*, which has a small daily circulation of 10,000 copies.
17. CSA. "IMP Group." CSA, 2013. 10 Jan. 2013. <www.csa.be/pluralisme/groepes/show/3_groupe_ipm>.
18. CSA. "Group Corelio." CSA, 2013. 10 Jan. 2013. <www.csa.be/pluralisme/groepes/show/7_groupe_corelio>.
19. For an overview, see <<http://www.boekenvak.be/voor-uitgevers/leden>> and <<http://adeb.be/editors>>. 10 Jan. 2013.
20. The publishing sector in Flanders and the Netherlands distinguishes between A-books (fiction, non-fiction, poetry, children's books, comic books), S-books (school books), W-books (scientific books) and O-books (other); <<http://www.kvb.nl/feiten-en-cijfers/definities>>.
21. A Guette S. Jacobs, A. Schramme and K. Vandenbempt, Onderzoeksrapport Creatieve Industrieën in Vlaanderen: Mapping en bedrijfseconomische analyse, Flanders DC and Antwerp Management School. April 2011. 10 Jan. 2013 <http://www.flandersdc.be/sites/default/files/flandersdc%20-%20creatieve_industrie_n_in_vlaanderen_-_mapping_en_bedrijfseconomische_analyse.pdf>.
22. <<http://www.lannoo.be/over-ons>>
23. <<http://buitenland.vfl.be/en/press/514/bologna-2013-confirms-the-international-reputation-of-flemish-children-s-and-youth-literature.html>>
24. <<http://foreignrights.wpg.be/content/uploads/STANDAARD-UITGEVERIJ-STRIPS.pdf>>
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27. T-Regs. "Belgium: Decisions to mandate resale/access on Cable-TV networks." Last update December 4, 2014. <<http://www.t-regs.com/index.php/2010/12/22/belgium-proposals-to-mandate-accessresale-on-cable-tv-networks-2/>>.
28. Since 2009, VMMa has offered its subscribers access to a digital music channel (Anne) through Belgacom.
29. SBS Belgium after 2014, 50% by Telenet, 25% by Corelio, and 25% by W&W.
30. SBS Belgium after 2014, 50% by Telenet, 25% by Corelio, and 25% by W&W.
31. "Directive 2010/13/Eu of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive)." *Official Journal of the European Union*, 15 Apr. 2012. 10 Jan. 2013. <<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:095:0001:0024:EN:PDF>>.
32. European Commission, Information Society and Media Directorate-General. "Management Plan 2012." DG INFSO, 13 Dec. 2011. 9 Jan. 2013. <http://ec.europa.eu/atwork/synthesis/amp/doc/infso_mp_en.pdf>.
33. The Belgian state held, in 2014, 56.32% of Belgacom's voting rights.
34. Raeymaeckers, Karen, et al. *Media landscape: Belgium*. European Journalism Centre, 8 Nov. 2010. 10 Jan. 2013. <http://ejc.net/media_landscapes/belgium>.