



CHAPTER

## 9 Media Ownership and Concentration in the Netherlands

Joost van Dreunen, Eli Noam, Paul Mutter

<https://doi.org/10.1093/acprof:oso/9780199987238.003.0009> Pages 206–230

Published: January 2016

### Abstract

This chapter is about media ownership and concentration in the Netherlands. Once it has summarized the Dutch media landscape, the remainder of the chapter looks toward print media (newspapers, 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). Print media is becoming less concentrated, while concentration is increasing in the audiovisual sector whose main firms are the public NPB, RTL (Bertelsmann). Internet media have seen concentration progress along a U-shaped curve between 2001 and 2010. The main telecom firms is the incumbent KPN. In cable television, it is Ziggo and Liberty Global.

**Keywords:** Dutch media market, media industry, film, broadcast providers, audiovisual media, telecommunications, Internet, NPB, RTL, Bertelsmann, KPN, Ziggo, Liberty Global, Telegraaf Media Group  
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**Subject:** Economic Sociology, Social Research and Statistics

### Introduction

In the Netherlands, strict anticoncentration regulation exists only on paper, despite the existence of a large number of regulatory agencies.<sup>1</sup> For example, when the commercial broadcaster RTL's RTL 4 channel, inaugurated in 1989, was denied a Dutch commercial operating license, it began transmitting Dutch-language content out of its headquarters in neighboring Luxembourg that proved very popular. Despite the fact that commercial broadcasting licenses were not available in the Netherlands, the government did not respond to RTL 4's actions, though eventually, RTL 4 legally entered the Dutch market when the government decided to grant commercial broadcasting licenses in 1992.<sup>2</sup>

Another instance of limited regulatory enforcement in the Netherlands was the 2007 Temporary Media Concentration Law, which set very high maximum market shares for individual corporate entities in print and audiovisual cross-ownership. After just three years the law was revoked, though, with the understanding that Dutch media industries would continue to self-regulate and have Mediamonitor, part of the Dutch Media Authority, produce annual concentration surveys.

One other important factor affecting media concentration in the country is the growing financial insolvency of state-subsidized media producers. While public and commercial producers compete fiercely for audience shares, budget cuts and layoffs are adversely affecting state enterprises. Beginning in 2013, the national media budget will be trimmed by 25% annually—US\$64.5 million (50 million euros)—with the cuts gradually increasing to US\$258 million (200 million euros) over the next few years.

## Newspapers

According to the Commissariaat voor de Media, “[a] pluriform supply of newspapers demands a wide offering of both national and independent regional newspapers.”<sup>3</sup> Although the market has historically been regional in nature, a decline in circulation for regional newspapers has led to marked increases in the national dailies’ circulation numbers. After a failed attempt in 1988 to institutionalize regulations regarding newspaper ownership, the industry instead chose self-regulation under the condition that no single publisher be allowed to obtain a market share greater than 33%. Like Belgium and Spain, the Netherlands does not have specific legal constraints for newspaper ownership or for cross-ownership of newspapers by media groups active in other market segments.

The newspaper market has become increasingly concentrated, with the top four companies accounting for 95% of the total market shares in 2000. Since then, though, established Dutch publishers such as Telegraaf Media Groep, Wegener, and PCM have been losing market shares to foreign publishers. In 1999 the Swedish publisher Metro began circulating its eponymous free daily, and in 2004 the British private equity firm Apax acquired PCM, and Mecom (UK) became the biggest regional publisher after buying two regional newspapers and Wegener in 2007 (Table 9.1).

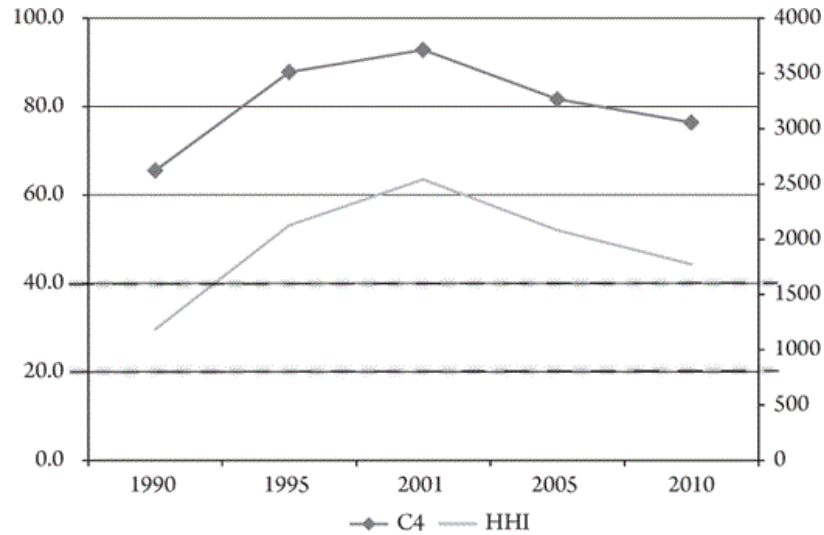
**Table 9-1.** Daily Newspapers (Market Shares by Circulation), 1990–2012

	1990	1995	2000	2001	2002	2003	2004	2005	2009	2012
Telegraaf Media Groep	19.1	24.5	29.8	30.7	33.1	32.8	33.7	34.2	29.5	36.9
Mecom (UK)/Koninklijke Wegener			28.0	24.5	24.9	25.0	24.3	22.2	21.8	Telegraaf
VNU	17.0	17.8	Mecom/Koninklijke Wegener							
Wegener	7.3	14.8								
PCM Uitgevers	12.3	30.7	30.4	30.8	24.6	24.2	23.1	19.5	19.9	22.8
NDU	17.2	PCM Uitgevers								
Noordelijke Dagblad Combinatie	5.5	6.8	6.8	6.9	6.0	6.1	5.9	5.8	5.2	5.5
Reformatorisch Dagblad	1.2	1.2	1.3	1.4	1.2	1.3	1.3	1.3	1.2	1.3
Nederlands Dagblad	0.6	0.6	0.7	0.8	0.7	0.7	0.8	0.7	0.7	0.7
Friesch Dagblad	0.5	0.4	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4
Koninklijke BDU	0.2	0.2	0.3	0.3	0.2	0.2	0.4	0.4		0.3
Others	19.1	3.0	2.2	4.1	8.8	9.2	10.1	15.5	21.3	1.5
Total Revenue (mil euros)	667	667	1,196	1,222	1,196	973	968	960	791	660
Total Revenue (mil US\$)	900	900	1,100	1,100	1,100	1,100	1,200	1,200	1,100	900
C4	65.6	87.8	95.0	92.9	88.6	88.1	87.0	81.7	76.4	90.3
HHI	1,187	2,127	2,645	2,542	2,359	2,326	2,297	2,079	1,771	1,914
N (>1%)	7	6	5	5	5	5	5	5	5	4
Noam Index	456	886	1,150	1,105	1,025	1,011	930	903	792	957

Source: HOI Online, Mediamonitor, Datamonitor.

p. 208 Total circulation in 2009 was 1.4 billion annually, down from 1.5 billion in 2001. Free dailies accounted for approximately 21% of the total circulation numbers. The market is only moderately concentrated, with an HHI of 1,914 in 2012, down from a high of 2,645 in 2000 (Figure 9.1).

Figure 9.1



Daily Newspapers Concentration (HHI and C4), 1990–2010

## Magazine Publishing

Annual circulation in the Netherlands has declined in recent years, from 716 million copies in 2004 to 584 million in 2009.<sup>4</sup> There were 165 different magazine titles in circulation in 2010, slightly down from 182 in 2007. Women’s magazines are the most popular titles.

p. 209 Of the popular women’s magazines, Sanoma Oyj (Finland) has the largest market share, with best-selling titles such as *Libelle* (445,223), *Margriet* (254,957), and *Flair* (111,251). The Telegraaf Media Groep is the second largest magazine publisher, although it publishes the most popular women’s periodical, *Vrouw*, which has a weekly circulation of 736,000 (by comparison, the Dutch-language versions of the US magazines *Cosmopolitan* and *Elle* have weekly circulations of 111,415 and 71,451, respectively).

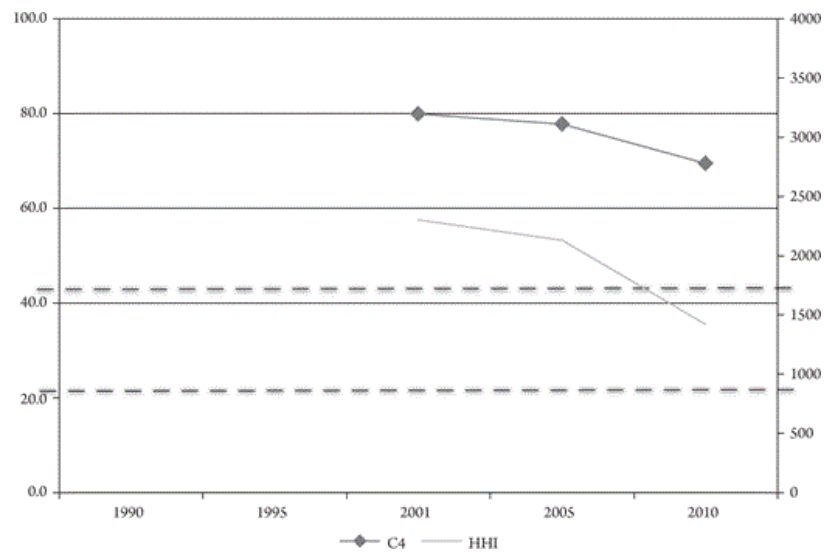
Because broadcasters in the Netherlands retain the rights to publish their programming schedules and offer them as a subscriber service, radio and television magazines are also prevalent in the market. Examples are *Veronica Magazine* (with a weekly circulation of 858,202), *Troskompas* (405,884), *Mikrogids* (400,580), *AVRObode* (302,739), and *NCRV-gids* (233,012) (Table 9.2).

**Table 9-2.** Magazine Publishing (Market Shares by Circulation), 2001–2010

	2001	2004	2007	2010
Sanoma Uitgevers (Sanoma Oyj, Finland)	39.5	37.3	26.6	23.8
Programmabladen AKN	21.5	20.8	18.2	18.0
Telegraaf Media Groep	0.3	0.6	13.2	14.9
Veronica Uitgeverij (ProSiebenSat.1 Media, Germany)	12.0	12.2	13.6	12.7
Hilversumse Media Compagnie	6.8	7.2	8.5	8.4
Audax Publishing	6.4	7.5	5.5	6.1
VARA Omroepvereniging	5.3	5.2	4.8	4.2
Omroepvereniging VPRO	2.6	2.7	2.8	3.0
Evangelische Omroep	1.7	2.4	2.1	2.1
Reed Business	1.9	1.8	1.9	1.9
Chellomedia Programming				1.6
Weekbladpers Tijdschriften	1.2	1.2	1.0	0.9
Gruner + Jahr (Bertelsmann AG, Germany)			0.7	0.9
Hachette Filipacchi Media (France)	0.4	0.4	0.6	0.6
Vipmedia Publishing en Services				0.3
De Groene Amsterdammer	0.2	0.2	0.2	0.3
Pelican Magazines (Hearst Corporation)				0.2
Uitgeverij Ode		0.1	0.1	0.1
AM van Gaal Media		0.1		
Credits Media	0.1	0.1		
EB Media/Inspirit Media	0.0	0.1	0.1	
Total Revenue (mil euros)	1,487	1,226	1,035	932
Total Revenue (mil US\$)	1,338	1,520	1,418	1,240
C4	79.9	77.8	71.6	69.4
HHI	2,301	2,129	1,543	1,419
N (>1%)	10	10	11	11
Noam Index	742	686	448	428

Source: Mediamonitor.

p. 210 The most noticeable change in terms of ownership was the launch of *Vrouw* by Telegraaf. Its success gave the company a national market share of 13.2% by 2007, primarily at the expense of Sanoma Oyj's titles. In addition, the appearance of several smaller magazines in recent years has contributed to an ongoing decline in concentration: HHI stood at 1,419 in 2010, down from 2,301 in 2001 (Figure 9.2).

**Figure 9.2**

Magazine Publishers Concentration (HHI and C4), 2001–2010

## Audiovisual Media

### Radio

The average Dutch citizen spends 200 minutes per day listening to the radio, an increase from 189 minutes per day a decade ago. National public radio stations hold total market shares of 31.6%; if regional public stations are included (12.1%), this figure rises to 43.7%. Commercial stations account for 56.3%. The Telegraaf Media Group has the largest market share of the commercial broadcasters (16.9%) due to its acquisition of Sky Radio Group. RTL Nederland, owned by the German RTL Group (Bertelsmann AG), is the second largest commercial broadcaster due to its ownership of the popular station Radio 538. In 2010, RTL also acquired Radio 10 Gold, and in early 2011 acquired Slam!FM, although the Dutch group Talpa Media Holding now owns all three of these stations (Radio 538, Radio 10 Gold, and Slam!FM).

State-subsidized stations such as Radio 2, Radio 3FM, Radio 4, and Radio 5 increased their audience shares during this period. The market shares of their commercial counterparts also increased, but this is largely the result of these stations acquiring multiple channels from their competitors. Sky Radio Group's market share peaked in 2000 at 14.7%, but then fell to 13.3%; in order to avert this downward trend, Sky acquired the stations Radio Veronica and Classic FM. Four new commercial broadcasters have appeared in the last decade, namely FunX, Radio 6, Q-Music, and 100%NL, whereas the state-owned classical music station Concertzender went off the air.

Regional radio stations in the Netherlands hold substantial market shares. Although they only account for 12.1% of total national market shares, in some provinces these stations have close to 25% of the regional market shares, especially in the more rural provinces of Groningen (24.2%), Drenthe (22.1%), and Friesland (21.2%).

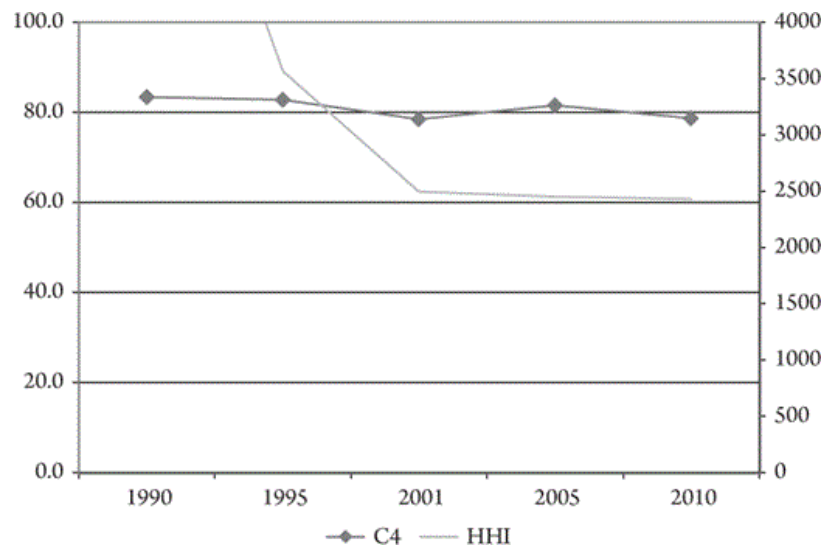
HHI for the Dutch radio market has historically been high. Despite a decrease from 6,956 in 1990, the concentration index stabilized at 2,428 in 2009 and then dropped to 1,674 in 2012. C4 in 2012 dropped to 71.8%, the lowest it had been in the observed period. (Table 9.3, Figure 9.3).

**Table 9-3.** Radio Group (Market Shares by Listeners), 1990–2012

	1990	1995	2000	2001	2002	2003	2004	2005	2009	2012
Netherlands Public Broadcasting	83.4	57.7	46.2	45.4	45.8	45.9	44.0	42.8	43.7	32.3
Sky Radio Group (Telegraaf Media Group)									17.5	16.9
Sky Radio Ltd.		6.9	14.7	14.1	13.3	17.1	17.4	16.5		
De Persgroep (Belgium)								4.5	6.9	6.6
RadioCorp B. V.									3.8	4.4
Talpa Media Holding					4.3	11.1	9.5	16.7	2.4	16.0
RTL Nederland (Bertelsmann AG, Germany)		1.3	4.7	4.3						Talpa
SBS Broadcasting (Germany), Telegraaf Media Group, Radio		9.0	5.1	4.8	Talpa					
Noordzee (Strengholt) Wegener		9.2	8.1	8.1	7.3	Talpa				
Radio 538 (RTL Group; Bertelsmann AG, Germany)						10.7	11.6	Talpa		
SKY (Murdoch Family, News Corp., US/UK/Australia)		4.6	10.0	10.9	13.0	Advent International/SKY				
Arrow Media Group B. V.			1.3	1.8	1.7	1.9	2.3	2.5	2.1	1.7
Slam!FM						0.3	0.5	1.3	2.0	
FD Mediagroep						0.2	0.3	0.4	0.9	
Vereniging Veronica		0.9			0.3	0.3		0.1	0.3	
TMF Radio VOF									0.2	
192 Media					0.1					
Bizned			0.7	0.6	1.8	0.5				
Business Nieuws Holding			0.3	0.3	0.3					4.9
Foreign Commercial Broadcasters				2.3	2.9	2.4	2.6	2.8	4.7	4.9
Others	17.0	8.3	8.8	7.2	5.7	6.0	6.5	6.7	5.4	17.2
Total Revenue (mil euros) <sup>1</sup>							298	293	278	259
Total Revenue (mil US\$)							369	373	386	355
C4	83.4	82.8	79	78.5	79.4	84.8	82.5	81.6	78.7	71.8
HHI	6,956	3,566	2,567	2,495	2,543	2,659	2,505	2,451	2,428	1,674
N (>1%)	1	6	7	8	9	7	7	8	9	7
Noam Index	6956	1456	970	882	848	1005	947	867	809	633

Source: Mediamonitor.

1 Includes kiosk sales, subscriptions, and freely distributed magazines.

**Figure 9.3**

Radio Group Concentration (HHI and C4), 1990–2010

## Broadcast Television

Until 1992, there were no commercial TV broadcasters licensed to operate in the Netherlands (as noted previously, RTL's stations all transmitted from Luxembourg). Prior to 1992, public channels such as Nederland 1, 2, and 3 held 65% of the total market shares. Due to the entry of commercial operators in the market, this fell to 46.3% in 2012. Nederland 2 and 3 have fared the worst so far in the new market, their market shares falling from 25.6% to 9.1% and from 13.9% to 8.6%, respectively. Nederland 1 has done much better, seeing its market shares fall and then rise again (from 25.4% to 28.6%) in the same period. Despite financial problems faced by all public media operators in the Netherlands, Nederland 1 still has the largest single market share.

Among the commercial broadcasters, RTL Nederland, which owns RTL4, RTL5, Yorin, and RTL8, has maintained a market share of 22.1% over the past two decades and has increased it to 32.6%, giving it the second largest market share after Netherlands Public Broadcasting. It has accomplished this increase by introducing new specialized channels, which have offset the fact that its flagship channel, RTL4, saw its market share fall from 22.1% in 1990 to 16.3% in 2009. New entrants during this period, such as SBS Nederland, have managed to win significant market shares: SBS held a 1.8% market share in 1995 to 22% in 2009, largely as a result of SBS 6's popularity and the introduction of NET 5 and V8/Veronica.

Regional broadcasters have also seen their market shares decline since 1992; accounting for 13% of the total market in 1990, these stations accounted for only 6% of the total national market share by 2009. Despite liberalization, international broadcasters—excluding RTL—have only been able to secure a 2.3% national market share combined (Table 9.4).

**Table 9-4.** TV Broadcasting (Market Shares by Revenue), 1984–2012

	1990	1995	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2012
Netherlands Public Broadcasting (public)	64.8	47.3	40.8	40.5	40.2	39.2	42.2	40.6	41.0	39.0	41.2	40.6	46.3
Nederland 1	25.4	15.7	13.3	13.3	12.4	12.8	13.0	14.5	16.4	22.2	24.9	23.9	28.6
Nederland 2	25.6	17.8	18.0	18.2	19.2	17.9	21.5	18.4	16.9	8.6	8.0	8.0	9.1
Nederland 3	13.9	13.8	9.5	9.0	8.5	8.5	7.7	7.7	7.8	8.2	8.3	8.6	8.6
RTL Nederland (Bertelsmann AG, Germany)	22.1	37.1	28.3	27.8	28.3	29.8	28.2	28.6	28.9	29.3	27.9	28.9	32.6
RTL4	22.1	25.3	15.4	16.9	17.7	18.7	18.0	17.9	17.0	16.1	15.0	16.3	19.8
RTL5	0.0	8.4	4.3	4.8	5.1	5.5	5.0	5.6	6.9	6.6	5.3	5.3	4.3
Yorin/RTL7	0.0	3.5	8.6	6.1	5.5	5.7	5.1	5.1	5.0	5.7	5.4	5.4	6.3
RTL8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	2.1	2.0	2.3
SBS Nederland (Sanoma Oyj, Finland)	0.0	1.8	17.5	17.8	18.2	19.0	19.5	20.8	21.1	22.7	22.8	22.0	18.7
SBS 6	0.0	1.5	10.8	11.5	10.4	10.9	11.2	11.9	12.0	12.5	12.9	13.0	10.4
NET 5	0.0	0.0	4.2	4.2	4.7	4.9	5.0	5.2	5.0	5.6	5.8	5.1	4.3
V8/Veronica	0.0	0.3	2.5	2.1	3.1	3.2	3.3	3.7	4.1	4.6	4.1	3.8	4.0
Regional Public Broadcasters	13.1	13.5	13.3	13.0	11.2	9.2	7.4	7.1	6.4	6.5	5.9	6.1	0.0
AT5								0.2				0.2	0.1
RNN7								0.1					
Regional and Foreign TV Broadcasters	0.0	0.3	0.0	0.9	2.1	2.7	2.7	2.6	2.6	2.5	2.2	2.2	2.3
Total Market Share (Public Broadcasters)	77.9	60.8	54.2	53.5	51.3	48.4	49.6	48.0	47.4	45.5	47.1	46.9	46.4
Total Market Share (Commercial Broadcasters)	22.1	39.2	45.8	46.5	48.7	51.6	50.4	52.0	52.6	54.5	52.9	53.1	53.6
Total Revenue (mil euros)												826	860



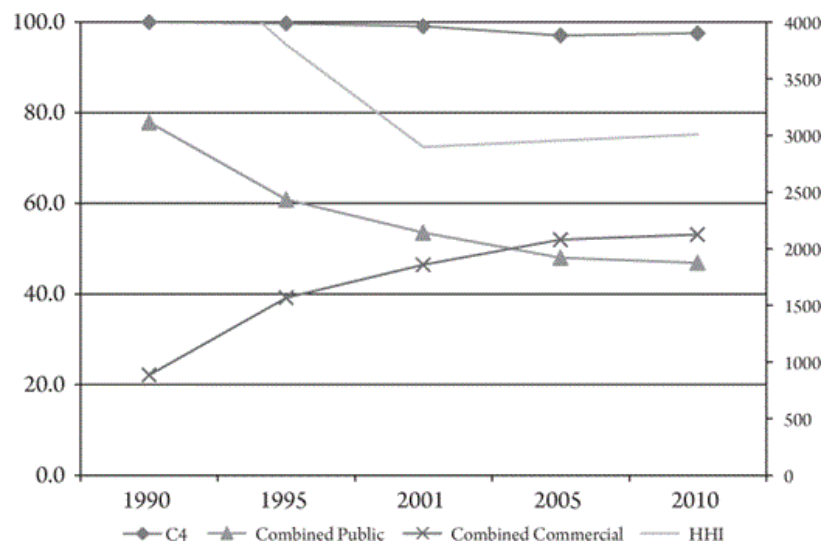
Total Revenue (mil US\$)	1,148 1,178												
C4	100.0	99.7	100.0	99.1	97.9	97.3	97.3	97.1	97.4	97.5	97.8	97.6	97.6
HHI	4,864	3,800	2,955	2,899	2,875	2,880	3,020	2,955	3,009	2,945	3,033	3,009	3,559
N (>1%)	5	8	10	10	11	11	11	11	11	11	12	12	12
Noam Index	2,175	1,344	934	917	867	868	911	891	907	888	876	869	1,027

Source: Mediamonitor, Stichting ter Promotie en Optimalisatie van Televisiereclame (SPOT).

p. 213 HHI has declined due to the new commercial entrants, falling from 4,864 in 1990 to 3,559 in 2012. In this period, commercial broadcasters have collectively increased their total market share from 22% in 1990 to 56.3% in 2012. Over the ↵

p. 214 ↵ same period, public broadcasters' total market share fell from 78% to 46.4% (Figure 9.4).

**Figure 9.4**



TV Broadcasting Concentration (HHI and C4), 1990–2010

## Multichannel TV Platforms

The Netherlands has only a handful of cable TV providers providing regional coverage. The largest, Ziggo, emerged from a merger in 2008 of three separate cable companies: Multikabel, Essent Kabelcomm (previously @Home Network), and Casema. The private equity firms Cinven (UK) and Warburg Pincus (US) acquired the three companies and merged them together as Ziggo in 2008, which made the new entity the largest player in the market, with 4.1 million subscribers.

The second largest cable company is UPC, which has 2.3 million subscribers. UPC, too, originated in a merger of smaller cable companies. In 1995, Philips Electronics and United International Holdings (US) acquired regional cable providers and brought them together as UPC in a joint venture. Ziggo and UPC do not actually compete outright because there is no overlap between their regional coverage areas.

The telecommunications provider KPN is the third largest player in the Dutch pay TV market. Offering the most expensive cable package—a monthly subscription to KPN costs US\$59.30 (46 euros), compared to UPC US\$54.80 (42.50 euros) and Ziggo \$54.20 (42 euros)—KPN also has the smallest market share. It entered the cable business by acquiring Caiway and its 158,000 subscribers in 2011 (Table 9.5).

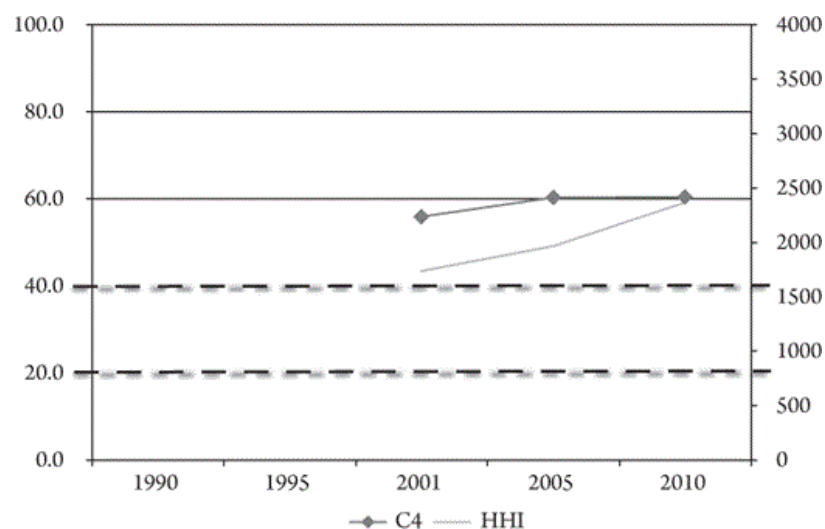
**Table 9-5.** Multichannel Video Platforms: Cable MSOS, DBS, IPTV (Market Shares by Revenue), 2001–2010

	2001	2005	2010
Ziggo (Zesko Holding)	0.0	4.9	53.2
Essent Kabelcom (@Home Network)	27.0	28.2	Ziggo
Casema	21.7	22.7	Ziggo
Multikabel (QuickNet)	4.9	Ziggo	
UPC (Liberty Global, US)	38.1	34.9	32.4
KPN			6.8
Caiway (CAIW Diensten B.V)	1.0	2.2	KPN
Others	7.2	7.2	7.6
Total Revenue (mil euros)	2,859	2,074	1,852
Total Revenue (mil US\$)	2,573	2,592	2,463
C4	91.8	90.6	92.4
HHI	2,682	2,554	3,929
N (>1%)	5	5	3
Noam Index	1,199	1,142	2,268

Source: Mediamonitor.<sup>1</sup>

- 1 Based on a Radio Advertising Bureau (RAB) survey of a viewing sample consisting of respondents ten years of age and older for daily broadcasting hours. See van der Burg, Miriam; Lauf, Edmond; and Negenborn, Rini. "The Dutch Media." Hilversum: Commissariaat voor Media, 2011. Jan. 31, 2013. <<http://www.mediamonitor.nl/dsresource?objectid=11694&type=org>>.

The Dutch cable television market is highly concentrated, with a C2 of 85.6% in 2010. The formation of Ziggo saw HHI increase from 2,554 in 2005 to 3,929 in 2010. Regional cable providers not affiliated with Ziggo or UPC have only a 7.6% combined national market share left (Figure 9.5).

**Figure 9.5**

Multichannel Video Platforms Concentration (HHI and C4), 1990–2010

## Video Channels

The video channels market in the Netherlands largely consists of foreign providers. MTV Networks (US), Discovery Communications (US), Eurosport (France), and National Geographic (US) all have significant market shares. However, the overall offering is, compared to US standards, limited. MTV Networks has dominated the market since 2001 and has managed to expand its overall share through a series of acquisitions, such as The Music Factory channel (Table 9.6). HHI stood at 903 in 2001, and rose to 1,847 in 2012. Similarly, C4 increased from 54.3% to 76.6% in that same period (Figure 9.6).

**Table 9-6.** Cable And DBS TV Programming Channels (Market Shares by Revenue), 2001–2012

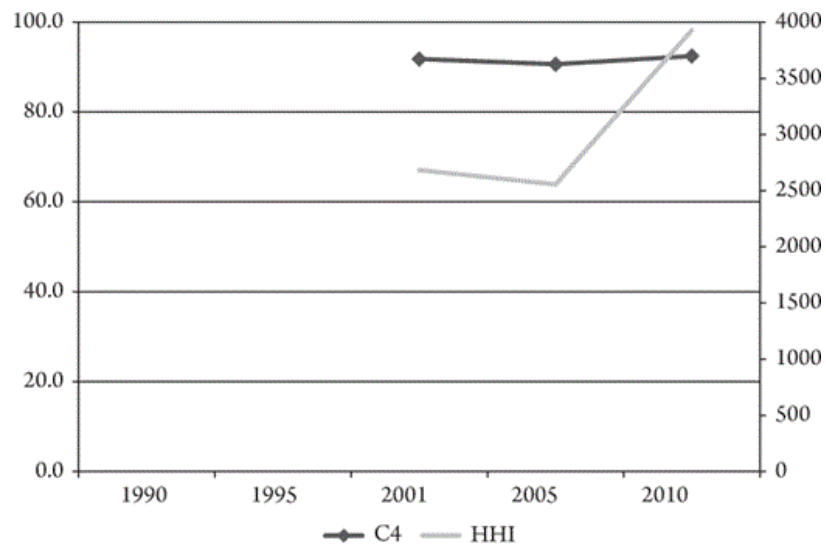
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2012
Viacom International Media Networks	22.0	21.3	26.7	33.1	25.1	36.5	43.6	46.4	31.1	34.1
<i>MTV</i>	0.4	0.5	0.5	0.8	0.7	0.7	0.8	0.7	0.9	0.7
<i>TMF</i>	0.9	0.8	0.8	0.6	0.8	0.6	0.8	0.7	0.7	
<i>Nickelodeon</i>	0.7	0.6	1.4	2.4	2.2	1.8	2.1	2.2	2.1	1.8
<i>Comedy Central</i>						0.4	0.7	0.9	1.0	1.4
<i>The Box</i>				2.1	1.7					
<i>Kindernet</i>										0.2
<i>TeenNick</i>										0.3
Discovery Communications Benelux (Discovery Communications, US)	14.3	15.7	15.8	16.1	15.3	26.0	23.8	27.8	19.6	19.5
<i>Discovery Channel</i>	1.2	1.3	1.5	1.5	1.7	1.7	1.7	1.8	1.8	1.6
<i>Animal Planet</i>	0.1	0.1	0.1	0.5	0.7	0.8	0.7	0.9	1.1	0.4
Walt Disney Company	6.6	6.7	5.0	4.8	4.5	7.3	7.9	8.2	6.1	15.6
<i>Jetix/Disney XD</i>	2.0	1.7	2.1	2.1	2.2	1.9	1.8	1.7	1.6	1.3
<i>Disney Channel</i>									0.1	0.6
<i>National Geographic Channel</i>	0.6	0.6	0.5	0.6	0.7	0.7	0.8	0.8	0.8	1.1
24Kitchen										0.3
Eurosport (TF1 Group, France)	9.9	7.9	7.9	6.5	5.7	9.4	8.9	9.3	5.4	7.0
Het Gesprek							0.8	0.9	0.6	
Cartoon Network (Time Warner, US)	8.1	2.8								
Others <sup>1</sup>	34.1	44.9	44.6	39.5	35.0	20.8	14.9	7.2	37.2	23.4
Total Revenue (mil euros) <sup>2</sup>	2,006	2,151	2,247	2,307	2,343	2,367	2,440	2,516	2,593	2,763
Total Revenue (mil US\$)	2,657	2,850	2,977	3,057	3,104	3,136	3,233	3,334	3,436	3,661
C4	54.3	51.7	55.4	60.5	50.6	79.2	84.2	91.8	62.2	76.6
HHI	903	822	1,060	1,439	934	2,162	2,553	3,095	1,432	1,847
N (>1%)	6	5	4	4	5	4	5	5	5	4
Noam Index	857	1,271	1,519	1,490	1,055	1,291	1,264	1,402	1,251	1,203

1 “Others” includes the multisystem operators (MSOs) Zekatel, COGAS/KTMO, Nutsbedrijven Maastricht, REKAM and, Kabe.

2 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.

3 SBS Nederland was acquired from ProSiebenSat.1 (Germany) in 2011 by Sanoma Oyj of Sweden (67%) and Talpa Media Holding (33%).

Figure 9.6



Video Channels Concentration (HHI and C4), 1990–2010

## Film

p. 215 Historically, major film international distributors like Warner Brothers, Universal Pictures International, and Walt Disney have claimed ↴ largest market shares in film distribution. However, state subsidization has led to an increase in the number of independent filmmakers and distributors over the past decade, with these independents holding a collective 14% of total box office receipts in 2008.

p. 216 There have been three major mergers in the market in the past decade. The first was the global acquisition of Tristar by Sony in 2005; the second, the acquisition of RVC by Entertainment One; and the third was merger of several subsidized independent distributors ↴

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(Filmmuseum, Holland Film, Filmbank, and the Nederlands Instituut voor Filmeducatie) into Eye Film. These mergers have failed to either significantly reduce or increase overall concentration (Table 9.7).

**Table 9-7.** Film Production/Distribution (Market Shares by Box Office %), 2001–2010

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Warner Bros. Pictures International Holland (Time Warner, US)	17.4	21.4	12.4	18.1	19.8	10.2	19.6	16	27.2	29
20th Century Fox Film Netherlands (Murdoch Family, News Corp., US/UK/AUS)	6.6	9.9	8.0	6.3	12.0	14.7	6.7	4.1	Warner Bros.	
Universal Pictures International (Comcast/GE, US)	27.3	15.2	20.1	21.3	22.0	16.3	22.5	26.9	16.6	17.1
Benelux Film Distributors						3.3	3.3	5.4	7.6	11.8
Walt Disney Pictures (US)	12.3	12.4	19.4	15.2	12.1	14.8	11.2	6.5	11.4	10
Independents	3.8	4.9	5.7	5.4	12.3	9.1	7.7	13.5	5.3	7.4
Sony Pictures Releasing Holland (Sony, Japan/US)					5.1	13.6	5.2	7.8	10.4	7.4
Columbia Tristar	4.9	11.4	8.2	7.4	Sony					
A-Film	6.7	13.0	12.5	14.6	7.4	10.6	9.8	4.8	3.9	6.0
E1 Entertainment Benelux (E1 Entertainment, US)									8.8	5.5
RCV	13.0	6.3	9.6	4.3	3.9	4.5	8.6	7.3	E1	
Cinéart Nederland								1.1	3.4	1.5
Paradiso Entertainment	2.6	2.7	1.5	2.0	0.9	1.0	1.9	3.1	1.6	1.0
Cinemien (ABC Theatrical Distribution)	1.3	0.9	1.3	1.3	1.1	1.2	2.3	0.9	0.9	0.8
Wild Bunch Benelux Distribution (France)									0.8	0.7
Eye Film Instituut Distributie									0.4	0.3
Filmmuseum Distributie	0.6	0.6	0.6	0.9	0.3	0.3	0.4	0.4	Eye	
Twin Film								0	0	0.1
Moonlight	1.0	0.0	0.3	0.9	1.1	0.3	0.1	0.5	0.2	0.1
Amstelfilm								<0.1	0.1	0.1
Others	2.5	1.5	0.3	2.2	2	0.1	0.8	1.5	1.4	1.4
Total Revenue (mil euros)	150	157	163	154	135	156	160	165	201	219
Total Revenue (mil US\$)	135	148	184	191	169	197	219	243	279	291
C4	70.1	61.9	64.5	69.2	66.2	55.3	63.2	64.2	65.6	67.9
HHI	1,508	1,308	1,353	1,377	1,417	1,218	1,338	1,399	1,448	1,552
N (>1%)	11	9	10	10	10	11	11	11	10	10
Noam Index	455	436	428	435	448	367	403	422	458	491

Source: Nederlandse Vereniging van Film Distributeurs.

C4 for the Dutch film production and distribution industry has consistently been over 62% (with the exception of 2006, when it was 55%). Similarly, the HHI indicates moderate (and declining) concentration for the entire period, reaching a high of 1,552 in 2010 and a low of 1,218 in 2005.

In terms of film exhibition, Pathé (France) has historically held the largest market share, (44.9% in 2010). The Dutch exhibitor Jogchem's Theaters ranked second with 12.2%. The Netherlands still has a large number of independent theaters, which collectively accounted for 21.7% of total box office receipts in 2010 (Table 9.8).

**Table 9-8.** Film Exhibition (Market Shares by Box Office %), 2001–2010

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Pathé (France)	34.6	36.3	36.2	38.3	37.8	37.6	36.7	37.2	37.1	44.9
Jogchem's Theaters	17.2	17.3	16.3	16.7	15.8	22.2	20.0	19.2	18.3	12.2
Merral		1.7				Jogchem's Theaters				
Polyfilm/Utopia	3.8	4.1	3.8	4.1	4.8					
Minerva	10.4	11.1	10.8	9.7	11.5	11.3	11.0	10.9	11.2	10.3
Wolff	9.4	9.3	8.6	8.6	8.8	9.6	9.6	10.1	9.5	5.9
Independents	21.3	20.1	20.4	17.0	16.5	15.3	18.2	17.2	18.3	21.7
Others <sup>1</sup>	3.3	0.2	3.8	5.6	4.9	3.9	4.5	5.3	5.5	5.1
Total No. of Screens	173	175	164	175	171	163	160	161	164	167
Total Revenue (mil euros)	150	151	164	154	135	156	160	165	201	219
Total Revenue (mil US\$)	163	164	179	168	174	191	214	259	315	293
C4	71.5	73.9	72	73.3	73.9	80.8	77.3	77.5	76.2	73.2
HHI	1,702	1,843	1,783	1,929	1,907	2,127	1,962	1,974	1,931	2,306
N (>1%)	5	5	5	5	5	5	5	5	5	5
Noam Index	761	824	797	863	853	951	877	883	864	1,031

Source: Nederlandse Vereniging van Film Distributeurs.

- 1 For 2001, 2005, and 2006, the category "Others" was reported separately. "Others" consists of numbers reported by the NFC under "Overigen," and also the reported receipts of the following distributors (where available): Indies, Upstream, C-Film Distributie, and 1 More Fil.

The concentration indices for Dutch film exhibitors are increasing, due to market consolidation. HHI rose from 1,702 in 2001 to 2,306 in 2010. C4, however, did not vary significantly during the same period.

## Telecommunications Media

### Wireline Telecom

Three developments in the Dutch wireline market have worn down the historically dominant market position of the state telecom provider KPN, which was fully privatized in 2006. The first development was heralded by the growth of mobile telephony in the Netherlands. The second challenge to KPN's monopoly came with the arrival of international competitors such as T-Mobile (Deutsche Telekom). Lastly, the transition to digital telephony has proven to be somewhat disadvantageous for KPN (Table 9.9).

**Table 9-9.** Wireline Telecom (Market Shares by Revenue), 2005–2011

	2005	2008	2010	2011
KPN	55.0	50.0	44.8	41.4
Ziggo (Zesko Holding)	7.0	13.0	11.0	13.8
UPC (Liberty Global, US)	7.5	8.0	9.0	13.7
Tele2 (Sweden)	5.0	5.0	6.5	6.9
T-Mobile (Deutsche Telekom, Germany)	2.0	2.5	3.1	3.4
Others <sup>1</sup>	23.5	21.5	25.6	20.8
Total Revenue (mil euros) <sup>2</sup>	5,829	5,536	5,341	5,243
Total Revenue (mil US\$)	7,286	7,177	7,104	7,068
C4	75	76	71	76
HHI	3,159	2,764	2,263	2,150
N (>1%)	5	5	5	5
Noam Index	1,413	1,236	1,012	962

Source: Onafhankelijke Post en Telecommunicatie Autoriteit (2011).

- 1 For 2001, 2005, and 2006, the category “Others” was reported separately. “Others” consists of numbers reported by the NFC for Three Lines Pictures, Multitone Films, Shooting Star Film Company, Bright Angel Distribution, and European Film Partners BV.
- 2 0.03% market share.

Concentration in the Dutch wireline market has declined significantly in recent years, with HHI falling from 3,159 in 2005 to 2,150 in 2011. Concentration is will likely decrease even further as KPN loses market share to other operators.

## Wireless Telecom

Three conglomerates dominate the oligarchical Dutch wireless industry. KPN is the market leader here as well, but it is followed closely by Vodafone and T-Mobile (Table 9.10).



**Table 9-10.** Wireless Telecom (Market Shares by Revenue), 2005–2011

	2005	2008	2011
KPN	40.0	40.0	35.0
T-Mobile (Deutsche Telekom, Germany)	30.0	30.0	25.0
Vodafone (UK)	20.0	25.0	30.0
Others	10.0	5.0	10.0
Total Revenue (mil euros)	4,694	6,118	7,542
Total Revenue (mil US\$)	5,867	7,937	10,007
C3	90	95	90
HHI	2,900	3,125	2,750
N (1%)	3	3	3
Noam Index	1,656	1,804	1,588

Source: Onafhankelijke Post en Telecommunicatie Autoriteit.

Overall concentration slightly declined between 2005 and 2011, but the entry barriers are high for prospective new providers.

## Internet Media

### Internet Service Providers (ISP)

p. 219 According to a 2009 Eurostat study, the Dutch are among the most active Internet users in Western Europe: 86% of the population between 15 and 74 are reported using the Internet on a regular basis. Despite high usage rates, Dutch policymakers have so far shied away from assessing market shares among Internet access providers.

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the ages of 16 and 74 reported using the Internet on a regular basis. Despite high usage rates, Dutch policymakers have so far shied away from assessing market shares among Internet access providers.

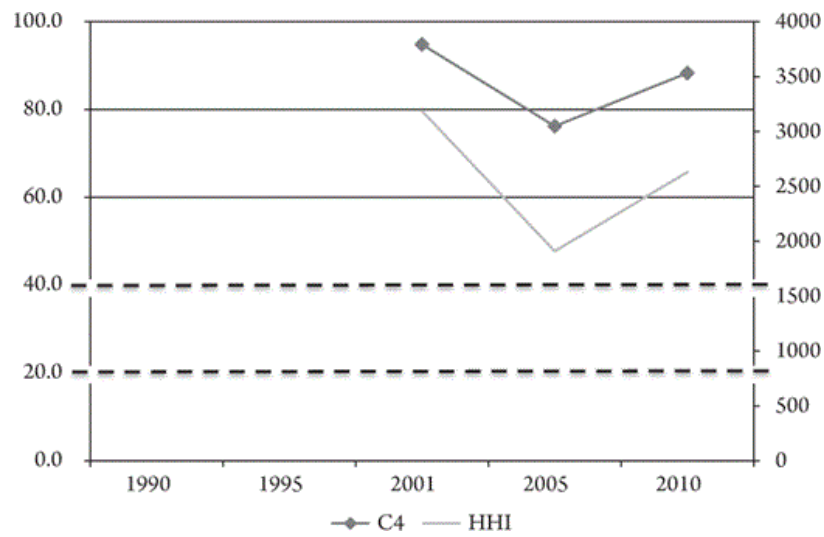
Over the past five years, the broadband Internet market in the Netherlands has consolidated. Since 2005, the sector has experienced a series of mergers and acquisitions that have brought smaller providers together, first under XS4ALL, and subsequently, under KPN, and saw Ziggo combine Multikabel, Casema, and Essent Kabelcom into a single operation. The market is now highly concentrated market with an HHI of 2,629 (up from 1,908 five years earlier) (Table 9.11, Figure 9.7).

**Table 9-11:** Internet Service Providers (Market Shares by Revenue), 2001–2010

	2001	2005	2010
KPN	38.4	34.6	42.6
Het Net		13.1	KPN
Freeler			
Tiscali		5.3	KPN
XS4ALL	2.7	3.2	
Demon NL		1.3	XS4ALL
hccInet		1.0	
CistroN		0.1	
World Online	Tiscali		
Ziggo (Zesko Holding)			23.4
Essent Kabelcom @home	38.4	19.2	Ziggo
Casema	0.8	5.8	
Multikabel		Ziggo	
UPC (Liberty Global, US)	15.3	9.2	13.8
Tele2 (Kinnevik, Sweden)		2.8	8.4
Caiway			
Others	2.2	3.1	10.5
Total Revenue (mil euros)	609	1,746	1,926
Total Revenue (mil US\$)	548	2,183	2,561
C4	94.8	76.2	88.3
HHI	3,186	1,908	2,629
N (>1%)	4	7	4
Noam Index	1,593	721	1,315

Source: Mediamonitor.

**Figure 9.7**



Internet Service Providers Concentration (HHI and C4), 2001–2010

## Search Engines

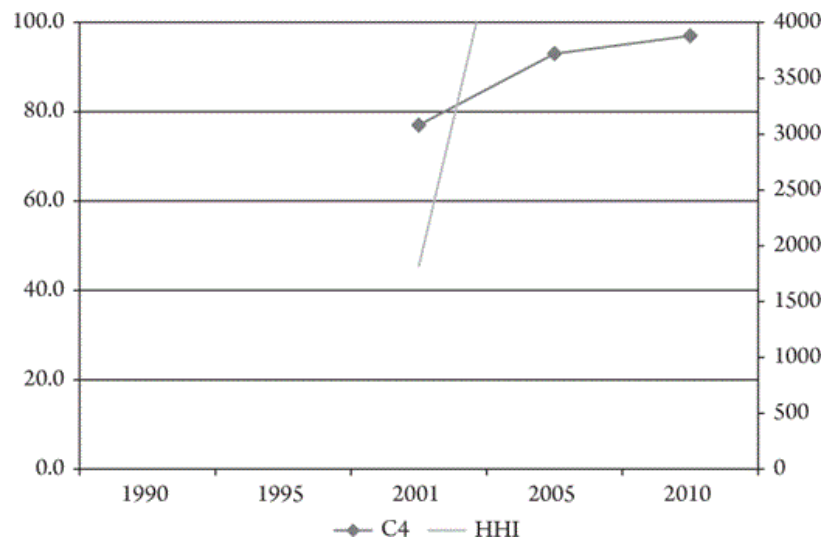
p. 222 As is the case in most EU member states, Google (US) dominates the search engine market. With a virtual monopoly (93% market share in 2010), a host of smaller local and international search engines contend for the remaining 7%, a small share that Google continues to erode in its favor. In 2002, Google only held 32% of the market at the time, and Ilse, a Dutch-language search engine, claimed 19%. Other US search engines such as Bing, Yahoo!, and Lycos held market shares of around 8% each. Google, however, then tripled its market share in the Netherlands in just four years as part of its worldwide expansion. The HHI for the Dutch search engine market has greatly increased from 2002 (1,818) to 2010 (8,662) (Table 9.12, Figure 9.8).

**Table 9-12.** Internet Search Engines (Market Shares by Search Volume), 2002–2010

	2002	2003	2004	2005	2006	2007	2008	2009	2010
Google (US)	32.0	51.3	69.0	83.0	91.0	93.0	92.0	93.0	93.0
MSN/Bing (Microsoft, US)	18.0	16.1	19.0	8.0	5.0	3.0	3.0	3.0	3.0
Ilse	19.0	7.5	1.0	0.5	n/a				
Yahoo! (US)	8.0	7.3	3.0	2.0	1.0	1.0	1.0	1.0	1.0
Lycos (US)	2.0	9.0	3.0	2.0	1.0	1.0	1.0	1.0	1.0
Vinden.nl	4.0	4.3	2.0	1.0	1.0	1.0	1.0	1.0	1.0
Altavista (US)	5.0	4.5	2.0	1.0	1.0	1.0	1.0	1.0	1.0
Others	12.0	0.0	1.0	2.5	0.0	0.0	1.0	0.0	0.0
Total Revenue (mil euros)	77	115	168	238	390	501	554	599	681
Total Revenue (mil US\$)	100	150	219	309	507	651	720	779	885
C4	77.0	83.9	91.0	93.0	97.0	97.0	96.0	97.0	97.0
HHI	1,818	3,120	5,148	6,963	8,310	8,662	8,477	8,662	8,662
N (>1%)	7	7	6	6	6	6	6	6	6
Noam Index	687	1,179	2,102	2,843	3,393	3,536	3,461	3,536	3,536

Source: Mediamonitor.

**Figure 9.8**



Search Engines Concentration (HHI and C4), 2002–2010

## Conclusion

p. 223 There are three main trends in the Dutch media market. The first is that print media is becoming less concentrated. Both newspapers and magazines are losing revenues due to online media growth and a decline in print advertising, and there has been a substantial decline in concentration in the sector, from 2,410 in 2001 to 1,584 in 2010 (Table 9.13).

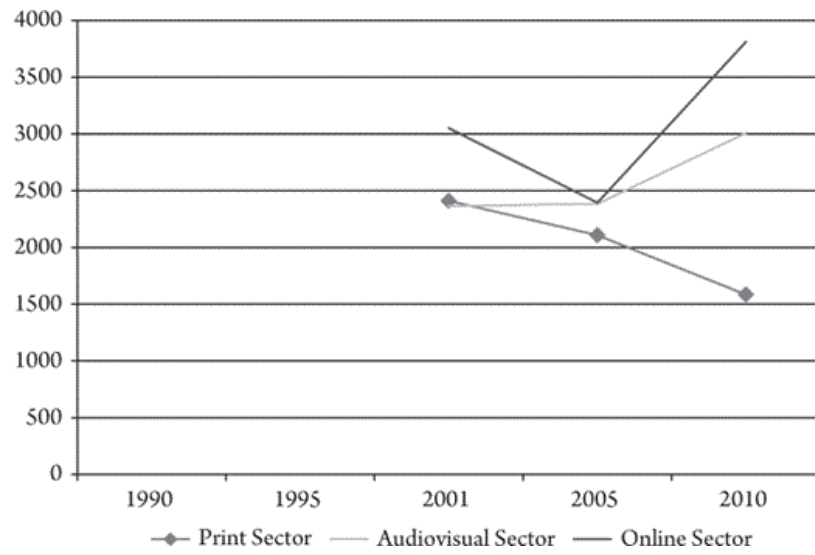
**Table 9-13.** Aggregate Dutch Media Sectors Concentration (HHI), 2001–2010

	2001	2005	2010
Print Media	2,410	2,107	1,584
Audiovisual Media	2,362	2,384	3,007
Online Media	3,051	2,394	3,811
Total Revenue (mil euros)	12,383	11,226	11,214
Total Revenue (mil US\$)	11,145	14,032	14,915
<b>Total HHI</b>	2,299	2,264	2,846

The second trend is that concentration is increasing in the audiovisual sector. After a period of stagnation between 2001 and 2005, HHI then rose to 3,007 by 2010. The consolidation of cable TV providers has driven this trend, with the growing popularity of video channels further contributing to this upward trend.

p. 224 The third trend is in online media. Broadband providers and search engines have seen concentration progress along a U-shaped curve between 2001 and 2010. After declining from 3,051 in 2001 to 2,394 in 2005, HHI rose to 3,811 in 2010 (Figure 9.9, Table 9.13).

Figure 9.9



Aggregate Dutch Media Sectors Concentration (HHI), 2001–2010

The Dutch media market is likely to remain highly concentrated. When taken together, the entire industry's HHI grew from 2,264 in 2005 to 2,846 in 2010, and there is a clear trend toward consolidation in most market segments. This has occurred despite the establishment of numerous monitoring agencies, although as noted earlier, the biggest regulatory problem is lack of enforcement.

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## Netherlands—Data Summaries

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Eli Noam and Paul Mutter

AT THE NATIONAL LEVEL, concentration has been increasing in the Dutch media market; the national power index rose from 2,378 in 2004 to 2,729 after 2008 (Table 9.14). On the other hand, the entry of free dailies by Swedish and British publishers and the growth of online media have decreased concentration (and caused revenue losses) in both the newspaper and magazine market.

**Table 9-14.** National Media Industries Concentration in the Netherlands

	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 (%)
KPN	1320.9	27.6	951.8	25.1	-5.59	-0.5
Ziggo	16.3	2.5	317.5	9.4	370.6	1.4
Deutsche Telekom (T-Mobile, Germany)	206	7.4	207	9.0	0.06	0.3
Vodafone (UK)	91.2	4.6	294.2	9.8	44.5	1.0
Google (US)	82.7	1.0	250.1	2.7	40.5	0.338
Liberty Global (US)	145.8	6.4	143.7	6.9	-0.28	0.1
Netherland Public Broadcasting (public)	99.8	2.4	94.6	2.2	-1.1	-0.054
Telegraaf Media Groep	54.6	1.6	52.3	1.9	-0.82	0.051
SBS Nederland (Sanoma) (Finland)	101.5	3.1	36.4	1.7	-12.8	-0.290
Viacom (US)	76.0	3.0	139.1	4.1	16.6	0.21
Bertelsmann (RTL, Germany)	36.9	1.4	42.2	1.4	2.9	0.003
Sanoma (Finland)	101.50	3.132	36.40	1.684	-12.83	-0.290
PCM Uitgevers	17.7	0.909	15.3	0.670	-2.8	-0.048
Mecom (UK)	23.0	1.0	0.00	0.000	-20.00	-0.207
Discovery (US)	28.2	1.9	45.5	2.3	12.2	0.10
ProSiebenSat.1 (Germany)	8.8	0.7	6.5	0.5	-5.1	-0.041
Warner Bros. (US)	2.6	0.1	8.0	0.3	42.1	0.029
Comcast (US)	0.8	0.1	0.7	0.08	-2.5	0.002
Reed Elsevier	0.2	0.1	0.2	0.1	-4.7	0.01
<b>Media Concentration Index</b>			<b>2004/5</b>	<b>2011 or Most Recent</b>	<b>% Change Annual Average</b>	
Total Revenue: Nat'l Media Industry (mil US\$)			25,729	30,609	3.8%	
Total Voices (n)			60	57	-1.0%	
Net Voices (n)			54	50	-1.5%	



Public Ownership (%)	4.6	4.1	-0.09%
Foreign Ownership (%)	33.7%	44.7%	2.2%
C4 Average—Weighted	80	84	0.9%
HHI Average—Weighted	2732	2754	0.2%
C1 Average—Weighted	41	40	0.00
Noam Index Average—Weighted	1001	1324	6.5
Pooled Overall Sector C4	46.0	53.3	1.5%
Pooled Overall Sector HHI	927	1001	1.6%
Pooled Overall Sector Noam Index	49	78	12.0%
Market Share of Top Ten Companies: Nat'l Media Industry (%) (Pooled C10)	60.5	73.8	2.7%
National Power Index	2378	2729	2.9%

One of the primary drivers for increased concentration has been the multichannel platform market. The largest cable provider, Ziggo, was formed through the merger of three separate cable companies: Multikabel, Essent Kabelcom, and Casema. Its market share in multichannel platforms increased substantially from 4.9% in 2004 to 53.2% in 2010 as a result, making it the third-largest platform media company (11.5 %) in the country and the fifth-largest content firm (4.6%).

Regulatory permission of foreign ownership in television, radio, and newspapers and lenient cross-media ownership restrictions led to an increase in foreign ownership of media companies. Vodafone (UK) and T-Mobile (Germany) have a larger market share in wireless. KPN (the telecom incumbent) is partly (23%) owned by Carlos Slim's America Móvil (Mexico), and that company made a bid in 2013 for the remainder. The RTL Group (Bertelsmann, Germany) established an alternative to the public broadcasters' monopoly, which held until 1992. RTL is now the third largest radio (10.6%) and second largest television broadcaster (32.6%) in the country, giving it control of 4.6% of all Dutch content media. After Ziggo, Liberty Global (US) is the second largest cable provider in the country with 32.4%, while US companies such as Warner Brothers, Disney, and Viacom dominate the relatively small film and video channel markets.

p. 227 Public broadcasters still lead the radio and broadcast TV markets. The public broadcaster NPB is the largest content media provider with a 7.1% share as of 2013 (Tables 9.15 and 9.16). ↪

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**Table 9-15.** Top Content Media Companies in the Netherlands

	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 (%)
<b>NPB (public)</b>	<b>296.1</b>	<b>7.2</b>	<b>310.6</b>	<b>7.1</b>	<b>0.9</b>	<b>-0.023</b>
Ziggo	2.4	0.5	246.7	4.6	2064.4	0.831
Telegraaf Media Group	161.9	4.8	171.9	6.2	1.2	0.270
Sanoma (Finland)	301.1	9.3	119.5	5.5	-12.1	-0.752
Viacom (US)	225.4	8.9	456.6	13.4	20.5	0.882
Liberty Global (US)	120.1	3.4	91.5	2.8	-4.8	-0.123
PCM Uitgevers	52.6	2.7	50.2	2.2	-0.9	-0.099
Bertelsmann (RTL, Germany)	109.7	4.1	138.7	4.6	5.3	-0.099
Discovery (US)	83.8	5.5	149.3	7.7	0.2	0.4
Liberty Global (US)	120.1	3.4	91.5	2.8	-4.8	-0.123
Mecom (UK)	68.2	3.1	0.0	0.0	-20.0	-0.6
ProSiebenSat.1 (Germany)	26.1	2.1	21.5	1.7	-3.6	-0.09
Reed Elsevier	0.6	0.3	0.5	0.3	-0.031	-0.01
<b>Media Concentration Index</b>						
	<b>2004/5</b>	<b>2011 or Most Recent</b>	<b>% Change Annual Average</b>			
Public Ownership (%)	7.2	7.1	-0.2%			
Foreign Ownership (%)	42.4	55.2	2.56%			
C4 Average—Weighted	76	82	1.21%			
HHI Average—Weighted	2527	3044	4.10%			
C1 Average—Weighted	34	42	0.01%			
National Power Index	1868	2842	10.44%			

**Table 9-16.** Top Platform Media Companies in the Netherlands

	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 (%)
<b>KPN</b>	<b>1992.8</b>	<b>41.6</b>	<b>1366.9</b>	<b>35.9</b>	<b>-6.3</b>	<b>-1.2</b>
T-Mobile (Germany)	311.3	11.2	297.7	12.9	-0.9	0.3
Ziggo	23.3	3.5	348.5	11.5	278.8	1.6
Vodafone (UK)	137.6	6.9	423.1	14.1	41.5	1.4
Liberty Global (US)	158.8	7.9	166.6	8.7	0.98	0.2

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	3.2	2.8	-0.1
Foreign Ownership (%)	29.3	40.0	2.1
C4 Average—Weighted	82	85	0.7
HHI Average—Weighted	2837	2628	-1.5
C1 Average—Weighted	45	39	-1%
National Power Index	2635	2679	0.34

## Notes

- These include the Commissariaat voor de Media (an independent organization that oversees media regulation and advises the government on media issues), Stichting Etherreclame (a state agency that oversees commercial broadcasting on public television and radio programs), Stichting Coproductiefonds Binnenlandse Omroep (the agency that subsidizes Dutch film producers), Mediamonitor (the Dutch Media Authority arm that produces concentration surveys for the Ministry of Education, Culture, and Science), the Onafhankelijke Post en Telecommunicatie Autoriteit (the independent post and telecom authority), Nederlandse Omroep Bond (the Dutch broadcasting association), the Institute for Media Auditing, Nationaal Onderzoek Multimedia (a joint industry committee focused on print media), and Stichting KijkOnderzoek (an independent audience survey group).
- RTL had pursued a similar strategy with French programming broadcast from Luxembourg several decades prior in order to win market shares in the French radio market. As was the case in the Netherlands, the French eventually reversed their restrictive policy.
- Brakman, I., van Cuilenburg, J., van der Meulen, L. "A View on Media Concentration: Concentration and Diversity of the Dutch Media in 2001." Hilversum: Commissariaat voor de Media, 2002. Jan 31, 2013. <http://www.mediamonitor.nl/dsresource?objectid=423&type=org>.
- Brakman, I., van Cuilenburg, J., van der Meulen, L. "A View on Media Concentration: Concentration and Diversity of the Dutch Media in 2001." Hilversum: Commissariaat voor de Media, 2002. Jan 31, 2013. <http://www.mediamonitor.nl/dsresource?objectid=423&type=org>.