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BELGIUM

Two Communities with Diverging Views on How to Manage Media Diversity

Leen d'Haenens, Frédéric Antoine and Frieda Saey

Abstract / Although Belgium's broadcasting history can be considered a perfect example of the overall situation in Western Europe, the country's specific cultural makeup and political shifts are also reflected in its media environment. The media system is characterized by a fairly high degree of cross-ownership, while major differences can be found in the degree of cultural protection. This article examines the stances being taken in the French- and Flemish-Speaking Communities: contextually, in terms of cross-ownership regulation; institutionally, as to the mission of the public broadcaster (*pur sang* or broader); and content-wise, with respect to home-grown, high identity value productions, as opposed to transnational productions from foreign players.

Keywords / broadcasting policy / cultural protection / Flanders / French-Speaking Belgium / public service broadcasting

Historical Background: From a Unitary to a Federal State

Bordered to the north by the Netherlands, to the east by Germany and the Grand Duchy of Luxembourg, and to the south and the west by France, Belgium lies in the economic and urban heart of Europe. Covering an area of 32,545 km² and with approximately 10.4 million inhabitants, the country could be defined as small. Belgian broadcasting clearly indicates the lines of the country's social and political divisions, as well as its linguistic and regional divides. The country's complex political structure has undergone significant changes over the years: it comprises three (Flemish, Walloon and Brussels Capital) regions and three (Flemish, French-speaking and German-speaking) Communities with their own legislative and executive institutions. In the political layer above these sits the federal government, exercising power in national affairs. As the country has almost always been governed by coalitions, the development of public broadcasting policy is invariably the result of compromise. The structure of public broadcasting parallels the evolution of the structure of the Belgian state, i.e. the shift from a unitary to a fully federalized model (Antoine et al., 2001).

From the 1970s, broadcasting policy was gradually removed from the ambit of national law and handed over to the Communities (ruling by decree). Public broadcasting became part of cultural affairs as a result of the law of 21 July 1971 (on the

Responsibility and the Operation of Cultural Councils in the Dutch-speaking and French-speaking Communities) and was brought under the power of the Communities. The law on the Provision of Public Radio and Television Services of 18 February 1977 completed the separation of the public broadcasting companies. The law of 16 July 1973, better known as the Culture Pact, had far-reaching consequences for public broadcasting, its intention being to ensure diversity: that is, to protect the variety of ideological and philosophical stances in the country. For instance, the boards of directors of public broadcasting companies had to reflect the proportion of seats held by the political parties within the Community Assemblies. This ruling consolidated the politicization of public broadcasting (see also Antoine et al., 2001).

Flanders and French-speaking Belgium issued their first decrees on broadcasting in 1977 and 1979 respectively. During the 1980s, both Communities developed separate broadcasting policies. Meanwhile, due to economic, geographic and demographic factors, Belgium became one of the most densely cabled countries in the world. Although the number of Belgian broadcasting companies was limited, viewers were soon supplied with a wide range of foreign stations. This formed a threat, not only to the viewer market but also to national advertising. Since commercial radio and television remained prohibited, advertisers could only reach their market through foreign stations. The effects of this were felt much more strongly in French-speaking Belgium than in Flanders. In the 1980s, this became an important argument in both Communities in favour of lifting the monopoly of the public broadcasting companies.

There are still many similarities between the present-day broadcasting landscapes in Flanders and Wallonia. Both have a diverse supply of public, private, national, regional and local stations, pay-stations and niche channels. Some 30 domestic and foreign television channels reach 70 percent of the population. There is a fairly high degree of cross-ownership, and the public broadcasters in both Communities, enjoying a mixed funding system, are cost efficient: the Flemish public broadcaster, VRT, has a budget totalling €396.4 million (€253 million of which is public financing) whereas the French-speaking Community's public broadcaster, RTBF, has a budget of €337.7 million (of which €178.6 million is from the public purse). Both rank among the four poorest public broadcasting institutions in Western Europe, together with Ireland and Portugal (EBU, 2005). There are also major differences in emphasis between the two Communities: in terms of the implementation of European legislation, the organization and mission of public broadcasting and the financial structure of private broadcasting.

We examine in this article whether the legal provisions and structural conditions for mainstream national channels adequately cater to the citizens in terms of choice and access to voices and sources in society and whether the media reflect this pluriform society. More concretely, we look at the different stances taken in the Flemish and French-speaking Communities: contextually, in terms of cross-ownership regulation; institutionally, with regard to the mission of the public broadcaster (whether to take a *pur sang* or broader stance with regard to PSB); and in terms of content, with respect to the supply of home-grown, high identity value productions as opposed to transnational productions from foreign players.¹ Looking at content allows us to

assess the degree of diversity provided by the public and private broadcasters, and to determine whether the former adequately responds to market failure, that is providing a complement/alternative to what the commercial broadcasters already have on offer.

Defining Diversity

Let us reflect briefly on the polysemic term diversity, for which a multi-measure methodology has been developed (see, for example, Hellman, 2001). Diversity refers to the heterogeneity of media content according to one or more criteria (McQuail and van Cuilenburg, 1983). According to McQuail (2000: 319–20), diversity should be defined in terms of a more or less wide range of choice for audiences, on all conceivable dimensions of interests and preferences; many and different opportunities for access of voices and to sources in society; and a true or sufficient reflection in the media of the varied reality of experience in society. This article analyses institutional performance as well as programme-related aspects linked to the notion of media diversity in the Flemish and French-speaking broadcasting markets. Media diversity is explored from the angle of media economics: the number of players and the competition between them are assessed. The notion of television profusion is introduced to examine the extent to which the television supply is exceeding demand and consumption. From the perspective of the programme/format level, questions such as the following are asked: Is just more of the same being supplied? Are there a lot of imports? Research has shown an increasing bipolarization whereby most channels focus their programming on a combination of national and non-European (US) imports (De Bens and De Smaele, 2001).

Do the Flemish and French-speaking public broadcasters in Belgium make any difference in this respect? Do they devote more of their broadcast time to non-fiction genres and to more national and European fiction than their commercial counterparts (De Bens and De Smaele, 2001; Picard, 2001), or have they engaged in the audience ratings race and ‘dumbed down’ their programme supply (Bilteryest et al., 2007; OSI and EUMAP, 2005)? In addition, audience reception as a response to the programme output should not be forgotten: do the programme production and distribution trends properly meet audience demands, as expressed in viewing time figures? In this respect, in an effort to combine looking at the programme supply and the audience reactions to it, a distinction is often made between open and reflective diversity in the literature. ‘Open diversity’ looks at the extent to which different types of programmes are presented in equal proportions. ‘Reflective diversity’ deals with the relation between supply and demand, i.e. it looks at the ratio between the types of programmes broadcast by the channels and those actually viewed or listened to (McQuail, 1992; van Cuilenburg, 1999; van der Wurff, 2004).

This article focuses on the impact of contextual factors such as market forces and regulatory conditions on diversity in the broadcasting landscape in Belgium. Research by van der Wurff (2005) shows that media content provided by a market can be diverse because outlets themselves are internally diverse, or because outlets provide different types of content that in combination create a diverse supply. Diversity

within outlets is important because it ensures that audiences are confronted with diverse and thought-provoking material; differentiation of outlets is also important because it ensures that audiences are able to choose between different products. Unfortunately, diversity within outlets and differentiation of outlets do not seem to sit together easily.

We encountered several methodological problems trying to operationalize the notion of open diversity in a comparative fashion for each of the two Communities. On the one hand, the Centre for Information on Media (CIM) Audimetric figures turned out to be the only figures that exist for both markets, but the public broadcasters' audience researchers consider these data as too unidimensional and too arbitrary, as a programme is only attributed to a single programme category among a very limited set of programme genres. Hence, these figures are not readily made use of in the public broadcasters' annual reports or other policy documents as it is considered that they do not sufficiently reflect the social dividend that the public broadcasters are meant to contribute over their commercial competitors. On the other hand, the so-called ESCORT figures – a European Broadcasting Union (EBU) classification system of radio and television programmes on the basis of seven dimensions: intention, format, content, target group, origination, language and participation – are only used by the public broadcasters. For that reason, these figures cannot be used as a benchmark or a relative indicator of diversity in relation to the other actors in the market. Although we recognize that the ESCORT figures do allow for more nuance in terms of diversity within a given programme (e.g. a sports programme with a short documentary on sports injuries and a quiz aimed at youth might be categorized under four different programme genres), we have used the CIM categories for our purposes to compare open and reflective diversity across the linguistic border and between the public and commercial broadcasters. We pose the following research question on diversity and the concept of PSB: how do the diversity profiles of the Flemish and Francophone public broadcasters serve as a remedy to market failure and offer public value?

Flanders

From a Monopoly to Open Competition with a Number of Limitations

The Belgian Law on Radio and Television Advertising of 6 February 1987 made it possible to gain revenue from advertising. Meanwhile, the Flemish government had passed its so-called Cable Decree (28 January 1987), which legislated for the end of the monopoly of the public broadcasting company. Nowadays, when it comes to television ownership restrictions in Flanders, nobody is allowed to own more than one community, regional or local station. While there are no media-specific cross-ownership restrictions other than general competition law nor are there foreign ownership restrictions (see also CEC, 2007). The main television player is the public broadcaster, VRT, with Eén as the mainstream channel and Canvas and Ketnet (the children's channel) sharing the second channel. The main commercial players are VTM

channel, VTM-Kanaal 2 (Ka2 meanwhile renamed into 2Be) and VT4 (VT4 has held a Belgian licence since 2002; it was previously operated by a UK company, VT4-Ltd).

From its launch in February 1989, VTM was required to provide a balanced and diverse set of programmes that should consist of a mix of information, education and entertainment. At first, it focused on entertainment but gradually invested more in information. In compliance with European legislation, VTM had to set aside part of its viewing time for European productions. Moreover, the 1988 Performance Decree stipulated that, by the end of five years, half of VTM's programmes should consist of Flemish cultural productions. At first there was no clear definition of what this meant precisely, so in 1994 a quota regulation was put in place. From then on, news, games, sport, ads and teletext could no longer be considered as Flemish cultural programming.

After its first month of operation in 1989, VTM had already gained 27 percent of the viewing market. This rose to 37 percent by the end of the year, at the direct expense of the Dutch stations, whose entertainment formats ceased to be so attractive there now was a Flemish equivalent in addition to the two VRT channels. Despite the fact that the average Flemish viewer already received a wide range of programmes on cable, it was only in the 1990s that the viewers' market became really fragmented and the public broadcaster's share dropped to a dramatic low (Antoine et al., 2001). The VTM monopoly on advertising was ended in February 1995 with the launch of VT4, a subsidiary of SBS (Scandinavian Broadcasting System), and officially a British station that nonetheless targeted Flemish viewers and Flemish advertising. By broadcasting from the UK, it could get around VTM's monopoly on advertising. Moreover, it was not required to comply with the Flemish government stipulations on advertising, which are more restrictive than those laid down for commercial stations in the UK. Nor was it required to present daily news programmes. VT4 not only creamed off part of the advertising market, it also forced VTM to make investments to counter the competition. One of the measures it took was to set up a second channel (Ka2). Both stations initially hoped to reach a new audience by showing prestigious programmes, but soon had to adapt their policy because they failed to reach the desired number of viewers.

Table 1 presents audience market shares for the broadcasters in the Flemish television marketplace for 2000–6, illustrating the period after the wave of commercialization and the consolidation of the public broadcaster in coexistence with its commercial counterparts.

Management Contract with the Government: Quality and Diversity

Since 1997, VRT and the Flemish government have periodically concluded management contracts, which stipulate the funding provisions for the next few years. The first contract was signed for the period 1997–2001, the second for the period 2002–6. These contracts define the tasks of the public broadcaster in terms of performance criteria and measurable objectives, and fixes the funding required to attain these objectives (Coppens and Saeys, 2006; Saeys and Antoine, 2007). The

TABLE 1

Television Actors and Market Shares in Flanders 2000–6 (in percentages)

	2000	2005	2006
TV1 – Eén	23.4	27.0	28.7
TV2 – Ketnet/Canvas	8.3	9.4	9.6
VTM	26.7	22.0	21.3
Ka2	7.7	5.6	6.7
VT4	7.9	6.4	7.0
VijfTV	–	2.4	4.2
Vitaya	0.1	2.4	2.9
Other (e.g. Dutch)	25.9	24.8	19.6

Sources: VRT Research Department; CIM-GfK Audimetrie.

current contract (for 2007–11), approved on 19 July 2006, equally sets out the policy and specific directions for VRT that will apply for the next five years, beginning in 2007 (Flemish Community, 2006). It lays down the conditions under which the funding required for VRT to fulfil its mission will be granted.

The management contract focuses in particular on the linear and generalist nature of the public broadcaster, which is to appeal to as wide an audience as possible. The public broadcaster must also serve specific target groups. Furthermore, it has to explicitly seek to safeguard the Flemish anchoring of the broadcasting service as well as appeal to all audiences, including ethnic minorities. As to programming, the contract reiterates the emphasis on Flemish anchoring, which takes the form of Flemish (co-)productions,² the target figure being 50 percent of the total output on the generalist channels between 6.00 p.m. and 11.00 p.m. As for music, at least 20 percent of music programming on radio must be dedicated to Flemish production, and at least one of the five VRT radio stations needs to be clearly branded as serving Dutch speakers. To meet the needs of viewers with hearing difficulties, it is planned to extend subtitling to 95 percent of programmes by 2010.

With regard to production, VRT's own production facility is to be transformed into a full-fledged division, the idea being to use all in-house expertise to continue making news and current affairs programmes, strategic programmes and programmes intended for prime-time slots in the most cost-effective way possible. To this end an 'Innovation and Development Lab' has been set up. While VRT is to continue co-operation with Flemish production companies, no news or current affairs programmes will be subcontracted, and strategic programmes will always be produced by VRT itself. The practice of subcontracting to selected production companies within a strategic partnership may be useful and even necessary for crucial programmes that VRT cannot make on its own. Table 2 shows 'own' production in 2006 (i.e. in-house and subcontracted production as opposed to imported programmes) in the different programme genres. 'Own' production has increased in the categories information, sports and fiction compared to the previous year (data not shown).

All Flemish broadcasting companies are subject to a number of programming regulations. First, on the EU level, there are the constraints issuing from the Television

TABLE 2

'Own' Production by VRT (2006) (in percentages^a)

	VRT (3058 h)	Eén (2141 h)	Canvas (including Ketnet; 916 h)	Canvas (excluding Ketnet; 729 h)
Information	25.98	20.73	38.27	38.05
News	20.1	27.91	1.90	2.38
Sports	14.32	9.25	26.18	32.89
Entertainment	11.58	11.87	10.93	10.75
Human interest	9.00	11.12	4.04	4.05
Fiction	7.35	7.27	8.06	0.00
Arts and science	5.81	6.32	4.63	4.85
Music	2.60	1.99	4.02	4.09
Various/other (third parties)	1.97	1.97	1.98	2.48
Religious programmes	1.11	1.58	0.00	0.00

^a Percentages of own production without 'repeats'.

Source: VRT Research Department.

without Frontiers Directive, stating that the majority of the programme supply excluding news, sports, games, advertising, teletext and teleshopping should consist of EU productions including in-house or commissioned productions. The stipulations are rather flexible and subject to interpretation, both with regard to the quotas laid down for programming European productions and to those for purchasing independent productions (Castille, 2000). The licences issued by the Flemish Media Authority specify quotas for the programming of Flemish cultural productions. There is a clear distinction between public and private television stations as to the origin of programmes: the public broadcaster has markedly more Flemish and European films and series, while American productions prevail among the private operators (De Bens and De Smaele, 2001; van Nieuwenhuyse, 2005). VRT, with 76 percent EU production and 20 percent independent production, on the basis of its 2006 programme output, clearly complies with the Television without Frontiers Directive (source: VRT Audience Research Department). When looking at non-European productions, 15 percent originates from the US, with the least supply of US content on VRT's main channel (8 percent) and the most on its children's channel (28 percent).

Focus on Diversity

Where does this leave us in terms of the open and reflective diversity of Flemish television output? Overall, taking all Flemish channels together, fiction (39 percent), general knowledge programmes (25 percent) and entertainment (23 percent) prevail. When looking at the public broadcaster's supply compared to that of the commercial channels, VRT dedicates more time to information, children's programmes and sports. The commercial channels' profile is built around (mostly imported) fiction, general knowledge programmes and entertainment.

When also taking into account audience reactions, measured in viewing time for programme genres, Table 3 shows us that VRT's modest entertainment portion of the television menu is heavily watched by the Flemish public. Striking also is that the commercial channels' information supply, albeit limited in broadcast hours, clearly appeals to the audience. The same goes for the commercial channels' sports programmes.

Table 3 shows that the route taken in favour of a broad supply of genres by the Flemish public broadcaster has led to a perception by the audience that is similar for both the public and commercial broadcasters, with a particular overall emphasis on fiction, information, children's and sports programmes. The reflective diversity measure also indicates a reverse proportionality with the supply: i.e. the less sports on offer on the commercial channels, the more viewers tend to watch, as there is very little on offer to start with. This latter point is illustrated by the relatively low ratio for sports on VRT, notwithstanding its prominence in the sports offering.

French-Speaking Belgium

From a Monopoly to Official Deregulation

French-speaking Belgium has certainly also been an experimental ground for the deregulation of radio and television, largely because of its geographical proximity to the Grand Duchy of Luxembourg as well as its cultural dependence on France. It has lived with the influence of foreign French-language radio programmes since the 1930s and has experienced a de facto internal private/public television duopoly system since the early 1970s. This long history has created a complex broadcast system in which, during the 1990s, the public authorities themselves encouraged private businesses and public companies to cooperate, in an effort to protect the

TABLE 3

Open and Reflective Diversity of Public and Private Television Channels in Flanders (2006)

	A		B		C		Ratio C/A	
	Broadcasting time (%)		Average viewing		% of total average		Reflective diversity ^a	
	Open diversity		time (in minutes)		viewing time			
	VRT	Commercial	VRT	Commercial	VRT	Commercial	VRT	Commercial
Fiction	35	41	89,033	375,473	34	46	97	114
General knowledge	18	27	44,713	229,654	17	28	93	103
Entertainment	9	27	26,286	151,872	10	19	107	70
Information	15	3	43,539	31,292	17	4	109	147
Children	9	2	27,917	15,876	11	2	125	108
Sports	12	1	27,564	12,139	11	1	89	114

^a Reflective diversity or the relation between programme supply and audience demand is calculated by dividing demand (C, in %) by supply (A, in %); 100 indicates an optimal balance between supply and demand.

Source: VRT Research Department.

cultural identity of this small Community in the face of globalization, and to shape a unique model, different from the media development in the Flemish part of the country (Antoine et al., 2001). On the one hand, there could be any number of commercial channels operating in this field, as long as they can find a way to balance their costs and advertising profits, and see French-speaking Belgium as no more than an auxiliary market that can be catered for with transnational programmes without high identity value (Antoine et al., 2001). On the other hand, in economic reality, a limited number of players might be inevitable: the French-speaking Community does not represent an infinitely extensible market and its inhabitants have a lower average income than their neighbours. This could lead, in the long term, to a limitation of the number of players. The withdrawal of the operator RTL-TVi to Luxembourg in 2005 undoubtedly constitutes a step in this direction. Nevertheless, RTL-TVi continues to play the proximity card, especially with news and magazine formats.

In July 1987, the government of the French Community opened the market to private television. In practice, this move was directed in the favour of RTL-TVi, a company incorporated in Belgium and controlled by the *Compagnie Luxembourgeoise de Télévision* (CLT) and a number of the newspaper groups in French-speaking Belgium. However, since Belgium has had to comply with the principles imposed by the EU's Television without Frontiers Directive, the balance between the public and private sectors that the French Community government had sought to achieve – in the form of compensation to the Francophone press groups and a ceiling of 25 percent of advertising revenue for the public broadcaster – has become irrelevant. Meanwhile, other players (including the channels of the French AB Group) have entered the market. A market logic has consequently replaced the intention of creating a more cultural content (Saeys and Antoine, 2007).

Table 4 shows the large number of public and private actors now playing in the television broadcasting market in the French-speaking region.

Until 2001, the private television sector could be regarded as serving in good part Belgian interests, and depending primarily on a structure linked to the Luxembourg company CLT (which was partially funded by Belgian capital). Since then, the CLT has been more or less absorbed into the RTL Group, and a new operator has launched other general interest channels on to the French-speaking market, within the sphere of influence of the French AB Group.

RTL-TVi counted for little within the RTL Group, and financial logic dictated a search for economies of scale without taking account of any national specifics. Thus, in 2002, the entire management of RTL-TVi was sacked, and replaced by managers more inclined to assimilate the group's general strategy. The real consequences of this turnaround took effect in October 2005, when the RTL-TVi board of directors decided not to apply to renew its licence. Referring to the Television without Frontiers Directive and its Luxembourg-based licence, the company considered that this would suffice for broadcasting in Belgium. As the Luxembourg regulatory framework is far less restrictive than that of the French Community of Belgium, the company intended to take advantage of it, while its management asserted that the channel would continue to deliver as much content to the Belgian Francophone Community as before 'on a voluntary basis'.

TABLE 4

**Television Actors and Market Shares in French-Speaking Belgium 2000–6
(in percentages)**

	2000	2005	2006
La Une (RTBF)	17.7	14.0	14.7
La Deux (RTBF)	3.4	3.0	4.9
RTL-TVI	18.1	17.9	19.1
Club-RTL	5.6	5.1	5.1
Plug TV	–	1.5	1.4
BE1	1.5	0.7	0.4
AB3	–	3.8	3.8
AB4	–	2.1	1.9
TF1	16.9	16.4	17.5
FR2	10.1	8.5	9.2
FR3	6.9	5.0	5.7
Other	19.8	22.1	16.2

Source: CIM-GfK Audimetrie NV.

RTL-TVi nowadays consists of three television channels: RTL-TVi, Club-RTL (1995) and Plug TV (2003). On 6 October 2001, a new operator appeared alongside RTL: YTV (Youth Television). This subsequently became Belgium Television, with 25 percent of its shares held by the French AB Group, and absorbing the activities of the AB3 channel, and, in 2002, AB4, a channel serving older audiences.

As far as possible, the Belgian French-speaking radio and television product has always been the subject of protectionist measures in order to ensure the survival of the national television channels, both public and private, under threat from the arrival of foreign channels. The European Directive, guaranteeing free circulation of audiovisual products among members of the Union and encouraging the emergence of a European (and non-national) television sector, delivered a fatal blow to these protectionist aspirations. In line with the European Directive, the Belgian television market is today totally open to European operators and there is no longer any restriction to the distribution of their programmes via cable.

Because of its size, and the difficulties encountered by media companies in staying economically viable, very few anti-concentration measures have, understandably, been taken in French-speaking Belgium. There is no legislation controlling the cash flow of the press or television groups. Only a few controls of cross-media concentration exist in law. The latest decree on audiovisual media (2003) thus attributes to the media authority, the Conseil Supérieur de l'Audiovisuel (CSA), the responsibility 'to protect access to a pluralist offer' by avoiding 'the exercise of a significant position'. According to the decree, 'a significant position' refers to when a person or entity holding more than 24 percent of the capital of a broadcaster, holds, directly or indirectly, more than 24 percent of the capital of another television broadcaster in the French Community; or when the accumulated audience of several radio or television stations reaches 20 percent of the total audience in the French

Community and these stations are owned, directly or indirectly, as a majority or minority holding, by the same person or entity.

The political power merely determines the minimal conditions for granting the broadcasters a renewable licence for a nine-year period. Apart from respecting the requirements of the European Directive, the French-speaking Community has only one genuine hold on power: namely to stipulate that a programme be obligatorily broadcast on the Community's cable networks. Indeed, the political power also determines what the cable television companies must and can broadcast on their networks.

The Public Broadcaster under Contract

Meanwhile, in 1989, the introduction of advertising on the public broadcaster, RTBF, did not result in an economic balance. To remedy the situation, the public service embarked in 1993 upon a restructuring plan called 'Horizon 97', intended to balance the budget by 1997. The decree of 14 July 1997 transformed the semi-public corporation into an independent cultural company responsible for the mission of public service radio and television in the French-speaking part of Belgium.

A series of management contracts between RTBF and the French Community have been concluded since 1997. Parallel with the Flemish case, in 2006, RTBF and the government of the French-speaking Community negotiated a third contract, to take effect in 2007. In order to ensure its public service mission, the contract stipulated that RTBF was 'to produce, co-produce, acquire, programme and transmit federal radio and television transmissions', to provide access to everything that is eventful, 'whether in particular it be important live current affairs, major sporting encounters, cinematographic works and significant cultural events', 'to contribute to the strengthening of social values, especially by a code of ethics based on respect for the human being and for the citizen' and 'to provoke, whenever possible, debate in its programs and to clarify the democratic imperatives of society' (Saeys and Antoine, 2007: PAGE??).

The 2001–5 contract had stipulated that the company was to broadcast at least five radio and two television channels, and specified the identity of those channels. As to television, this would be the general interest channel, La Une (originally founded in 1953), and the multi-thematic channel, La Deux, whose specific identity remains difficult to define, and has done since its creation in 1977.

The management contract negotiated in 2006 presents a rather different configuration from the earlier ones, and is closer to VRT's management contract. The philosophy of the latter contract is based on the establishment of targets to be achieved, whereas that of RTBF is based on strict compliance with a long list of obligations and constraints. So far, RTBF has not demonstrated the reactive dynamism that was encountered at VRT. Even presented as an independent company, the institution remained close to its official status of state department, strongly marked by political influence. The new contract also places a strong emphasis on non-linear services. RTBF now provides a wide podcasting supply of its radio content, as well as on-demand television programmes on the IPTV platform 'Belgacom TV'. But this still

remains auxiliary to linear services. Currently, no exclusive content is provided on-demand.

Focus on Diversity

Where does this lead us in terms of open and reflective diversity in French-speaking Belgium? The cultural models pursued by the public and the main private television channels clearly differ from one another, which may be illustrated by RTBF's ability to offer high-level magazine and educational entertainment programmes at the beginning of prime-time.

One might assume that fiction is the particular prerogative of the private channels. Nevertheless, as Table 5 illustrates, the situation is more complex as the share of airtime devoted by the public channels to fiction is significant. Thus, between its two channels, in 2004 RTBF devoted 35.3 percent of its airtime to fiction, against 10.8 percent to news and information. Subject to strong budgetary constraints, RTBF fills its airtime with fictional broadcasting not only in the daytime but also during prime-time. Numerous repeats of own-production transmissions also figure, however, which markedly reduces the relative importance of fiction in the whole of public channel broadcasting as compared to the situation in the private channels.

On RTL-TVi, programming has always been conceived with reference to fiction, and with a focus on prime-time. The presence of programming types other than (tele-)films and series throughout the whole of prime-time and night-time is an extremely rare occurrence, even contradicting the image that it has forged for itself. Following the example of most private channels, RTL fills its essential daytime programming with series. The second private channel, Club-RTL, fulfils a complementary function in this regard. During the day, it concentrates on series and cartoons

TABLE 5

Programme Output by Genre of RTBF (2004) (in percentages)

Genre	La Une 6060 hrs	La Deux 6567 hrs	Total 12,627 hrs
Fiction	40.9	30.2	35.3
Entertainment	2.6	0.5	1.5
Music	0.1	7.0	3.7
Sport	6.3	14.5	10.6
News	11.2	6.1	8.6
Information	3.5	0.9	2.2
Arts/humanities/sciences	2.6	6.7	4.8
Education	18.1	26.3	22.3
Religion	0.0	0.6	0.4
Others	4.1	1.7	2.8
Presentation/promotion	2.8	2.7	2.8
Advertising	7.8	2.6	5.1

Source: Observatoire Européen de l'Audiovisuel (2006).

for children and adolescents. Plug TV, the RTL Group's channel for teenagers, also offers a large amount of series as well as films. The AB3 and AB4 channels can be regarded as 'second market' channels, of which a large part of the airtime is focused on fictional repeats.

The obligation to comply with the Television without Frontiers Directive ensures less Americanization. The Directive's requirement, however, is not complied with by all players. The floor of more than 50 percent, laid down by the Directive, is sometimes only slightly exceeded. Thus, in 2004, RTBF reported that it had broadcast 54 percent European works of fiction, and that 76 percent of the full-length films broadcast were European, as were 81 percent of its 90-minute fiction programmes. But barely 18 percent of the 50-minute series it broadcast were European.

Within the RTL Group, achieving the right proportion of European works remains a recurring problem. Analysing its production in 2004, the CSA recorded the fact that, across all of its services, RTL broadcast 43.4 percent European works, 25.7 percent independent works and 19.3 percent recent independent works. These proportions obviously take no account of the time slots in which these European or foreign programmes were broadcast. The case of French-speaking Belgium is also significant in this respect. Indeed, lacking programmes with a strong national cultural identity, the Community's television stations have become accustomed to capitalizing on fiction as a traffic builder. Thus, serial fiction here not only occupies daytime slots, but also prime-time, and the broadcasting of films occupies, on its own, an important place. By way of comparison with Flanders, subcontracting to independent producers is especially prevalent in Francophone Belgium in the private broadcasting sector, e.g. Keynews, the main documentary/magazine provider for RTL-TVi. Coming back to our open and reflective diversity measurement (Table 6), fiction (50 percent) and entertainment (17 percent) formats are predominantly determining the television output of television channels in French-speaking Belgium. When distinguishing between public and commercial television, the public broadcaster offers a more diverse supply with an emphasis on fiction, general knowledge content and information. Taking into account the audience perception of both channel types, information and children's programmes are highly watched on the commercial channels, while the rather modest entertainment share on RTBF manages to reap a maximum benefit in terms of time spent with it.

Table 6 illustrates that the different broadcast models of the public and private television channels in French-speaking Belgium are also perceived as such by the audiences. Striking is the time spent on RTBF's entertainment share, which does not exactly correspond to the *pur sang* route chosen by the Francophone public broadcaster. This shows that the audience expects the public broadcaster to provide entertainment as full-fledged content alongside the more 'serious' programme genres.

Conclusions

Both the Francophone and Flemish Communities, although gradually grown apart, continue to show many similarities. In Flanders, in addition to the quotas laid down by the European institutions, both the Flemish public broadcaster and its commercial

TABLE 6

Open and Reflective Diversity of Public and Private Broadcasters in French-Speaking Belgium (2006)

	A		B		C		Ratio C/A	
	Broadcasting time (%)		Average viewing		% of total average		Reflective diversity ^a	
	Open diversity		time (in minutes)		viewing time			
	Public	Commercial	Public	Commercial	Public	Commercial	Public	Commercial
Fiction	31	62	125,375	460,777	33	69	107	110
General knowledge	24	6	67,350	43,828	18	7	74	106
Information	25	4	109,205	37,927	29	6	115	129
Sports	12	2	54,802	12,701	14	2	118	122
Children	5	0.10	13,824	1,327	4	0.20	75	199
Entertainment	2	25	8,503	111,771	2	17	100	66

^a Reflective diversity or the relation between programme supply and audience demand is calculated by dividing demand (C, in %) by supply (A, in %); 100 indicates an optimal balance between supply and demand.

Source: VRT Research Department.

counterparts are obliged to provide a diversity of programmes consisting of information, education and entertainment. French-speaking Belgium, on the contrary, largely because of its proximity to the Grand Duchy of Luxembourg and its endemic cultural dependence on France, lost a great deal of its power in protecting its cultural specificities in its audiovisual landscape. This is due to a growing international liberalism, increasingly dominated by foreign players reaching the audience with transnational programmes as opposed to home-grown, high identity value productions. And it is a secondary market that has proved attractive albeit its inhabitants have a lower average income than their neighbours to the north. Over the years, the Flemish government's language and cultural protectionist policies in the broadcast realm have been far more effective than the government's policy stance in French-speaking Belgium. Since Flemish commercial television was launched, the audience has been far less influenced by the Dutch broadcast content than has the French-speaking audience by the French broadcast content from neighbouring France. Moreover, a subordinate role to the French media world remained a feature of RTBF, which opted for a policy of complementarity with the French channels rather than attempting to compete with them, not realizing that the competition that would affect it most directly would in fact come from Luxembourg. In conclusion, the Belgian case does not support the proposition that small states/regions tend to intervene with strong diversity regulation.

One important question remains: how and to what extent, if at all, are the cultural identities of the respective Communities reflected by their public broadcasting companies? When it comes to comparing the realization of the public broadcasting mission, RTBF tends to adopt a more *pur sang* PSB concept than VRT, whose supply is aimed at a far broader audience. This is exemplified in the nature and diversity of the programme genres on offer, and the way in which the audience reacts to this situation. RTBF is watched more for the information, fiction and sports shares

of its programme output than VRT. Relatively speaking, RTBF is thus perceived less as an entertainment, children's and general knowledge broadcaster than is the case for VRT. The management contract bears the stamp of protectionism, especially in Flanders, where home-grown productions are a prominent part in the contract with the government.

Finally, although the article has mainly dealt with linear broadcast services, we must ask whether such identities will still be recognizable in the new multimedia landscape. The development of online multimedia services will hinge on the availability of the necessary infrastructure, which has to be both high quality and affordable. In such a volatile context, the specific tasks and possibilities of public broadcasting will have to be organized consistently in terms of public value offered as opposed to being merely technology driven. This is one of the challenges to overcome in the near future.

Notes

1. RTBF, needing to rely on a very small research department, does not seem able or willing to invest in documenting its programme output in great detail. Often, tables meant to present the Belgian case merely refer to the Flemish part in EBU statistical sources. For this reason, we have had to rely on somewhat older data in the section on French-speaking Belgium.
2. Flemish anchoring can be ensured via VRT's own production company, Ispro, in cooperation with the Flemish Audiovisual Fund, and via strategic partnerships with outside production companies.

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