**Diverging Debates on PSB Prospects as to Mission, Organization and Financing: The Netherlands and Flanders Compared**

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New information technologies, liberalizing EU and national policies, together with rapidly changing societies – from mono- to multicultural – entail undoubtedly serious consequences for the prospects of public service broadcasters in Europe. Consequently, they will need to solve their current identity crisis, reformulate their remit, and reorganize their institutions in order to stay in tune with the rapidly changing societies they want to serve. More in general, the traditional (all too) close relationship between public broadcasters and national politics seems to become more distant and problematic in the same pace as the viewing and listening public leaves behind public broadcasters in favor of their commercial competitors ('politics follows public'?). The latest battle ground are the digital strategies adopted by most PSB's, their shaping of e-communities and the deployment of cross-media applications in an effort to keep in touch with the new demographics and 'taste cultures' of Western societies. All in all, European politics and public broadcasting alike are in the middle of a process of reinventing the concept of public service broadcasting and to reconsider if and to what extent the existing institutions are still serving the idea of public service broadcasting as it was formulated over 80 years ago.

Against this European background, this paper will analyze the political debate and policy development currently generated in two neighboring contexts where very different stances are being taken with regard to public broadcasting: Flanders and the Netherlands. The paper will dig into the diverging arguments and actions of the leading political parties, regulators and broadcasters that are at stake on the future PSB remit, e.g. the mission and program task, organization, financing and the position of public broadcasting on digital platforms. Comparing recent debates and policy making in both countries the paper concludes that despite very different traditions there seems to be a certain convergence of public broadcasting policies in Flanders and the Netherlands in recent years.

## 1 Short Historical Outline: Flanders

Broadcasting in Belgium can be considered a prototype of broadcasting in Western Europe, which was dominated for years by public broadcasting organizations that drew deeply for their inspiration upon the ideas of the BBC. This situation was to change profoundly, but this did not occur until the 1980s, when European legislation became dominant. Moreover, Belgian broadcasting also clearly indicates the lines of the country's social division and the related developments (political and ideological, linguistic and regional divides). Belgium's political structure is quite complex and has undergone significant changes over the past 25 years. The country comprises three regions (the Flemish, Walloon and Brussels Capital regions) and three Communities (The Flemish, French-speaking and German-speaking Communities), each of which has its own legislative and executive institutions. Above them is the federal government, which exercises power in national affairs. As the country has almost always been governed by a coalition, the development of public broadcasting policy is invariably the result of compromise and seldom reflects a straightforward vision. Furthermore, the public broadcasting structure parallels the evolution within the structure of the Belgian state: the shift from a unitary to a fully federalized model (Antoine, d'Haenens & Saeys, 2001).

As early as 1981, the then center-right government declared its intention to substitute the monopoly of public television with a system of open competition. Because of the strong opposition and many practical problems involved however, this intention did not reach fruition until 1987 (Drijvers, 1990). The Law on Radio and Television Advertising of February 6, 1987 made it possible for broadcasters to derive revenue from advertising. Meanwhile, the Flemish government had passed its so-called Cable Decree (Decree of January 28, 1987), which laid down the legal basis for ending the monopoly of the public broadcasting company. Moreover, only one commercial TV company could be set up and allowed to broadcast via the cable network and address as such the whole Flemish population.

The *Vlaamse Televisie Maatschappij* (VTM) was issued a license for no less than 18 years and soon gained a larger market share than public television (Antoine, d'Haenens & Saeys, 2001). In an effort to anticipate foreign stations targeting the Flemish market from abroad, a number of limitations were built into the Cable Decree: foreign television stations would only be allowed access to the cable if they broadcast in one of the languages of their country of origin. This limitation was justified from a cultural point of view. In 1992 however, the European Court of Justice ruled that these limitations were in conflict with art. 59 of the EC Treaty, as they were in fact measures of economic protection. As a result, the language stipulation was removed from the Cable Decree. VTM was required to provide a balanced and diversified set of programs that should consist of information, education and entertainment. At first, it mainly focused on entertainment but gradually invested more in information. In compliance with European legislation, VTM had to reserve part of its viewing time for European productions. Moreover, the 1988 Performance Decree stipulated that, following a period of five years, half of VTM's programs should consist of Flemish cultural productions. No clear definition had been given 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 programs.

When it was launched in February 1989, VTM immediately gained 27% of the viewers market. This rose to 37% by the end of the year, the price being paid by the Dutch stations and the BRT (TV1 and TV2). Despite the fact that the average Flemish viewer already had a wide range of programs on the cable network, it was only in the 1990's that the viewers market became really fragmented (Antoine, d'Haenens, & Saeys, 2001).

Table 1. *Market Share of TV in Flanders, 1985-1989*

| | 1985 | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|---|
| **BRT-TV 1** | 51.4 | 45.8 | 41.0 | 41.1 | 22.5 |
| **BRT-TV 2** | 7.9 | 13.4 | 14.9 | 16.2 | 9.0 |
| **Dutch channels** | 24.0 | 24.5 | 27.1 | 25.2 | 17.1 |
| **RTBF** | 3.0 | 2.8 | 2.3 | 1.9 | 1.3 |
| **RTL (Luxembourg)** | 3.3 | 3.0 | 2.9 | 3.1 | 1.9 |
| **French channels** | 4.2 | 4.5 | 5.1 | 6.2 | 3.7 |
| **Other** | 6.2 | 6.0 | 6.7 | 6.3 | 44.5* |

Sources: VRT Research Department; Saeys & Antoine (in press)
* figures inclusive VTM, launched in February 1989

## 2 The Present

### 2.1 The Flemish public broadcaster's goals and funding laid down in a service contract

The VTM monopoly on advertising was ended *de facto* in February 1995 by the setting up of VT4. VT4, a subsidiary of SBS, is officially a British station that nonetheless targets Flemish viewers and Flemish advertising. By broadcasting from Great Britain, it can get around VTM's monopoly on advertising. Moreover, it is not required to comply with the Flemish government stipulations on advertising, which are more restrictive than those laid down for commercial stations in Great Britain. Nor is it required to present daily news programs. VT4 not only creamed off part of the advertising market, it also forced VTM to make investments to counter 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 programs, but soon had to adapt their policy because they failed to reach the number of viewers they expected. After a dramatically low audience share in the beginning of the 1990s due to the launch of Ka2 and of VT4 the public broadcaster went to great lengths rendering its programming more attractive (Saeys & Van Baelen, 1996; De Bens & Paulussen, 2005).

Only as of 1995 the public broadcaster was revitalized, both from an institutional and a program output perspective. As to program supply, the general mission was defined as follows: "to reach the largest possible part of the Flemish population with a diversity of programs that could arouse the interest of the viewers and listeners and meet their expectations." Information and culture are considered key areas, but also sports, modern-style educational programs, home-produced drama, tasteful entertainment, and youth and children's programs are to be part of the output. Quality remains key, in addition to universality and complementarity. A new element was the commitment to achieve the goals set: the public broadcaster is to make its mission explicit in a multi-year plan and to translate it into measurable goals.

In terms of audience groups being targeted, Flemish viewers are segmented into six more or less homogeneous clusters: TV-addicts (15%), family viewers (15%), extra-value seekers (22%), active discoverers (17%), spontaneous hedonists (22%) and the restless (9%). Two of these clusters, the restless and the addicts, are seen to be incompatible with the mission of the public broadcaster as laid down in the decree. The remaining four groups are being serviced with a mix of serious and entertaining programs, differentiating TV1 (the "widening" channel) and TV2 (the "deepening" channel). In 1997 TV2 was split up further

into two time-blocks: *Ketnet*, the channel for youngsters (until 8 p.m.) and *Canvas*, the quality channel (Saeys & Antoine, in press).

This operation proved very successful as since 1996 the downward trend has been reversed and market shares have again been registered of more than 30% for both public TV channels together. In 2004 a record high of 40% was noted and a market share hovering around 35% has since been the general rule (BRT/BRTN/VRT Annual Reports, Saeys & Antoine, in press).

Table 2. *Television Market Shares in Flanders 1990-2005*

| | **1990** | **1995** | **2000** | **2005** |
|---|---|---|---|---|
| **TV1** | 21.8 | 17.5 | 23.4 | 21.3 |
| **TV2 – Ketnet/Canvas** | 7.0 | 5.1 | 8.3 | 6.5 |
| **VTM** | 35.6 | 37.1 | 26.7 | 28.9 |
| **Ka2** | - | 3.9 | 7.7 | 6.5 |
| **VT4** | - | 6.1 | 7.9 | 8.7 |
| **VijfTV** | - | - | - | 2.4 |
| **Vitaya** | - | - | 0.1 | 2.4 |
| **Dutch channels** | 12.0 | 6.4 | 5.0 | 4.2* |

Sources: VRT Research Department; Audimetrie; Saeys & Antoine (in press)
* figures Netherlands only available from January 2005 until September 2005

Another innovation as to the institutional perspective and the relationship with the government, the VRT and the Flemish government have periodically concluded public-service contracts since 1997, stipulating the funding provisions for the next few years. The first contract was signed for the period 1997-2001, the second for the period 2002-2006. Such contract defines the tasks of the public broadcaster in terms of performance criteria and measurable objectives, and fixes the funding required to attain these objectives (Saeys & Antoine, in press; Coppens & Saeys, 2006).

As the most important part of the public broadcaster's income continues to come from the government grant – BEF 7,612 billion (€188.7 million) in 1997, to be increased annually by 4% if the goals set in the contract are met – it is obvious that the government wants to monitor the accomplishment of the goals to be met. In 2002 the basic grant amounted to €229 million, to be increased annually by 4% (on condition the goals are met), which means that the total 2006 grant amounts to €268 million. The VRT also receives lump-sums earmarked for specific projects, among which digital radio and television (Saeys & Antoine, in press).

## 3 The Future

### 3.1 Public-service contract 2007-2011: the outcome of a fierce debate on the mission and the funding of the public broadcaster

As a reminder: VRT implements its mission as a public broadcaster in conformity with the Council of Europe's resolutions of Prague (8 December 1994) and Krakow (16 June 2000), with the decrees of the Flemish Parliament and with the tasks defined in May 2004 by the Board of Directors and the management committee ('VRT Guidelines for the future'). In addition, there is a public-service contract between the Flemish Community and VRT which defines the broadcaster's mission in general terms.

The latest public-service contract was approved on 19 July 2006, the public at large having been canvassed and the Media Council having given its advice. The latter praised the way in which VRT was fulfilling its public tasks, but was critical of the plans for digitization,

arguing that Flanders has no need for the eight digital channels proposed nor does it have the financial scope. It was furthermore claimed that the plans for digitization cannot be reconciled with the public broadcaster's essential tasks.

The current public-service contract, just like the two earlier versions, outlines a conditional policy with specific directions which will apply in the next five years, beginning in 2007. The contract lays down the conditions under which the financial resources required for VRT's mission will be granted. These conditions take the form of quantifiable objectives in the domains of programming, human resources and financial and technological requirements, and they include the duty to report on performance as well as measures taken in the case of non-compliance. After three years an interim assessment is made and after 18 months a report is drawn up on the improvement of cost structure and efficiency. Also, and this is a first, after 18 months there will be scope for new consultations on widening the range of VRT's digital programs, although this will be limited to news and information.

The public-service 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 entertainment function being fulfilled by fun channels such as Radio Donna with a "low-threshold, accessible and contemporary referral function". In addition, the public broadcaster must also serve specific target groups. Furthermore, the contract explicitly seeks to safeguard the Flemish anchoring of the broadcasting service. Finally, VRT productions must be gradually digitalized and the visibility of the public broadcaster on digital platforms such as the Internet and mobile telephony must be ensured, although VRT must not play an anticipatory role and must confine itself to reacting to the wishes and needs of the audience.

In terms of funding, the public-service contract provides, for the year 2007 and for the entire duration of the contract, a basic grant with which the public broadcaster should be able to carry out its mission. In 2007 VRT will receive €279 million; by 2011, allowing for a rise in wage costs, that sum will amount to €293.3 million. In addition, a sum of €3.8 million is provided for research and innovation in 2007; in 2012 this amount will rise to €4.1 million. The contract also stipulates that VRT may enjoy supplementary revenue, e.g. from the private sector and from the sector of subsidized arts, to the benefit of the cultural channel. In contrast, revenue from radio commercials is limited to €40.9 million annually. As far as revenue from television sponsoring and partnerships is concerned, a limit is imposed of €8.7 million and from 2008 onwards a maximum of €4.5 million annually.

### 3.2 A new VRT decree sharpens conflict between politicians and the public broadcaster

In 2004 the coalition agreement of the Flemish government for the period 2004-2009 laid down a clearly outlined mission for the new minister for the media, Geert Bourgeois (of N-VA, the new Flemish alliance party). It comprised the setting up of a framework enabling greater financial transparency of the public broadcaster's operations, among others with respect to commercial activities and revenues from advertising. The Flemish Parliament, furthermore, voted a motion on 6 December 2004 to the effect that the Minister was to draw up rules based on the principles of good governance[1]. Before digging any further into the recently sharpened conflict between the public broadcaster and political decision-makers, it should be mentioned that the Flemish public broadcaster could count on a lot of goodwill

[1] A Charter of Good Governance was adopted by the Board of Directors on 21 March 2005, its rules and bye-laws being defined by the media decrees. It imposes a code of conduct on the directors containing elements such as the duty of discretion, the avoidance of conflicts of interests and criteria defining independence. In Tony Mary's view, the charter was amply sufficient to remove any uncertainties or vagueness with regard to the division of powers, and a new VRT decree was therefore, in his opinion, not needed.

from all political parties, leaving aside the known sensitivities among for instance right-wing parties regarding the spending of public funds on public service broadcasting programs aimed at large audiences.

However, in spring and far into summer 2006 relations between the political decision-makers and the public broadcasting service proved far from serene, even though negotiations preparatory to a new decree and to the renewal of the public-service contract were under way. Comments made by the two sides were often acrimonious.

The minister for the media sought to establish more clearly defined relations between the management and the board of the directors as well as greater financial control. In his efforts Mr. Bourgeois was supported by the European Commission, which closely monitors the use made of the taxpayer's money, among others because of a complaint lodged by the commercial broadcasting holding VMMa. The new decree was passed on 10 May 2006[2]. It gives priority to safeguarding the public mission of the broadcaster but also aims to keep a watchful eye on the commercial sidelines of the broadcasting service (which should support its public mission, generate their own funding and not distort the market) and to put an end to any disputes about the respective powers of the board of directors, the managing director and the management team. The board of directors can in future be enlarged with three independent experts in the fields of media policy and business management[3] and becomes the same full-fledged body that private companies have, i.e. a body which must be given a say in strategic decisions such as launching thematic channels and entering upon partnership deals. Furthermore, the board can now also take initiatives instead of being confined to a purely reactive role.

In view of VRT's managing director, Mr. Tony Mary, these changes are part of a well-thought-out operation to slim down the public broadcasting service. In this connection he refers to the return of the former political stranglehold on the public broadcaster which existed before his predecessor, Bert De Graeve, introduced the 'new culture' at VRT. He vehemently opposed any 'interferences' on the part of the board of directors with the day-to-day management of the public broadcasting service. Mr. Mary demanded guarantees in writing, but had to settle for the Minister's undertaking that the managing director would remain in charge of 'operational' policies.

In brief, in spite of the successes achieved by VRT with its much-valued mix of familiar and innovative programs (the ratings and coverage figures are telling enough), the relations between the political decision-makers and VRT's manager went from bad to worse. They ended in a complete stalemate, preluded by VRT's strategic moves with regard to the sports channel, the deal with Belgacom about the soccer contract, Mr. Mary's fierce criticism of the new decree and the public-service contract, and to top it all his decision to air the eighth season of the popular police series *Flikken* first on digital Belgacom TV against payment. When, moreover, the board of directors blew the whistle on Mr. Mary because of the *Flikken* decision, he saw no other option but to take his board and the entire Flemish government to court. The upshot was that Tony Mary was suspended from his post. His contract was subsequently terminated by mutual agreement, Mr. Mary receiving a payment of €775.000 in return for his silence and discretion. In the words of the parties: in the interest of the public broadcasting service, its employees and the public at large, there will thus be no further controversy or any legal wrangle.

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[2] The Green party as well as Christian Van Eyken, a French-speaking parliamentarian, voted against.

[3] Spirit, the left-liberal party, would have liked to completely depoliticize the board of directors, after the example of the Netherlands, among others, and considered this a logical step towards the reform of VRT such as it was initiated in 1996 with the so-called mini and maxi decrees.

### 3.3 Mission: informative, cohesive and instructive

In the coming years VRT will have to cope with three major challenges: internationalization, the convergence of distribution and content, and digitization, the latter of which will result in thematic channels and program for target groups. All VRT channels together will need to provide the audience with a wide and effective range of programs, and in so doing the public broadcaster will no longer be able to resort to a net-specific approach since in a kind of on-going interaction each VRT-net will continuously refer the viewer to the other nets. The underlying idea is that VRT can offer Flemish society an extra value, notably in the following four domains:

- in the *cultural* domain by propagating the distinct nature and the diversity of culture in Flanders by means of fiction, documentaries and music production of Flemish origin;
- in the *societal* domain by having an eye for all socio-demographic groups by means of entertainment and sports programs, the latter also spending time on less known sports;
- in the *democratic* domain by presenting independent, credible and true information, including more investigative journalism;
- in the *social* domain by playing a major connective role and furthering social cohesion by means of a mix of high-quality programs of an informative, cohesive and instructive nature.

In terms of actual programming policy this produces both generalist programs (informative, cohesive and instructive) and specialist ones (cohesive and instructive). In radio the informative and cohesive function is fulfilled by Radio Donna. A quick and alert station offering short items and focusing on culture and lifestyle, Radio Donna has an important referral function in the linear nature of the public broadcaster. Radio2 for its part is the guide for active audiences in all age-brackets, thus furthering social cohesion between the regions, Flanders and the world. In television this role is assumed by channel Eén (One): it addresses as many groups of viewers as possible by means of extensive newscasts and current affairs programs, with additional brief newscasts in the mornings and afternoons, and with entertainment programs, thus having a cohesive function for the largest possible groups of viewers. Finally, the instructive function in radio is taken by Radio1, which is to be a window on the world with information embedded in a varied mix of programs. In television this task is fulfilled by Canvas, which caters for the critical extra-value seeker with striking stories from the home front and abroad and with instructive programs.

Ketnet (on television) and Stubru (on radio) are generalist stations for particular target groups: the former has Flemish programs for children and the latter news and cultural programs for 12-to-25-year-olds. Specialist thematic programming consists of three elements: news (reinforced by the *vrtnieuws.net* site and in the future by Nieuws+), culture (Klara radio and a new, as yet to be launched digital thematic channel as soon as the new public-service contract becomes effective) and sports (on Sporza Radio, *Sporza.be*, and in the future on mobile phone) with the emphasis on greater interactivity and greater potential for navigation.

The mission common to all VRT brands is to appeal to as wide an audience as possible, irrespective of age, gender or social group. This is quantified in the following criteria measuring the performance of the public broadcaster in terms of coverage:

- VRT as a whole: at least 90% of the population listens to or views VRT programs on a monthly basis;
- Television: at least 80% of Flemish viewers view VRT programs for at least 15 consecutive minutes (on a weekly basis);
- Radio: at least 80% of listeners listen to VRT programs for at least 15 consecutive minutes (on a weekly basis);

. Newscasts and information magazines (television and radio): coverage of, on average, 60% of VRT viewers per day (i.e. at least 25% of the program, linear or by request), and on average 80% of VRT listeners per day (i.e. at least 10 minutes);
. Culture on generalist television channels via track 2[4]: at least 20% of the population on a weekly basis (as against 15% in the past);
. Education on generalist television channels via track 2[5]: at least 25% of the population on a weekly basis (as against 10% in the past).

### 3.4 New areas of attention with respect to quality

VRT must become a quality brand. Quality becomes apparent in content, form and language of the programs. A distinction is made between four dimensions of quality. *Public* quality refers to the extent to which the broadcaster correctly fulfils its public mission without diminishing the strongest possible link with the media user (*functional and attributed* quality). Program makers must respect *ethical* quality and meet the most stringent standards of *operational and professional* quality. These dimensions of quality have, for the first time, been laid down in the new public-service contract as part of the performance criteria. VRT must also undertake to develop an adequate set of tools with which the dimensions of quality can be monitored, and must submit an annual progress report on the subject.

*In the area of programming*

The public-service contract renews the emphasis on Flemish anchoring, which takes the form of Flemish (co-)productions[6], the target figure for the new contractual term being 50% of the total output on the generalist channels between 18h and 23h. As far as music is concerned, at least 20% of music-listening time on radio must be spent on Flemish production, and at least one of the five VRT radio stations needs to be clearly branded as a station with a Dutch-speaking character. To meet the needs of the hard-of-hearing and the partially sighted, it is intended to extend subtitling to 95% of programs by 2010. The modernization of websites will be carried out with the greatest possible focus on the Blindsurfer label.

*In the area of production*

VRT's own production facility will be transformed into a full-fledged division, the idea being to use all in-house expertise to continue making news and current-affairs programs, strategic programs and programs intended for crucial time-slots in the most cost-effective way possible. To this end a 'Cell Innovation and Development' will be set up. Still, VRT will continue its co-operation with Flemish production companies, although subcontracting will never involve news or current-affairs programs; strategic programs will in principle still be made by VRT itself.

The practice of subcontracting to selected production companies within a strategic partnership may be useful and even necessary for crucial programs which VRT cannot make on its own. In this respect the outsourcing of programs as well as the role of external production

[4] The definition of art programs is a broad one (e.g. documentaries). The track1 programs with (popular) cultural items are not included here.
[5] The programs meant here are documentaries about science and technology, medicine, natural science, animals, history, practical know-how (cooking, gardening, decorating) and didactic programs on Ketnet.
[6] Flemish anchoring can be ensured via VRT's own production company Ispro, in co-operation with the Flemish Audio-visual Fund, and via strategic partnerships with outside production companies.

companies such as *Woestijnvis*, a practice initiated several years ago by then managing-director Bert De Graeve in order to refurbish the public broadcaster's tarnished reputation, is not entirely without its critics. "Mr. De Graeve needed the help of small but sharp outfits in order to turn his own unwieldy company around. Ten years on, VRT is swamped by outside suppliers of programs", writes Frank Demets, a journalist of *Knack* (6 September 2006). He goes on to claim that the public broadcaster bought outside programs to the tune of €6 million in 1996 and that Mr. De Graeve quadrupled that sum to €25 million. In 2005, when Mr. Mary held sway over VRT, the cost of ordering programs from close production companies is said to have soared to as much as €82 million. However, these figures definitely look more modest if the share of these programs in total transmission time is taken into consideration. An article by Rik Boey (13 April 2006) shows that in 2005 Flemish production companies account for 'a mere' 27%[7] of Flemish programs on VRT, i.e. some 50% of total television fare.

*In the area of technology*

VRT's linear services, as laid down in a scheme of programs, obviously remain at the core of the public broadcaster's mission, but the new public-service contract provides for the possibility of enriching linear services with non-linear multimedia services, the aim being to enhance the media user's comfort (Visienota VRT, 2005). One such service involves a thematic channel, of which a cross-media cultural project has been the subject of extensive discussions in the press with respect to the digitization of VRT. The project would certainly meet the wishes of the cultural sector as well as the minister for cultural affairs, but it will not be available before 2007 at the earliest. Moreover, a number of tricky matters still need to be solved: the cost is forbidding (€13 million) and the channel must have a potential coverage of at least half a million Flemish viewers with digital sets. One of the most important ambitions of the public broadcasters is the development of digital channels (Visienota VRT, 2005). The VRT, however, has to deal with conflicts involving the private broadcasters, who have recently been united in the POF (*Private Omroep Federatie*, Private Broadcasting Federation). For now, the VRT received the permission to launch just one digital channel, a cultural channel. The penetration of digital television in Flanders is indeed not very successful yet. Since 1997, the only digital offer in Belgium was the cable transmitted Canal Digital. It offered a big amount of television channels and a digital screen quality. However, this offer only attracted 60,000 subscribers. In 2004 *IN.DI Interkabel* (an association of cable companies) started with a digital offer of the Flemish television channels, but this initiative was not really a success either. The proper kick-off of digital television in Flanders started in June 2005 with *Belgacom TV*. As a reaction to this, *Telenet Digital TV* proposed a digital offer in September 2005. The first results were a bit of a disillusion. In April 2006, Belgacom TV had 50,000 subscribers, Telenet Digital TV 150,000. TV Vlaanderen started in 2006 and offers digital television through satellite. The exact amount of subscribers of this fourth digital operator is still unknown at this stage (Petitjean & De Ruyter, 2006).

## 4. Historical Outline: The Netherlands

Despite its open borders, international orientation and its central location between the bigger European countries the Netherlands has a peculiar tradition with respect to television and media that is closely related to the country's overall socio-political structure of the past century. The Dutch system of "segmented pluralism" in which social groups and civil society

[7] This is the answer given by the minister, Mr. Bourgeois, to a question asked by Carl Decaluwé, MP (CD&V, the Flemish Christian-democrat party).

play a vital role represents an interesting alternative to media systems relying mainly on either the state or the market. But at the beginning of a new century this unique Dutch model is eroding rapidly and is starting to resemble a more European or even global media model in which liberal policies and commercial media markets dominate. Over the past two decades the Dutch media have changed almost completely, and public information has shifted from a merit good to a market commodity, mainly as a result of 20 years of liberalizing national and European broadcasting and telecommunications policies. Consequently, the Dutch television sector, has become increasingly internationalized. Initially, the Netherlands has chosen a broadcasting system that is neither like the ones in other European countries nor a commercial broadcasting model, as in the U.S. or Luxembourg, but a unique solution to the problem of how to allocate a scarce resource on the basis of serving the needs and interests of society which is commonly characterized as pillarization (Lijphart, 1975). In this system, broadcasting was left, neither to the state nor market, but to social movements that had already established their own organizations in most domains of social life including politics, education, health care, culture and leisure (Bardoel, 2001; Van der Haak & Van Snippenburg, 2001; Brants & McQuail, 2003).

Since the liberal bourgeoisie dominated the state apparatus until the introduction of general elections at the beginning of 20th century, three social groups, being the orthodox protestants, the roman catholics and the social-democrats, considered themselves underprivileged. They all hoped to gain from this pillarization process that provided for a weak state and strong civil society. The ideological foundation for this strategy can be traced back to both the Calvinist and Catholic social ideologies that can be labeled respectively as "cultural sovereignty" and "subsidiarity" (the latter concept has obtained wider usage more recently in the context of European integration). As a result the liberal-conservatives elite was left with no other option than to become the fourth pillar in Dutch society.

## 5. The Present

### 5.1 The Dutch television market

At present three large parties dominate the Dutch television market (Bardoel & Van Reenen, 2004; Netherlands Media Authority, 2002). The public broadcasting system, HMG and SBS all have three nationwide channels. Commercial television in the Netherlands is – with the notable exception of Talpa, owned by foreign companies who enjoy minimum program obligations (see Machet et al., 2002), other than the provisions of the European Television without Frontiers. There are a total of 19 national channels, ten/nine of which are generalist and mainlyoperated by the three large groups that own three channels each and there are nine thematic channels operated by other commercial broadcasters. In 2005 John de Mol, one of the founders and former owners of Endemol production company, launched a new channel Talpa (which means 'mol' or 'mole' in Latin) that has a market share of about 5 percent and plans to launch a second channel in 2007. At present almost all television households are connected to cable and/or satellite. This means that all domestic television channels reach all households. In 2004 the television channels available free-to-air in Dutch households are the following (data over 2004, 24 hours).

*Table 3. Main Public and Commercial Television Stations and their Audience Shares (6:00 p.m. – 12: 00 p.m.; Population 6 Years and Over)*

| **Station** | **Audience Share 1990** | **1994** | **1998** | **2002** | **2004** | **2005** |
|---|---|---|---|---|---|---|
| Nederland 1 | 24 | 16 | 13 | 12 | 126 | 13 |
| Nederland 2 | 25 | 17 | 17 | 17 | 199 | 16 |
| Nederland 3 | 13 | 18 | 10 | 8 | 75 | 7 |
| **Public Television Total** | **62** | **51** | **40** | **37** | **39** | **35** |
| RTL 4 | 21 | 26 | 18 | 17 | 17 | 16 |
| RTL 5 | - | 6 | 4 | 5 | 4 | 5 |
| RTL 7 | - | - | 10 | 6 | 6 | 5 |
| **RTL Netherlands Total** | **21** | **32** | **32** | **28** | **26** | **26** |
| SBS 6 | - | - | 10 | 11 | 11 | 12 |
| Net 5 | - | - | - | 5 | 5 | 5 |
| Veronica | - | - | - | 4 | 4 | 4 |
| **SBS Broadcasting** | **-** | **-** | **10** | **20** | **20** | **21** |
| Talpa | | | | | | 8 |
| Others / Video / DVD | | | | | | 10 |

As Table 3 demonstrates the ten generalist channels remain the dominant actors in Dutch television. Almost fifty per cent of the program output of the public channels contains information and education and on commercial channels the proportion of these program categories is about 30 per cent. Over half of the programs on commercial channels are fiction and on the public channels this proportion is about 20 per cent. The audience share of the three main suppliers was 85 percent in 2004.

## 5.2 A new Media Act

The arrival of commercial broadcasters has greatly changed the media landscape. A new *Concession Act* (2000), which is a new version of the Media Act, guarantees the public system three television channels and five radio stations until 2010. The Act places the task of providing public radio and television services in the hands of a single concession holder, NOS (now NPB), which ensures that licensed broadcasters, as participants in the concession, jointly fulfill their statutory duty of providing high-quality and diverse programming which reaches both large and small sections of the Dutch population. To this end NPB accounts for the way in which the public broadcasting system performs its tasks in a "concession policy plan" (published to obtain a ten-year concession, see NOS, 2000), and in its annual budgets. A review will be carried out after five years to determine whether broadcasting associations can remain within the public system.

Although the Media Act leaves the fundamental basis of the Dutch public broadcasting system unchanged, the central control of production, and particularly of programming, has been strengthened. The Executive Board of NPB and network coordinators have a key role in determining the general program policy, the network profiles and the positioning of programs in the broadcasting schedules. The new Act also introduced a "double legitimacy" for the public broadcasters based on a tiered system for separate broadcasting associations and also for public broadcasting taken as a whole. The new "public accountability" policy of public broadcasting (Bardoel & d'Haenens, 2004; Bardoel & Brants, 2003) implies both external

accountability measures through more public dialogue and public assessment of performance (i.e. the review committee) and internal quality control (i.e. a "quality card"). In addition, individual broadcast associations must also demonstrate that their members "can influence policy in a verifiable and democratic manner" (NOS, 2000, p. 11). However, there has also been growing discontent on behalf of the public with the services and content of the public channels and a growing feeling that the organizational model is outdated. The recent sharp decrease in membership of public broadcasters among Dutch households, with the exception of new entrants such as BNN, Link and MAX illustrates the growing gap between the groups that constitute the public service broadcasters and the wider public.

## 6. Towards New Media Policies

In 2002 a new centre-right government, Balkenende (I), introduced structural cutbacks to the public broadcasting system to the sum of Euro 30 million, and only one year later Balkenende (II) reduced the annual budget of 800 million Euro (2004) again by up to 80 million Euro in 2008. More importantly, the Government ordered a review by McKinsey into the efficiency of the public broadcasting system, as well as a study by the Scientific Council for Government Policy into the aims and obligations of the public broadcasters in the Netherlands. At the same time the Public Broadcasting Review Committee that evaluates the public broadcasters every five-year was initiated (Bardoel, 2003). In this respect, the public television and radio system has recently received scrutiny from a number of different fronts.

### 6.1 Public broadcasting review committee

The Concession Act provides for an evaluation of the performance of the public broadcasting associations by an independent review committee every five years. The first Public Broadcasting Review Committee carried out its evaluation and presented a report on the functioning of public broadcasting in April 2004. As its starting point the review assessed the self-assessment documents of the 20 broadcasting organizations that reported in the following areas:

1. program perspective: i.e. mission and identity, performance, co-operation;
2. audience perspective: i.e. reach, segmentation, distinctiveness, accountability;
3. organization perspective: i.e. organizational structure and culture, financial transparency, efficiency, innovation.

Altogether, 21 self-assessments (20 organizations and an assessment of the system as a whole), and a hundred interviews constituted the basis of the committees' assessment. The committee concluded that, taking public broadcasting associations individually, performance ranges from reasonable to good. It concluded that mutual cooperation however was seriously inadequate. As a result the program schedule and the public reach falls short of the target of 40 per cent market share. According to the public broadcasting organizations' own statistics, nine out of 16 million viewers are on the brink of turning their backs on public service broadcasters and are, generally speaking, only being retained by entertainment and sports programming. Furthermore, important groups such as the young, the less educated and ethnic minorities are not being sufficiently reached by the public broadcasting services. According to the committee, the cause of this situation lies mainly in the managerial structure. "The constellation of the existing system, aimed at organizing and managing distinction has, in its present form, become a serious handicap" (Public Broadcasting Review Committee, 2004, p. 113). There is too little focus on the viewer or the listener and too much attention on internal managerial problems within the system.

Although advocated by some political parties and program-makers pressing for more decisiveness, the committee did not opt for a national broadcasting structure like the BBC**,** but rather to fit in with the specific Dutch broadcasting tradition. In the committee's model of the future, existing broadcasting organizations should focus on producing "identity programs," for which they are awarded a quarter to half the current number of program hours. The remaining hours are to be commissioned by NPB within the agreed network or broadcasting profile, so that both the broadcasting organizations and independent producers will have a role. In the committee's view this open model will allow external plurality to develop in line with the dynamics of present-day society, while at the same time securing enough innovation and professionalism. In the political world, there was support for the committee's critical analysis and its sense of urgency. The Minister responsible for the media has passed a legislative proposal that envisages the development of a collective strategy for public broadcasters through performance agreements both between broadcasting institutions and with the Government. Also, the role of the Executive Board of NPB is further strengthened to secure clear direction for the programming on radio and television channels. Finally, a supervisory board, independent of the executive of the broadcasting associations, is established as part of the package of short-term reforms that was introduced by January 1st, 2005.

### 6.2 Public broadcasting policy plan 2007-2011

In its most recent Policy Plan for the years 2007-2011 the Executive Board of Netherlands Public Broadcasting defines as its mission "to be there of and for everybody and to bond Dutch society with programs that inform, inspire and entertain". (Meerjarenbegroting, 2006: 4). In response to a "negative spiral" of a decreasing reach of public television and radio stations, especially among the young, and of budget cuts NPB changed its television schedule drastically. As a result of the introduction of Talpa in the autumn of 2005 the total market share of public TV stations dropped to 35% in 2005, and the reach among viewers under 50 dropped 7% within a year. The old supply model, in which all of the three TV channels were programmed by three broadcasting organizations and which produced a Christian-oriented Nederland 1, a popular Nederland 2 and a progressive Nederland 3, was replaced by a model in which the Executive Board took over the authority to programs all TV channels. The new, more viewer oriented programming model resembles the practice in most neighboring countries in which one attractive, general interest channel is supplemented by a more special-interest second channel. The third channel is explicitly geared towards a younger audience, which means – in a PSB context – younger than 50 years old. After a lot of debate and conflict and even occasional strikes, the new model became operational by October, 2006 and first research shows that especially the first network, that became market leader, and the third network, that actually attracts more young viewers, seems to be successful. NPB also wants to strengthen program innovation by reserving 1% of the budget for this purpose.

For public radio the both the market share and the reach among the population have dropped considerably recently, to 28.5% and 43.2% for the first half of 2006 respectively. Especially Radio 1, the news and sports station has lost listeners to regional stations, music stations and also the Internet and has problems to reach a younger audience. After restyling operations both Radio 2, a music stations for the age group of 35-55 years of age, and Radio 3, a pop-rock station for the age group of 15- 34, have regained market positions in recent years. Netherlands Public Broadcasting also took over some private, non-commercial cable radio stations a few years ago: the Concert Station (Concertzender), that brings more specialist classical music, world music and jazz, next to the more mainstream classical music

station Radio 4, and FunX that presents urban music for a more multicultural young audience, next to the pop station Radio 4 that attracts more white listeners.

Dutch public broadcasting is very active on the Internet, and the public broadcasting domains altogether rank number 2 of the most frequently visited internet domains in the Netherlands. Especially www.uitzendinggemist.nl ('broadcasts missed') is very successful with about 4 million consultations a month. As a result very popular TV broadcast attract an extra 1% of the audience via this new platform.

Dutch public broadcasting has also realized a bouquet of digital television theme channels, some of which are offered by NPB and others stem from initiatives by one or more individual broadcasting organizations. Due to the slow penetration of digital set top boxes, the tight financial budget and copyright problems the will be no new initiatives on a short term. y December, 2006 the analog distribution of TV stations will be terminated.

### 6.3 A new agenda for Dutch media policy

Also in 2005, the long awaited recommendations of the prestigious Scientific Council for Government Policy (WRR, 2005) on a new agenda for Dutch media policy was published. In its report "Focus on Functions: Challenges for a Sustainable Media Policy" the council concluded that currently Dutch media policy demonstrates tunnel vision by concentrating solely on traditional media and infrastructures, while ignoring other important sectors of the media. Therefore, the public interest or pluralism in the media should no longer be looked at in terms of a single medium or sector, such as broadcasting or the press, but should include the supply of content and its use via other media, whether public or private, on the basis of important social functions. This new policy model requires constant monitoring of the media landscape to identify potential risks to the plurality of supply and demand and a need for a more selective and pragmatic government interference. In relation to public broadcasting the WRR considers the current organization of public broadcasting as just one of the conceivable options.

The public interest is served first of all by the functions of a high-quality news service and the formation of public opinion and social debate, and, to a lesser extent, the functions of arts and culture and specialized information. Although private parties, according to the council, also contribute to these functions, a sufficient and continuous level of these functions cannot (yet) be guaranteed without forms of public service. Other functions such as light entertainment, advertising and public relations should in principle be excluded from the public sector and do not form a core task of public broadcasting in the future. Looking at the organization the council also reviewed four possible models for the structure of Dutch public service broadcasting, ranging from a model with no public service at all to a "mixed and open model" for public broadcast media. In the latter model, that the council recommended the implementation of the public interest differs according to function. The news service should be provided by an independent, public organization as NOS presently does. The function of opinion formation and debate could be left to a wide range of broadcasting associations that can claim support of substantial sectors of civil society (more explicitly than is now the case with Dutch broadcasting organizations). Finally, the arts, culture and education should be delivered by an open and generally accessible system of tendering.

Looking at the conclusions of the review committee and the scientific council and at consultations with some 30 other stakeholders, there seems to be a growing consensus on the future of public broadcasting:

1. The management of a traditionally decentralized public broadcasting system should be centralized in order to cope with commercial competition and the challenges of new technologies and a rapidly changing, ever more multicultural society;

2. The role of broadcasting associations should be restricted to their core task, i.e. producing "identity programs" and contributing to opinion formation and social debate. Network scheduling should be left to the executive board;

3. Public broadcasting should be opened up for independent producers in order to enhance representation of new groups (the young and "new Netherlanders") and foster innovation in the public system.

After fierce negotiations between coalition partners the Dutch government tabled a compromise in which these principles are included. In the draft for a new Media Act the NOS will provide news and information, the broadcasting associations will specialize in opinion and debate and therefore lose half of their current budget, and for arts, culture and education there will be a tendering system in which both independent producers and public broadcasting associations can compete. The proposal has far-reaching consequences for all broadcasters, and was therefore the subject of fierce debate. Most broadcasting associations strongly opposed the proposed focus on identity programs, the reduced room for broad entertainment-like programs and the increasing power of the Executive Board of NPB. The Executive Board welcomed its more powerful role in programming and budgetary matters, but highlighted the program and budget guarantees that individual licensees will keep. In the public debate there was concern about the proposed abolition of NPS, which in its short existence has obtained a reputation in current affairs and cultural programs as well as content for ethnic groups. The proposal is another example of a typically Dutch, highly complex compromise, but the sudden fall of the centre-right government Balkenende (II) leaves all options open again unexpectedly. After new election in November 2006 a new government coalition of another kind will certainly develop another compromise that offers a middle way between tradition and renewal. (…)

## 7. Conclusions: A Comparative Perspective

Nowadays, at the dawn of the 21st century, broadcasting can still be considered as both a visible indicator and the result of developments in society. Not only technical opportunities, but also political and economic, legal and cultural conditions have proven to be co-determining the ways in which broadcasters can/should function. Hence these contextual factors have influenced broadcasting institutions, their production and distribution mechanisms, as well as consumption patterns. As was illustrated at length in the above sections on the public broadcasters in Flanders and the Netherlands, these tremendous contextual changes – i.e. the commercialization and digitization of the broadcast sector which led to a multiplication of distribution channels and an overall unfavorable political climate with governments seeming less and less willing to provide healthy financial conditions – have not automatically led to uniformity, nor has commercialization led to extreme simplification or a unified western broadcasting model. Even within the European Union one cannot speak of a uniform broadcasting model.

In the 1980s and 1990s more commercialization led to competition and content convergence between the commercial channels and the public broadcaster, with a huge identity crisis as a result for the latter. Meanwhile, better times have come along for the public broadcasters, as after two decades of "dual broadcasting" in Europe, the demise of public

service broadcasting is not yet as serious as forecast. In recent years, public broadcasters in some European countries even managed to regain public attention or program rights they had lost to their commercial counterparts. Public broadcasters are currently at the heart of public attention and seem to have regained their very reason for existing. Nevertheless, broad public discussion and concern are needed as the basic problems of public broadcasting concerning mission and funding are still numerous.

As of the Protocol to the Treaty of Amsterdam on public broadcasters in the EU member states (October 2, 1997), the duality of the European broadcasting scene has been recognized and public service broadcasting is regarded as a cornerstone of democracy. Therefore, its funding is a member state preserve, provided this is used for the fulfilment of the public service remit, in a transparent fashion and not affecting competition. As a result of this stance compromising between cultural and economic arguments, the demand for a more detailed account of the contours of public service broadcasting, and of public (plus)value becomes even more essential. Hence it is not really surprising that in some EU countries, of which Flanders provides a clear-cut example, a tendency can be noticed towards the development of agreements and contracts between the public broadcaster and the government, especially when it comes to mission and funding procedures.

As a result of technological convergence, the barriers between the classical media platforms can no longer be maintained. Hence more and more voices plead in favor of a functional approach to the media: i.e. departing from the societal functions that the entire media scene needs to comply with. The Netherlands offers an example where a far reaching and more integrated approach to the media is being adopted. Nevertheless, as linear viewing is still going to be the dominant use for the decade ahead, it is certainly still too early to act upon the supposed substitution and interchangeability of media functions. At present national public broadcasters in Europe are still crucial conveyors of political and cultural communication to the public in their respective countries. Commercial media make their contribution too, but cannot guarantee freely accessible, reliable information, innovative culture and deliberate education. Public broadcasters will need to prove to be all the more necessary in a context of rampant commercialism, characterized by a skewed program supply addressing mainly attractive demographic audiences. As a consequence of the changing context, and as we have seen in our two neighbouring countries under study, public broadcasters have started to renew their remit and their relation to the main stakeholders, while also reorganizing their operations. They are at best halfway through this transition phase.

Looking at the contexts within which both public broadcasters have worked on their transition in Flanders and the Netherlands, a fragmented society is a striking feature, but clearly different institutional choices were made: the Dutch pillarized broadcasting model in a unitary country contrasts with a unitary public broadcaster in Flanders, as one of the three regions in a fully federalized Belgium. Also in the introduction of a dual broadcasting system different choices were made. In the Netherlands the main political actors – the social-democratic party and, more importantly, the Christian-democratic party – have prevented the coming of commercial broadcasting until European legislation, i.e. the Directive 3Television without Frontiers", made this policy impossible. As a result, national initiatives for commercial television were blocked and commercial broadcasting eventually fell in the hands of foreign owners, RTL and SBS. In Flanders national publishing houses played a key role in the introduction of commercial broadcasting (nine Flemish publishing groups had a minority share of 11.11% each; after a brief interruption of the Dutch VNU as a shareholder (44.26%), two Flemish publishing companies, Roularta and the Persgroep, each obtained a 50% market share). Therefore, the Flemish commercial television market can be characterized by strong

national ownership and moderate competition, whereas the Dutch market combines foreign ownership with fierce competition.

At present, Dutch public broadcasting still has the handicap of a decentralized structure that makes it difficult to respond to new challenges, coming from commercial competitors earlier on as well as from crossmedia providers more recently. Politics and public broadcasting have been trying to modernize and centralise the system in order to make it fit for the future already for fifteen years now, but due to a lack of consensus, between the political and the public broadcasting system but also within the Hague and Hilversum, only slow progress is made and often ambitious policy plans are followed by limited action. Not only because of a Calvinist tradition but also due to the great number of actors involved, the emphasis lies on rational-formal decision making, which resulted in over twenty major and minor changes in the Media Act over the last decade. In Flanders, there are just two main actors, the Flemish government and the unitary public broadcaster VRT that deal with each other, mainly through negotiations and management contracts, and where public broadcasting tries to gain more autonomy in order to get away from a tradition of political interference and clientelism. The Flemish public broadcaster has been successful in realizing an almost total make-over, from a highly politicized and bureaucratic BRT to a much more audience-oriented and flexible VRT. Consequently the roles between Dutch and Flemish public broadcasting have been reversed. Where in the past the Dutch PSB model was often seen as an example to be followed in Flanders (e.g., the introduction of third parties programming years ago), now VRT policies are often considered as good practices for Dutch broadcasting (e.g., the introduction of life style groups and psychographic research as a basis for program scheduling).

All this means that public service broadcasting policies and practices in both neighbouring countries are gradually growing towards each other, although each maintaining its own intrinsicalities, depending on reigning cultural and political sensitivities.

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