



VLAAMSE REGULATOR VOOR DE MEDIA

Onafhankelijk toezichthouder voor
de Vlaamse audiovisuele media

Media concentration in Flanders

English version - 2016

Table of content

1.	Introduction	3
2.	Overview of the Media Concentration Report 2016	5
2.1	Chapter 1: Defining the Flemish media industry	5
2.2	Chapter 2: Flemish media groups	6
2.3	Chapter 3 : Information on media concentration	9
2.4	Chapter 4: Stimulating diversity - remedies and suggestions for policy makers	10
2.5	Chapter 5: General Conclusion	10
3.	Main findings of the Media Concentration Report 2016	11
4.	Table of contents of the Media Concentration Report 2016	15
5.	Translation of the list of figures and tables	18

1. Introduction

The task of reporting on media concentration was granted to the Flemish Media Regulator (Vlaamse Regulator voor de media (VRM)) by the Flemish media decree.

On a yearly basis VRM presents a report to the Flemish policy makers containing information on the positions occupied by agents in the Flemish media sector. This report is also made available to the general public (via website and print copies).

The current text aims at making VRM's report on media concentration 2016 accessible to English speakers.

The underlying text will function as a manual on how to find a way in the Dutch version of the report, rather than as a translation of the full text of the report.

This manual consists of

- an introduction describing the content of the report
- an overview of the different chapters
- the main findings of the media concentration report 2016
- a translation of the table of contents of the report
- a translation of the lists of tables and figures

Concentration can be approached from many angles. From the publication of its first report in 2008, VRM opted for an approach from an economic point of view. We therefore focus on the relationships between the different players in the market, rather than e.g. performing content analysis.

VRM uses Michael Porter's concept of value chains in order to define the media sector.

In a value chain, all links where added value is created are identified, thus tracing a chain from content producer, over aggregator, via distributor, to the final customer.

This chain can be less or more fragmented. Within every link of the chain a different form of competition may exist (depending on the number of suppliers and their relationship to the demand in the following link).

Andersen (2002) drew a value chain for the audiovisual industry for the European Commission.

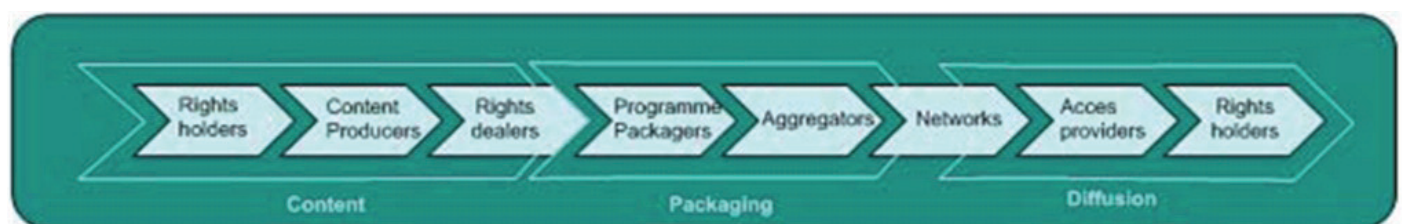


Figure 1: Value-added chain for the audiovisual industry
Source: Andersen, European Commission (2002).

The markets for media products are double-sided markets. On the one hand, consumers buy media products containing information and entertainment. On the other hand, advertisers buy consumers' attention for their advertisements. The chain must thus be followed in two directions.

While studying media concentration, one can differentiate between horizontal, vertical and cross-medial concentration.

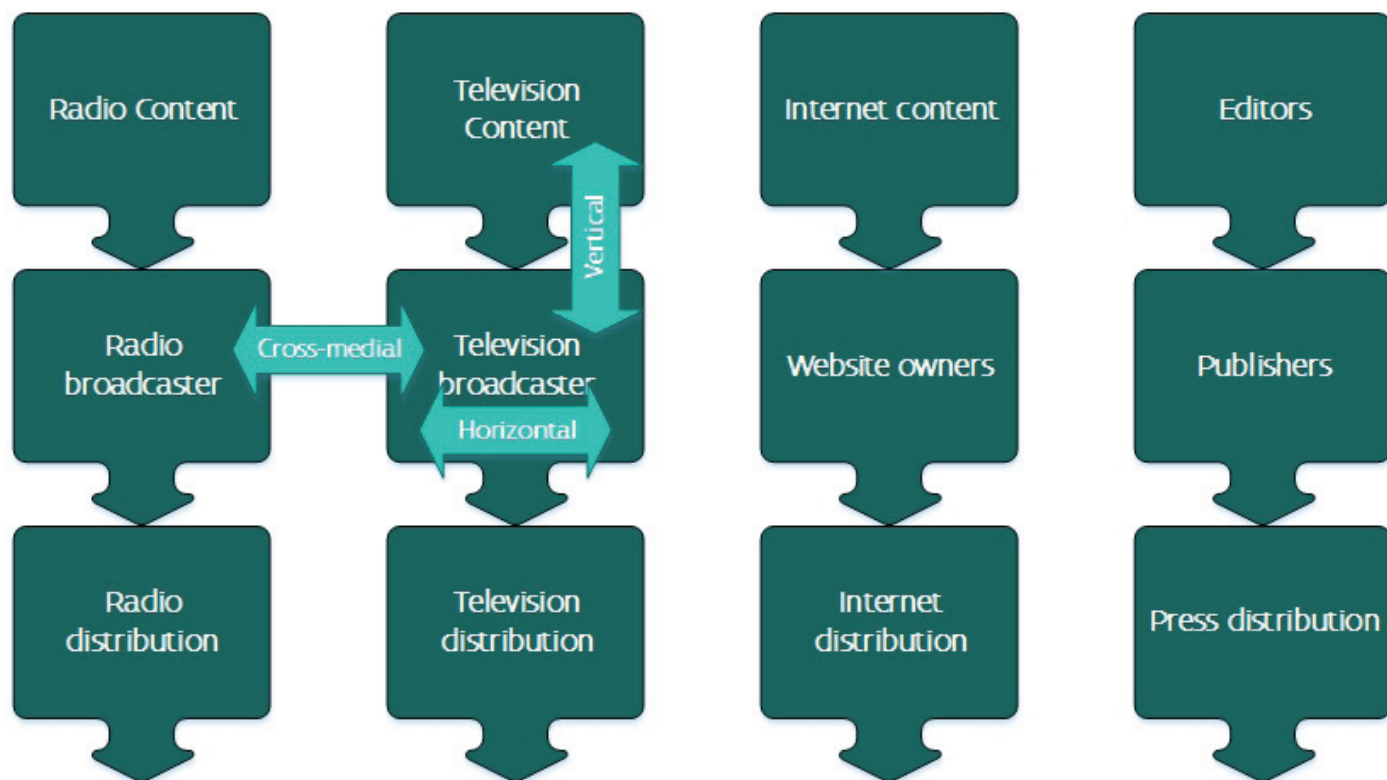


Figure 2: Different types of media concentration
Source: VRM based on M. Porter

- Horizontal concentration occurs when the number of players within one link is limited
- Vertical concentration occurs when following links in one chain are owned or controlled by a limited number of players
- Cross-medial concentration exists when there is an entanglement between the suppliers of various media products

In the first chapter of the report the Flemish media industry is defined.

Flemish media groups are described in the second chapter. Information on shareholders, company structure and product offerings is given for every media group.

In the third chapter, information on media concentration is quantified and financial results and facts and figures on popularity of media brands are given.

Throughout the report, interesting facts that do not fit the general framework are elaborated in so-called "Information Fragments", with a specific layout.

The fourth chapter gives information on measures that are taken to enhance diversity and media plurality in Flanders. It also mentions possible new legal initiatives, stressing a number of them as policy suggestions.

The conclusions of the report are formulated in chapter 5.

2. Overview of the Media Concentration Report 2016

2.1 Chapter 1: Defining the Flemish media industry

In the first chapter of the report, the Flemish media industry is defined. The value chains of radio, television, internet and print media are depicted and the players that are present in every link are identified. A colour code gives a first indication of the degree of concentration. Figure 3 is the value chain for the internet.

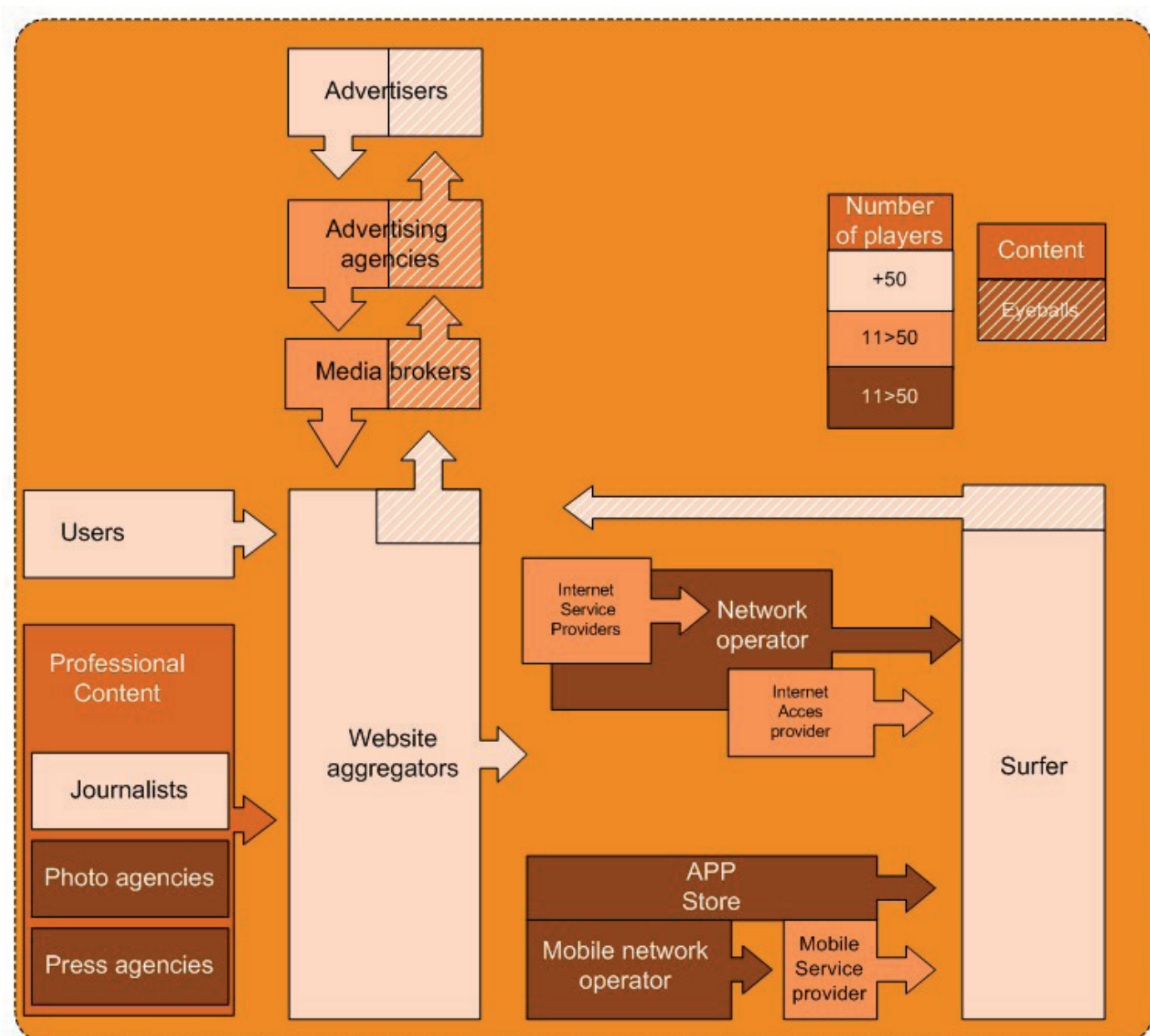


Figure 3: Internet value-added chain

VRM lists all companies that are active within a certain link of the value chain, together with their product offering and company number (as shown in table below).

PUBLISHERS OF NEWSPAPERS

PROVIDER	COMPANY NUMBER	OFFER
De Persgroep Publishing nv	403506340	De Morgen
		Het Laatste Nieuws/De Nieuwe Gazet
Mediahuis nv	439849666	De Standaard
		Gazet van Antwerpen
		Het Belang van Limburg
		Het Nieuwsblad/De Gentenaar
Mediafin nv	404800301	De Tijd

Table 1: Publishers of newspapers

Next to the four media types (radio, television, print media and internet), VRM describes convergence and cross-media trends in the Flemish media landscape.

We conclude the chapter with a first indication on horizontal media concentration (by counting the players present in the different links).

HORIZONTAL CONCENTRATION

MEDIUM	CONTENT	AGGREGATION	DISTRIBUTION
Radio		National radio (private and public)	Radio signaling
		Local radio	
Television	Facility companies	Television organizations (linear en non-linear)	Service providers & network administrators
	Production houses	Operating companies for regional television	
Print media	Press and photo agencies	Newspaper publishers	Distributors press
		Publishers free press	
		Publishers magazines	
Internet		Websites	Internet service providers / network providers
		Social media accounts	Mobile operators
		Apps	Social media networks
			App stores

Table 2: Horizontal concentration based on number of players in the value chain¹

Legend:

Number of players
>50
11-50
1-10

2.2 Chapter 2: Flemish media groups

A limited number of Flemish media groups is active in the Flemish media landscape via different media products. Table 2 gives an overview. Some of these groups are joint ventures of other groups, as can be seen in Figure 4.

¹ Within the local radio's there is chain formation. This isn't reflected in the table because the individual local radio's were counted and not the structures behind these radio's. Each local radio is run by another non-profit organization, but an individual may be the chairman of several associations. In practice several local radio's operate in this manner.

MEDIA OFFERINGS OF THE MAIN MEDIA GROUPS

Media group	Radio		TV		Newspapers	Magazines	Internet		Regie
	Content + aggregation	Distribution	Content + aggregation	Distribution	Content + aggregation	Content + aggregation	Content + aggregation	Distribution	
Concentra nv	x	-	x	-	x	x	x	-	x
Mediahuis nv	-	-	-	-	x	x	x	-	x
Corelio nv	x	-	x	-	x	x	x	-	x
De Vijver Media nv	x	-	x	-	-	-	x	-	x
Telenet bvba	x	x	x	x	-	-	x	x	x
De Persgroep nv	x	-	x	x	x	x	x	x	x
Medialaan nv	x	-	x	x	-	-	x	x	x
Roularta Media Group nv	x	-	x	x	x	x	x	x	x
Proximus nv	-	x	x	x	-	-	x	x	x
Sanoma Media Belgium nv	-	-	-	-	-	x	x	-	x
VRT nv	x	-	x	-	-	-	x	-	x

Table 3: Media offerings of the main media groups in Flanders

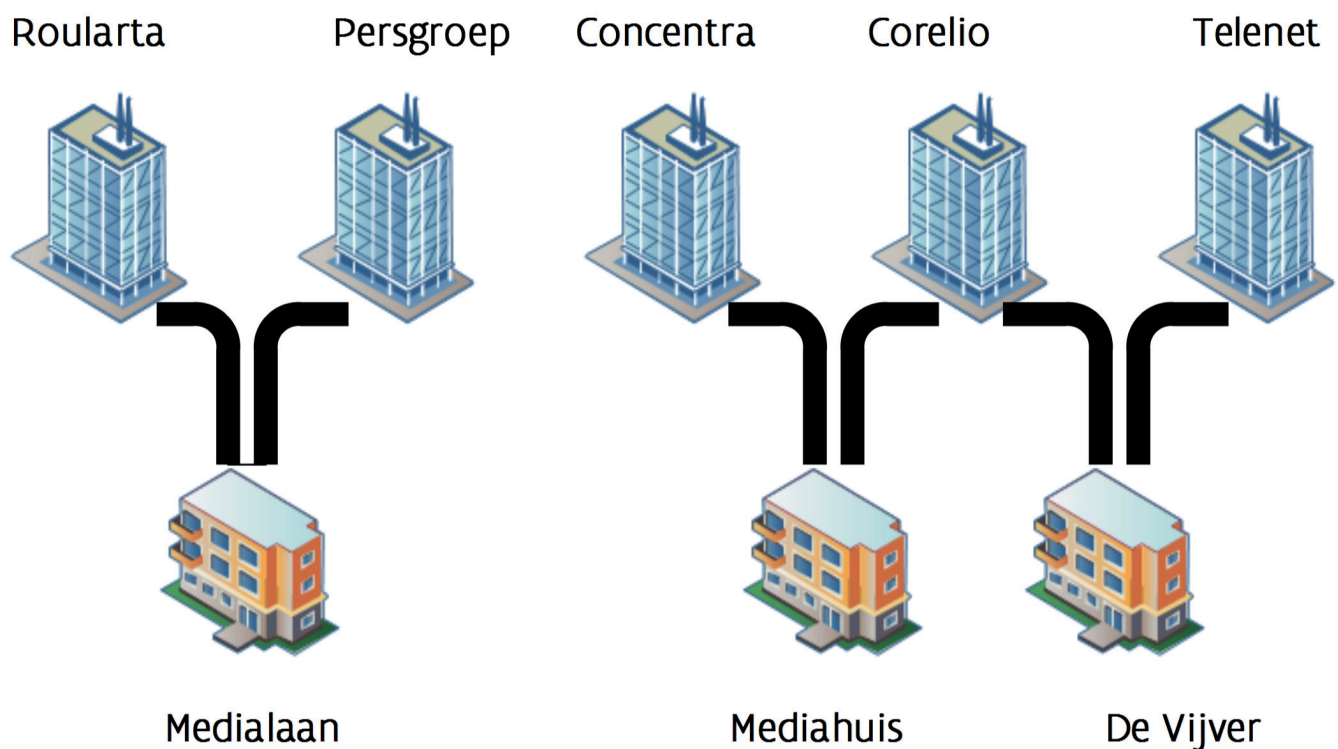


Figure 4: Media groups as subsidiaries of other media groups

For each group, an overview of the shareholders and the group structure is given, as well as an overview of the product offerings. An overview of product offerings per media group is given in a grid, citing the product names while distinguishing between different media forms and the different stages of the value chain. An indication of the geographical reach of the product is given by a symbol.

SHAREHOLDER STRUCTURE

CAPITAL

SHAREHOLDER

● Stichting De Zeven Eycken (Nederlands KVK 41085521)	91,30%
● Katholieke Impuls- en Mediafonds	8,70%
● Total	100,00 %

Table 4: Shareholders Concentra NV

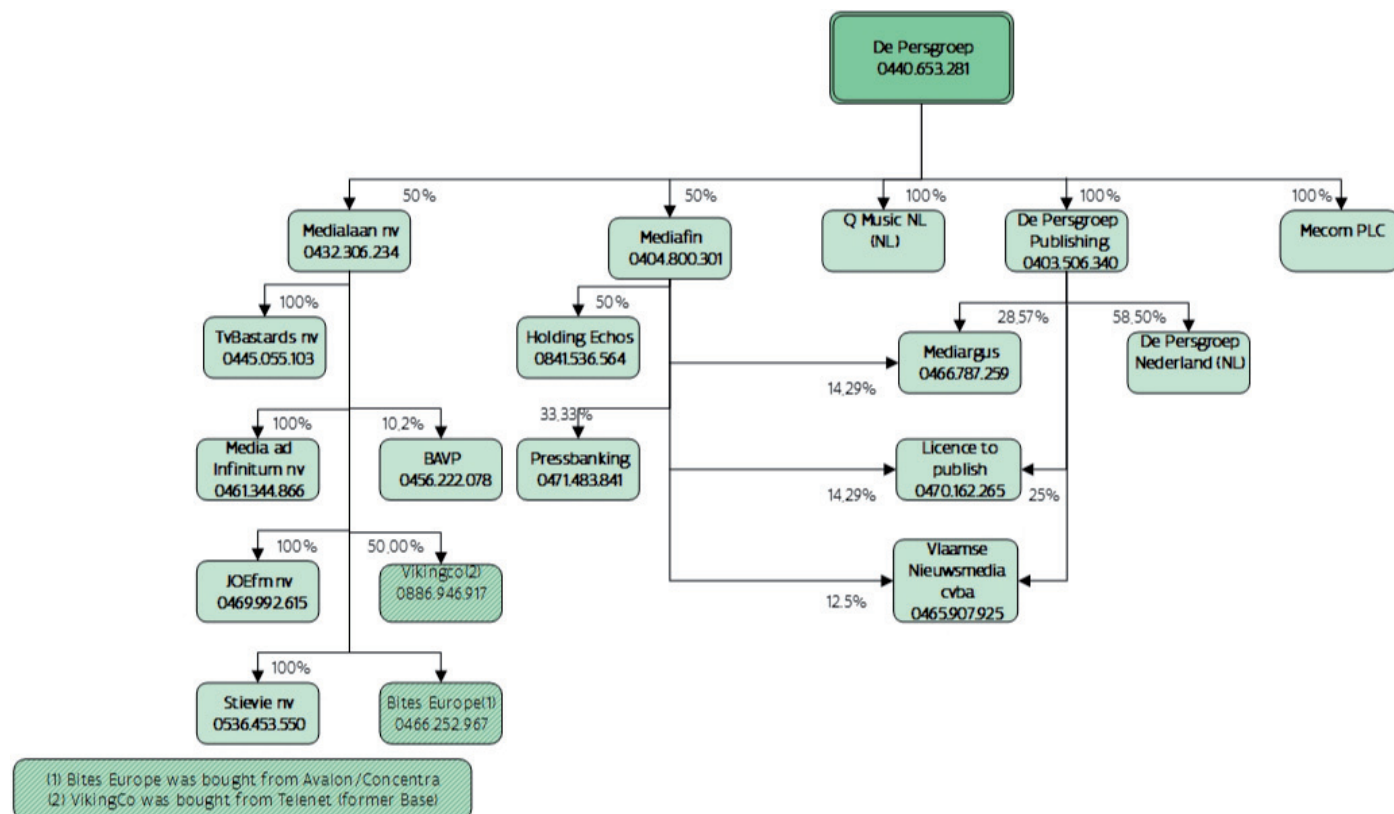


Figure 5 Group structure De Persgroep

Group name	Production content	Aggregation	Distribution	Reach
Radio		Product name		
Television	Product name			
Print media				
Internet				
Miscellaneous				

Figure 6: Product grid of a group

LEGEND OF THE PRODUCT GRID

● Product name	Product or activity under full control of the group
● (Product name)	Product or activity that was transferred to another group after the closing of the annual accounts
● Product name	Product or activity in which the group participates
●	Product available in or aimed at a part of Flanders (e.g. local television or regional newspaper)
●	Product available in or aimed at the whole of Flanders
●	Product with a French equivalent and aimed at the Belgian Market
●	Product aimed at a foreign market

Figure 7: Legend of the product grid

2.3 Chapter 3 : Information on media concentration

In the 3rd chapter of its report, VRM studies concentration for each media type.

First, vertical, horizontal and cross-medial integration are briefly described.

Secondly, there is an analysis based on financial information. A table with an overview of the most recent financial information of the main players in the specific link of the value chain is given, together with a graphic of the evolution of the average of these values over the last 10 years. VRM uses the following financial values :

- 10/15: Equity
- 20/58: Assets
- 70: Turnover
- 70/74: Operating Income
- 9901: Operating profit/loss
- 9903: Profit/loss before taxes
- 9087: Average number of employees

VRM calculates the average for all companies in a sector, and the year 2006 is used as a benchmark. The CPI (consumer price index) is also included in the figures. In Belgium, all companies have to report their financial statement to the National Bank of Belgium. The financial statements can be integrally consulted on its website.

FINANCIAL FIGURES

COMPANY NAME	EQUITY	ASSETS	TURNOVER	OPERATING INCOME	OPERATING +/-	+/- BEFORE TAXES	EMPLOYEES
	10/15	20/58	70	70/74	9901	9903	9087
• Mediaaan nv	73.549.187	230.519.109	256.692.269	313.759.007	43.892.347	43.606.881	531,6
• JOEfm nv	19.578.962	20.767.119	8.604.886	8.986.192	2.925.061	3.085.392	16,1
• Vlaanderen Eén nv	-4.787.660	4.619.800	8.922.843	8.949.881	888.002	811.953	20,8

Table 5: Financial figures 2016 national private radio



Figure 9: Evolution of average values 2006–2015 national private radio

Thirdly, there is an analysis based on audience shares. This information comes mostly from CIM. There are several figures taken into account:

- Radio: audience shares and average listening duration April-June 2016
- Television: audience shares 2015
- Print media: paid circulation (print+digital) and total print circulation
- Internet: daily average website visits 5-25 September 2016
- Social Media:
 - Facebook account: likes
 - Twitter account: followers

Instagram account: followers
 Google Plus account: followers
 YouTube channel: subscribers

These numbers were collected by the VRM in September 2016.

- Apps: the number of downloads as provided by Google Play, collected in the summer of 2016.

We measure media concentration by calculating C4 and Herfindahl (HHI) indexes. These are traditional indicators to measure concentration in an industry. The indicators can be calculated per product category, both on the basis of financial data such as sales, as well as on the basis of popularity data, e.g. viewers.

The evolution of the prices of media products is also studied in the third chapter.

Finally, the Flemish media landscape is situated in an international context.

2.4 Chapter 4: Stimulating diversity - remedies and suggestions for policy makers

The fourth chapter gives information on measures that are taken to enhance diversity and media plurality in Flanders. It also mentions possible new legal initiatives underlining a number of them as policy suggestions.

These measures were described according to an existing schedule that distinguishes restrictions, counterweight, economic intervention, transparency and organizational measures. Generally, it was noted that audiovisual media are subject to more rules than print media and internet.

POLICY MEASURES

CATEGORY	APPLICATION IN FLANDERS
• Restrictions	Application of articles 189-192 Media Decree DVB-T: wholesale model Signal integrity
• Tegengewicht	Must-carry, must-offer, event regulation and freedom of newsgathering Public service broadcaster VRT Fund Pascal Decroos for investigative journalism Religious programming Obligation of subtitling (news) programmes
• Economic interventions	MediAcademie Support of regional broadcasters Stimulation of the audiovisual sector Project grants for media initiatives Screen Flanders
• Transparency	Media concentration report Supervision of compliance by the public broadcasters of the Flemish Community's management Licences, broadcasting permits, notifications Media education programmes
• Organisational measures	Founding of VRM Belgian and European competition authority

Table 6: Policy measures to enhance diversity and media plurality

2.5 Chapter 5: General Conclusion

A general conclusion is given in the fifth chapter.

3. Main findings of the Media Concentration Report 2016

There are few radio stations that you can listen to across the whole of Flanders. There is a high degree of concentration, caused by the dominant position of the radio stations of the public broadcaster. The transition to DAB+ may possibly change that situation, since this technology would create space for more radio stations. DAB+ is stimulated by the government, and radio broadcasters are obliged to invest in this new technology.

At local level there are many players, but since they each are active in small areas, we can often speak of a geographic monopoly. In addition, there is a tendency to group local radios. The radio stations that are part of a chain represent 71% of the total number of active local radios. In 2017, there will be a new round of frequency allocation and the Flemish Government wants to take that opportunity to avoid this chain formation among local radios in the future. At the same time, a new category of commercial radio broadcasters will be created: commercial network radios. These radios are due for 2018 and will have regional coverage (around several cities).

In 2015-2016 there were several changes in the Flemish television landscape. Medialaan changed its youth channel JIM to a kids' channel named KADET, made for a specific audience of 8-12 year-old boys. It also changed the name of its channel 2BE to Q2. With the name Q2 they are making a link with the popular radio channel Qmusic. Medialaan also acquired the channel Acht by means of the acquisition of Bites Europe. It changed the name of Acht to CAZ and changed the programming to reach a male audience. SBS Belgium created a third channel, ZES, where the programming will consist of American series and movies. The (new) positioning of these channels can be understood in terms of advertisers' needs.

Despite the popularity of new types of TV consumption (OTT e.g. Netflix), traditional Flemish television broadcasters stand firm. The degree of concentration increases as you progress through the value chain. At TV production level, there is low concentration. There are many independent production companies. A bigger concentration can be found at the level of the broadcasters. Although occasionally new players join the market, they rarely manage to conquer a large market share. Because of the acquisition of Bites Europe by Medialaan and the introduction of a new channel by broadcasting company SBS Belgium, it is likely that the concentration will increase. Finally the distribution market is dominated by few players. Cable distributor Telenet is the largest player in this field. The Belgian cable network owners (Telenet in Flanders) were obliged by the Conference of Regulators of the electronic communications sector to provide a wholesale offer for analogue and digital TV, as well as broadband (but only in combination with digital TV). Following this regulatory decision, Orange started a digital TV distribution offer in Belgium in 2016, using the cable network.

An important evolution in television is the breakthrough of OTT (television distribution via the Internet). The Flemish television distributors have their own OTT players (Proximus TV Overal and Yelo Play (Telenet)). The TV broadcasters on their side also developed a joint OTT platform, STIEVIE, where TV programmes are available for 6 days. STIEVIE became eventually a subsidiary company of one broadcaster, Medialaan. Medialaan released in 2015 STIEVIE FREE, a similar but free OTT platform that only consists of the TV programmes of Medialaan (also available for 6 days). Next to OTT players, Flemish broadcasters are also more intensively using their website and app where they provide several TV programmes for free. The public broadcaster is planning a digital video player in January 2017.

As a result of new technologies, the revenue models for television are changing. This is causing tension over the distribution of income between players within different links in the value chain. Content producers, aggregators and distributors all want to claim the largest possible share of the revenue. Several players are trying to broaden their business. Telenet, the dominant player on the distribution market, holds 50% shares in De Vijver Media which is the parent company of SBS Belgium (television broadcaster with three television channels) and a successful production company. Telenet also produces TV series. On the other hand Medialaan (content producer and aggregator) has introduced an OTT player (STIEVIE) and has acquired a mobile operator.

Print media face difficulties due to declining sales and falling ad revenue. This is particularly the case for the magazines. The market of magazines is shrinking. In 2016 some titles changed owners and others ceased to exist. In contrast to magazines, newspapers are managing to (partially) compensate the decline in printed sales with the rise of digital sales. Especially the "quality" newspapers have high digital sales, and those sales have become an important share of the total sales. The so called "popular" newspapers have fewer digital sales but have very popular news sites and social media accounts.

The concentration at newspaper publishers level has dramatically increased through the creation of Mediahuis in 2013. Since then the 7 main Flemish newspapers are published by merely two publishers, De Persgroep and Mediahuis. The market for magazines is somewhat less concentrated.

On the distribution market, in 2016 the national postal service company bought the biggest press distributor, AMP, a parcel delivery network Kariboo! and four (press) shop brands (Press Shop, Relay, One Minute and Hubiz) from the French company Lagardère.

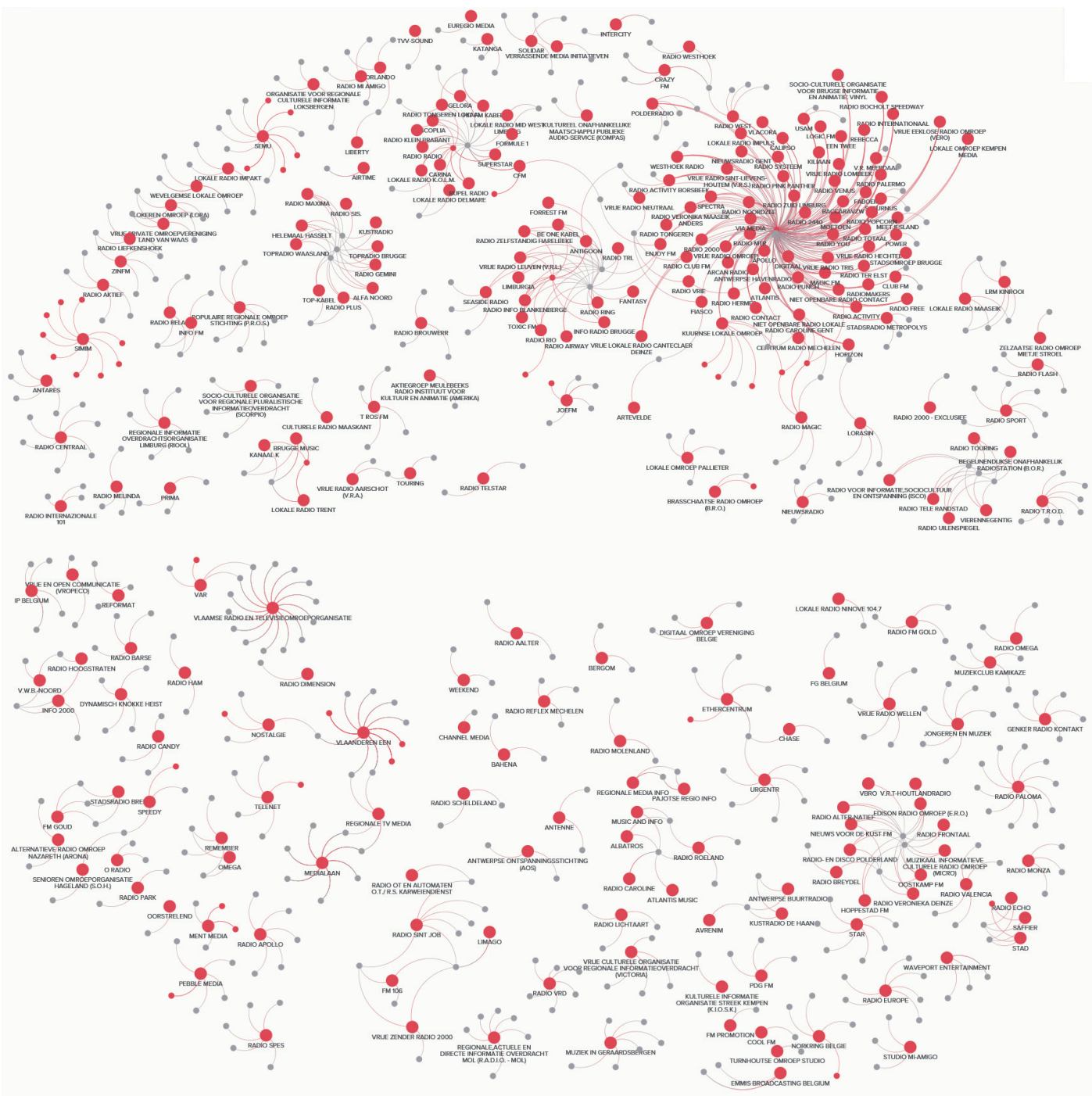
It is difficult to measure concentration levels of the Internet, as a surfer can easily visit a lot of websites, and many popular websites are controlled by foreign companies. Yet we notice, in reference to websites of Flemish media groups, a high concentration in terms of groups and a low concentration in terms of available websites.

Media companies extensively use the possibilities of the internet for their products. Websites, social media and apps have become firm extensions for a lot of media brands from radio, television and print media.

The relative popularity of radio, TV and print media brands in their own medium, is not always reflected on the internet equivalent. News media are very popular; their websites are the most visited ones. They perform well on social media as well, along with media brands that have a rather young image.

Convergence and cross-media trends have become a reality in the Flemish media landscape. Brands have moved to the forefront and are used in different types of media.

VRM has studied the accumulation of mandates in media companies. There is mainly a concentration of mandates in the field of local radios, as you can see in the next figure.



The evolution of the prices of media products is studied in the third chapter. The cost for radio, TV and print media rises again in 2015, even faster than the consumer price index. However the indirect cost to enjoy media products, such as the cost of a computer or a smartphone drops (the increasing electricity price is an exception to the rule).

The Flemish media landscape is situated in an international context. Due to the language barrier, it is not easy for Flemish media companies to develop activities abroad. Unsurprisingly, the acquisitions of De Persgroep and Mediahuis in 2015 were both mainly in The Netherlands. Roularta sold all of its French activities in 2016. International participations in Flemish production companies are increasing. Social media are mainly controlled from abroad. As a result, a part of Flemish advertising spending goes to foreign companies.

In recent years, there were a lot of changes in the field of the media groups. These changes mainly have to do with intensified interrelationships. Three media groups (De Vijver Media, Mediahuis and Mediaalaan) consist of intersections between other Flemish media groups. In a changing environment they look for opportunities in different areas.

As well as strategic alliances, acquisitions are a way of gaining ground. In 2016 Telenet took over Base Company and thus acquired a mobile network. In that way Telenet will no longer have to use the Orange network for its mobile offers. As a result of the merger, Medialaan acquired the mobile operator Mobile Vikings.

A third way of strengthening a media group is vertical integration, i.e. occupying positions in other links of the value chain. The biggest television distributor Telenet has acquired shares in the company “De Vijver” which is active in content production and aggregation. On the other hand Medialaan – active in content production and aggregation – has taken positions in the distribution link (OTT and mobile).

Although there is not one single player that dominates the whole Flemish media industry, many forms of horizontal, vertical or cross media concentration exist in and between several Flemish media types. The aggregation link of the media types described in the report (radio, television, print media and internet) are 80% to 100% in the hands of nine media groups. In the field of radio the VRT-audience share remains more 50%. We also note increasing activities of the dominant television distributor Telenet in other parts of the television value chain. In the market of the print media the dominance of the newspaper market by only two major publishers, De Persgroep and Mediahuis, is striking. Below is a chart comparing the market shares of the different media groups.

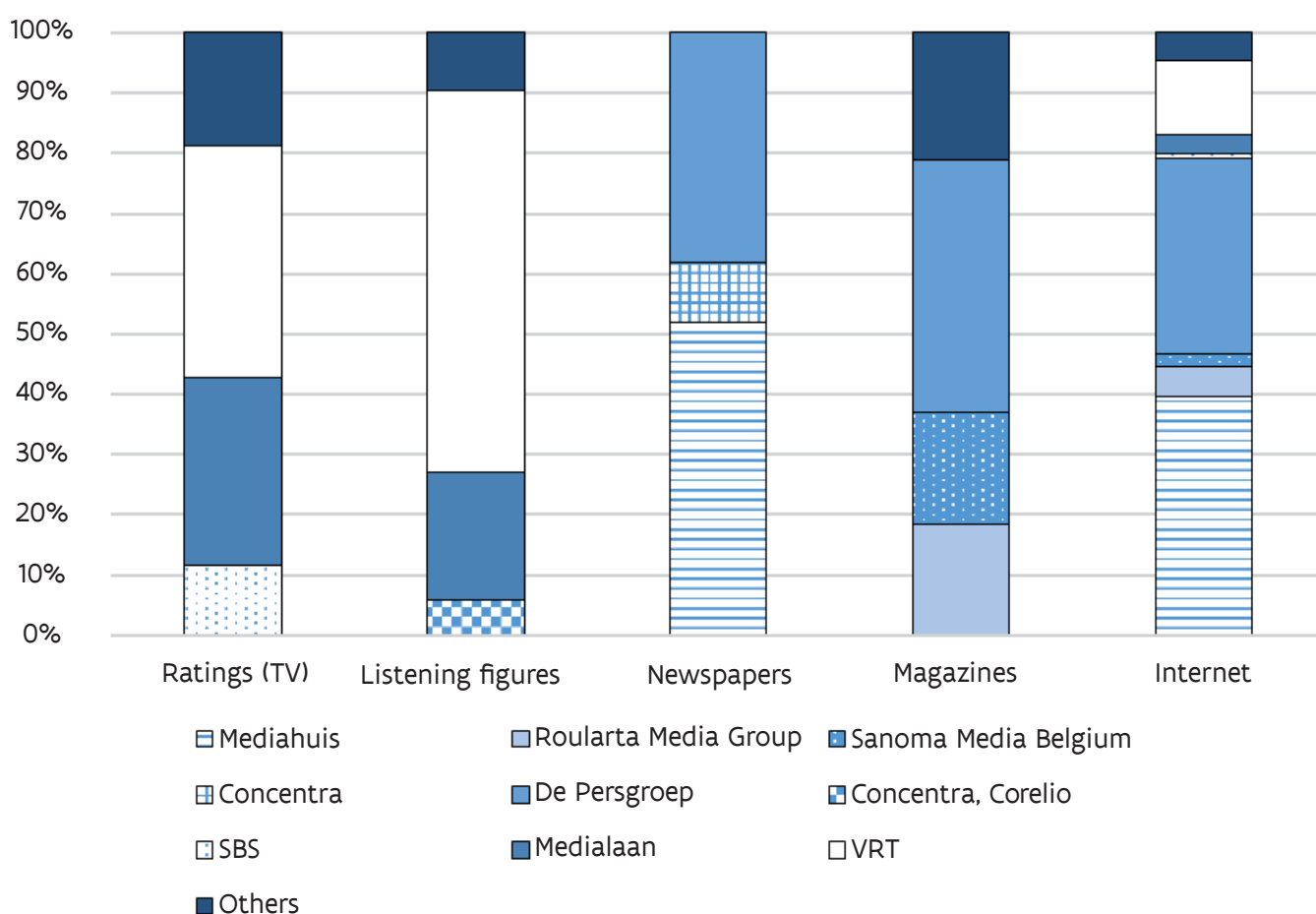


Figure 11: Overview of media group market shares

4. Table of contents of the Media Concentration Report 2016

PREFACE	5	
INTRODUCTION	6	
1 THE FLEMISH MEDIASECTOR	13	
1.1 RADIO	13	
1.1.1 Content Providers	14	
1.1.2 Aggregation: radio broadcasters	17	
1.1.3 Distribution: radio broadcasting transmission	23	
1.2 TELEVISION	26	
1.2.1 Content Providers	27	
1.2.2 Aggregation: television broadcasters	34	
1.2.3 Distribution: television broadcasting transmission	41	
1.3 PRINT MEDIA	48	
1.3.1 Content Providers	50	
1.3.2 Aggregation: publishers		57
1.3.3 Distribution: print media	62	
1.4 INTERNET	66	
1.4.1 Content Providers	68	
1.4.2 Advertising sales	68	
1.4.3 Aggregation: website owners	70	
1.4.4 Distribution: fixed internet	75	
1.4.5 Distribution: mobile internet: app stores	76	
1.4.6 Distribution: mobile internet: mobile operators	77	
1.5 CONVERGENCE AND CROSS-MEDIA	78	
1.5.1 Cross-media trends	79	
1.5.2 Convergence	80	
1.6 CONCLUSION CHAPTER 1	83	
2 MEDIA GROUPS IN FLANDERS	89	
2.1 CONCENTRA NV	91	
2.1.1 Group structure and shareholders	91	
2.1.2 Product offer Concentra NV	93	
2.2 CORELIO NV	96	
2.2.1 Group structure and shareholders	96	
2.2.2 Product offer Corelio NV	98	
2.3 DE PERSGROEP NV	101	
2.3.1 Group structure and shareholders	101	
2.3.2 Product offer De Persgroep NV	102	
2.4 DE VIJVER MEDIA NV	107	
2.4.1 Group structure and shareholders	107	
2.4.2 Product offer De Vijver Media NV	108	
2.5 MEDIAHUIS NV	110	
2.5.1 Group structure and shareholders	110	
2.5.2 Product offer Mediahuis NV	111	
2.6 MEDIALAAN NV	114	
2.6.1 Group structure and shareholders	114	
2.6.2 Product offer Medialaan NV	114	
2.7 PROXIMUS NV	117	
2.7.1 Group structure and shareholders	117	
2.7.2 Product offer Proximus NV	119	
2.8 ROULARTA MEDIA GROUP NV	122	
2.8.1 Group structure and shareholders	122	
2.8.2 Product offer Roularta Media Group NV	124	
2.9 SANOMA MEDIA BELGIUM NV	129	
2.9.1 Group structure and shareholders	129	
2.9.2 Product offer Sanoma Media Belgium NV	130	
2.10 TELENET BVBA	134	
2.10.1 Group structure and shareholders	134	

2.10.2	Product offer Telenet BVBA	136
2.11	VLAAMSE RADIO– EN TELEVISIEOMROEPORGANISATIE(VRT NV)	139
2.11.1	Group structure and shareholders	139
2.11.2	Product offer Vlaamse Radio – en Televisieomroeporganisatie	139
2.12	CROSS MEDIALITY AND ENTANGLEMENT OF PRODUCT OFFERS OF FLEMISH MEDIA GROUPS	143
2.12.1	Crossmediality of product offers of Flemish Media Groups	143
2.12.2	Entwinement of Flemish Media Groups	143
2.13	DIRECTORS	146
2.14	CONCLUSION CHAPTER 2	147
3	INFORMATION ON MEDIA CONCENTRATION	151
3.1	INFORMATION ON MEDIA CONCENTRATION PER MEDIA TYPE	151
3.1.1	Radio	153
3.1.2	Television	164
3.1.3	Print Media	189
3.1.4	Internet	216
3.2	MEDIA GROUPS	226
3.2.1	Analysis based on financial figures	226
3.2.2	Analysis based on audience shares	227
3.3	PRICE EVOLUTION OF MEDIA PRODUCTS	228
3.3.1	Radio and television	229
3.3.2	Print media	233
3.3.3	Internet	234
3.3.4	Price evolution ad space	236
3.4	FLEMISH MEDIA INDUSTRY IN AN INTERNATIONAL CONTEXT	239
3.4.1	Flanders in the world	239
3.4.2	The world in Flanders	241
3.5	CONCLUSION CHAPTER 3	243
4	STIMULATING DIVERSITY – POTENTIAL REMEDIES AND SUGGESTIONS FOR POLICY MAKERS	249
4.1	RESTRICTIONS	249
4.1.1	Ownership restrictions	249
4.1.2	Regulation	250
4.1.3	Signal integrity	252
4.1.4	Opportunities and suggestions for policy makers	253
4.2	COUNTERWEIGHT	255
4.2.1	Must-carry, must-offer and events regulation	255
4.2.2	Public broadcaster VRT NV	258
4.2.3	Fund Pascal Decroos	259
4.2.4	Third-party broadcasting /ideological programmes	259
4.2.5	Subtitling	259
4.2.6	Opportunities and suggestions for policy makers	260
4.3	ECONOMIC INTERVENTION	260
4.3.1	Mediacademie	261
4.3.2	Support for regional television broadcasters	261
4.3.3	Support for the audiovisual industry	262
4.3.4	Screen Flanders	263
4.3.5	Support for innovative media projects	263
4.3.6	Federal measures	263
4.3.7	Opportunities and suggestions for policy makers	264
4.4	TRANSPARENCY	264
4.4.1	Media Concentration Report	264
4.4.2	Audit of the management agreement of the public broadcaster	264
4.4.3	Broadcasting licensing	265
4.4.4	Knowledge Centre for Culture and Media Participation, Electronic News Archive and Mediawijs.be	266
4.4.5	Opportunities and suggestions for policy makers	267
4.5	ORGANIZATIONAL MEASURES	268

4.5.1	Foundation VRM	269
4.5.2	Belgian and European Competition authorities	269
4.5.3	Opportunities and suggestions for policy makers	269
4.6	CONCLUSION CHAPTER 4	270
4.6.1	Opportunities and suggestions for policy makers	272
5	GENERAL CONCLUSION	277

5. Translation of the list of figures and tables

Figure 1: Value chain of the audiovisual industry	7
Figure 2: Illustration of different forms of media concentration	8
Figure 3: Value chain of radio	13
Table 1: Advertising sales radio	16
Table 2: National public radio stations	17
Table 3: Regional public radio stations	18
Table 4: National private radio stations	18
Table 5: Partnerships between local radio stations	20
Table 6: Other radio stations via cable	21
Table 7: Community radios	21
Table 8: Other radio stations notifications	22
Table 9: Radio transmission operators	23
Table 10: Online music services	25
Figure 4: Value chain of television	26
Table 11: Independent production companies	28
Table 12: Collective management organizations	30
Table 13: Television facility companies	31
Table 14: Advertising sales television	32
Table 15: Public broadcaster - linear television channels	34
Table 16: Private broadcasters - linear television channels	36
Table 17: Regional television broadcasters	38
Figure 5: Regional television in Flanders	38
Table 18: Nonlinear television services	40
Table 19: Platforms for broadcasting transmission	41
Figure 6: Value chain of broadcast transmission	43
Table 20: Broadcasting transmission - coax	44
Table 21: Broadcasting transmission - DSL	44
Table 22: Broadcasting transmission - terrestrial (fixed)	45
Table 23: Broadcasting transmission - terrestrial (mobile)	45
Table 24: Broadcasting transmission - satellite	45
Table 25: Broadcasting transmission - OTT	47
Figure 7: Value chain of print media	48
Table 26: Press agencies	51
Table 27: Photo agencies	51
Table 28: Advertising sales for Flemish paid newspapers	51
Table 29: Advertising sales for magazines	54
Table 30: Media agencies	54
Table 31: Publishers paid newspapers	56
Table 32: Publishers magazines	60
Table 33: Publishers free press	61
Table 34: Distributors newspapers and magazines	62
Table 35: Distributors free press	63
Table 36: Apps newspapers	64
Table 37: Apps magazines	65
Figure 8: Value chain of the Internet	67
Table 38: Advertising sales for websites	69
Table 39: Websites Flemish media sector	72
Table 40: Flemish (news)sites not linked with another media format	73
Table 41: Most popular social media sites in Flanders	73
Table 42: Internet service providers, network operators and internet access providers	76
Table 43: Most popular app stores in Flanders	76
Table 44: Apps Flemish media groups	77
Table 45: Mobile operators and their network (excluding business market)	78
Figure 9: Examples of the difference between cross-mediality and convergence	79
Table 46: Multimedia brands	82
Figure 10: Horizontal concentration based on number of players in value chain	84

Figure 11: Media groups being part of other media groups	89
Table 47: Media groups in Flanders	89
Table 48: Legenda product overview per group	90
Table 49: Shareholder structure Concentra NV	91
Figure 12: Organogram Concentra NV	92
Figure 13: Product overview Concentra NV	95
Table 50: Shareholder structure Corelio NV	96
Figure 14: Organogram Corelio NV	97
Figure 15: Product overview Corelio NV	100
Table 51: Shareholder structure De Persgroep NV	101
Figure 16: Organogram De Persgroep NV	102
Figure 17: Product overview De Persgroep NV	106
Table 52: Shareholder structure De Vijver Media NV	107
Figure 18: Organogram De Vijver Media NV	108
Figure 19: Product overview De Vijver Media NV	109
Figure 20: Organogram Mediahuis NV	111
Table 53: Shareholder structure Mediahuis NV	110
Figure 21: Product overview Mediahuis NV	113
Figure 22: Organogram Medialaan NV	114
Table 54: Shareholder structure Medialaan NV	114
Figure 23: Product overview Medialaan NV	116
Table 55: Shareholder structure Proximus NV	117
Figure 24: Organogram Proximus NV	118
Figure 25: Product overview Proximus NV	121
Table 56: Shareholder structure Roularta Media Group NV	122
Figure 26: Organogram Roularta Media Group NV	123
Figure 27: Product overview Roularta Media Group NV	128
Figure 28: Organogram Sanoma Media Belgium nv	130
Figure 29: Product overview Sanoma Media Belgium NV	133
Table 57: Shareholder structure Telenet NV	134
Figure 30: Organogram Telenet NV	135
Figure 31: Product overview Telenet NV	138
Figure 32: Organogram VRT NV	139
Table 58: Shareholder structure VRT NV	139
Table 59: Additional radio products VRT NV	140
Figure 33: Product overview VRT NV	142
Table 60: Media groups in Flanders and their offerings	143
Figure 34: Entanglement of media groups in Flanders	145
Table 61: Overview of mandates	146
Table 62: Financial information 2015 public national radio	153
Figure 35: Evolution of average financial values 2006-2015 public national radio	154
Table 63: Financial information 2015 private national radio	154
Figure 36: Evolution of average financial values 2006-2015 private national radio	155
Figure 37: Market share radio station – wave 2016-2	156
Figure 38: Average listening time per radio station – wave 2016-2	157
Figure 39: Market shares radio stations 2006-2016	158
Figure 40: Proportion of public vs private radio	159
Figure 41: Evolution of concentration indexes radio stations 2006-2016	160
Table 64: Concentration indexes media groups based on listening figures 2006-2016	159
Table 65: Number of installations apps radio (Google Play)	161
Table 66: Financial information 2015 facility companies	166
Figure 42: Online popularity radio stations	160
Figure 43: Market share national radio stations	162
Figure 44: Market shares public vs private radio	163
Figure 45: Concentration of mandates in the radio sector	164
Figure 46: Evolution of average financial values 2006-2015 facility companies	167
Table 67: Financial information 2015 independent production companies	166
Figure 47: Evolution of average financial values 2006-2015 production companies	168

Table 68: Financial information 2015 public broadcaster	169
Figure 48: Evolution of average financial values 2006-2015 public broadcaster	169
Table 69: Financial information 2015 private broadcaster	170
Figure 49: Evolution of average financial values 2006-2015 private broadcasters	170
Table 70: Financial information 2015 exploitation companies regional television	171
Figure 50: Evolution of average financial values 2006-2015 exploitation companies regional television	172
Figure 51: Mean, maximum and minimum of the daily reach (percentages) of the nine regional broadcasters	173
Table 71: Financial information 2015 network operators and access providers ('000 euros, except employees)	173
Figure 52: Evolution of average financial values 2006-2015 broadcasting transmission	174
Figure 53: Evolution of VOD number of hits and revenues with intervention of broadcasters 2007-2015	175
Figure 54: Evolution of VOD number of hits and revenues without intervention of broadcasters 2007-2015	175
Table 72: Television production companies with 5 or more productions in first half of 2016	177
Table 73: Television production companies in the top 100 of most watched TV programmes 2009-2015	178
Table 74: Concentration indexes production companies based on number of productions 2016	178
Figure 55: Shares TV channels in average viewing time 2015	179
Table 75: Figures on video streaming	180
Figure 56: Evolution shares TV channels in average viewing time 2006-2015	181
Table 76: Concentration indexes TV broadcasters based on average viewing time 2006-2016	181
Figure 57: Evolution of concentration indexes TV broadcasters 2006-2016	182
Figure 58: Online popularity TV channels	183
Figure 59: Market shares media groups TV	183
Table 77: Number of installations apps TV (Google Play)	185
Figure 60: Evolution of number of cable subscribers (coax and IPTV) 2008-2016	186
Table 78: Popularity of Flemish OTT players	187
Figure 61: Concentration of mandates in the TV sector	189
Table 79: Financial information 2014 press agencies	190
Table 80: Financial information 2015 photo agencies	191
Table 81: Financial information 2015 media agencies	191
Table 82: Financial information 2015 publishers newspapers	192
Figure 62: Evolution of average financial values 2006-2015 publishers newspapers	192
Table 83: Financial information 2015 publishers magazines	193
Figure 63: Evolution of average financial values 2006-2015 publishers magazines	194
Table 84: Financial information 2015 publishers free press	195
Figure 64: Evolution of average financial values 2006-2015 publishers free press	195
Figure 65: Evolution of average financial values 2006-2015 publishers free press (without Roularta Media Group NV, De Persgroep Publishing NV and Mediahuis NV)	196
Table 85: Financial information 2015 distributors print media	196
Figure 66: Evolution of average financial values 2006-2015 distributors print media	197
Figure 67: Paid circulation newspapers 2011-2015	198
Figure 68: Paid circulation newspapers 2011-2015: subscription vs single copy sales	199
Figure 69: Market shares paid circulation newspapers 2013-2015	200
Figure 70: Market share print edition newspapers 2013-2015	200
Table 86: Market shares newspapers (circulation) 2005-2015	201
Table 87: Concentration indexes newspapers (paid circulation) 2007-2015	202
Table 88: Concentration indexes newspapers (circulation) 2007-2015	202
Figure 71: Evolution of concentration indexes paid circulation newspapers 2007-2015	203
Figure 72: Online popularity newspapers	204
Figure 73: Market shares newspapers	205
Figure 74: Market shares media groups newspapers	206
Table 89: Number of installations apps newspapers (Google Play)	207
Figure 75: Paid circulation magazines 2012-2015	208

Figure 76: Paid circulation magazines 2015: subscription vs single copy sales	209
Figure 77: Market shares most popular magazines	209
Figure 78: Market shares publishers of top 20 magazines 2015	210
Table 90: Concentration indexes magazines (paid circulation) 2007-2015	211
Figure 79: Evolution of concentration indexes paid circulation magazines 2007-2015	211
Figure 80: Online popularity magazines – website visits	212
Figure 81: Online popularity magazines – social media	213
Figure 82: Market shares magazines	214
Figure 83: Market shares media groups magazines	214
Table 91: Number of installations apps magazines (Google Play)	215
Figure 84: Concentration of mandates in the print media sector	216
Table 92: Financial information 2015 internet service providers, network operators and internet access providers	217
Figure 85: Number of Flemings having an account on social media sites and having logged in during the last month	218
Figure 86: Online popularity – top 10 websites	219
Figure 87: Online popularity (news)sites not linked to another media format	220
Figure 88: Market shares media groups internet	221
Table 93: Concentration indexes media websites (based on visits) 2011-2016	221
Figure 89: Evolution of concentration indexes media websites 2011-2016	222
Table 94: Online popularity Belgian websites 2012-2016	223
Figure 90: Online popularity – social media top 10	224
Figure 91: Number of available applications per operating system-native app store	225
Table 94: Number of installations apps (Google Play)	226
Table 96: Financial information 2015 media groups	227
Figure 92: Evolution of average financial values 2006-2015 media groups	227
Figure 93: Market shares media groups	228
Figure 94: Evolution of costs for radio and television 2006-2016	230
Figure 95: Evolution of costs for electricity 2006-2016	231
Figure 96: Evolution of prices for basic subscription television (including author rights; excluding VAT) 2005-2016	232
Figure 97: Prices cheapest triple play bundle (monthly costs excluding one-off costs)	232
Figure 98: Evolution of the price index for newspapers 2006-2016	233
Figure 99: Evolution of the price index for magazines 2006-2016	234
Figure 100: Evolution of the price index for computers 2006-2016	235
Figure 101: Evolution of the price index for mobile phones 2006-2016	236
Table 97: Evolution costs (gross) advertising space Belgium 2010-2015	237
Table 98: Evolution advertising investments 2012-2015	237
Table 99: Media agencies billing 2012-2015	238
Table 100: Largest media companies worldwide, their 2015 revenues and media activities	241
Table 101: Foreign broadcasting companies addressing the Flemish market	242
Table 102: Overview of concentration indexes	245
Table 103: Overview of policies on media concentration and pluralism (Cavallin)	249
Table 104: Examples of must-offer obligations	257
Figure 102: Situating policy measures in the value chain	271
Figure 103: Situating policy suggestions in the value chain	274

Vlaamse Regulator voor de Media (VRM)

The mission of the Vlaamse Regulator voor de Media (VRM) or Flemish Regulator for the Media, is to enforce the media regulations in the Flemish Community, settle disputes related to the media regulations and issue media recognition and licenses in accordance with the regulations. It consists of two chambers, a general chamber and a chamber for impartiality and the protection of minors.

In Belgium, each cultural community has its own audiovisual media services regulatory body: the Flemish regulator for the Media (VRM) in the Flemish-speaking community, the High Council for the Audiovisual sector (CSA) in the French-speaking community, and the Media Council (Medienrat) in the German community. Radio and television broadcasting in the Brussels Capital Region, as far it concerns the two communities, is regulated by BIPT (Belgian Institute for Postal services and Telecommunications). BIPT is a federal administration that is the regulator for electronic communications, the electromagnetic spectrum of radio frequencies, the audiovisual media in the Brussels-Capital Region and the postal market.

<http://www.vlaamseregulatormedia.be/en>

<http://www.csa.be/>

<http://www.medienrat.be/>

<http://www.bipt.be/>

Since 2008, VRM publishes a yearly report on media concentration in Flanders. VRM aims to make the report, written in Dutch, accessible for the international public. That's why VRM chose to write an English guide for the 2016 version of the report. The document contains on the one hand a 'manual' for interpreting the Flemish report and on the other hand a translation of the main conclusions of the report.

This English document, as well as the report, can be found on the English version of the website of VRM

<http://www.vlaamseregulatormedia.be/en> .



Vlaanderen
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