

FLEMISH- AND FRENCH-LANGUAGE TELEVISION IN BELGIUM IN THE FACE OF GLOBALISATION: MATTERS OF POLICY AND IDENTITY

Leen d'Haenens
Frederic Antoine
Frieda Saeys

Abstract

Belgian broadcasting clearly reflects the country's sociological make-up as well as its changing political, ideological, linguistic and regional map. The country comprises three regions (the Flemish, Walloon and Brussels Capital regions) and three Communities (The Flemish, French-language and German-language Communities), each of which has its own legislative and executive institutions. Above them, we find the Federal Government which exercises power in national affairs. The country is almost always governed by a coalition, and broadcasting policy is invariably the result of compromise and seldom reflects a straightforward vision. In its structure, broadcasting reflects developments in state structure: the movement from a unitary to a fully-federalised model. In the meantime, the three Communities have also developed their own separate policies on private broadcasting companies, each fitting into the framework of its own policies on the media. While Flanders has only experienced a competitive television system at the end of the eighties, French-speaking Belgium has experienced a de facto internal private/public television duopoly since the early seventies.

Introduction

The first Belgian television broadcast took place on 31 October 1953. Exploitation rights were equally assigned to the INR/NIR (*Institut National de la Radio/Nationaal Instituut voor de Radio*). French- and Dutch-language programmes on different channels were opted for from the very beginning and even the line systems

used were different. Public broadcasting was given a new statute in 1960 as a result of which its *de facto* monopoly and further decentralisation was ratified. The NIR/INR was split into two separate organisations, i.e. the *Belgische Radio en Televisie, Nederlandse Uitzendingen* (BRT) for Flanders, and the *Radiodiffusion-Télévision Beige, Emissions françaises* (RTB) for French-speaking Belgium. Also a public radio and television service was created for the German-speaking cantons of the country under the name of BRF (*Belgisches Rundfunk- und Fernsehzentrum für deutschsprachige-Sendungen*). Government intervention was limited in theory, but in practice the Government exerted a lot of influence through its appointment procedures. This resulted in the Board of Directors being composed of members of the three main political parties.

From the seventies onwards, audiovisual media in Belgium had to deal with two levels of legislature. On the one hand, public broadcasting became part of Cultural Affairs as a result of the act dated 21 July 1971 and was therefore under the power of the Communities. On the other hand, technical areas still remained in the hands of the national Government: revenue from radio and TV licences, government announcements and commercial advertising. The phases of state reform that followed further undermined government power by transferring these areas of competence to the Communities. The 16 July 1973 act, better known as the *Culture Pact*, had far-reaching consequences for public broadcasting, its intention being to ensure the protection of the various ideological and philosophical movements in the country. From then on, administrative bodies had to be formed in proportion to the representation of the political parties within the Community Assembly. This system consolidated the politicisation of public broadcasting. At the end of the seventies, French-speaking Belgium (in 1977) and Flanders (in 1979) passed their own decrees on broadcasting. During the eighties they developed their own separate broadcasting policies. Public broadcasting organisations then lost their monopoly both in Flanders and in Wallonia. Meanwhile, because of its ideal position and of other geographic and demographic factors, Belgium became one of the most densely cabled countries in the world (98%). Though the number of Belgian broadcasting organisations was limited, Belgian viewers were soon supplied with a wide range of foreign stations.

The Development of a Flemish Broadcasting Scene

The first Flemish decree on public broadcasting dates from 28 December 1979. The BRT was thereby attributed a fourfold task, i.e. education, information, training and entertainment. The decree was amended a couple of times during the eighties, but it was only in the nineties, as a result of pressure from commercial channels, that public broadcasting was to undergo a profound change. According to the 1987 federal law on radio and television advertising, the Flemish Cable Decree confirmed

that only one commercial TV company could be set up and allowed to broadcast via the cable network and as such address the whole Flemish population. The *Vlaamse Televisie Maatschappij* (VTM), launched in February 1989, was issued a license for no less than 18 years and soon gained a larger market share than the public station. A point of interest here is the regulation on programme transmission by cable. Each cable network operator is required to transmit programmes from both the Flemish and French-speaking public broadcasting organisations as well as those from VTM and the local station in its area (Decree of 23 October 1991). The showing of all other programmes is subject to prior agreement by the Flemish Government and to any other conditions it may see fit to stipulate.

Commercial Company VTM Secures a Strong Position in the Market

In order to anticipate foreign stations targeting Flanders and broadcasting on the Flemish network from outside the country, a number of limitations on these stations were built into the Cable Decree, one of which was that they would only be allowed access to the cable if they broadcast in one of the languages of the country of origin. This limitation was explained and justified from a threefold cultural point of view, i.e. the maintenance of press multiformity, which profited directly from TV advertising; the maintenance of artistic heritage, and finally, the continued viability of the public broadcasting organisations. In 1992, these reasons were found by the European Court of Justice to be in conflict with art. 59 of the EC Treaty, because they were in fact measures of economic protection. The language stipulation was also removed from the amended Cable Decree.

VTM is required to provide a balanced and diversified set of programmes which should consist of information, education and entertainment. At first, it mainly focused on entertainment but gradually invested more and more in information. In order to prevent its viewing time from being filled with cheap programmes - mainly from the US - VTM had to set aside some time for Flemish and European productions. The 1988 Performance Decree stipulates that, following a period of five years, half of VTM's programmes 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 not be considered as Flemish cultural programs. The Flemish Government would determine which quotas were to be respected. This decree also obliged VTM to allot one tenth of its viewing time to independent producers.

When it was launched, VTM immediately gained 27% of the viewer market. This rose to 37% by the end of the year, at the expense of Dutch stations and the Flemish public broadcaster (TV1 and TV2). While the average Flemish viewer already had a wide range of programmes on the cable network, it was only in the nineties

that the viewers market became really fragmented.

Table 1: *Flemish Television Market Shares since 1989*

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
TV1	22.5	21.8	25.7	25.5	25.0	22.5	17.5	19.3	21.3	24.3
TV2/Ketnet/ Canvas	9.0	7.0	4.1	4.6	4.5	6.4	5.1	5.7	6.5	8.9
VTM	27.4	35.6	38.1	37.3	38.3	36.4	37.1	32.8	28.9	30.6
Ka2							3.9	6.5	6.5	6.6
VT4							6.1	7.9	8.7	9.1
Netherl.	17.1	11.5	9.4	9.1	9.0	8.7	6.4	5.3	5.0	4.5

Source: VAT Research Department

VTM's monopoly on advertising was ended *de facto* in February 1995 by the creation of VT4. A subsidiary of SBS, VT4 is officially a British station which nonetheless targets Flemish viewers and Flemish advertising. By broadcasting from Great Britain, it can get around VTM's monopoly on advertising. Furthermore, as a British station it is not obliged to comply with Flemish Government stipulations on advertising, which are much more limiting than those laid down for commercial stations in Great Britain. Because of the competition created by VT4 from 1995 on, VTM's turnover and profits dropped significantly. VT4 not only creamed off part of the advertising market, it also forced VTM to make investments to counter competition, by setting up a second channel (Ka2), for example. Both stations initially targeted an unserved audience by showing prestigious programmes, but soon had to adapt their policy because they failed to reach the number of viewers they expected. In December 1996, the European Commission declared that VTM's monopoly was in conflict with European Community regulations. Flemish legislation on the matter would therefore have to be amended and stations such as VT4 would also have to be allowed to be shown on the Flemish cable network. But even after the adapted Advertising Decree of 28 April 1998 had ended the monopoly of VTM, VT4 chose to stay British.

The Public Broadcaster Fights Back

These rapid and profound changes in the media landscape made a review of the legal framework of public broadcasting necessary. The fact that the 27 March 1991 Decree changed the name BAT to BRTN was highly symptomatic. The intention of the decree was, among other things, to give public broadcasting more autonomy and more scope not only to face the recent increase in competition at home, but al-

so to meet new technological, economic and legal developments on an international level. It would soon become apparent that an even more drastic approach was needed if the BRTN was to remain a strong broadcaster and worthy partner in the final years of the century. Though the arrival of a commercial competitor had been spoken about for years, public broadcasting was not really prepared for the event: the arrival of VTM initially caused panic. Only in 1990, did the BRT decide to restyle itself completely. Entertainment was increased within prime time and on TV1 in general, while it was reduced on TV2. No consistent programming policy was followed for the two channels in the following years. When a strategy aiming to turn TV2 into a channel for "a specialised niche of passionate viewers" failed to deliver the expected result right away, the two channels underwent a new make-over intended to create a specific image for each. In the meantime, VTM acquired a record market share (over 40%) in prime time. Moreover, all these programme changes had to be made in keeping with BRTN's legally outlined tasks both for radio and television, i.e. to provide a balanced set of programmes which consisted of information, education and entertainment. Particular attention had to be paid to information, which had to be truthful and impartial. Moreover, since 1994 all programmes had to be free of discrimination, while special care had to be taken in projecting and promoting the cultural identity of the Flemish Community.

The 22 December 1995 Decree clearly took the McKinsey report into consideration as far as programming was concerned. The general task now presented was to reach the largest possible number of Flemish people by supplying a diverse number of programmes. Priorities were information and culture, as well as a sufficient number of sport, contemporary education, Flemish drama and "tasteful" entertainment programs. Youth and children's programmes should also be on offer. Quality is the key word in programming, next to universality and complementarity. What is new is an obligation as to result: the organisation is required to clarify its tasks within a mid-term plan (several years) and to set measurable objectives for itself. In 1996, a policy plan was drawn up for television in cooperation with research agency Censydiam. One of its points of departure was the division of Flemish viewers into six more or less homogeneous groups based on expectations: *TV addicts* (15%), *family viewers* (15%), *seekers of added value* (22%), *active discoverers* (17%), *spontaneous enjoyers* (22%) and *the restless* (9%). According to Censydiam, the needs of two of these sections do not match the tasks set for a public broadcasting organisation by the decree, i.e. the *restless* (mainly VT4 viewers) and the *TV addicts* (mainly VTM viewers). The BRTN therefore decided to tune its programmes to the four remaining groups. In doing so, they opted for an integral mixture of serious programming and entertainment, but also created a clear differentiation between TV1 (the broader channel) and TV2 (the in-depth channel). Regarding their commitment to quality, they drew up a number of parameters in keeping with the decree which did not only involve quantities: they included not only conventional viewer

numbers and market shares but also range, ratings, the number of viewers of informative programmes and programmes meant for specific target groups.

On 29 April 1997, the so-called "Maxi Decree" was accepted by the Flemish parliament, concluding the overhaul of the BRTN, started by the "Mini Decree" of December 1995. This overhaul took longer than expected, so that it fell to new Administrator Bert De Graeve to sketch the new decree in broad outlines: new statute of the public broadcasting service and its personnel, and introduction of a management contract with the Flemish Government, setting out the public broadcasting service's mission and budget. De Graeve's proposal was largely accepted by the Flemish parliament: the BRTN became a public limited corporation from 1 January 1998, under the name "Vlaamse Radio en Televisie" (VRT).

In May 1997, the Flemish Government and the public broadcasting service entered into a management contract for a period of five years (1997-2001). The contract includes a number of measurable goals concerning public broadcasting. The first channel, TV1, has to be a lively and easily accessible channel offering a large dose of family conviviality. Moreover, it must be the leader in information. Culture and education must be part of the programme supply but foremost in mixed programme formulas. The entertainment value of TV1 must be high, but voyeurism and sensation should be avoided at all costs. The second channel (called Canvas from 8:00 p.m. on) must be informative, instructive and built upon expertise shown in in-depth news and current affairs programmes. This second channel is also aimed at children and teens during pre-prime time (until 8:00 p.m. under the name "Ketnet"). Concrete production aims are two yearly Flemish drama productions of thirteen weeks, two yearly Flemish comedy productions of thirteen weeks, news around noon, and a youth series block with youth news on week days. In terms of viewing figures, the VRT aims at a weekly reach of 76 per cent of the population, one and a half million viewers for the news and other information programmes together, and at a mean appreciation of 7.5 on a scale of 10 for entertainment and fiction programmes, for a weekly reach of 15 per cent for culture programmes, and of 10 per cent for educational programmes, and at a ratio of 50 per cent of Flemish productions in prime-time (6:00 to 10:00 p.m.). Most of those objectives had already been achieved by 1997: appreciation figures for entertainment and fiction were 7.7 and 7.8 on a scale of 10, the mean reach figures per week hit the 78.1 per cent mark, and weekly reach figures for educational and cultural programmes were 21.2 and 16.8 per cent. Only with the target of one and a half million viewers for the various news programmes did actual figures fall slightly short of expectations: a means of 1,413,900 viewers were reached every day. All these far-reaching measures and the incertitude they bring with them have caused unrest among the VRT staff. Yet, a clear dynamism can be detected in a programming which succeeded in preventing the number of viewers from bottoming out.

The French-Language Broadcasting Landscape

Competition from Outside

Let us now look at the French-language end of the Belgian TV spectrum. In the late 1940's, when television did not yet exist in Belgium, the owners of the first TV-sets were receiving programmes from a French transmitter located in Lille. When Belgian television did finally emerge, the habit of consuming programmes broadcast from abroad was already entrenched. The public television service found itself immediately in a situation of competition with French television, some of whose programmes it even relayed.

Subsequently this subordinate role to the French media world would remain a feature of the RTBf, which opted for a policy of complementarity with the French channels rather than attempting to compete with them, not realising that the competition which would affect it most directly would in fact come from Luxembourg. While Europe was dominated by monopolistic public television services, it was from that tiny state East of the border that competition was to come, supported in its targeting of Belgian audiences by cable television. Born in 1961 in Namur, the first European city to benefit from this new technology, cable television was at first only used to supply deep valleys with the images which otherwise they had great difficulty in receiving. But very soon cable television enabled all Walloons to receive TV broadcasts from all neighbouring countries: France, Great Britain, the Netherlands, Germany and Luxembourg. Suddenly Luxembourg television - intended until then only for viewers in France's Lorraine region - also reached several hundred thousand Belgians. For *Tele-Luxembourg*, this arrival on the Belgian market was something of a life-saver as, from its foundation in 1955 by the CLT (*Compagnie Luxembourgeoise de Telediffusion*), it had been limited in its Hertzian transmission range and had never succeeded in reaching "critical mass" from an economic point of view. As for the cable distribution companies, the inclusion of this channel among the programmes on offer (the only means for almost all French-speakers to tune in to this station) became an indisputable commercial advantage as the television of the Grand-Duchy was characterised by the attractive nature of its range of drama programmes.

Competition from Inside

In the early nineteen eighties the politicians then in power (Christian Democrats and conservative Liberals) began to perceive differently the future of radio and television within the French Community. Accusing the public service of being too politically committed to the left and too influenced by the unions, some parties challenged the internal pluralism system in force at the RTBf, favouring a kind of "ex-

ternal pluralism," including private media, which it was asserted would better guarantee a balanced representation of the range of political opinions. This occurred at a time when the RTBf was beginning to be aware of the competition it was facing from the Luxembourg channel, a time also when the legitimacy of the public service found itself increasingly under fire. Despite the authorisation it received in 1983 to broadcast "non-commercial advertising," the public sector was slow to react and lost significant audience shares to its increasingly aggressive Luxembourg competitor.

Realising that it could only conquer the French-language market by giving a "Belgian" content to its programme supply, the CLT created a specific channel for Belgian audiences in the late 1970's and then, in 1983, it secured from the Belgian Government a Hertzian beam enabling it to broadcast to Luxembourg programmes produced live in Brussels. If it were not for the fact that Hertzian transmission of the RTL signal originated in Luxembourg rather than in Belgium and that the revenue from Belgian advertising on this channel ended up in Luxembourg hands, French-speaking Belgium could be said to have had from then on a true private channel competing directly with public television. At any rate everything was now in place that would lead to the deregulation of the existing media system.

Official Deregulation

This official deregulation took place under another government made up of Christian Democrats and Liberals, both at the central ("federal") level and at the level of the French Community. In February 1987 the Federal Government introduced an act authorising advertising on radio and television, something which in theory had been forbidden until then. In July of the same year, by means of an ambitious decree embracing all radio and television related issues, the Government of the French Community redefined the radio-television scene to the benefit of new private operators. Allowing the creation of private television stations within the French community, it awarded them a monopoly for advertising revenue. In practice this recognition was granted to RTL-TVI, a company incorporated in Belgium and controlled by the CLT and most of the daily press groups in French-speaking Belgium.

However, a few months after this act had been passed, elections sent home the current government and brought to power a Christian Democratic/Socialist coalition whose credo was a so-called "return of the heart." Legislation adopted by the preceding government was therefore amended by several new laws (mainly in 1989 and 1991) intended to balance resources and influences between the public and private sectors as part of what can only be termed a "Belgian-style compromise." The different components of the media scene laid out at the time of the deregulation were therefore preserved, but the positions established were modified. This

compromise remains the key feature of the radio and television sector in the French Community even though changes have been made with respect to advertising.

The Public Service: An Independent Company Under Contract

In order to avoid new cost-saving plans and cuts in the public service, it was necessary to ensure its public funding and to stabilise it. Thus a decree dated 14 July 1997 transformed the semi-public RTBf into an independent cultural company responsible for public service radio and television in the French-speaking part of Belgium. Although it did not fundamentally change the institution's mission or internal workings, this new decree made it possible for the relationship between the RTBf and the State to be contractualised, by defining both the nature of the financial undertakings conceded by the authorities and the obligations and constraints that this funding imposed on the RTBf.

In return, the management contract defined the RTBf's obligations. The independent cultural company thus undertook "to produce, co-produce, acquire, programme and transmit federal radio and television transmissions," to provide access to everything that is eventful, "whether it be important live current affairs, major sporting encounters, cinematographic works or significant cultural events," "to contribute to the strengthening of social values, especially through a code of ethics based on respect for the human being and for the citizen" and "to provoke, whenever possible, debate in its programmes and to clarify the democratic imperatives of society." The management contract stipulates that the company is to operate at least five radio and two television channels. For radio, this relates to one general-interest station, two general-interest channels offering programmes intended for the Brussels region and the Walloon region, including a programme "reserved for every kind of ancient, classical or contemporary music." For television, this includes one general-interest channel and one general-interest or specialised channel.

The RTBf television channels must broadcast an average of more than seven hours of own-production or co-production transmissions, including a regional news programme and two general news programmes. The television channels are to ensure that an annual average of 3,000 minutes in current affairs debate and dialogue are broadcast. In application of the European legislation, at least 51% of airtime, apart from the exceptions envisaged in the directive, is to be devoted to European works; 33% of airtime (excluding news, sporting events, games, advertising, teletext and test card services) is to be reserved for works whose filming and production are carried out by French-language professionals.

There are less specific requirements in terms of annual volume, as far as the cultural, scientific and continuing education transmissions, magazines and documen-

taries are concerned. However, in television, the annual number of musical, lyrical, choreographical and dramatic shows, with priority given to those produced in the French Community, cannot be less than twelve per year. Transmissions such as "Cine Club" are also to be screened at least forty times a year. Both in radio and in television, in variety transmissions, the RTBf has to endeavour to give pride of place to French-language songs and to present and promote the artists of the French Community. Finally, an amount of money that is not to be less than one hundred million Belgian francs (or EURO2.5 million, indexed on an annual basis) is reserved each year for contracts for co-production, acquisition and/or purchasing of television rights concluded with independent producers from European radio and television bodies. Should the RTBf fail to fulfil all of these obligations, the contract sets out a series of sanctions based on the payment of fines "that can on no account be more than 1% of the total subsidy" paid by the French Community. As the contract stipulates, the RTBf currently operates two television channels (a general channel, *La Une* and a supplementary channel, *La Deux*), as well as five radio stations (geographical spread based on age groups and programming).

A Private Sector No Longer in Deficit

Although the CLT had long targeted Belgian audiences, the conversion of this "foreign" channel into an officially Belgian one - RTL-TVI¹ - did not immediately bring the expected benefits. At first the "Belgicised" channel had even worse audience ratings than the Luxembourg station from which it was taking over. This situation did not last long, however, with RTL-TVI eventually garnering larger audiences than public television. Financial results were another matter, however. It quickly became apparent to the CLT that setting up a specific television channel for an audience as small as that of French-speaking Belgium cost proportionally more than it could bring in. RTL-TVI being part of a foreign multinational group which sometimes paid some of the costs incumbent upon the station, the latter's own financial results were not always easy to interpret. On examination it nonetheless appears that the initial years of the channel in Belgium resulted in a loss of LUF6.7 million (EURO270,000) in 1989, a situation serious enough that the question was raised of discontinuing the operation and converting the station into a regional bridgehead of a centralised European network, located in Luxembourg. This possibility, whose appropriateness was not agreed upon by the whole CLT board, became more distant when the station's balance sheet became slightly positive in the early nineties, and has not been a real one since 1994, after the financial position of RTL-TVI really improved. In order to increase its audience, the channel began broadcasting a second generalist programme in February 1995 mainly intended for young, city-dwelling adults. While it has not achieved impressive audience ratings,² this station adds to the market share already in the hands of RTL-TVI.

Differences in Programme Policy Between the Public and Private Broadcasters

The cultural models carried by the public and private television channels within the French Community are not similar, which may be explained by the share of home production in each of these channels: less than 24% for the two private channels in 1997, 69% for the RTBf (counting repeats). Public television also differs from its private counterpart in its ability to offer high-level magazine and educational entertainment programmes at the beginning of prime time. A sign of the permanence of the public service (but also of its ossification) is the fact that some RTBf programmes are unusually long-lived. With lesser means than the RTBf, RTL-TVI frequently proves more audacious than its public competitor. While the RTBf only began to come on the air at noon in the fall of 1996, RTL had been doing this since 1977, and broadcasting without a break from noon to midnight since 1987. RTL-TVI was the first (even before the French channels) to start broadcasting early in the morning on the weekend with children's programmes (1983).

The broadcasting of fiction constitutes the major characteristic of the private channels (and pay-TV) of the French Community in Belgium. In 1997, on these two channels, the RTBf devoted 23% of its airtime to fiction (11% in series and serials, 7.5% in films, and 4% in television films). But, at the same time, fiction accounted for 54.5% of RTL-TVI's programming (35.5% in series and cartoons, 19% in films). Since deregulation of the radio and television scene, the share of fictional programmes has noticeably increased on public television, particularly during prime time. A telefilm or a film is thus programmed during the first or second part of every evening on the leading public channel. Like the majority of general-interest channels, the RTBf also fills a part of its daytime programming with the help of fictional items. But these appear relatively seldom in these programme slots. Numerous repeats of own-production transmissions also occur, which markedly reduces the relative importance of fiction in the whole of public channel broadcasting as compared with the situation in the private channels.

On RTL-TVI, programming has always been conceived with reference to the broadcasting of fiction, and firstly in the prime-time slots. The presence of programming types other than films, telefilms and series throughout the whole of prime-time and night-time is an extremely rare occurrence on this channel, even contradicting the image that it has forged for itself. Following the example of the majority of private channels, RTL furthermore fills its essential day-time programming with series. The second private channel, Club-RTL, fulfils a complementary function in this regard. During the day, it concentrates on series and cartoons for children, and then for teenagers. The age of the target audience increases until prime-time, which centres around the showing of old films. Every evening, Club-RTL shows the

same film twice, with a popular infotainment magazine wedged in between.

In 1997, 46% of the total volume of RTBf airtime was composed of own- and co-productions, and 24% of first-showing purchase and exchange. In this second category, non-European productions accounted for 48% of the films broadcast, 75% of the series and serials, and 15% of the telefilms. Just about all of these were products of American origin. In comparison with 1996, the share taken by US productions increased significantly for films and series, but decreased for telefilms. On RTL-TVI, the number of own-production hours in 1997 represented 44% of airtime excluding repeats, as compared to 31% in 1996. In 1997, American productions occupied 77% of airtime for films and telefilms on RTL-TVI. For RTL-TVI, the proportion of European works for 1997 is estimated at 49.6%, which is slightly less than the recommendation of the TWF Directive. TVI has been progressing on this point, however.

It could be hypothesised that, culturally dominated by their French neighbour, the French-speaking Belgian television stations are incapable of offering their viewers strong-identity programmes, especially in the domain of fiction. Unlike what happens in several neighbouring countries, the French-speaking Belgian is not fond of series or telefilms highlighting the countryside and culture of Wallonia or Brussels. By default, (s)he falls back on "regional" information centres which are becoming, both for private and public television, increasingly anecdotal in character, focusing on social facts with which supposedly the viewers can identify and to which they can relate with some intensity. The uninterrupted coverage of the wedding of the Crown Prince of Belgium (December 1999) handled in an "over-the-top" manner by all the television stations, is the latest and most relevant example.

In absolute terms, competition for audience share mainly involves the leading public channel and the leading private channel, followed by an outsider, France's private channel TF1. A few years ago, TF1 even represented a danger for the Belgian channels, with which it was competing for roughly equal shares of the market. Today the situation has settled down. The two public French channels, FR2 and FR3, also draw a significant number of viewers. Put together, the three large French channels have larger Belgian viewing figures between 5:00 and 11:00 p.m. than either of the Belgian channels. This situation puts French-speaking Belgium in a very different context from many of its neighbours, where one local channel, usually private, enjoys significant market domination, frequently capturing a market share of more than 30%. In French-speaking Belgium, the scores achieved by the national channels are far more modest, and much closer to each other.

FLEMISH-AND FRENCH-LANGUAGE TELEVISION IN BELGIUM IN THE FACE OF GLOBALISATION

Table 2: Audience shares (adults/15+, 5.00-11.00 p.m., 1998, %)

RTL-TVI	24.6
La Une {RTBf}	21.1
TF1	13.1
FR2	7.7
FR3	6.6
Club RTL	4.7
La Deux {RTBf}	2.7
Canal+	2
VCR	6

Source: RTBf Research Department

A small community surrounded by major countries and dominated by its French neighbour, the French Community of Belgium long sought to protect its cultural identity and its radio and television market from *foreign* appetites. This is the reason why Belgian politicians have always lobbied within international bodies, GAIT and WTO in particular, in favour of a cultural exception clause for radio and television products. Insofar as was possible, the Belgian French-language radio and television product has always been the subject of protectionist measures intended to enable the survival of the national public and private television channels, under threat from foreign channels. A case in point was TF1, which planned on several occasions to conquer Belgium's advertising market by beaming into this country a specific satellite signal.

The TWF Directive, which guaranteed the free circulation of pictures among members of the Union and encouraged the emergence of a European (and non national) radio and television sector, delivered a fatal blow to these protectionist aspirations. On 10 September 1996, the French Community of Belgium was found guilty on this subject by the European Court of Justice, which found that the system of prior Authorisation did not comply with the TWF Directive. Today the Belgian television market is totally open to European operators and there is no longer any obstruction to the cable distribution of their programmes. Being unable to legislate in the domain of Hertzian and *satellite* reception, the current lawmakers *determine* the operating conditions of the radio-TV distribution networks, still subject to government authorisation. The "must carry" and "may carry" principles are still in force. But the conditions imposing the retransmission of certain programmes have been considerably lightened.

The "must carry" principles henceforth apply to French Community programmes. Thus every cable distributor must relay all RTBf programmes, the programmes of

the local and Community television stations of the area in question, the programmes of the international stations in which the RTBf participates (TV5, Arte, etc.), as designated by the Government, the programmes of the private TV (Eurosport, etc.) and pay-TV stations (Canal+) recognised by the French Community. Beyond these, the "must carry" principles also concern certain other Belgian television stations: two public service channels of the Flemish Community and, should it exist, the public television of the German-speaking Community. At the European level, the "must carry" principle applies to all the programmes of those EU television stations having entered into an agreement with the French Community concerning the promotion of the cultural production in the French Community and in Europe. For other European programmes, specific government authorisation is required.

No longer being able to condition foreign channel access to its market, the French Community chose, following the example of other European laws, to encourage the development of a programming and production industry for its own radio and television content. Here as well, however, past conditions intended for the exclusive support of the Belgian French-speaking market have today been replaced by much more relaxed standards. Current law requires the French Community television stations to meet a quota of original, French-language works of up to one third of the airtime allocated to European works.

The private television stations have to ensure that 20% of their programming is own-production, and must spend a set amount on external services. For at least 5% of their programming time, they must enter into French-language co-production agreements or external service contracts with individuals or companies "established in the French-language region, in the bilingual region of Brussels-Capital, or elsewhere in the European Community." According to other legal requirements, these same channels must also conclude, for at least 2% of their programming, co-production agreements or external service contracts with individuals or companies established in the same geographical areas as those mentioned above. Finally, a channel is to acquire the broadcasting rights for programmes produced in the French Community "in priority and whenever possible" from an independent producer or distributor of the French Community.

Conclusion

In June 1999, a new political coalition bringing together Liberals, Socialists and Greens dispatched the Christian-Democratic party - in power for forty years without interruption - to the opposition benches. The coalition, with the Liberals firmly ensconced in the driving seat, has not chosen to disturb the current balances, nor to destabilise the public radio and television sector for the benefit of the private sector, as was the case the last time the Liberals came to power, during the eighties.

In Flanders, it is clear that a high degree of interweaving of interests remains between the various media. This expresses itself through cross-ownership, cooperation in the field of reporting, and in advertising management. The public service managed to obtain a strong market position again. After having followed its own media policy for years, Flanders is now witnessing the growing influence of European regulations as well as an increasing presence of multinational corporations in the Flemish media market. While Flanders' cable network was extremely dense from the very beginning, its media landscape has only become differentiated in the last ten years. Most significant by far was the arrival of national commercial station VTM, which triggered many important developments within public broadcasting.

At the same time the skyrocketing channel supply is on a collision course with the *de facto* monopoly in the hands of cable companies. As long as virtually the entire Belgian population is dependent on cable for radio and television access, the "national" equilibrium between private and public television will be maintained. But there is no certainty that things will be the same once the Belgians choose to abandon this system that they pioneered, or when, through the development of fibre optic networks, the supply of local or international programmes begins to grow in a substantial manner.

Notes

1. The official launch of RLT-TVI took place in September 1987, with 66% of the capital being held by CLT and 34% by the major daily newspaper publishers grouped together in the Audiopresse company.

2. Its programming was consequently changed in December 1996 and it now includes very popular daytime programmes for children and teens.

Bibliography

Antoine, F. (1998) 'Media politics in French-speaking Belgium: From the origins of deregulation to the impossibility of control'. In d'Haenens, L. & Saeys, F. (eds), *Media Dynamics & Regulatory Concerns in the Digital Age*, pp. 125-44. Berlin, Quintessenz Verlag.

BRTN Research Department (several issues). *Het continu kijkersonderzoek*. Brussels, BRTN.

CLT Annual Reports (several issues). Luxembourg, CLT.

d'Haenens, L. & Saeys, F. (1998) 'Media politics in Dutch-speaking Belgium: The reluctant mutation from a monopoly to a multi-channel landscape'. In d'Haenens, L. & Saeys, F. (eds), *Media Dynamics & Regulatory Concerns in the Digital Age*; pp. 104-24. Berlin, Quintessenz Verlag.

RTBf Annual Reports (several issues). Brussels, RTBf.

VTM Research Department (1990-1996) *VTM Jaaroverzicht*. Vilvoorde, VTM.