

# Belgium - Media Landscape

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## Table of contents

- Introduction
  - Media
    - Print
    - Radio
    - Television
    - Digital Media
    - Social Networks
    - Opinion Makers
    - Sources
  - Organisations
    - Trade Unions
    - Journalist Associations
    - News Agencies
    - Audience measurement organisations
    - Sources
  - Policies
    - Media legislation
    - Accountability systems
    - Regulatory authorities
    - Sources
  - Education
    - Universities and schools
    - Professional development
    - Sources
  - Conclusions
    - 5.1 Conclusion
    - 5.2 References
- 

## Overview

Belgium is a country with a highly complex political structure and is divided into three different language communities. The largest region, in the northern, Dutch-speaking part of Belgium, is Flanders, with approximately 6.5 million inhabitants. Some

4.5 million French-speaking Belgians live in Wallonia. The German-speaking community is by far the smallest region, with about 76,000 inhabitants. It only counts the small newspaper *Grenz-Echo* and public service broadcaster *BRF*, and it is excluded from further analysis in this overview. The cultural and linguistic diversity in Belgium has resulted in a segmented landscape along the lines of the different language communities; it is therefore difficult to speak of a unified Belgian media market.

The federal state structure is thus reflected in the Belgian media landscape. Thanks to constitutional reform from the 1970s onwards, competences for media and cultural affairs, among others, were transferred to the regions. As a result, there is essentially no 'Belgian' approach to media regulation and media accountability, but rather, two distinct, and sometimes significantly different, regulation systems. Simultaneously, markets in both parts of the country have evolved differently according to their respective competitive dynamics and industry life cycles: Whereas French-language dailies have been facing a steep decline in readership, the circulation of Flemish newspapers has stabilised in the last decade.

The historical development of the media is rooted in a tradition of high political parallelism. Belgium was one of the early-consolidated liberal countries with strong liberal institutions and freedom of the press anchored in the constitution of 1831. The media reflected the cultural and societal cleavage of the time and this explains why the French language, which was the cultural language of the elite, even in the Flemish-speaking North, initially dominated the historical development of the print media. From 1880/1900, newspapers blossomed, with broad ideological diversity, already segmented into distinct brands for the elite readership and for mass readership.

The media landscape gradually became depoliticised starting in the 1960s. At present, none of the major media outlets are clearly associated with a political or ideological position (except for the openly progressive daily *De Morgen* in Flanders). Historically, some newspapers were in the hands of political parties, labour organisations and so on. The concentration process that accelerated after World War Two faded out these political affiliations as all newspaper brands came into the hands of commercial owners. However, a recent consolidation in Wallonia brought back the question of political parallelism when Tecteo (an industrial group active in energy and telecommunications, with strong ties with the socialist party – now rebranded Publifin) took over regional newspaper group *L'Avenir*.

The professionalism of journalism is difficult to define without taking into account the language differences or different media types. At a community level there is a press council and there are codes of ethics. Editorial statutes in print media are rare: If they exist, they were often created in a process of consolidation, to safeguard newsroom identity of ideological branding. In the case of *Het Laatste Nieuws*, a Council was established to safeguard the liberal roots of the newspaper. As of today journalists entering the organisation have to subscribe to the ideological code; each appointment of an editor-in-chief needs to be approved by the Council.

In broadcast media, however, editorial statutes have become commonplace, encouraged by various laws. Whereas the editorial statute of commercial broadcaster *VTM* is still in preparation, public service broadcaster *VRT* developed its newsroom statute in 1998. The statute guarantees newsroom autonomy and even judicial support in case external actors try to steer the newsroom policy. The autonomy of the newsroom management and of the editor-in-chief are also ensured by the statute. In spite of carefully described procedures, statutes are not always enforced. In recent years, there is an increasing tendency of politicians to exert pressure on the autonomy of the public service broadcaster (Raeymaeckers & Heynderickx, 2017).

The role of the state has been important in the shaping of the Belgian media landscape. The enactment of one of the most liberal press regimes of the time resulted in a flourishing newspaper sector, characterised by a larger number of titles reflecting a wide array of ideological diversity. Since the appearance of radio and television, regulation became inevitable, if

only for the organisation of the structural regulation of technical infrastructure and spectrum allocation. Media regulation also protects the general interest by safeguarding plurality, cultural diversity, access to information, protection of minors, and editorial independence from political and commercial pressures.

Moreover, public service broadcasting institutions *VRT* and *RTBF* have a strong legitimacy: Public subsidies from the communities are substantial and financing is arranged via multi-annual (4 to 5 years) protocols signed with the government and Flanders and Federation Wallonia-Brussels respectively. There are almost no media-specific cross-ownership rules; this lack of rules has resulted in high levels of media concentration in both parts of the country. Print media also benefit from public subsidies, both direct and indirect. Media companies also benefit from a range of complementary measures such as reduced rates for distribution and innovation incentives. The Flemish Government also supports platforms that sustain different forms of journalism and journalism education.

## Media

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### Print

Since the 1960s, the circulation of newspapers in Belgium has been decreasing sharply: the average daily (paid) circulation has more than halved from 2.5 million to 1.2 million between 1960 and 2016. However, this figure masks major differences between the evolution of the newspaper markets in the two parts of the country. Unlike the French-language press, which has been suffering a spectacular decline in readership over the last six decades, newspaper circulation in Flanders has experienced only a modest decline and has more or less stabilised in the last years: Whereas French-language dailies lost about three quarters of their circulation since 1960 (from 1.4 million to 330,477), in Flanders the decline in daily circulation was limited to about one fifth (from 1.1 million to 891,564). The figures demonstrate that the French-language press, which prevailed over the Flemish press until the late 1960s, lost its dominant position on the Belgian newspaper market and now accounts for 27 percent of the total circulation in Belgium.

The decline in readership and circulation, among other drivers, started off a process of concentration in the newspaper market. Ever since, dozens of newspaper titles have disappeared: The number of titles fell from 48 to 15 between 1960 and 2016. *Het Volk* was the last title to disappear from the market, in 2008, a few years after it was purchased by Corelio (today better known as “Mediahuis”). In the same period of time, the number of independent newspaper publishers shrank from 34 to 5. As a result, newspaper markets in both parts of the country are characterised by high levels of market concentration and shrinking (external) diversity. A research by Steunpunt Media (2015) looked into the effects of media concentration on diversity and revealed a growth in the amount of news articles shared between different newspapers that are owned by the same group between 1983 and 2013.

In Flanders, the market was divided between De Persgroep, Corelio and Concentra until 2013. However, in 2013, a landmark deal between Corelio and Concentra was cleared by the Belgian Competition Authority, merging both newspaper businesses into joint venture Mediahuis. The publisher owns quality newspaper *De Standaard* (100,053 copies), popular title *Het Nieuwsblad* (238,804 copies) and regional newspapers *Het Belang van Limburg* (93,414 copies) and *Gazet van Antwerpen* (87,834 copies). Not only did the merger create the biggest newspaper publisher in the Flemish market (accounting for 58.9 percent of total circulation), but it also resulted in a duopoly situation. Its competitor De Persgroep accounts for the rest of the market, operating the quality newspaper *De Morgen* (54,750 copies) and the popular title (and market leader) *Het Laatste Nieuws*

(274,832 copies). In 2017, De Persgroep sold its 50% stake in Mediafin, its joint venture with Groupe Rossel, the largest media group in the French-speaking part of the market, to Roularta, which is mainly active in magazines and regional media. Mediafin operates the financial newspapers *De Tijd* (41,877 copies) and *L'Echo* (15,964 copies).

In Wallonia, the press is controlled by Groupe Rossel, IPM and Tecteo publishing a total of 7 newspaper titles. Groupe Rossel is by far the biggest publisher and accounts for 51.9 percent of the market. It owns the quality title *Le Soir* (65,659 copies) and also publishes popular titles under the company name *Sudpresse* (90,220 copies). Moreover, it controls 50 percent of Mediafin, which publishes financial newspapers in both parts of the country. The second, much smaller group is IPM, which publishes two titles: quality newspaper *La Libre Belgique* (35,524 copies) and popular title *La Dernière Heure* (42,015 copies). In 2013, Corelio, the media company in the Flemish-speaking part of the country, now known as Mediahuis, sold its stake in *L'Avenir* to utility group Publifin for 26 million euro. *L'Avenir*, formerly known as *Vers L'Avenir*, has a circulation of 81,095 copies. Publifin also expressed its interest in purchasing IPM, but the deal was, at least temporarily, called off. However, the financially precarious situation of the French-language press, whose circulation has declined dramatically by more than 35 percent since 2000, may continue to put further consolidation on the agenda.

Media ownership in Belgium is largely determined by language interests (De Bens & Raeymaeckers, 2010). In 1999, the diocese of Namur sold its 74 percent share in the catholic newspaper group *Vers l'Avenir* to Corelio, which acquired the remaining shares in 2005. However, Corelio's divestiture of the regional newspaper to Publifin put it back in Walloon hands. Other recent developments include joint investments in which Flemish and Walloon publishers team up to control newspaper titles. The former independent financial titles *De Tijd* and *L'Echo* were taken over by Mediafin, a consortium of Groupe Rossel and Roularta. Similarly, Mediahuis and Groupe Rossel participate in Mass Transit Media, which commercialises the free daily *Metro* (110,594 copies in Flanders, 98,582 copies in Wallonia).

In order to enlarge scale economies, Flemish publishers started international investments, especially in the Netherlands. In 2003 De Persgroep expanded to the Dutch market after acquiring the shares of Het Parool and in 2009 it acquired the titles of media group PCM, which publishes *de Volkskrant*, *NRC Handelsblad*, *Trouw* and *Algemeen Dagblad* (NRC Media was later sold to investment fund Egeria). De Persgroep increased its international presence with the purchase of MECOM, which owns publishers in the Netherlands (regional titles) and Denmark (in 2014, for € 245 million) and Kempen Pers (in 2015). In 2014, Mediahuis completed its purchase of NRC Media for € 90 million and integrated Concentra's interests in the Dutch Media Groep Limburg; in 2017 its € 243 million bid for the last remaining newspaper title in Dutch ownership *De Telegraaf* (Telegraaf Media Groep) was accepted. Finally, Groupe Rossel operates the French newspaper publisher La Voix du Nord and has 49.4 percent of the shares of the French free daily *20 Minutes* (from Norwegian media group Schibsted). It is interesting to notice that the international expansion of the media groups is aligned across cultural identities: Media companies in the south of the country tend to expand to France, while their competitors in the north of the country were very successful in invading the Dutch market.

The news outlets run by each of these publishing companies are outlined below:

- Mediahuis: *De Standaard*, *Het Nieuwsblad*, *Het Belang van Limburg* and *Gazet van Antwerpen*, *Metro* as free daily (with Rossel).
- De Persgroep: *Het Laatste Nieuws*, *De Morgen*.
- Roularta: *De Tijd/L'Echo* (via Mediafin).
- Groupe Rossel: *Le Soir*, *Sudpresse (La Nouvelle Gazette)*, *Grenz-Echo* and *De Tijd/L'Echo* (via Mediafin), *Metro* as free daily (with Mediahuis).
- IPM: *La Libre Belgique* and *La Dernière Heure*.
- Publifin: *L'Avenir*.

## Radio

Broadcasting in Belgium developed according to the political and ideological divisions in Belgian society. Although the pioneering station *Radio Belgique* was a neutral station, most early stations in the 1920s were directly linked to ideological interest groups, such that almost every political party had its own private station. In 1930, the national public service broadcasting institution *INR-NIR* was set up, fully funded by the government. After World War Two, it was granted a public monopoly, while all private, ideological stations were incorporated within the structure of the national broadcaster (d'Haenens, Antoine & Saeys, 2007). Finally in 1977, the process of splitting up the nationwide INR-NIR into two divisions resulted in a permanent separation of the two public service institutions: *RTBF* (Wallonia) and *BRTN* (Flanders). The public radio monopoly was first challenged by pirate stations from ships in the North Sea in the late 1960s: Most had commercial ambitions and were providing popular music, which was in stark contrast to the rather old-fashioned programmes of public radio stations at that moment.

Both language communities legalised 'free' radio in 1981 and 1982 respectively, but they reacted quite differently to these evolutions and soon developed diverging policy frameworks. In order to preserve the public service broadcaster, Flemish policymakers tried to limit the impact of free radio by preventing them to form networks, which adversely impacted the economic sustainability of these stations and drove many of them into bankruptcy. Moreover, the public service broadcaster was decentralised, in an attempt to increase control of the local market. This protectionist policy at the Flemish level is best illustrated by the relatively late opening of the national commercial market, which developed only by 2002. Flemish policy starkly contrasts with audiovisual policies in the southern part of the country, where the monopoly of RTBF was officially broken up in 1991 when national commercial radio was introduced. The protectionism of Flemish policymakers in favour of BRTN and the rather market-based approach encouraging commercial radio is reflected in today's radio market structure of the respective communities (Evens & Paulussen, 2012).

In Flanders, the market is dominated by public service broadcaster *VRT* (formerly BRTN), which accounts for 63.3 percent of the listening market. *Radio 2* is the indisputable market leader with a share of 28.1 percent; *Studio Brussel* (alternative and rock, 13 percent) and *MNM* (popular music, 10.4 percent) are other popular VRT brands. Commercial broadcaster Medialaan operates *Q music* (13.4 percent) and *JOE fm* (7.8 percent); the third national commercial channel *Nostalgie* has a market share of 5.8 percent. It can be concluded that the public service broadcaster VRT (with five stations) holds a dominant position in the radio market, whereas the national commercial market (with three stations) has been struggling to develop. It is noteworthy to mention that all commercial radio stations are still owned by Flemish news publishers, illustrating the high level of media cross-ownership (Medialaan, the performant commercial broadcaster for television and radio is owned by De Persgroep).

In Wallonia, the radio market is much more fragmented than in Flanders. It is characterised by a larger and stronger presence of commercial radio stations; *Radio Contact* is the market leader (16 percent) with *Bel-RTL* as runner-up (14.5 percent). In

terms of audience share, five RTBF stations hold a 34.3 percent market share, with *VivaCité* (14.3 percent) and *Classic 21* (8.7 percent) as most successful brands. In contrast to Flanders, the market for commercial radio is much more established, partly because commercial radio stations were awarded with frequency allotments optimally covering the economic poles of the region. Most radio stations are owned by foreign media groups, most notably from France (*Groupe NRJ*) and Luxemburg (*Groupe RTL/Bertelsmann*), leaving almost no commercial radio station in the hands of domestic media organisations.

## Television

In 1931, the first television program was broadcast in Belgium by the INR-NIR. After the establishment of RTBF and BRTN, each public service broadcasting institution had a monopoly in their respective markets. But the high penetration of cable television, which started to replace terrestrial reception in the late 1950s, allowed the broadcast of over 20 foreign television stations, most notably from the Netherlands, Germany and France. This ensured competitive pressure on the public service television and opened up a debate for breaking up the public monopoly (pressured by European policy). In 1981, a new law allowed for the presence of pay-TV, regional television and, most importantly, private television in both Wallonia and Flanders. However, it took six years for Wallonia and eight years to Flanders to install a private competitor to the public monopoly.

In 1989, *Vlaamse Televisie Maatschappij* (VTM) became the first Flemish commercial broadcaster. The Flemish Government required that at least 51 percent of the shares would be owned by newspaper publishers. The European Commission later protested against this requirement, calling it a form of obliged cross-ownership. In reality, newspaper organisations came to control 100 percent of the capital of VTM (nowadays 100% owned by De Persgroep). In the following years, other channels such as *VT4* and *Ka2* entered the market. As a result of this 'new' competition, the market share of the BRTN, which was rebranded into *VRT*, shrank spectacularly. In order to give the organisation more autonomy from the government, a system of management contracts was introduced, giving VRT more weapons to address the increased competition. Using new management and marketing techniques, VRT was able to reclaim a part of its market share and has been the market leader with *één* (first channel) since 2008. As of today, VRT commands a 38.5 percent market share. Main competitor Mediahuis, which owns generalist channel *VTM* and thematic channels *Vitaya*, *CAZ* and *Q2* and children channels *Cadet* and *VTMKZoom*, accounts for 31.6 percent of the market.

In 2014, De Vijver, the other main commercial broadcaster operating *VIER* (7.8 percent) and *VIJF* (4 percent), was purchased by cable operator *Telenet*, a subsidiary of U.S. cable giant Liberty Global. With the purchase, Telenet controls the entire audiovisual value chain: it owns Flanders' best known production company *Woestijnvis* and the second commercial channel *VIER*. Telenet is also the largest pay-TV operator (about 85 percent of all connections), holds the most attractive sports and movie rights, controls about 50 percent of all internet connections and some 25 percent of mobile telephone users, resulting in an unprecedented accumulation of market power (Evens, 2014). Telecom incumbent *Proximus* (formerly Belgacom) is a distant runner-up on the market for digital television services, which has a penetration of about 90 percent of Flemish households.

Walloon public broadcaster RTBF was challenged by a commercial competitor (*RTL-TV*) as early as 1987. Like its Flemish counterpart VTM, *RTL-TV* was, at least partially, owned by newspaper publishers via *Audiopresse* (today, only *Groupe Rossel* participates), which has a minority share of 34 percent in *RTL-TV*. The remaining shares are with the Luxemburg media conglomerate *Groupe RTL/Bertelsmann*, which also operates *Club RTL* (3.5 percent) and *Plug RTL* (2.7 percent). Officially a Luxemburg channel, *RTL-TV* is the market leader with 19 percent. In addition, French channels, most notably *TF1* (15.5 percent), *France 2* (7.1 percent) and *France 3* (4.9 percent), are very successful in the audience market of Wallonia. In contrast to Flanders, the public service broadcaster plays only a minor role in the television market: the combined market

share of *La Une* and *La Deux* accounts for only 20.5 percent. However, there are signs that RTBF still is not yet fully depoliticised, which hampers its ability to compete with foreign channels (both in radio and television). The Walloon market for digital television services is divided between *Proximus* and *VOO*. Telecom incumbent Proximus was the first provider in 2005, but after consolidating most of the independent cable operators, VOO has become the leading television provider. VOO is part of Publifin and also owns pay-TV channels BeTV, which hold the rights to the Belgian football league. Similar to Proximus, which operates in both parts of the country, VOO provides quadruple play services (television, telephony, internet and mobile all-in-one). Rumour has it that Telenet and VOO, active in Flanders and Wallonia respectively, would like to merge operations in order to provide a national quadruple play offering.

## Digital Media

Belgian newspapers have been offering digital versions since the early 2000s: the financial title *De Tijd* was the first with an online edition (website) and quality brand *De Standaard* pioneered the pdf format, which has now become the main digital newspaper model. The sale of digital newspapers did not take off until late 2010, when the Apple iPod was introduced. The introduction of tablets, which now have a penetration rate of over 50 percent in both parts of the country, represented a juncture in the lifecycle of newspapers publishers, for whom digital formats represent a unique opportunity to reconsider the meaning and purpose of news delivery and to challenge the traditional journalistic narratives and layout formats.

Despite these opportunities, digital circulation did not account for more than 9 percent of the total circulation in 2016, just 1 percent more than the year before. Hence, digital circulation is growing, but at a rather slow pace, and its growth is hardly compensating for the decreasing circulation of traditional newspapers, especially in Wallonia. Since 2010, paper circulation in the southern part has declined by 119,355 copies (minus 29 percent) while digital circulation grew by 34,075 copies. The situation is quite different in Flanders, where paper circulation declined by 110,510 (minus 12 percent) but digital subscriptions grew by 76,809 copies.

In Flanders, digital circulation is 80,267 copies (9 percent of total circulation), with quality newspapers *De Standaard* (16,389 copies) and *De Morgen* (16,305 copies) leading the market in absolute numbers. Financial newspaper *De Tijd* leads in relative numbers: digital represents about 36 percent of its total circulation. Recently, popular newspapers have seen a strong growth in digital sales too. In Wallonia, quality newspaper *Le Soir* takes the lead with 10,246 digital copies, followed by regional title *Sudpresse* (8,706 copies). Similar to its Flemish counterpart, digital sales represent nearly 40 percent of total circulation for financial newspaper *L'Echo*.

Online video platform Netflix gained ground in September 2014 and has built a base of about 400,000 daily viewers (208,000 in Flanders; 192,000 in Wallonia). However, the actual number of viewers is higher since passwords are widely shared with friends and family members. In response to Netflix' arrival in Belgium, television broadcasters have also developed online offerings, so to keep the viewer engaged and generate additional revenue from subscriptions and advertising. Medialaan started *Stievie*, a subscription platform offering live and on-demand television, and has made all television programmes freely available on its website for registered viewers. Moreover, VRT has launched its free video player *VRT nu* early in 2017. RTBF has a similar service: *Auvio*.

## Social Networks

Thanks to the wide availability of high-speed broadband networks – a result of the public service by both cable and telecom operators – the penetration of Internet access is relatively high. The number of Internet users in Belgium has surpassed 9 million, equally to a penetration of 82 percent. However, there is a remarkable difference between the two language communities: Whereas Internet penetration in Flanders exceeds 90 percent, the proportion of Internet users in the Southern

part is of about 72 percent. Belgium used to lag behind in terms of mobile data subscription, but since 2014 the proportion of mobile data subscribers has been increasing fast to more than 60 percent.

New media platforms are by far the most consulted websites in Belgium. Google and Facebook are the most popular websites in Belgium, followed by YouTube, Microsoft Outlook (Hotmail) and Wikipedia. Ranked as number 9, HLN.be, the website of *Het Laatste Nieuws*, is the only representative of a traditional media brand in the top 10; Het Nieuwsblad.be is ranked number 12. The popularity of news aggregators such as Facebook, Google and Twitter puts pressure on traditional media organisations. About 40 percent of Internet activity in Belgium is related to social networks, 16 percent of attention goes to portals and search engines. Barely 20 percent of all traffic is related to traditional media websites. Not only in terms of traffic, but, since views are sold to advertisers, also in terms of advertising revenue. It is therefore no surprise that online advertising is growing, in most cases at the expense of traditional media organisations.

Whereas television advertising has remained more or less stable over the last years (about 54 percent), advertising income of newspapers and magazines has declined dramatically. Although the share of newspapers and magazines on the Belgian advertising market remained stable between 1998 and 2006 (about 38 percent), its share has sharply fallen to 27.4 percent. Meanwhile, the share of online advertising in the total advertising investments has grown to over 6 percent. However, these figures are grossly underestimated since they are limited to traditional display advertising (banners) and do not include search, content integration and/or native advertising. Since it is estimated that Facebook and Google command at least two thirds of all Internet advertising in Belgium, the share (and volume) of online advertising is assumed to be a two- or threefold of the officially reported digital revenues.

## Opinion Makers

In recent years, a couple of digital news initiatives have been established; some of them have grown into trustworthy providers of news and opinion. Launched in 2009, *Apache* was the first news blog with professional journalists. It focuses on investigative journalism, and access to articles requires a subscription. *MO\**, which also has a monthly paper edition, focuses on the problem of sustainable development in the South and issues of globalisation. *De Wereld Morgen* also specialises in critical coverage and opinion and is run by professional journalists as well as citizen journalists. The website is supported by trade unions and committed NGOs, and is known for its leftist viewpoints. *Scepter*, on the contrary, claims to be an independent political news medium and publishes conservative, right-wing opinions. Finally, *Newsmonkey* was branded as the 'Flemish BuzzFeed' and focuses on social media as its main distribution channel. It is built on the idea of popular lists and videos to go viral. Most of these digital-only news websites have united themselves in *Media21*.

## Sources

Newspapers

- [De Morgen](#)
- [De Standaard](#)
- [De Tijd](#)
- [Gazet van Antwerpen](#)
- [Het Belang van Limburg](#)
- [Het Laatste Nieuws](#)
- [Het Nieuwsblad](#)
- [L'Avenir](#)
- [L'Echo](#)



- [La Dernière Heure](#)
- [La Libre Belgique](#)
- [Le Soir](#)
- [Metro \(fr\)](#)
- [Metro \(nl\)](#)
- [Sudpresse](#)

#### Publishers

- [De Persgroep](#)
- [Groupe Rossel](#)
- [IPM](#)
- [Mediahuis](#)
- [Publifin](#)
- [Roularta](#)

#### Radio

- [Bel-RTL](#)
- [Classic 21](#)
- [Fun Radio](#)
- [Joe FM](#)
- [Klara](#)
- [La Première](#)
- [MNM](#)
- [Musiq'3](#)
- [Nostalgie](#)
- [NRJ](#)
- [Pure FM](#)
- [Q music](#)
- [Radio 1](#)
- [Radio 2](#)
- [Radio Contact](#)
- [Radio Nostalgie](#)
- [Studio Brussel](#)
- [VivaCité](#)

#### Television

- [BeTV](#)
- [Canvas](#)
- [Club RTL](#)
- [één](#)
- [France 2](#)
- [France 3](#)
- [La Deux](#)

- [La Une](#)
- [Plug RTL](#)
- [Q2](#)
- [RTL-TVI](#)
- [TF1](#)
- [VIER](#)
- [VIJF](#)
- [Vitaya](#)
- [VTM](#)

Opinion makers

- [Apache](#)
- [De Wereld Morgen](#)
- [Media21](#)
- [MO\\*](#)
- [Newsmonkey](#)
- [Scepter](#)

## Organisations

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### Trade Unions

The Belgian journalists' union is called the AVBB. It came into being in 1978 after a fusion of the *Beroepsunie van de Belgische Pers* and the *Algemene Belgische Persbond*, the latter of which existed since 1889.

Since its inception, the AVBB has defended both the interests of journalists and their professional standards. It includes recognised professional journalists and interns, both employed and those working on a freelance basis. The criterion for applying is that a journalist earning her main source of income from journalistic activities. Press photographers and cameramen are also part of the AVBB and enjoy the status of professional journalists. AVBB also publishes a bi-monthly magazine, *De Journalist*, in both a French and Dutch. It also publishes an official annual on the Belgian press, containing a lot of practical information.

In 1998, the AVBB formed Flemish and Walloon divisions. The Walloon division is called the Association des Journalistes Professionnels (AJP). The Flemish division is called the *Vlaamse Vereniging van Beroepsjournalisten* (VVJ). The AVBB continues to exist on a federal level, however.

Membership in the AVBB confers certain advantages: a free press pass, a free official licence plate, a press pass of the International Federation of Journalists, a collective health insurance, a subscription to *De Journalist*, etc.

Since 1974, the Belgian newspaper publishers have organised themselves in the BVDU, the *Belgische Vereniging van Dagbladuitgevers*. It defends the interests of publishers, both nationally and internationally, and signs collective trade agreements with the journalists' union.

Belgium has no strong tradition of editorial charters that specify the powers, rights and responsibilities of journalists and publishers at a specific newspaper or magazine. Historically, there have been a few attempts. When *De Persgroep* acquired the left-wing paper *De Morgen* in 1989, a foundation was established to guard the independence of the editorial staff. It took the property right over the title and has a say in the appointment or the firing of the editor-in-chief. The editorial charter provides few guarantees, however: it is in no way binding for *De Persgroep*. It is but an arrangement between the editorial staff and the management of *De Nieuwe Morgen*, which ceased to exist. *De facto*, the editorial staff of *De Morgen* remains relatively autonomous.

As in most Western countries, investigative journalism in Belgium is on the decline. The *Fonds Pascal Decroos*, named after a well-known Belgian journalist, has formed to try and do something about this. It provides working scholarships for journalists eager to work on special projects. It gets its financing from different parties: the Flemish government provides a 250,000 euro yearly subsidy. Particular individuals and companies can become members (income from this source amounts to 9,000 euro per year) or leave a legacy to the fund. Flemish newspapers and magazines provide free advertising space. Two of its online initiatives are [Mediakritiek.be](http://Mediakritiek.be), a forum for a critical review of trends in journalism and the media, and [Wobbing.eu](http://Wobbing.eu), which fights for more freedom of information.

The state of Belgian, especially Flemish, journalism is well documented. This is because of the University of Ghent (see below), which undertakes extensive surveys of the journalistic population. It has done this every 10 years since 1973. The surveys provide a wealth of information about the demographic properties of Belgian journalists: their education, their motivations, their external and internal mobility, the satisfaction they derive from their work, their political-ideological leanings. Most of these studies were in co-operation with the AVBB, providing for a broad coverage of the population. Because the surveys have been mostly conducted in a similar manner over the years, longitudinal analyses are possible. Most Flemish journalists continue to work in the print media. The occupation is primarily one of men, although in the last decades the share of women has improved, especially in radios and magazines. Today there is a 70-30 split, although few women rise to top positions in the journalistic world. Most journalists are highly educated, despite coming from middle class backgrounds. External mobility exists: half of the journalists previously had a different occupation. A relatively high percentage come from the academic world. Internal mobility is limited, although rising. A lot of this mobility goes from print media to audiovisual media, especially toward television. Flemish journalists are satisfied with their financial status and the social prestige they receive. Sources of unhappiness about working conditions are low job security, irregular hours, limited promotion opportunities and, especially, workpressure. Ideologically speaking, Belgian journalists are more progressive and left-leaning than the populace – a global trend.

## Journalist Associations

The Belgian professional organisation for journalists is called AVBB/AGJPB (*Algemene Vereniging van Beroepsjournalisten van België/Association Générale des journalistes professionnels de Belgique*). Since its foundation in 1978, it has been defending both the interests of journalists and their professional standards. The criterion for applying is that a person earns his/her main source of income from journalistic activities. Press photographers and cameramen are also part of the AVBB/AGJPB and enjoy the status of professional journalists. In 1988, AVBB/AGJPB formed Flemish VVJ (*Vlaamse Vereniging van Beroepsjournalisten*) and Walloon AJP (*Association des Journalistes Professionnels*) divisions, who defend the rights of journalists for those issues that the language communities and institutions regulate. However, AVBB/AGJPB continues to exist at a federal level, taking care of federal affairs such as copyrights.

Flemish newspaper publishers have organised themselves in *Vlaamse Nieuwsmedia* (formerly *Vlaamse Dagbladpers*); *The Ppress* is the Belgian association of Belgian periodical press (magazines, trade magazines etc.). These organisations

defend the interests of publishers, both nationally and internationally, and sign collective trade agreements with the journalist unions.

## News Agencies

Belgium has always had one major news agency, *Belga News Agency*, which was founded in 1920 and started to cover domestic news in 1925. From 1944 onwards, editorial work was done both in Dutch and French, with a division into two separate desks in 1970. In cooperation with international partners such as *Agence France-Presse* (AFP) its service Belga Image offers thousands of press photos every day. Since 2009, Belga also offers creative commons and even royalty-free images. The Belgian newspapers became the majority shareholder in 1948.

Digitalization at Belga started in 1981 and continued with the adoption of new technologies that allowed for the real-time delivery of material: fax, an ISDN network (for sending colour photos) and e-mail. In 2001, SMS services for mobile phones were also started. Five years later, Belga started to supply video material for websites. With this, Belga started to compete with *Zoom.in*, a European supplier of online news video material that had a quasi-monopoly on the Belgian market until 2006. Nowadays, both the public and private broadcasters have become very active in selling video material to newspaper websites too.

## Audience measurement organisations

The main supplier of media statistics and audience measurement is the *Centrum voor Informatie over de Media* (CIM). CIM was established in 1971 and is jointly owned (and funded) by media organisations, media agencies and advertisers. CIM's mission is to provide its members with accurate, reliable and standardised information to commercialise their media, offering a single currency to the advertising market. CIM is quite unique in Europe as it has the sole responsibility of delivering the currency not only to the television sector, but also to newspaper and magazines publishers, radio stations, outdoor venues, cinemas and online media.

## Sources

- [Association des Journalistes Professionels \(AJP\)](#)
- [Belga News Agency](#)
- [Centrum voor Informatie over de Media \(CIM\)](#)
- [The Ppress](#)
- [Vlaamse Nieuwsmedia](#)
- [Vlaamse Vereniging van Beroepsjournalisten \(VVJ\)](#)

## Policies

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### Media legislation

As mentioned, authority over cultural affairs resides with the language communities: A 1980 law specifies radio and television as cultural affairs. Basic rules can be found in media decrees, which are discussed by the Parliament and specified by the Minister of Media of the respective language communities. These media decrees stipulate the conditions by which television

and radio broadcasters (both public and commercial) as well as cable operators must abide. Media decrees have evolved gradually over time and are subject to revision. In most cases, Parliaments implement European directives such as the Audiovisual Media Services Directive and the Satellite and Cable Directive into community law. However, there is ample room for specific legal initiatives, such as the requirement for television distributors (cable, IPTV etc.) to participate in the financing of Flemish fiction series (known as 'Stimuleringsregeling voor audiovisuele sector').

Beside the communities, which are responsible for media affairs, the federal government remains the authorised support system for the press. Indirect government support, aimed to help the newspaper market as a whole, is organised at the federal level. The most important of these subsidies are favourable rates for postal delivery. It is estimated that the federal government annually pays "bpost" about € 170 million to distribute Belgian newspapers and magazines (in 2015, the five-year contract was renewed for € 850 million). Moreover, news media enjoy a 0 percent VAT regime; this applies to all newspapers and magazines with informative content for the general public that appear at least 50 times a year (in contrast to digital media, which are taxed at a 21 percent VAT rate). It is estimated that the 0 percent VAT regime costs the government about € 120 million per year. Whereas press publishers deem these measures necessary in order to fulfil their democratic role, *Media21* claims that these measures are disproportionate and counterproductive for the innovation of digital journalism.

## Accountability systems

The national professional organization of journalists (*AVBB/AGJPB*) is the cradle of all initiatives to draw the lines of an ethical code for journalists. In Flanders, *de Raad voor de Journalistiek* (RvdJ) was founded in 2002. Its ethical framework was formalized in 2010 in the *Code van de Raad voor de Journalistiek*. The council involves representatives from the publishers and media companies, journalists, and experts outside of the media circles. The Council has an impressive track record and the self-regulatory body appears to sustain the quality of journalism. A large proportion of the complaints evaluated by the Council is related to invasion of privacy or perceived invasion of privacy, but there are also complaints relating to tabloidization or sensationalism.

For the French-speaking part of the country, the *Conseil de Déontologie Journalistique* (CDJ) was created in 2009 and its missions were defined by law, making it more co-regulatory (public authorities and the sector) than self-regulatory (the sector only). CDJ involves representatives from the publishers, journalists, editors-in-chief, and civil society. It established its own *Code de déontologie journalistique* in 2009, which was updated in 2013. CDJ works closely together with their Flemish counterpart as well as with the regulator for audio-visual media, the *Conseil Supérieur de l'Audiovisuel* (CSA). Together with the CSA, the CDJ publishes a report each year on the activities regarding complaints and specific cases with ethical characteristics (Raeymaeckers & Heinderyckx, 2017).

## Regulatory authorities

The responsibility for the enforcement of the media legislation rests with the regional media regulators: the *Vlaamse Regulator voor de Media* (VRM) and *Conseil Supérieur de l'Audiovisuel* (CSA) for Flanders and Wallonia respectively. The VRM has a bicameral structure: The first chamber decides on general matters while the second chamber rules on issues regarding independence and the protection of minors. Responsibility for the evaluation of the contract between the government and public broadcaster also resides with the VRM. CSA, the Walloon counterpart, has similar responsibilities and three counsels: an advertising counsel, a control counsel and a licence counsel.

On the federal level, the *Belgian Institute for Postal Services and Telecommunications* (BIPT) regulates electronic communications (telephony, internet, digital television) and guarantees competition in the market. Moreover, it manages the electromagnetic spectrum and allocates scarce resources such as radio frequencies. Finally, it functions as media regulator

in the Brussels-Capital Region, ensuring that operators in the bilingual area comply with specific regulations on radio and television.

A 2007 law established the *Conference of Regulators for Electronic Communications* (CRC) in order to stimulate coordination between the federal BIPT and the regional VRM and CSA. In 2011, based on an extensive market analysis, the CRC imposed the different cable operators Telenet, Tecteo and SFR/Numéricable to provide wholesale access to alternative operators. According to CRC, cable operators occupied a dominant position in the market for internet and cable television and were therefore required to open up their cable network. Similarly, Proximus was obliged to open up its copper network for alternative providers of broadband and digital television services.

## Sources

Laws, Regulations and Institutions

- [Belgian Institute for Postal Services and Telecommunications \(BIPT\)](#)
- [Conseil de Déontologie Journalistique \(CDJ\)](#)
- [Conseil Supérieur de l'Audiovisuel \(CSA\)](#)
- [Raad voor de Journalistiek \(RvdJ\)](#)
- [Vlaamse Regulator voor de Media \(VRM\)](#)

## Education

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### Universities and schools

In most universities, journalism studies are part of the curriculum of the Masters. These courses are sometimes offered in collaboration with schools for higher professional education. Aside the academic curriculum closely linked with academic research on journalism, many institutes for higher education offer different curricula for journalism.

Journalism education curricula in Flanders:

- Bachelor in de Journalistiek at Artevelde Hogeschool, Ghent
- Bachelor in de Journalistiek at Artesis-Plantijn Hogeschool, Antwerp
- Bachelor in de Journalistiek at Erasmus Hogeschool, Brussels
- Bachelor in de Journalistiek at Howest, Kortrijk
- Bachelor in de Journalistiek at PXL Limburg, Hasselt
- Bachelor in de Journalistiek at Thomas More, Mechelen
- Master in de Journalistiek at KU Leuven Campus, Brussels
- Master in de Communicatiewetenschappen: afstudeerrichting Journalistiek at Ghent University
- Master in de Journalistiek at Vrije Universiteit, Brussels
- Bachelor en Journalisme at IHECS, Brussels
- Master en Journalisme at Université Catholique de Louvain, Louvain-La-Neuve
- Master en Journalisme at Université de Liège, Liège
- Master en Journalisme at Université Libre de Bruxelles, Brussels

Journalism education curricula in Wallonia:

- Bachelor en Journalisme at IHECS, Brussels
- Master en Journalisme at Université Catholique de Louvain, Louvain-La-Neuve
- Master en Journalisme at Université de Liège, Liège
- Master en Journalisme at Université Libre de Bruxelles, Brussels

## Professional development

The language communities support training facilities and professional development. The Flemish community government provides € 300,000 per year to *Fonds Pascal Decroos* (grants for investigative journalism). Additionally, it supports *Mediarte* (€ 270,000) and *MediAcademie* (€ 730,000), which provide professionals with training to in audiovisual and news media respectively.

## Sources

- [Artesis-Plantijn Hogeschool](#)
- [Artevelde Hogeschool](#)
- [Erasmus Hogeschool](#)
- [Fonds Pascal Decroos](#)
- [Howest](#)
- [IHECS](#)
- [KU Leuven Campus Brussel](#)
- [MediAcademie](#)
- [Mediarte](#)
- [PXL Limburg](#)
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- [Université Catholique de Louvain](#)
- [Université de Liège](#)
- [Université Libre de Bruxelles](#)
- [Universiteit Gent](#)
- [Vrije Universiteit Brussel](#)

## Traditional forms of communication

### Summary

### Sources

# Conclusions

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## Conclusion

The Belgian media landscape is unique in the sense that there is no unified marketplace: markets in the northern and southern part of the country are separated along the lines of the different language communities. Following the decentralisation of the federal state, Flanders and Wallonia have developed diverging policies, which has at its turn resulted into different market structures and media organisations. Except for a few cases, media organisations in both parts have no shared interests in media ventures. Whereas in the North ownership of media organisations has largely remained in the hand of local owners, the French-language market is controlled by media organisations from France and Luxemburg .

Despite the de-politicisation of the press from the 1980s onwards, the newspaper market continues to display a wide array of ideological voices. The enduring evolution of consolidation has produced a concentrated market in both parts of the country, and is threatening media pluralism. Moreover, the shrinking market for newspapers, both in terms of readers and advertising, is putting pressure on the sustainability of news media. Digital revenue only accounts for about 10 percent of total circulation, and has yet not compensated for the losses caused by the decline in circulation. Although television broadcasters are in better shape, partly thanks to the opportunities of online video, the accumulation of power that resides with cable operator Telenet has to be closely monitored.

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