



## Brussels Studies

La revue scientifique électronique pour les recherches sur Bruxelles / Het elektronisch wetenschappelijk tijdschrift voor onderzoek over Brussel / The e-journal for academic research on Brussels

**Notes de synthèse | 2018**

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# A mediapark in Brussels? The media industry and its regional dynamics

BSI synopsis

*Un médiapark à Bruxelles ? L'industrie des médias et sa dynamique régionale*

*Een mediapark in Brussel? De mediasector en zijn regionale dynamiek*

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### Electronic version

URL: <http://journals.openedition.org/brussels/1938>

ISSN: 2031-0293

### Publisher

Université Saint-Louis Bruxelles

### Electronic reference

Marlen Komorowski, Victor Wiard, Sabri Derinöz, Ike Picone, David Domingo and Geoffroy Patriarche, « A mediapark in Brussels? The media industry and its regional dynamics », *Brussels Studies* [Online], Synopses, no 129, Online since 12 November 2018, connection on 12 November 2018. URL : <http://journals.openedition.org/brussels/1938>

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## AUTHOR'S NOTE

This synopsis is based on the research findings of the Media Clusters Brussels (MCB) project ([www.mediaclusters.brussels](http://www.mediaclusters.brussels)), financed by Innoviris under the Anticipate – Prospective Research for Brussels – programme under grant 2014-PRFB-66. It summarises almost four years of research in order to inform the general public, policy makers and the scientific community regarding media cluster development at a theoretical level, and regarding current policy ambitions in Brussels. The authors are very grateful towards Sylvain Plazy who, as a former MCB researcher at *Université Saint-Louis – Bruxelles*, contributed to the research results reported in this synopsis.

## Introduction

- 1 The Government of the Brussels Capital Region (BCR) foresees within the coming 10 years the development of *mediapark.brussels*, an urban and property development project in the Reyers neighbourhood, located in the Municipality of Schaerbeek. The *mediapark.brussels* project is a fascinating case study of the complexity of governance in Brussels and Belgium. Media-related policy is the responsibility of the (language) Communities of Belgium. This leads to two Belgian-wide public broadcasters (RTBF and VRT) whose organisation, structure and financing fall under the cultural competences of

the Communities. The Government of the BCR therefore does not have direct competence in matters concerning the media (including radio and television), but its role in urban planning is the motor of the mediapark.brussels project. Reyers is already the home of the two Belgian-wide public broadcasters and other media companies located around the area. The mediapark.brussels project aims at creating a lively neighbourhood for creators, innovators and media workers, agglomerating media activities in a media cluster. mediapark.brussels will lead to a complete restructuring of the Reyers area: two new buildings for the public broadcasters as well as additional office space, housing, commercial facilities, and park areas will be built. The goal of the Government of the BCR is to strengthen the international position of the city with respect to other European capitals and the neighbouring regions by fostering growth in the media industry [mediapark.brussels, 2018].

- 2 The mediapark.brussels project takes place in a context where the common assumption among scholars is that a concentration of related stakeholders in a regional agglomeration brings advantages for firms, including higher efficiency, innovative potential, lower transaction costs and more knowledge spillover [Scott, 2000]. Additionally, governments at different levels acknowledged that the media industry provides important leverage to local economies. The European Commission takes the position that the media industry plays “a key economic, social and cultural role in Europe”, which “creates growth and jobs” [European Commission, 2015]. For these reasons, governments are applying the media cluster concept more and more in their policies. This is also seen at the level of the BCR. The Government of the BCR is investing in the development of mediapark.brussels through the Urban Development Corporation (SAU-MSI). Concurrently, impulse.brussels, the Brussels enterprise agency, has been setting up screen.brussels, an initiative combining a fund for audiovisual and digital productions and a media cluster initiative in support of the media sector in Brussels. Local (semi-)public stakeholders such as the Brussels television station BX1, the journalism and communication school IHECS Academy, and the Brussels Video Centre have seen the cluster benefits and have confirmed their relocation to mediapark.brussels. Despite the apparent consensus among scholars and governments described above over the fact that the development of media clusters via the agglomeration of media companies is beneficial, many questions remain unanswered. Some scholars [e.g. Bruneel, Spithoven and Maesen, 2007] go as far as questioning the relevance of proximity among firms in a cluster and hence the resulting benefits.
- 3 This synopsis explores the media cluster concept, analyses the current state of the Brussels media industry and assesses the mediapark.brussels project. Quantitative and qualitative data from multiple sources have been collected and analysed: a database on media companies in Brussels from Bel-first [Bureau van Dijk, 2018], on media workers with data from National Social Security Office [NSSO] and National Institute for Social Security [NISSE], a dedicated online survey among media workers in and around Brussels (n=577) as well as interviews with journalists (n=14) and media workers involved in shared learning initiatives (n=13). It is complemented by knowledge gathered through the collaborative activities (workshops, meetings, seminars, public events, etc.) of the project with important stakeholders, including representatives of the BCR and media companies. More details about the methodologies applied and the project findings can be found in the Deliverables of the Media Clusters Brussels (MCB) project referenced throughout the synopsis.<sup>1</sup> This synopsis is structured as follows: (1) first, a framework is presented to

define the media sectors (in Brussels) and explain the media cluster concept and its application in policy; (2) second, research results about the Brussels media industry and policy ambitions are presented; (3) finally, debates and tensions in the development of the mediapark.brussels are discussed in light of (1) and (2).

## 1. Media and clustering policies

- 4 Our framework to study media clusters in Brussels draws on different disciplines and fields of study (such as media studies, cluster theory, policy, journalism and organisational learning) and combines several lines of conceptual, theoretical and policy developments concerning (1.1) media industry activities, (1.2) the media cluster concept, (1.3) the different types of media cluster, (1.4) the media clusters' various entities and (1.5) the use of media clusters as a policy tool.

### 1.1. Defining media industry activities

- 5 An industry is widely acknowledged as a group of “productive institutions” that are linked through activities [Williams, 1983]. In general terms, the media industry is often (but not always) considered as part of the cultural and creative industries (CCI) [Garnham, 2005; Martens, Dobbels, Amez and Ysebaert, 2014]. Current research (including on Brussels) comprises most media-related activities such as the audiovisual, press and advertising sector and studies it along with performing arts, fashion and even architecture [e.g. Mauri, Vlegels, Lucy, Lazzaro, and Ysebaert, 2017]. Even though it is still relevant to study the commonalities of the CCI, including the working conditions of the creative workforce, researchers have argued that the specificities of mediated content production should spark analysis focusing on this sector [Komorowski and Ranaivoson, 2018; Picard, 2009]. Furthermore, until recently there was no consensus among scholars and politicians concerning what to include in the media industry – in terms of sectors and activities – when bringing media into their agendas. The reasons for this lack in unanimity are manifold. In particular, the influence of technological changes on the media industry makes it hard to delineate new rising sectors. This is troublesome, as in order to research but also to integrate the media industry into the policy agenda, it is of the utmost importance to know how to define it.
- 6 In this research, we define the media industry according to its outcome, i.e. the mediated content. This includes all output that is distributed through a carrying medium, such as paper, television as well as the internet. The medium used for the content should enable distribution to a large group of consumers. The activities in the media industry can be described by what are known as core activities, including the production and publishing of content. Additionally, we suggest using the industrial systems approach inspired by the work of Porter [1990], which means that different kinds of activities add value to the mediated content. These activities go beyond core activities (production, publishing) and include support (distribution, post- and pre-production, retail), facilitation (research institutions, membership organisations, educational institutions, etc.) and external activities (software suppliers, telecommunication, etc.). Finally, a sectoral delineation is necessary in order to enable comparison in research. By analysing various studies from international and local sources on the topic [including KEA European Affairs, 2006; OECD, 2011; Verheyen and Franck, 2012], we classified content production into four broad

sectors of the media industry: print, audiovisual (AV), “new” media and the advertising sector. This was used to define a list of NACE codes for data extraction (see Annexe 1 for a full list of media industry activities and a comparison of the sources used).

## 1.2. Adapting the media cluster concept

- 7 When the media industry concept is applied in policy strategies, it is often combined with local or regional media industry development, thus bringing the cluster idea into the picture. Porter [2000: 16] established the most well-known definition of the cluster concept and defines it as “a geographically proximate group of interconnected companies and associated institutions in a particular field, linked by commonalities and complementarities”. A media cluster can be therefore defined as an agglomeration of companies and institutions that are linked by media industry activities. This definition stresses the notion that the media industry activities are localised in proximity within a particular geographic area while benefiting from this location. We are therefore concerned with advantages that can stem from not only the proximity to other media stakeholders, but also from the local characteristics of the place.
- 8 In the academic literature, the notion of media clusters has grown in popularity only during the last 20 years. Researchers from different fields are taking an interest in media cluster theory, including geography, urban studies, business, economics and management studies, sociology as well as media and communication studies. This makes the research landscape fragmented. A large number of terms are being used in academia and political contexts including “media hubs”, “creative cities”, “media cities”, “hot-spots” and more. This can lead to a certain level of confusion, as various terminologies are adopted in a more or less interchangeable manner. Additionally, one of the most fundamental issues in adapting the media cluster concept is the comparability of the phenomenon. Each cluster develops in a very different environment and is historically and culturally bound to the place it evolves in. Moreover, media clusters can be found at various geographical levels, from neighbourhoods to cities to regions, meaning that different proximity levels apply [Boix, Hervas-Oliver and Miguel-Molina, 2015]. Because of that, there is a need to discuss the conceptual idea of media clusters in order to streamline the understanding of the concepts when adapted in policies and in projects.

## 1.3. Differentiating the types of media cluster

- 9 Because of the aforementioned issues, it is important to understand that there are different types of media cluster with distinctive features. While each cluster is unique and shaped by its context, we can group certain kinds of media cluster to make a comparison possible and enable a better distinction between these types. By comparing a large number of case studies from the literature on the matter, we have developed six different types of media cluster. They can be described as follows:
- 10 1. The Creative Region is shaped through urban space that provides access to urban infrastructures (e.g. transport), which therefore brings economic, social and cultural advantages such as a large labour pool, which is typically found in big cities. The Creative Region covers big metropolitan areas. For example, Greater Paris (France) is often described as a Creative Region.
2. The Giant Anchor is driven by one or several large private or public institutions as the

focal point. This cluster type is populated by media firms that are mostly reliant on contracts with these large institutions, therefore building a strong service supply network. An example is the media cluster around the public broadcaster NOS in Hilversum, The Netherlands.

3. The Specialised Area produces advantages for firms through the close proximity and density of specialised activities in an area. The Specialised Area can be found in certain neighbourhoods and districts like the AV production cluster in the Soho district in London, UK. This cluster type emerges through the dense specialisation in activities.

4. The Attracting Enabler is based on available facilities and large-scale resources that can be shared. This includes facilities such as movie studios, like the Babelsberg movie studios in Potsdam, Germany. The proximity to a facility or shared resource leads to the accessibility of support services, infrastructures and networks. These facilities are not necessarily only found in an urban context, therefore differentiating it from the first type.

5. The Real Estate media cluster is driven by an office space that is provided by private or public initiatives aiming to agglomerate media activities. The cluster can range from just a small office space to a complex of buildings. It often enables accessibility to certain services, facilities (like studios, meeting rooms, etc.) and networks. An example is the future mediapark.brussels.

6. The Pooling Initiative is characterised by the existence of a public or private initiative that manages the media cluster members in one way or another. The cluster is especially influenced by policy, funding mechanisms and direct management of people working for the initiative directly or indirectly. For example, screen.brussels is a Pooling Initiative type.

- 11 By differentiating these different types of media cluster it is possible to better understand the different driving forces behind them. It is important to recognise that different types of media cluster can be located in the same area and on different geographical scales, which is reflected in the typology we have developed.

## 1.4. Analysing various media cluster entities

- 12 Research on media clusters and the media industry is multidisciplinary due to the fact that clusters, as complex systems, involve a diversity of “entities”. In our analysis of media clusters, we have focused on three different entities: media institutions at macro level, media workers at micro level and communities of practice among media workers at meso level.

### 1.4.1. The media organisations in media clusters (macro level)

- 13 A first pertinent unit of analysis in the study of clusters is obviously the organisations at macro level. The most valuable theoretical and empirical work in cluster literature, greatly contributing to public policy debates around cluster development, focuses on the companies within a cluster [Yeung, 2000]. For instance, there is an extensive amount of literature that uses the idea of agglomeration and concentration of media firms within locations to identify clusters [cf. Boix *et al.*, 2015]. There is also a vast amount of literature that focuses on the influence of clustering on firms in terms of innovation [cf. Beaudry and Breschi, 2003]. Other examples of approaches adopted in literature are the analysis of networks of media firms within a location [cf. Krätke, 2002], and cluster policy focusing

on the support of firms [cf. Barkley and Henry, 2001]. This illustrates the significance of this entity.

- 14 Martin [2000: 77] argues that “the form and evolution of the economic landscape cannot be fully understood without giving due attention to the various social institutions on which economic activity depends and through which it is shaped”. We propose to take the socio-economic approach to the first level entity and include all institutions that are directly or indirectly related to the “creation of mediated content” as described above. This means that the dynamics of the media cluster are also supported by facilitating and supporting institutions. Additionally, we assume that these institutions are strongly embedded with respect to the firms within a cluster.

#### 1.4.2. The workers in media clusters (micro level)

- 15 Studying media clusters also requires looking at the micro level, namely the media workers. Even though media cluster studies often highlight the importance of having a “skilled” or “flexible” workforce in a cluster [cf. Cook and Johns, 2011; Karlsson and Picard, 2011], not many have taken the worker as the main unit of analysis. However, the literature shows that the quality, quantity and configuration of workers in media companies, media industries and a fortiori clusters influence them [cf. Chesnel, Molho, Morteau and Raimbeau, 2013].
- 16 The sociology of work and professions provides tools to assess media workers. “Media work” can refer to a diversity of individuals: a freelance journalist, a creator in an advertising company, a trainee in post-production, an amateur blogger, etc. Three partially overlapping terms can be used to show this diversity: employees, professionals and producers. Media employees work for companies that produce media content. Media professionals are individuals with a specific education in media production related activities. Media producers produce mediated content but might not work for a media company. Not all media workers are professionals [Anderson, 2014], as they might not meet all the common criteria: i.e. having a formal education, common standards, a specific set of rules and an internal regulatory power [Volti, 2011]. Finally, some producers are employees, yet there is a growing number of self-employed workers in an increasingly precarious and flexible job market [Deuze, 2007]. We suggest the definition of a media worker as any individual who works within a media company or produces content directly, interacting with other media workers and producing or facilitating the production of media content.

#### 1.4.3. The communities of practice for media workers (meso level)

- 17 Next to media organisations and workers, we also consider structures at meso level, through which media workers share knowledge and experiences and develop new resources and practices. In order to capture this phenomenon, we use the concept of communities of practice (CoPs) as defined by Wenger: “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” [2006: 1]. This aspect of media clusters is often overlooked in media cluster research, although as pointed out by Chesnel *et al.* [2013], agglomerating companies in a specific location can foster the creation of such learning opportunities, and these are a key factor contributing to the performance of clusters. Therefore, we emphasise the



importance of considering CoPs as a cluster entity in itself, although the word “entity” might be misleading, connoting fixity while CoPs are continuously evolving.

- 18 In order to delineate CoPs, we have borrowed three key conceptual dimensions from Wenger’s situated learning approach: the domain, the community and the practice. With this in mind, we circumscribe further our object of study in two respects. First, internal CoPs (only inside an organisation) were kept outside of the scope in order to focus on cross-organisational (and potentially larger) CoPs. This choice was dictated by the overall perspective of the research, which focuses on the interactions and relations that develop between or across companies, rather than on the dynamics occurring in a single organisation. Second, virtual-only CoPs were also left aside because of the cluster perspective, which takes into consideration the geographical and proximity dimensions of the media industry. Therefore, for the research presented here, we include CoPs that meet in Brussels on a more or less regular basis.

### 1.5. Applying the media cluster concept as a policy tool

- 19 As described, the media cluster concept is used increasingly by policy makers. Freedman [2008] highlights the importance of political stakeholders in media systems. He defines policy in this context as the “systematic attempt to foster certain types of media structure and behaviour and suppress alternative modes (...)” [Freedman, 2008: 1]. Traditionally, the media industry has been seen as an industry that deserves special protection due to the public's right to independent information, pluralism and freedom of expression, which are the pillars of a healthy democratic society [Toussaint-Desmoulins, 2011]. These principles have been used to justify public intervention in the media industry. Institutional support for the media industry in Europe [d'Haenens, Sousa and Trappel, 2018] often takes the shape of project-based or audience-based subsidies for public media companies in the AV sector. Tax deductions are also common for the printed and online press, audiovisual production and gaming sector, including reduced VAT on their products, tax shelters, reductions on their infrastructure costs, or benefits for journalists such as the free use of public transport. Policies that support the development of media clusters also fit into this logic of fostering a stronger media industry, but offer a more innovative approach in a context where other tools have stayed stable for the most part in the last twenty years [Nielsen, 2014]. The rationale justifying public intervention is still the same, i.e. to support the media industry as an economic driver for local economies. This has been acknowledged at various policy levels. For example, EU programmes and funds have been set up, aimed at supporting media cluster development in Europe. This includes the European Regional Development Fund (ERDF), Creative Europe, COSME and Horizon2020, as well as the many initiatives integrated into the “European cluster approach for growth”, comprising the European Cluster Observatory and the European Cluster Collaboration Platform.
- 20 Specific policy tools that go beyond typical media policy and urban development projects for media cluster development can include two approaches in particular: the development of media parks (Real Estate media cluster type), or cluster initiatives (Pooling Initiative media cluster type). Both are policy tools that aim at supporting local clusters by bringing together public and private sector stakeholders. On the one hand, cluster initiatives are a particular form of (public-) private partnerships. Cluster initiatives are generally engaged in a broad range of activities designed to support the



cluster, such as joint marketing, training, coordinating joint projects, lobbying, etc. [Sölvell, Lindqvist and Ketels, 2003]. On the other hand, cluster parks (most often called business parks, industrial parks, office parks or research parks in the literature) are a collection of similar architecturally arranged office buildings, grouping together the same kind of sector stakeholders [Atwa, Ibrahim and Saleh, 2017]. Both cluster parks and cluster initiatives in the media industry have recently appeared all over the world. Examples of media parks include Mediacity Bergen, Digital Media City in Seoul, MediaCityUK, Media Park Beijing, Dubai Media City, Moore Park Sydney and Media Park Hilversum. Examples of media cluster initiatives include Imaginove France, Creative Zurich Initiative, Creative and Content Industries Cluster Initiative Colombia and Musitec Australia.

## 2. Media clustering in Brussels

- 21 Using the media cluster framework outlined above, we can shed light on several clustering configurations in the Brussels media industry, highlight the diversity of the media workforce, and offer an overview of different models and activities of worker communities. First, (2.1) we will adopt a more empirical perspective, drawing upon the key results of the research from a media institution perspective, from a media worker perspective and from the CoP perspective in order to understand the situation of the Brussels media industry. Then (2.2) we will adopt a policy perspective, in particular looking at the directions envisioned for or taken by the mediapark.brussels project.

### 2.1. The Brussels media industry and its de facto cluster

- 22 Before delineating the future plans of the Government of the BCR to develop a media cluster in Brussels, let us focus on the current state of the Brussels media industry and the kinds of media cluster which already exist in the city.<sup>2</sup> As mentioned above, the following analysis is based on data extracted from Bel-first [Bureau van Dijk, 2018], NSSO, NISSE for 2014 and 2015. Additionally, an online survey (n=577) targeting media workers in Brussels was conducted between 2016 and 2017. The survey represents demographic profiles closely resembling the census data of media workers except for the advertising sector, which were underrepresented in the responses, and a bigger response rate of independent workers than in the census. Nevertheless, the sample was deemed as representative. These data are complemented by insights from interviews with journalists (n=14) and media workers involved in CoPs (n=13), either as participants or core group members. Multiple methods were combined in order to find communities in Brussels: online searches, informal contacts, observations at media-related events and the online survey. Putting the three aforementioned entities (companies, workers and CoPs) into perspective provides a contrasted picture of the Brussels media industry and the existing media clusters in the city.

#### 2.1.1. The big media stakeholders clustering in the neighbourhoods of Brussels

- 23 The analysis based on the Bel-first database<sup>3</sup> with data from 2014 showed that Brussels (Brussels-Capital Region including the 19 municipalities) is the leading location for media activities and production in Belgium, creating 40 % of the total net added value of the Belgian media industry. Around 6 500 media companies and institutions are active in the

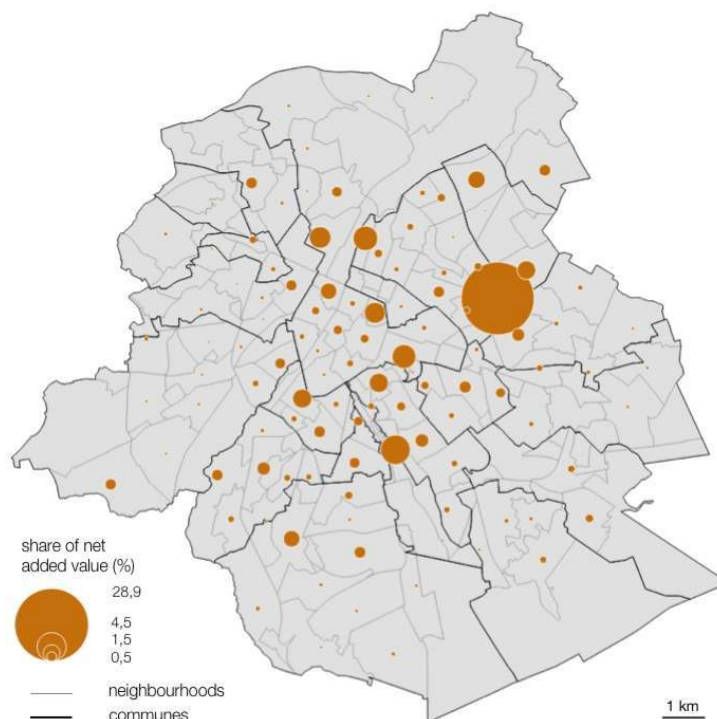
Brussels media industry as employers. This means that 6,4 % of all employers in Brussels (99.388 in total) belong to the media industry. With 1 699 million EUR net added value produced, the media industry represents 2,4 % of the total economy of Brussels. The yearly average growth level (2007-2014) of the media industry in Brussels (2,5 %) is higher than the overall growth level of the Brussels economy (2,1 %) and the Belgian economy (2,2 %). This shows that the media industry in Brussels is growing strong and is important for the local industry. Brussels is characterised by a small number of very large media organisations and a lot of small and micro organisations. No more than 17 media organisations represent approximately 50 % of the total net added value of the Brussels media industry, the biggest including VRT, RTBF, RTL BELGIUM and KINEPOLIS GROUP from the AV sector, ROSSEL ET CIE, VERBRUIKERS UNIE TEST, MEDIAFIN, IPM from the print sector, and JC DECAUX and IP BELGIUM from the advertising sector. When broken down, the AV sector is the largest sector, representing 48,7 % of the Brussels media industry. This is due to several very large stakeholders in this sector. VRT alone represents 11,8 %. Interestingly, not many big international media companies are located in Brussels. For example, there is a subsidiary of WARNER BROS and DISNEY, yet of such international stakeholders, only the local distribution operations are located in Brussels. Based on the results of the data (using the most commonly used methods to identify media clusters), these media institutions and companies form at least four highly significant media clusters within Brussels: an (1) AV media cluster around the public broadcasters at Reyers, a (2) news media cluster in the European Quarter, an (3) AV media cluster in Flagey, *Étang*s – *Porte de Namur*, and a (4) media cluster at the canal. Figure 1 shows a map of the findings.

- 24 The (1) AV media cluster, which is in and beyond the Reyers neighbourhood, has most likely formed due to the presence of major broadcasters (VRT, RTBF, BETV, RTL) and the presence of post- and pre-production companies, in which more than 54 % of the total net added value of the Brussels media industry is produced, which makes it the biggest media cluster in the metropolis. We described this kind of media cluster earlier in this synopsis as the Giant Anchor type. In the Giant Anchor, a close value network is formed between these major broadcasters and smaller firms that are reliant on contracts from the anchoring firms. When we look at the firms in this media cluster, there are mainly small or independent AV media firms.
- 25 The European Quarter (2) has been identified as a media cluster, as many international media outlets have their offices there and journalists are located in this area. This is unsurprising, as it is estimated that around 1 000 journalists, cameramen and other press personnel are connected to the European institutions [Dotti, 2015]. This type of media cluster has been described previously as an Attracting Enabler. The Attracting Enabler is in this case the institutions. Through the presence of the institutions, a lot of infrastructure has been put into place to support the media activities that are connected to it, including office space, studio facilities and technical facilities. However, the interaction between media stakeholders is limited, as there are no contracts or dependencies between journalists, for example.
- 26 The analysis also showed that the area from Flagey, *Étang*s to *Porte de Namur* (3) has a high share in media activities. There are a high number of AV production and advertising companies located in this area. This includes big companies such as CLEAR CHANNEL and U.G.C., but most firms are small- or medium-sized. This kind of media cluster has been described as a Specialised Area and can be compared to Soho in London. This media

cluster type forms through a high specialisation of activities that leads to a shared labour pool and knowledge exchange.

- 27 And finally, around the canal in Brussels including the Maritime Quarter and the North Quarter (4), there are advertising companies (e.g. JC DECAUX), as well as print and other sector activities. This includes several media companies that are located in the *Tour & Taxis* buildings (e.g. newspaper publisher MEDIAFIN). This purpose-built Real Estate media cluster attracts certain media activities. In general, the canal area is known for cheap and large office space but is becoming increasingly attractive for creative activities.

**Figure 1. The distribution of media industry activities in the neighbourhoods of Brussels based on share of net added value in Brussels in 2014**



### 2.1.2. The diverse and skilled workforce of the Brussels media clusters

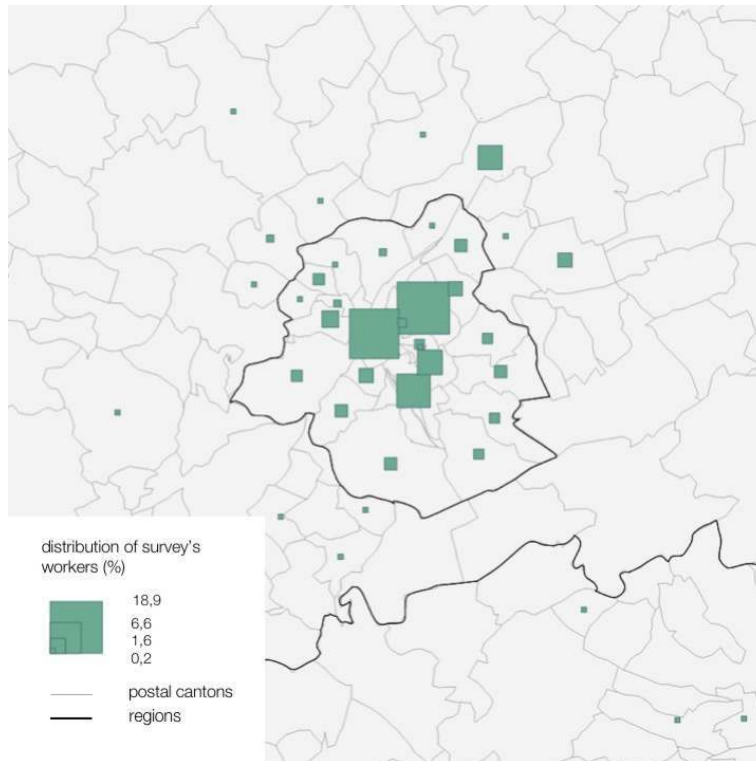
- 28 Data from the NSSO<sup>4</sup> from 2015 show that there are around 15 000 employees working in the media industry in Brussels. NISSE data account for 1 300 independent (self-employed) workers in the Brussels media industry. This means that there are at least 16 000 media workers in Brussels. We can observe a slow but steady decline in employees (from 16 169 in 2011 to 14 825 in 2015) and a rise in independent workers (an average of 1 % per year, up to 8,3 % of the workforce in 2015). The amount of media employees decreased by the same percentage between 2011 and 2015 (8,4 %), while the overall number of employees in Brussels declined by 0,5 % in the same time frame, potentially showing a deprivation in working conditions in the media sector. This trend can also be observed in the CCI in Brussels (Mauri *et al.*, 2017). This trend is partly confirmed by the survey, as results show that even though media workers have a high level of education, many of them indicated still having fixed-term and temporary contracts (38 %). Furthermore, of the

134 individuals who indicated that they were freelancers, 31 % work for only one company, which would confirm the so-called “false independent” phenomenon within news media companies. From the outside, it might look like media workers have a regular schedule, the average paid hours being 38 hours per week. However, we can see that many of them have part-time contracts. Furthermore, many of the respondents work extra hours for no pay, with an average of 17,20 hours.

- 29 Based on the NSSO data, we can further differentiate between the media sectors. A large number of employees (42,4 %) work in television programming and broadcasting for one of the few big stakeholders located in Brussels. This confirms the importance of the big “anchors” in the Brussels metropolitan area, such as RTBF, VRT and RTL in Reyers, and VTM in Vilvoorde. Other sub-sectors include the production and editing of audio and video content, as well as post-production and distribution. The second-largest sector in terms of workforce is advertising (20,7 %), followed by the print sector (19,8 %) and the new media sector (17,1 %). In the print sector, the majority of employees work for dailies, weeklies and news agencies, or are involved in pre-press activities and retail for such products. In the “new” media sector, the vast majority of workers are reported to work for data hosting and processing services. The survey results show that within these sectors, the media workers of Brussels have a variety of functions and participate in different ways in the city’s media environment. Job titles relate to content production, with professions such as journalist, communication professional or AV content director. Additionally, job titles include professions that are responsible for the technical aspects of mediated content production and post-production (e.g. “cameramen”, “editors”, “IT engineers”). A third group includes those involved in management in one way or another (e.g. “producers”, “senior or chief editors”, “CEO’s”). This reveals the complexity of media content production, diffusion and facilitating processes and the wide spectrum of tasks and skills involved. In order to have a better understanding of what these job titles imply, the survey contained questions regarding the tasks performed by respondents. Naturally, the most indicated task is the production of media content. However, most respondents are multi-taskers, with a mean of 2,4 tasks per person on a regular basis. According to the survey, this diverse workforce is highly skilled and feels comfortable with self-management and creative tasks, and can produce contents in a diversity of formats. Brussels’ media workers are also highly educated, with more than half of the respondents having a master's degree or equivalent. Only 5 % of respondents have not pursued higher education.
- 30 Finally, we looked at the spatial distribution of workers across Brussels. The majority of respondents in the survey indicated working in the centre of Brussels, Schaerbeek and Ixelles, but are scattered in and around the city. Figure 2 shows a map of the findings. This confirms the results as described above. Furthermore, data from the survey indicate that they are very mobile. The majority of them have to make work-related trips within the city or its vicinity during working hours several times per month, and more than 35 % of the media workers in Brussels have to make work-related trips several times per week. 60 % of the workforce lives in Brussels – with around 25 % of the workers coming from Flanders (mainly Flemish Brabant) and around 15 % from Wallonia. They spend a lot of time commuting, as the majority of all respondents in the survey spend more than one hour commuting every day, even those who live in Brussels. The media workers in Brussels make use of a variety of transport means, the car being the most common, followed by public transport, walking and cycling. This is in keeping with research on

mobility, which is becoming increasingly multimodal in Brussels [Hubert, Lebrun, Huynen and Dobruszkes, 2013].

**Figure 2. The distribution of the main workplaces of media workers in the municipalities of Brussels based on survey responses**



### 2.1.3. CoPs in the Brussels media industry: distinguishing between the top-down and bottom-up approaches

- 31 One way to characterise the media-related CoPs that are active in Brussels is to distinguish between two approaches. First, top-down CoPs are initiated and supported by public stakeholders or well-established domain-related institutions. Such institutions have dedicated human, financial and material resources as well as other types of resources (such as notoriety, legitimacy and large contact databases) to help them fulfil their missions, of which the community is only one facet. One example of such communities is VRT Sandbox, an incubator based on a collaboration between VRT and (mostly) technological organisations. VRT Sandbox also organises open events called “Creative Circles” where they showcase their projects. Another example of a top-down CoP is Plan TV, which is a trimestral event targeting TV producers, offering workshops and networking opportunities. Plan TV was hosted initially by the French-speaking community AV regulator, the *Conseil Supérieur de l'Audiovisuel* (CSA), and is now co-organised with TWIST, screen.brussels and mediarte.be. In a quite different domain, BE.VR (The Belgian Virtual Reality Meetup) is a regular meeting organised by screen.brussels to form a community of people interested in virtual reality (VR). In these events, people can try new technologies, listen to speakers, share projects and expertise, as well as meet with the Brussels VR community.

- 32 Secondly, bottom-up CoPs originate from personal initiatives. In most cases, the organisers are the only structure to support the development of the community. Their motivation is not always clear but some of our interviewees talked about discovering new things, networking with stakeholders and practitioners, strengthening their domain, supporting their professional activity, sharing common interests and organising events. Their access to resources is more limited than in the top-down approach, not only in terms of facilities but also, for instance, in terms of finding contacts and accessing public funds. In certain cases, it seems harder to keep the bottom-up community viable beyond individual motivations. For example, Brotaru is a monthly networking event for game developers that takes place in cafés in Brussels and is supported by screen.brussels. It allows people to show and test each other's games as well as discuss business issues and everything related to the job, in a casual setting. Another example is *Café Numérique*, which consists of evening meetings on topics related to innovation and new technologies in general. The concept exists worldwide but each local team has to organise their own activities.
- 33 Some of these CoPs are based on an already existing concept developed in another country (e.g. Brotaru, Storycode). Some are well-defined models that correspond entirely or partly to our definition of a CoP, which is large enough to encompass a diversity of models (e.g. VRT Sandbox is an incubator and transformaxl is a co-working space hosting several media-related companies). The locations of CoP events are influenced by the CoP model: top-down CoPs use their own infrastructures while bottom-up CoPs depend on partnerships (and thus often move from place to place). Overall, the survey results indicate that the CoP events in which the respondents participate are most often located in the city centre, then at Reyers, Louise and the canal, followed by Schuman, ULB and VUB, Flagey, the South Station and *Parvis de Saint-Gilles*.
- 34 CoP events gather between 20 and 100 participants, sometimes more, depending on the domain and the kind of event or topic, with a mix of regular and occasional participants. Our survey results show that most of the respondents (over 70 %) do not attend CoP events, and among them, most do not know about CoP events. This does not necessarily mean, however, that CoPs are irrelevant. Our analyses also suggest that media workers who attend CoP events do experience a range of benefits from their participation, including resolving problems, accessing expertise, learning new practices, increasing their value and developing their marketability. These benefits for media workers as individuals infuse into the performance of companies and sectors in diverse ways (e.g. innovation, collaboration, internationalisation and being ahead of competitors).

#### 2.1.4. The AV media stakeholders at the Reyers media cluster

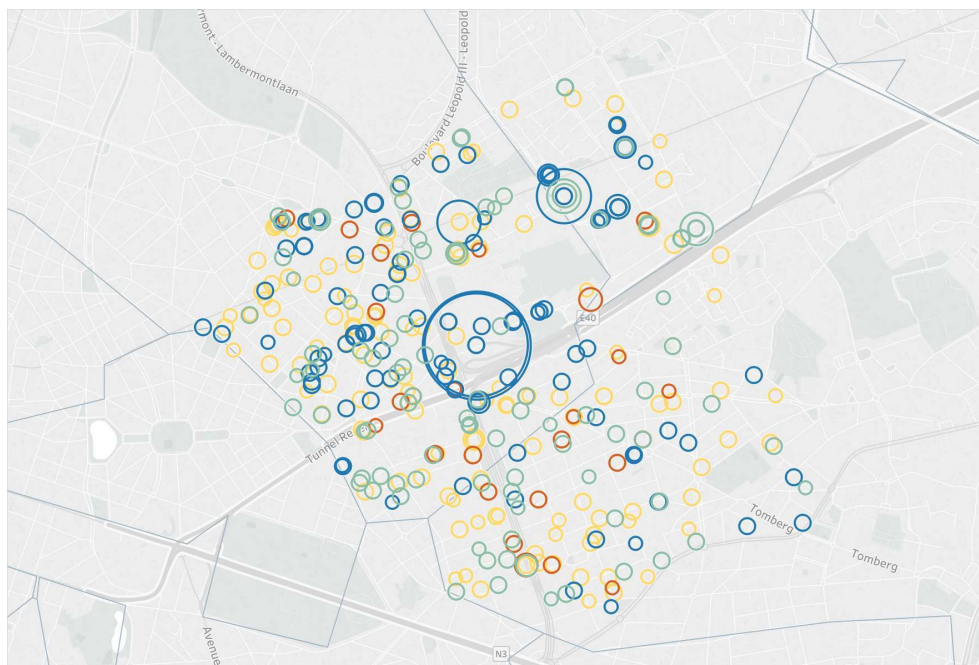
- 35 As described above, the neighbourhood of Reyers – the future location of mediapark.brussels that is being developed – can already be defined as a significant media cluster in Brussels. If we investigate the media cluster around the neighbourhood more closely, we see that around 50 media organisations are situated in this neighbourhood, including four large-sized (VRT, RTBF, BETV and RTL BELGIUM) and more than 20 smaller AV organisations. There are also several entities from the other sectors, including more than 10 advertising and 10 print companies. All of these media stakeholders are located directly around the Reyers area of the public broadcasters and often share one address, indicating that there are office buildings where several media companies are located. If we look beyond the Reyers neighbourhood and integrate



organisations that are at a maximum walking distance of 20 minutes from the two public broadcasters, we are able to identify ten times as many media firms (more than 500). The activities become much more diversified, including also much more print and advertising companies. This suggests that a specialisation in AV activities is only high in closest proximity to Reyers. Figure 3 shows the distribution of media organisations in and around the Reyers neighbourhood.

- 36 Data on the workforce indicate that around 5 000 media workers are present in the cluster, approximately 4 000 of whom work for the large organisations, mainly the two public broadcasters VRT and RTBF, and the private companies BETV and RTL BELGIUM. Workers involved with these companies are mainly journalists and other content producers, technicians in charge of infrastructure, filming, etc. or management. Workers from satellite companies are also involved mostly in AV activities such as production and post-production. According to the interviews and the online survey, Reyers does not seem to be an area where cross-organisational CoPs often meet, one exception being VRT Sandbox Creative Circles, which is actually the only CoP that we heard about in Reyers and that fits our definition. According to the organisers, Creative Circles attracts a wide variety of profiles, from competitors to different stakeholders, resulting in a good balance between regulars and newcomers. According to the organisers, through its incubator, the opportunities for VRT to interact with other professionals and companies would not exist without such a structure. They consider that VRT benefits directly from its CoP, which brings innovations to the organisation, facilitates access to new technologies at low cost, helps it to stay ahead of competitors, and increases its visibility.

**Figure 3. The location of media organisations in and around Reyers (20 minutes walking distance) based on addresses**



**SIZE OF CIRCLES IS BASED ON THE AVERAGE NUMBER OF EMPLOYEES (BLUE = AV, GREEN = ADVERTISING, YELLOW = PRINT, ORANGE = NEW MEDIA)**



## 2.2. The Brussels media cluster policy

37 In order to understand in more detail the current plans in Brussels in terms of the development of media clusters, we analysed current policy documents, publications of stakeholders such as website content (from Brussels agencies, stakeholders and companies) and newspaper articles. Here, we present the policy background for the mediapark.brussels project, the arguments and logic that drive the project stakeholders, and a timeline of milestones reached up to now and those planned for the future, highlighting the involved stakeholders.

### 2.2.1. The policy background and the initial steps towards the Brussels media cluster policy

38 The development of the media industry in Brussels from a policy perspective can only be understood in the context of the political complexity of Belgium as a country in general and of the metropolitan area of Brussels in particular. Different administrations are in charge of different policies that regulate and foster the media industry in Brussels. The public competences are separated between the (language) Communities (French, Flemish and German, the latter having no authority in Brussels), in charge of individual aspects of public life, including culture, media and education, and the Regions – including the Brussels-Capital Region in the case of Brussels – which are in charge of territorial aspects of public life, such as urbanism, economy and transport. During the federalisation of Belgium, the public broadcasting company was split into three entities in 1977, and the subsidies for journalism became the responsibility of the respective Communities according to the language of the media. The Government of the BCR – the executive branch of public administration in the Brussels-Capital Region – oversees 19 municipalities, including the City of Brussels itself (the core of the metropolis). However, the Government of the BCR and its multiple semi-public entities (see Table 1) are responsible for defining and executing strategic urban planning and creating the conditions for economic investment. It is within these competences that the mediapark.brussels project has taken shape, notably under the leadership of ADT-ATO (the Urban Development Agency, absorbed by perspective.brussels in 2016). The urban planning focus of the cluster has not encouraged the involvement of other regional agencies or Community policymakers, leaving its cultural and economic perspectives in the hands of the media industry stakeholders involved in the project. The municipalities in BCR have large autonomy in local policy, and the support from the council of Schaerbeek – where Reyers is located – has been a key factor in materialising the first steps towards mediapark.brussels.

**Table 1. Distribution of policy responsibilities connected to the media industry in BCR**

Entity	Administrative level	Responsibility
Centre d'aide à la presse écrite	French-speaking Community	Press subsidies

Service général de l'Audiovisuel et des Médias	French-speaking Community	Audiovisual media subsidies
Conseil Supérieur de l'Audiovisuel	French-speaking Community	Media regulation
Ministère de l'Enseignement Supérieur, de la Recherche et des Médias	French-speaking Community	Media policy coordination
Vlaamse Regulator voor de Media	Flemish Community	Media regulation
Vlaams Audiovisueel Fonds	Flemish Community	Audiovisual media subsidies
Ministerie van Cultuur, Media, Jeugd en Brussel	Flemish Community	Media policy coordination
perspective.brussels	Brussels-Capital Region	Urban planning
citydev.brussels	Brussels-Capital Region	Urban development
sau.brussels	Brussels-Capital Region	Operational urban development in strategic areas
innoviris.brussels	Brussels-Capital Region	Research
impulse.brussels	Brussels Capital Region	Entrepreneurship (general scope)
screen.brussels	Brussels-Capital Region	Entrepreneurship in the audiovisual sector
Brussels Economy and Employment	Brussels-Capital Region	Economy
Actiris	Brussels-Capital Region	Employment
Government of the BCR	Brussels-Capital Region	General policy coordination

- 39 The development of policies by the Government of the BCR aimed at media cluster development in the city goes well back. On 12 December 2013, the Government of the BCR approved the Sustainable Regional Development Plan. In this plan, the Government of the BCR identified priority sectors for the growth of the Brussels' economy, one of which belongs to the "cultural and creative sectors such as fashion, design, advertising, art and digital and printed media" [Sustainable Regional Development Plan, 2013: 82]. Additionally, in this plan, Brussels identified four territorial competitiveness "poles": areas or neighbourhoods in Brussels that will be developed to strengthen the position of

priority sectors in them. One of them is “Pole Reyers for communication and imaging” [Sustainable Regional Development Plan, 2013: 89]. These can be seen as the real starting points of media cluster development strategies in Brussels: the plans to gather together and attract media industry activities in certain locations in Brussels.

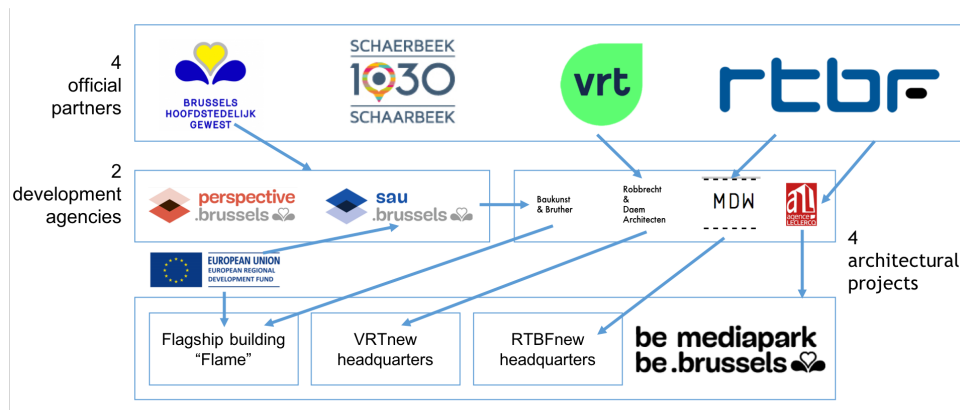
- 40 The plans go back to the Regional Development Plan signed by the Government of the BCR in 1995 and then updated and revised in 2002. In the 2002 version, the BCR identified Reyers – the location of the two public broadcasters RTBF and VRT – as one of fourteen priority areas for the development of the Region [Ministry of the Brussels-Capital Region, 2002: 556]. The Regional Development Plan (RDP) emphasised the “revitalisation” of neighbourhoods and presented a comprehensive town planning project for the entire territory of Brussels. With the addition of the word “sustainable” into the project plan, the 2013 Sustainable Regional Development Plan emphasised the economic development strategy of the city much more and implemented more concrete plans for priority areas.
- 41 In 2010, the next major step was taken to integrate media cluster development into the Brussels policy agenda. The Government of the BCR adopted the “Reyers Master Plan”. In this plan, five major projects were formulated, covering the construction of new office buildings, housing, streets and parks in and around the area of Reyers [BUUR, 2010: 3-5]. The policy tool to create a media park, a Real Estate media cluster type, was adopted. Even though many plans have been made about the future of the Reyers area, there was political debate and uncertainty about a major “concern” for the Brussels media industry, which was only resolved in 2013 [Lieten, 2013]. The major media stakeholder on the site – the public broadcaster of the Flemish Community, VRT – decided to stay in Brussels, at Reyers. There was discussion about relocating VRT due to the age of its current building. Vilvoorde and Mechelen were very keen to welcome VRT, not only to further strengthen the media sectors in their respective cities, but also because of the symbolic value of the public broadcaster. The decision to keep VRT in Brussels was in the end widely supported as it would guarantee a link between the Flemish public broadcaster and the capital. The decision to stay at Reyers opened the way for future political development and planning: the Brussels Capital Region, the Municipality of Schaerbeek, the two public broadcasters, RTBF and VRT, and the Urban Development Agency of Brussels (ADT-ATO) as part of the Government of the BCR, signed the cooperation agreements in 2013, defining shared development objectives, the building programme for the redevelopment of the VRT-RTBF site and the undertaking to incorporate these ambitions into a master plan on a joint project ownership basis.

### 2.2.2. The project partners and future plans for mediapark.brussels

- 42 Four major project partners are leading the project. As part of the agreement, the Brussels-Capital Region acquired (by 2017) the sites of the two public television broadcasters on Boulevard Reyers, taking ownership of the land. This was managed by a new agency established in Brussels: The SAU-MSI (Urban Development Corporation), which is the public operator responsible for the operational implementation of development plans by means of land and or building ownership control in the priority development areas. In this context, SAU-MSI took over the responsibilities of ADT-ATO, which was restructured and, since 2016, has been part of perspective.brussels, the Brussels regional consultation and research centre that develops strategies to shape Brussels. Each partner called for architectural offices and awarded contracts for projects for the construction of new buildings. In 2014, the Government of the BCR appointed an

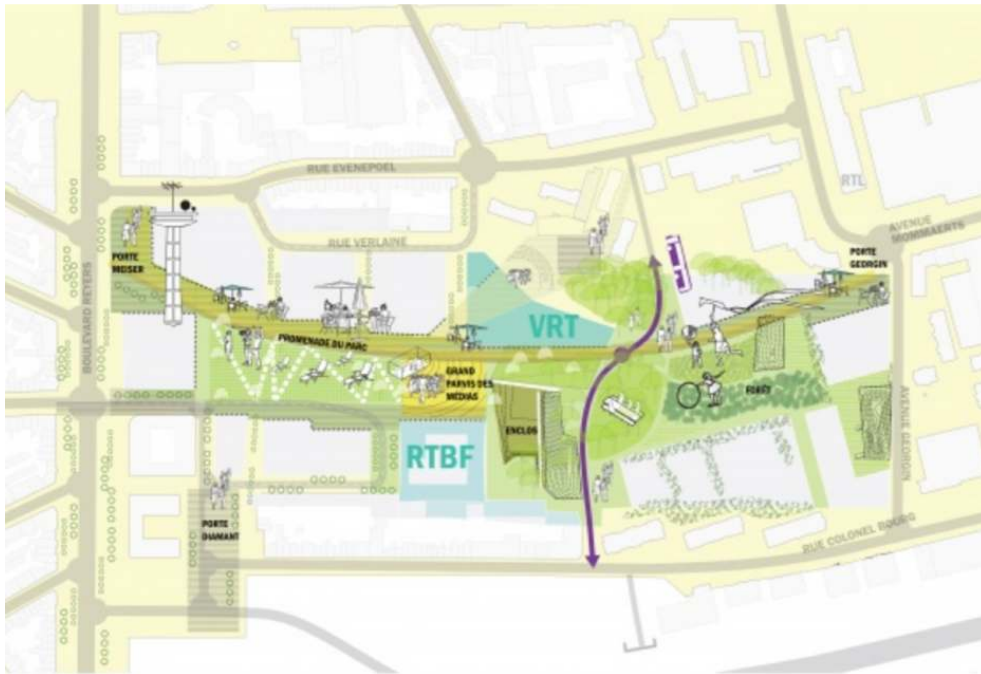
international team led by French architect and urban planner François Leclercq to design the mediapark.brussels urban project, updating the Master Plan of 2010 and laying out the foundation for the entire area. See figure 4 for a full overview of involved project partners.

**Figure 4.** The project partners for the development of the future mediapark.brussels.



- 43 The new Master Plan was still being developed at the time of this research. Both public broadcasters – VRT and RTBF – appointed separate architectural offices to build their respective new headquarters, and the plans were published in 2016. On the same site, SAU-MSI is planning to erect a new building named “Frame”. This “flagship building” is one of the first elements in the physical implementation of the mediapark.brussels project. The project was granted 12,5 million EUR in 2014 by the Regional Operational Programme of the European Regional Development Fund (ERDF ROP) 2014-2020. The ERDF funds research, strategy development, communication and the organisation of events, the creation of an “innovation centre” and the new flagship building. The new building will include offices, television studios, a reception, an auditorium, training rooms, a small canteen and technical rooms. Various media stakeholders from Brussels have already decided to relocate to the building once finished: the broadcaster BX1, screen.brussels, the IHECS Academy – which already collaborates closely with RTBF – and the Brussels Video Centre. Additionally, an innovation platform dedicated to the media and the AV sector, consisting of a co-working space, an incubator and a premises for a training institute, will be in the building. The building is given substance by the urban development agency of the Government of the BCR, while it attracts organisations such as BX1 and BVC, which are run by the Federation Wallonia-Brussels. And until now, no organisations falling under the competence of the Flemish Community, such as the BX1 counterpart BRUZZ, have announced that they will move to Frame. At the same time, we see parallel initiatives emerge, originating within the Flemish or Walloon government, as media policy falls under the competence of the respective Dutch- and French-speaking Communities. For example, in July 2018, the media minister Sven Gatz presented the mediahub.brussels initiative, aimed at stimulating knowledge creation, media education and collaboration between media stakeholders in Brussels and beyond. The Walloon government has also invested in a network initiative called TWIST, regrouping audiovisual, digital and multimedia activities. Figure 5 displays a first draft by the architectural office of the outline for the new Reyers area.

Figure 5. Plans for the future outline of the Reyers area



- 44 It is interesting to note the proximity of Reyers to cluster initiatives in other sectors. Agoria, the umbrella organisation grouping the tech industry in BCR and working towards its development, is situated in the Diamant building right next to mediapark.brussels. Reyers is also relatively well connected to another strategic development area in Brussels, namely Delta, where a university pole is planned around the campuses of both the Dutch- and French-speaking universities, VUB and ULB. A strengthening of the links between both areas, e.g. in terms of media innovation, could be envisaged in future.
- 45 The planned steps until the finalisation of the entire Reyers project include the publication and adoption of the new Master Plan in 2018 and the demolition and construction of the new buildings and areas, approximately by 2030 (see table 2 for an overview of the timeline). The main vision for the mediapark.brussels project is, in the end, to create an “innovative media ecosystem for Brussels”. The mediapark.brussels district is supposed to be “creative, open and pleasant to live in”, but it is mostly depicted as a “strategic project to promote the development of broadcasting, the media and the creative industries in Brussels” [mediapark.brussels, 2018]. This is in line with the policy documents and communication with the general public. Additionally, the Government of the BCR sees the development of a media cluster at Reyers as an opportunity to “strengthen the international position of Brussels relative to other European capitals and the neighbouring regions, in a context of unprecedented change and growth in these sectors (media, information technology and communication, advertising, marketing, communication and graphic design agencies, news agencies, publishers, research and new technologies, music, broadcasting, and virtual and augmented reality)” [mediapark.brussels, 2018].

**Table 2. The timeline of media cluster policy development in Brussels: the major steps towards mediapark.brussels**

2002	Regional Development Plan (1995 revision) by the Government of the BCR	Identification of Reyers as 1 of 14 priority areas
2010	Master Plan by the Government of the BCR	Presentation of a plan to develop Reyers, integrating 5 concrete projects
2013	Sustainable Regional Development Plan by the Government of the BCR	Proposal for a media cluster project at Reyers
2013	Signing of cooperation agreement	Government of the BCR, Municipality of Schaerbeek, RTBF, VRT, ADT-ATO
2014	Urban Planner appointed	Update of 2010 Master Plan
2014	ERDF Funding	Funding granted for first flagship building on the site
2015	Mediapark.brussels brand	Plans to develop the 8 ha around the new VRT and RTBF building
2018	Frame	Flagship building is revealed and named Frame (Brussels Media Community)
2018 + 2022	2018	Adoption of the new Master Plan by the four partners
	2019	Start of construction of Frame
	2018-2022	Construction of new VRT and RTBF buildings
	2018-2024	Work on public space
	2022	Start of residential construction
	2023-2024 2024-20...	Demolition of old VRT and RTBF facilities Residential construction
2022	VRT and RTBF Building	Completion of VRT and RTBF and Frame buildings
2024	Finalisation of mediapark.brussels	

### 3. Discussion: Tensions in the development of mediapark.brussels

- 46 As stated before, the success of government-driven clusters is not guaranteed. There are of course always the global and sectoral dynamics at play. A cluster initiative will not be able to counter larger media trends such as the decline of the written press, the pressure broadcasters are experiencing from over-the-top stakeholders such as Netflix, and the

development of new subsectors such as VR. In this case, however, we are mainly interested in the internal dynamics of media clusters, which are not simply a given of every policy-driven cluster project. In order to demonstrate this, let us look at an example of a similar project: the BBC Real Estate media cluster developed in Salford, Manchester, called MediaCityUK. The BBC relocated its national operations from London to Salford in 2011. The Real Estate media cluster MediaCityUK can easily be compared to the ambitions of the mediapark.brussels project: new office space, buildings, the integration of universities, restaurants, shops and hundreds of flats, as well as the creation of a media ecosystem, were the task of MediaCityUK. The project was supposed to bring growth to Greater Manchester. After more than six years, the outcome is chastening. Recent research found that MediaCityUK had minimal impact on employment across Greater Manchester. The report says fewer than 5 000 jobs (equivalent to only 0,3 % of the total employment in Greater Manchester) have been created in MediaCityUK as a result of the BBC's move, which it contrasts with predictions of 15 000 in 2011 [Semple, 2017]. Additionally, the arrival of the BBC led to scare stories of crime in MediaCityUK, showing how many BBC employees are unhappy with the new Real Estate media cluster [Carter, 2012].

- 47 Other examples of negative stories about unsuccessful media cluster development exist. Furthermore, in the literature, many authors doubt that policy ambitions can create successful media clusters and argue that media clusters are instead naturally growing economic structures. This is why the mediapark.brussels project needs to be developed on a foundational basis of insights regarding the local media industry, as well as on theoretical insights in research, which can guide its successful development. In the following sections, we try to assess the possible strategies for the mediapark.brussels project in light of the research results and framework presented above. It is argued that a series of tensions between decision makers and other stakeholders exist with respect to the development of mediapark.brussels, which might be worth considering further: (3.1) a tension between an urban or a cultural development, (3.2) a tension between a local or an international perspective, and (3.3) a tension between a broad or a specialised cluster.

### 3.1. Urban development or a Community project for mediapark.brussels

- 48 The fact that mediapark.brussels is above all an urban development project is undoubtedly the result of the fact that, in the Belgian political system, culture in general, and media-related matters specifically, fall under the competence of the Dutch- and French-speaking Communities. More fundamentally, we are talking about two very distinct media markets, catering to these different publics. Still, various stakeholders are active in both markets and are located in Brussels. This might lead to a mismatch between the urban development and programming aspects in the future development of mediapark.brussels, where the former are driven by a territorial approach initiated by the BCR and the latter by a Community approach directed by the French and Flemish Communities. Indeed, up until now, it is unclear which services mediapark.brussels is likely to offer beyond office space and infrastructure. There are a few programmes in Brussels that support content creation, such as the screen.brussels fund, which provides funding to companies for AV productions. However, when it comes to other domains, we see that this competence is firmly rooted in the Communities. Media innovation policies



are a good example. One of the main incubators for young start-ups in Flanders, for example, is the *istart* programme offered by imec, situated in Leuven. Innovation funding for journalistic projects is granted by the Flemish Media Ministry.

- 49 One of the risks of this mismatch is that the mediapark.brussels project may not be able to combine its infrastructure offering with an attractive programming support to incentivise the development of the media industry. Admittedly, there are some incentives at federal level, such as the Belgian Tax Shelter for AV productions, and at Community level, such as the aforementioned *screen.brussels* film fund. These, however, support just a small fraction of the media industry. It is symptomatic that the strategy of the biggest Flemish publishing companies, *De Persgroep* and *Mediahuis*, is more focused on the aid offered by the Flemish Community. The confirmation that *De Persgroep* and possibly also *Mediahuis* will be moving their newsrooms from Vilvoorde and Groot-Bijgaarden (the *de facto* outskirts of Brussels) to Antwerp shows that Brussels is not attractive to media companies that cater to the Dutch-language markets.
- 50 This does not necessarily mean that the set-up of mediapark.brussels is bound to be stifled, trapped in between urban development and cultural competences to support the development of the media industry. The mediapark.brussels project could consolidate existing projects to stimulate innovation and entrepreneurship in the sector. CoPs in particular do not seem to be integrated into the plans, while our research shows that clusters could benefit from them in many respects. The presence of the public broadcasters, which, in their plans for new headquarters have expressed the ambition to be much more open to other stakeholders in mediapark.brussels and beyond, could represent a great asset in terms of the sharing of knowledge and infrastructures. This can be done, for instance, through their own CoPs (i.e. OpenVRT) or through partnerships with other initiatives such as *screen.brussels*. There is definitely room for the further development of this type of activity in the Reyers area.
- 51 By investing in new buildings in Brussels, VRT and RTBF have also shown a commitment to the city, and to mediapark.brussels in particular. From this perspective, the government of the BCR could be more ambitious with respect to the development of a programmatic offering along with a real estate investment and focus on fostering media innovation. This offering has still not been explored properly in Brussels. On the one hand, the Brussels-based incubators ICAB and iDrops are technology driven and do not consider the specificities of the media industry, where innovation revolves around formats as well as service offerings. On the other hand, initiatives focused on content production are situated at Community level, primarily supporting content production (film, journalism, etc.) in a specific language. As such, they do not incorporate an innovative or technological aspect. Here, Brussels could play a role, tying incentives for start-ups and scale-ups to a commitment to move to mediapark.brussels, collaborate with other stakeholders in the Brussels ecosystem, etc. CoPs can also contribute to the development of a programmatic offering that is innovative and attractive: they work as flexible structures that can help to keep members up-to-date, respond quickly to specific emerging needs and cut across traditional borders (such as “AV” vs. “digital”, “content” vs. “technology”).
- 52 In order to provide such benefits, though, CoPs need to be consolidated. In that respect, it might be worth considering how CoPs could be better supported in a flexible way. This could be a role for *screen.brussels* or *mediahub.brussels*, as part of their responsibility to foster media innovation in Brussels. Bottom-up CoPs in particular would need such

support, as they often lack resources of various sorts, i.e. not only funding but also facilities, equipment, communication, partnerships, etc. The fact that certain CoPs are short-lived is not necessarily a problem: they are evolving in relation to the broader media environment, which might be considered as an asset. The lack of resources to achieve their ambitions in a relatively short period of time is, however, problematic. Another potential role for such initiatives would be to monitor proactively the evolving and very diverse needs of media workers in order to stimulate new CoPs wherever they are needed or to better connect existing ones to these needs.

### 3.2. Supporting local industry or living up to international ambitions

- 53 Strengthening the Brussels media industry is definitely a key ambitions of the Government of the BCR. There is a focus on developing a “new creative district that is open, diverse and vibrant” in order to “restore the quality of life at the heart of these areas”. Indeed, Reyers has been thoroughly impacted by road infrastructures and large office buildings. This ambition is reflected in the Master Plan of mediapark.brussels, where investing in Frame and facilities for media businesses closely linked to the VRT and RTBF building is only part of the story. The creation of 3 000 new dwellings, local facilities and services, a large urban park for recreation and events, as well as measures to reduce traffic are all geared towards improving the quality of life rather than attracting media companies. This could encourage media workers to live closer to their workplace instead of having so many media workers commute to Brussels every day. The presence of educational institutions specialised in media professions could increase the knowledge exchange with media companies through lifelong learning opportunities, traineeships and collaborations on research and innovation [Mateos-Garcia and Sapsed, 2011]. The integration of IHECS in Frame is a first interesting step in this direction. All of these points work towards a project with a local objective.
- 54 But Brussels is not only home to Belgian media organisations and workers. Its position as capital of the European Union attracts many foreigners, mainly in the area of journalism. mediapark.brussels could aspire to reinforce the attractiveness of the city for other international media initiatives. Of course, both ambitions are not mutually exclusive. However, it is important to consider this duality when thinking in terms of clustering logics. The focus on developing the local area translates into the kind of media cluster envisioned by the Government of the BCR, namely one focused on developing the local or regional media industry. The question is raised as to whether this is a big enough ambition for the success of the media cluster. It comes down to the tension between supporting local industry on the one hand and developing an international attraction pole on the other. By focusing on local industry, issues could emerge in terms of competing with already established media clusters in the city. mediapark.brussels has already attracted stakeholders that were already located in Brussels. Functioning media clusters around Flagey and the canal might decrease in size while mediapark.brussels siphons media activities from them. This does not lead to the growth of the media industry in Brussels as a whole. A good example of media clusters that successfully attract international stakeholders is the music tech scene in the Scandinavian countries. Years of focused investments in audio technology have resulted in a slate of new companies, from large international stakeholders like Spotify to award-winning speaker producers like Audio Pro or Jabra. Spillover effects can be witnessed in the recording industry, with

various pop artists and producers coming from the Nordic countries and music sales remaining high. This Specialised Area and the expertise it harbours has attracted international investments in music tech, and has put cities like Stockholm on the innovation map.

- 55 The example shows an element to be considered in the further development of mediapark.brussels. When investing in local industry, and focusing specifically on creative and innovative products and services, it is important for these companies to be active in a market where there is a demand for their services. Start-ups are not the clients of start-ups. Of course there are also larger companies at Reyers currently, including but not limited to VRT and RTBF. Still, the number might be too limited to allow the better part of start-ups to scale up to sustainable businesses. As such, the Brussels media clusters should also have an outward perspective, either by attracting companies to Brussels in order to be closer to these services, or by actively marketing these services among international companies, for example through the promotion of the central location of Brussels in Europe.
- 56 This tension is also at play regarding CoPs. On the one hand, there is room for developing CoPs locally (or regionally), for instance in terms of broadening and strengthening the links between Brussels-based CoPs and educational institutions (universities and vocational higher educational institutions). Another potential development on a local or regional scale is to provide better support to the smaller, bottom-up CoPs – which, as highlighted above, often lack resources – through a stronger connection to established stakeholders in the field, such as public service media (RTBF and VRT) and AV regulatory authorities (CSA, VRM). On the other hand, it may be insufficient to focus only on local development. Because of the small size of the Belgian media market, CoPs run the risk of losing momentum if they do not expand their scope beyond regional and even national borders. Competitiveness in a small market can indeed prevent the sharing of ideas and new practices among communities where competitors also participate. Moreover, the small size of the Belgian media industry also limits the range of original contributions from within, as there are not many new projects to showcase on a regular basis. Feeding CoPs with contributions from outside the country is thus a means to alleviate the competitive burden – at least at regional or national level – as well as to maintain an ongoing renewal (and attractiveness) of the community. It is also one lever among others through which an international attraction pole could be developed, for instance by facilitating connections with key international stakeholders.
- 57 Additionally, in any of these scenarios, workers tend to be an afterthought in policy development. Their working conditions have tended to worsen in the last ten years, with more precarious contracts and an increase in the number of freelance workers and a decrease in permanent contracts. Public administrations have the tools to encourage a healthier job market, and a media cluster could be an opportunity to encourage best practices such as requiring companies to apply for financial support or to use the infrastructure at mediapark.brussels in order to adhere to certain standards in working conditions.

### 3.3. Opening up the media cluster or specialising in certain media activities

- 58 As discussed, the media industry consists of a wide variety of products and services. In Brussels, we do not seem to have a clear roadmap that depicts which media industry products and services the mediapark.brussels project might focus on. Implicitly though, there is definitely a focus on the AV industry. When looking at the stakeholders in the sector, we see a strong presence of the AV industry. The policy instruments within screen.brussels are geared towards AV production: the cluster is open to companies beyond AV production, but the majority of its members still specialise in it; the film commission and film fund support AV productions and co-productions respectively. The funding line for business support aims to focus more on VR and games, but all in all, everything is clearly oriented towards more traditional AV production.
- 59 The efforts made in Brussels (and in Belgium as a whole) to attract investment and foster high-quality AV productions seems to have paid off in recent years. Mediapark.brussels could opt to adopt the strategy of a Specialised Area cluster more markedly, especially with large AV companies already present in the area, which could function as anchors. A strategy that would be geared more towards the media sector as a whole could also be envisioned but would require opening up the existing instruments and initiatives to other media industries and putting in place new programmes that anticipate the specific needs of game developers or journalists, for example. At the same time, such a focused strategy does not come without risks, for example, if the specific sector underperforms and does not deliver the expected return on investment for the Region. The question remains as to whether a broad approach to media offers a good basis for a cluster initiative, specifically because the needs of the various stakeholders in it might be different. Content producers might welcome the fact that (pre- and or post-) production facilities are offered. Digital product developers might benefit from a testing infrastructure and creative labs. Engineers working on advancements in media-related technologies, such as VR rendering, might benefit from the close vicinity of academic or business-oriented research and development units. Catering to all these (sub-)sectors or focusing on a specialisation is still a key decision to be made for the mediapark.brussels project.
- 60 When it comes to CoPs, one would intuitively consider that a broad industry would need a wide range of CoPs addressing different (sub-)sectors and issues while a specialised industry would need a narrow range of CoPs focusing on the industry's core activity. If one takes as a premise that CoPs should respond to the diverse and evolving needs of media workers, our research suggests a more complex set of perspectives. First, in both the broad industry scenario and the Specialised Area scenario, CoPs can (and indeed do) have different degrees of specialisation. Some are rather broad or transversal (such as *Café Numérique*, which addresses a wide range of issues related to “everything digital”) while others are more specialised in terms of, for instance, (sub-)sectors (such as BE.VR, which is focused on virtual reality) or issues being addressed (for instance, one could imagine a CoP on motion sickness). These different positionings respond to different needs and can be equally relevant in both scenarios. Secondly, CoPs are relevant not only in terms of the media industry's core activity, i.e. content production, but also in terms of supporting and facilitating, as well as external activities. These activities add value to the mediated content and are key to the functioning of the media industry as a whole. Thus

the “non-core” activities should be considered as well in any initiative that would aim to foster or coordinate CoPs in media clusters, either in the broad industry scenario or in the Specialised Area scenario.

## Conclusion

- 61 Brussels is home to the largest concentration of media organisations in Belgium and is also a major international hub for news production. The metropolis may be considered as a media cluster, but a closer look at the data shows that it is actually home to several specialised clusters in specific neighbourhoods. The AV cluster in Reyers is the most significant in terms of share of net added value and number of employees, and it therefore comes as no surprise that the Government of the BCR decided to make it the focal point of its media-related policy efforts. The mediapark.brussels project might boost an already dynamic sector, but its possible success will depend greatly on its configuration, defined by the choices the Government of the BCR and the other stakeholders will make in the near future. We suggest that these choices should be guided by the following key considerations.
- 62 First, future developments should take into closer consideration the three kinds of entity that constitute media clusters. Not only companies, but also workers and communities of practice are crucial in the functioning of a cluster. Secondly, while the focus is on mediapark.brussels, stakeholders should be aware of the other media clusters that exist in Brussels. Will they be given equal opportunities to develop or should everything be focused on mediapark.brussels? And how can the siphoning of other local media clusters be avoided? Thirdly, several directions are available in configuring the scope of a media cluster, which are not necessarily mutually exclusive, but can generate reciprocal tensions. Addressing these tensions will be essential in order to maintain the overall coherence of the project. These tensions are, namely: that between a focus on territorial urban development versus placing the accent on cultural and media industry (Community) strategies; that between supporting the local industry and attracting international stakeholders; and that between creating a wide-spectrum media cluster and reinforcing the AV specialisation of Reyers.
- 63 The competences of the Government of the Brussels Capital Region, which are limited to urban and economic development, with no say on cultural policies related to media, have naturally shaped mediapark.brussels into a real estate project for the most part. This is not necessarily problematic, but it is important to acknowledge this in order to make a thorough assessment of the opportunities and challenges afforded by mediapark.brussels. The project will benefit from a more systemic involvement of all of the media industry stakeholders beyond those more closely connected to Reyers, as well as other administrations at Community and federal level, in order to coordinate strategies to make the cluster the strongest tool possible to support the local media industry.
- 64 Additionally, public authorities at regional, community and federal level should collaborate to refine the sectoral data on media companies and workers and invest in harvesting more detailed data at local level. The work of the research project Media Clusters Brussels can be used as a starting point to set up an observatory of the media industry, which could compile and analyse information systematically regarding the impact of the media industry in the metropolis in general, and of the cluster at mediapark.brussels in particular.

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## APPENDIXES

Appendix 1 – List of media industry activities and NACE codes used in this study and a comparison with the studies used to compile the list.

NACE number	NACE classification	SECTOR	OECD (2011)	Idea Consult (2012)	KEA European Affairs (2006)
C18.1.1	Printing of newspapers	PRINT		X	X
C18.1.3	Pre-press and pre-media services	PRINT		X	X
C18.1.4	Binding and related services	PRINT		X	X
C18.2.0	Reproduction of recorded media	AV		X	X
G47.6.1	Retail sale of books in specialised shops	PRINT			
G47.6.2	Retail sale of newspapers in specialised shops	PRINT			X
G47.6.3	Retail sale of music / video recordings in specialised shops	AV			X
J58.1.1	Book publishing	PRINT		X	X
J58.1.2	Publishing of directories and mailing lists	PRINT	X	X	X
J58.1.3	Publishing of newspapers	PRINT	X	X	X
J58.1.4	Publishing of journals and periodicals	PRINT	X	X	X
J58.1.9	Other publishing activities	PRINT	X	X	X
J58.2.1	Publishing of computer games	NEW MEDIA	X	X	X
J59.1.1	Motion picture, video and television programme production	AV	X	X	X
J59.1.2	Motion picture, video and television programme post-production	AV	X	X	X
J59.1.3	Motion picture, video and television programme distribution	AV	X	X	X
J59.1.4	Motion picture projection activities	AV	X		X
J59.2.0	Sound recording and music publishing activities	AV	X	X	X
J60.1.0	Radio broadcasting	AV	X	X	X
J60.2.0	Television programming and broadcasting activities	AV	X	X	X
J63.1.1	Data processing, hosting and related activities	NEW MEDIA	X	X	
J63.1.2	Web portals	NEW MEDIA	X	X	
J63.9.1	News agency activities	PRINT	X	X	X
M73.1.1	Advertising agencies	ADVERTISING		X	X
M73.1.2	Media representation	ADVERTISING		X	X

## NOTES

1. Deliverables of the MCB project are available online at: [www.mediaclusters.brussels/publications/](http://www.mediaclusters.brussels/publications/).
2. For insights about the CCI in the BCR see Mauri, Vlegels, Lucy, Lazzaro and Ysebaert [2017].
3. We must consider the results presented here cautiously and as estimations, as the data at our disposal from Bel-first to provide insight into the media industry and to identify media clusters are imprecise. Bel-first, published by Bureau van Dijk Electronic, includes financial data on the population of Belgian companies, associations and foundations with and without filing obligation to the National Bank of Belgium (NBB) (in total about 2,2 million entities). Economic entities with active status with and whose principal activity falls under the identified NACE codes and the indicators from 2014 were retrieved. However, not all media companies can be identified due to the classification system (NACE) applied and because the Bel-first database cannot differentiate between the location of companies in terms of production activities (e.g. headquarters and actual production location). Additionally, companies and independent workers might indicate the wrong activities. The smaller the company, the less data are provided. Missing data cells have been harmonised. Still, the NACE code database is the only one available that provides insight into the various media clusters in Brussels, and has therefore been used

to provide initial estimations and insight. See the following Deliverable of MCB for more insight regarding the data source, data limitations and harmonisation process: KOMOROWSKI, M., 2017. Report on Data Analysis: Brussels' media industry. In: *Media Clusters Brussels, Work Package 2: Media organizations' characteristics and value chain*, Deliverable 2.3a, 04/2017. Available from: <http://mediacusters.brussels/wp-content/uploads/2017/06/MCB-Deliverable-2.3a.pdf>

4. There are limitations that need to be discussed regarding the available data. NSSO provides data on employees as well as some non-profit organisations. NISSE provides data on self-employed workers. However, some NGOs and a few other media companies are exempt from providing information to NSSO (e.g. RTBF). There are methodological limitations as NSSO and NISSE used two different occupational and economic activity classifications until 2009, as well as different classification levels (4-digit and 6-digit levels). Despite our effort to harmonise the data in order to make it comparable, insights need to be considered with caution, as estimations of the actual amount of media workers in Brussels. See the following Deliverables of MCB for more insights regarding the data limitations of NSSO and NISSE: WIARD, V. and DOMINGO, D., 2017. Report of analysis: first census of media workers in Brussels. In: *Media Clusters Brussels, Work Package 4: Media workers' skills, profiles and social networks*, Deliverable 4.2a, 04/2017. Available from: [http://mediacusters.brussels/wp-content/uploads/2017/06/D4.2a\\_Final.pdf](http://mediacusters.brussels/wp-content/uploads/2017/06/D4.2a_Final.pdf) and WIARD, V., DOMINGO, D., PLAZY, S., DERINÖZ, S., and PATRIARCHE, G., 2017. Database on media employees and self-employed in Brussels, *Work Package 4: Media workers' skills, profiles and social networks*, Deliverable 4.2b, 12/2017. Available from: [http://mediacusters.brussels/wp-content/uploads/2018/04/D4\\_2b\\_final.docx.pdf](http://mediacusters.brussels/wp-content/uploads/2018/04/D4_2b_final.docx.pdf)

## ABSTRACTS

This synopsis analyses from a media cluster perspective the characteristics of the media industry in Brussels and assesses the implications for the major policy intervention of the Brussels Capital Region in this industry: the mediapark.brussels, a 10-year urban and property development project at Reyers around the existing site of the public broadcasting companies VRT and RTBF. Our research results shed light on several clustering configurations in the Brussels media industry, highlight the diversity of the media workforce, and offer an overview of different models and activities of worker communities. The current policy framework for the mediapark.brussels project is outlined. The insights gained are used to assess the possible strategies for the project, considering that in Belgium, the media are a competence of the Communities and not of the Government of the Brussels Capital Region. We discuss the tension that manifests itself in the development of mediapark.brussels: tension between an urban and a cultural development, tension between local and international perspective, and tension between a wide-spectrum and a specialised media cluster.

La présente note de synthèse examine les caractéristiques de l'industrie des médias à Bruxelles du point de vue des clusters de médias et en évalue les implications pour la principale action stratégique de la Région de Bruxelles-Capitale à l'égard de cette industrie, à savoir, le projet décennal *mediapark.brussels* pour le développement urbanistique et immobilier du quartier

Reyers, autour du site actuel des organismes publics de radiotélévision que sont la VRT et la RTBF. Les résultats de nos recherches mettent en lumière plusieurs configurations de *clusters* au sein de l'industrie des médias à Bruxelles, soulignent la diversité du personnel de ce secteur et donnent un aperçu de différents modèles de communautés de travailleurs et de leurs activités. Les orientations politiques qui président actuellement à la mise en place de mediapark.brussels sont exposées. Les connaissances acquises permettent d'évaluer les stratégies envisageables pour ce projet, compte tenu du fait qu'en Belgique, les médias relèvent de la compétence des Communautés, et non pas du gouvernement de la Région de Bruxelles-Capitale. Nous évoquons les tensions qui se manifestent dans le cadre de la mise en place de mediapark.brussels, opposant développement urbanistique et développement culturel, perspective locale et perspective internationale, cluster de médias couvrant un large éventail d'activités et cluster de médias spécialisé.

In deze synthesenota analyseren we vanuit een mediaclusterperspectief de kenmerken van de Brusselse mediasector en evalueren we de implicaties voor de grote beleidsinterventie van het Brussels Hoofdstedelijk Gewest in deze sector: mediapark.brussels. Dit stadsontwikkelingsproject ter hoogte van de Reyerslaan, vlak bij de huidige site van de openbare televisiezenders VRT en RTBF, zal tien jaar in beslag nemen. De resultaten van ons onderzoek werpen een licht op verschillende clusterconfiguraties in de Brusselse mediasector, belichten de diversiteit van de medewerkers en bieden een overzicht van de verschillende modellen en activiteiten van werknemersgemeenschappen. Tevens wordt het huidige beleidskader voor het project mediapark.brussels geschetst. De verkregen inzichten worden aangewend om de mogelijke strategieën voor het project te beoordelen, rekening houdend met het feit dat media in België een bevoegdheid van de gemeenschappen is en niet van de Brusselse Hoofdstedelijke Regering. We bespreken hierbij de spanningen die tot uiting komen bij de ontwikkeling van mediapark.brussels: tussen stadsontwikkeling en culturele ontwikkeling, tussen het lokale en het internationale perspectief, en tussen breed opgevatte en gespecialiseerde *mediaclusters*.

## INDEX

**Mots-clés:** développement économique, aire métropolitaine, région, politique régionale, développement territorial, planification urbaine

**Subjects:** 6. économie – emploi

**Trefwoorden** economische ontwikkeling, groostedelijk gebied, gewest, gewestelijk beleid, territoriale ontwikkeling, stadsplanning

**Keywords:** economic development, metropolitan area, region, regional policy, territorial development, urban planning

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