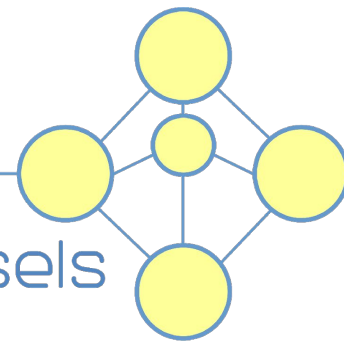




A mediapark in Reyers? Brussels' media industry and its regional dynamics

Research teams:

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Discussants:

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Moderation:

Margaux Hardy (IRIB)

Research Background

Context of the research project

Media Clusters Brussels is...

- A collaborative research project of the three leading universities in Brussels, VUB, ULB and USL-B
- Funded by Innoviris (2014-2018)
- Collaborations with multiple stakeholders (VRT & RTBF, but also Screen.Brussels, SAU, etc.).



In collaboration with



Why study media (as an industry)?

- Emerging field (media economics and media management)
 - Not much data
 - Rapidly evolving because of:
 - Digitization
 - Platformization (GAFA's)
 - Concentration (of big media conglomerates) **&** fragmentation (of many small players & self-employed)
- > Changing market structure, changing companies' structures, changing working conditions

Why study Brussels?

- Unique place (capital of Belgium and Europe, medium size city but very diverse, etc.)
- Unique media environment (multilingual -public and private- media, local, national and international)
- Many changes (mainly the MediaPark at the policy/project level)

Why use the concept of cluster(s) ?

- A cluster is an agglomeration of entities, it is as much a social phenomenon as a scientific concept
- Cluster theory is strategical (aims at assessing the concentration and repartition of specific entities in a specific "territory")
- It is a multifaceted concept, works in an interdisciplinary approach
- Can be applied to different levels (or entities) such as companies, workers, social networks, etc.

- > Cluster theory can help assess the "health" and diversity of a media environment
- > It can help assess the potential success of the MediaPark
- > It can help study this new trend of media cities, media hubs, etc. in developed countries

Research Background

The different types of conceptualized clusters

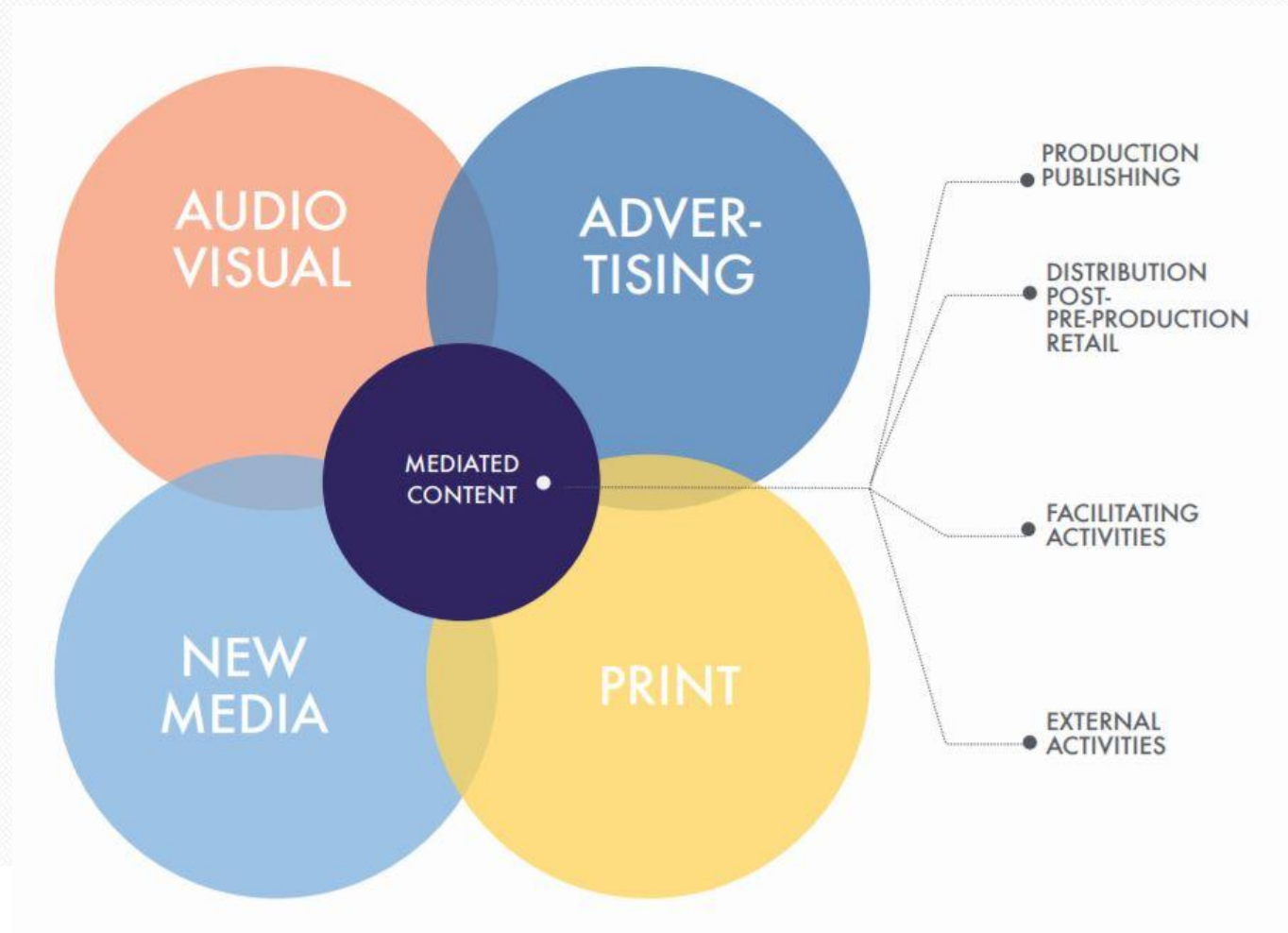
	CREATIVE REGION	Metropolitan regions that attract through URBANIZATION ECONOMIES	Paris, Amsterdam, Singapore
	GIANT ANCHOR	Defined by the location of major media institutions that outsource forming LOCALIZATION ECONOMIES	Hilversum, Leipzig, Cologne
	SPECIALIZED AREA	Smaller city or neighbourhood that highly specializes in a media activity creating AGGLOMERATION ECONOMIES	Soho in London, St. Pauli in Hamburg, Silicon Valley
	ATTRACTING ENABLER	Local facilities and resources that attract and enable media activities creating LOCALIZATION ECONOMIES	Babelsberg Film Studios, Pinewood Studios Group
	REAL ESTATE	Artificially formed through real estate investment that targets media activities and offers office space	Media Park Hilversum, Dubai Media City
	POOLING INITIATIVE	Artificially formed through a private or publicly funded initiative	RockCity Sweden, @22 in Barcelona, Screen.brussels

Entities, theoretical standpoint and empirical data

1. Macro level
 - a. Entities: media companies
 - b. Standpoint: media economics / socio-economy of media
 - c. Data: literature review + database analysis (BelFirst) + online survey
2. Micro level
 - a. Entities: workers
 - b. Standpoint: sociology of (media) work
 - c. Data: literature review + database analysis (NSSO/NISSE) + online survey + interviews
3. Meso level
 - a. Entities: communities of practice (CoP)
 - b. Standpoint: social learning, organizational learning
 - c. Data: observation + online survey + interviews

Research Background

Defining the media sector



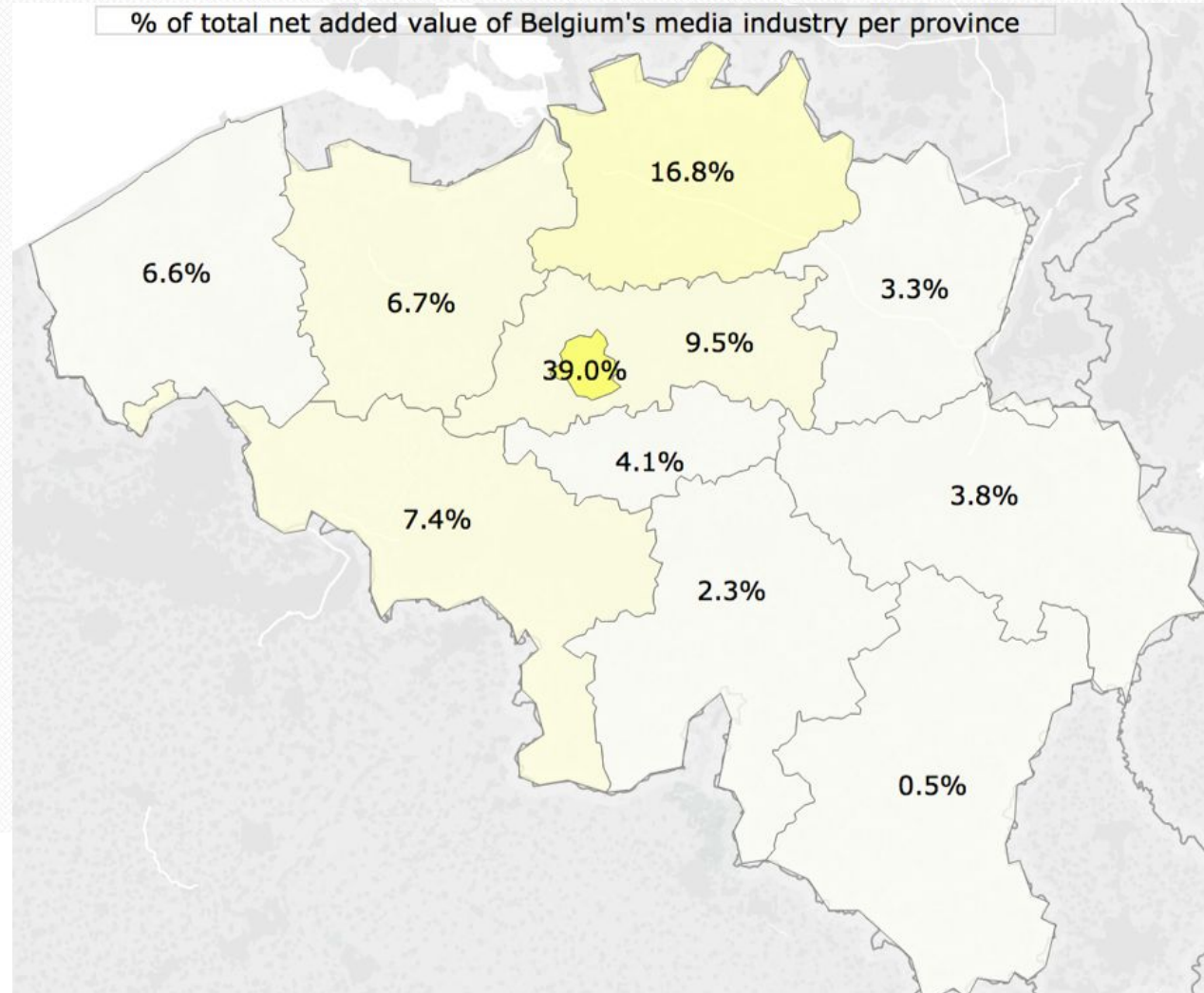
Empirical results

Brussels as a de facto Cluster

Brussels is a cluster !

Brussels creates around 40% of the total net added value of Belgium's media industry, directly followed by Antwerp and Flams-Brabant.

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.

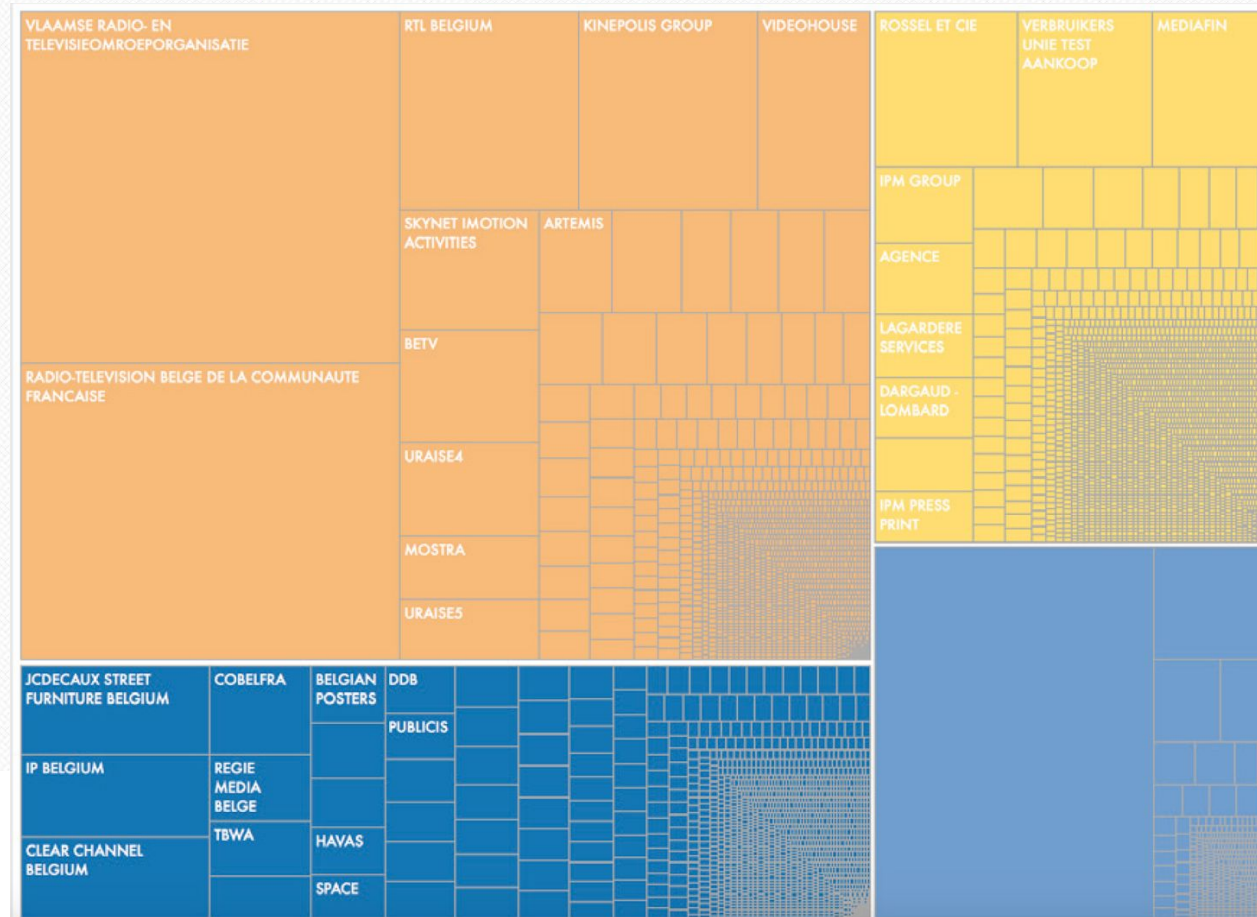


Companies : the big guys

The big media players clustering in Brussels

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.

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.



SECTORS

- 48,7% AUDIOVISUAL
- 19,3% ADVERTISING
- 18,8% PRINT
- 13,3% NEW MEDIA

11,8% VRT

10,0% RTBF

2,0% ROSSEL

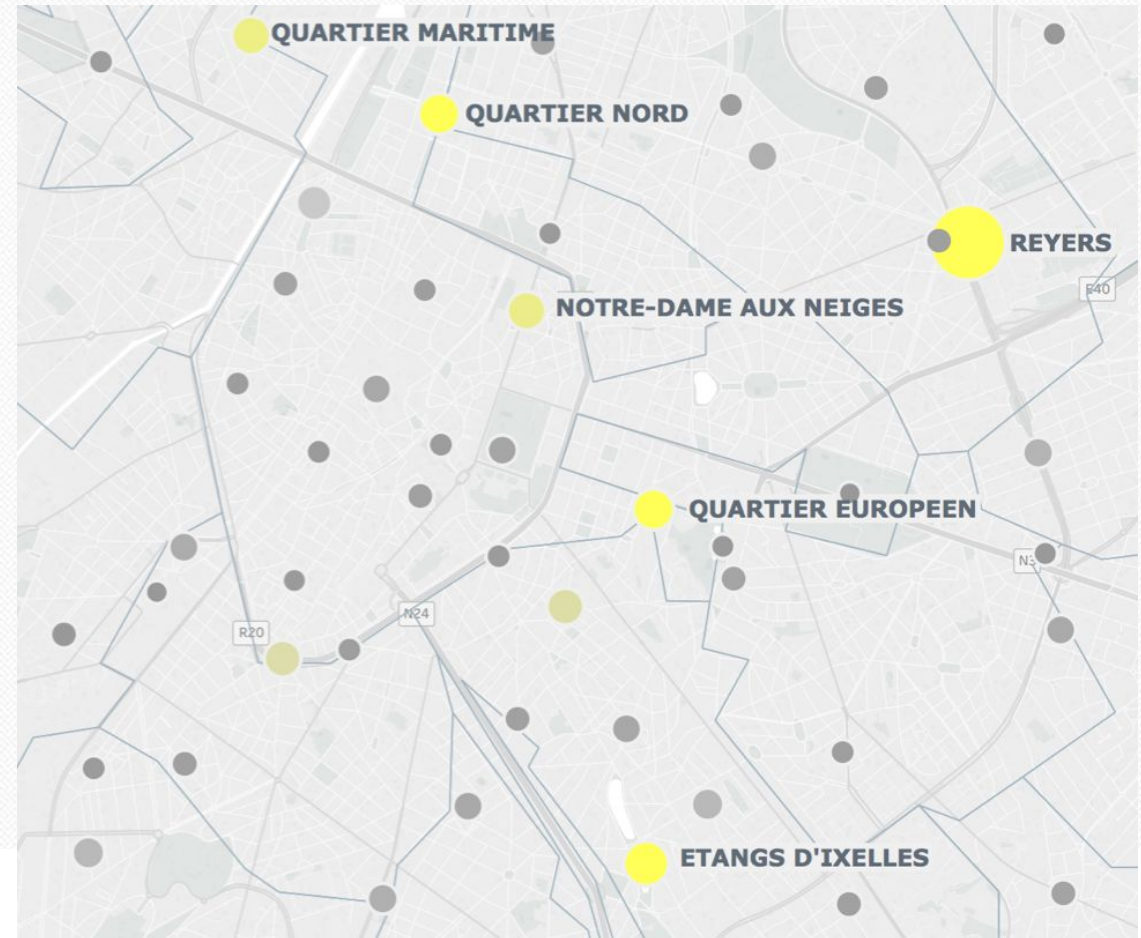
1,5% JC DECAUX

by contribution to total
BXL media industry

4 clusters in Brussels

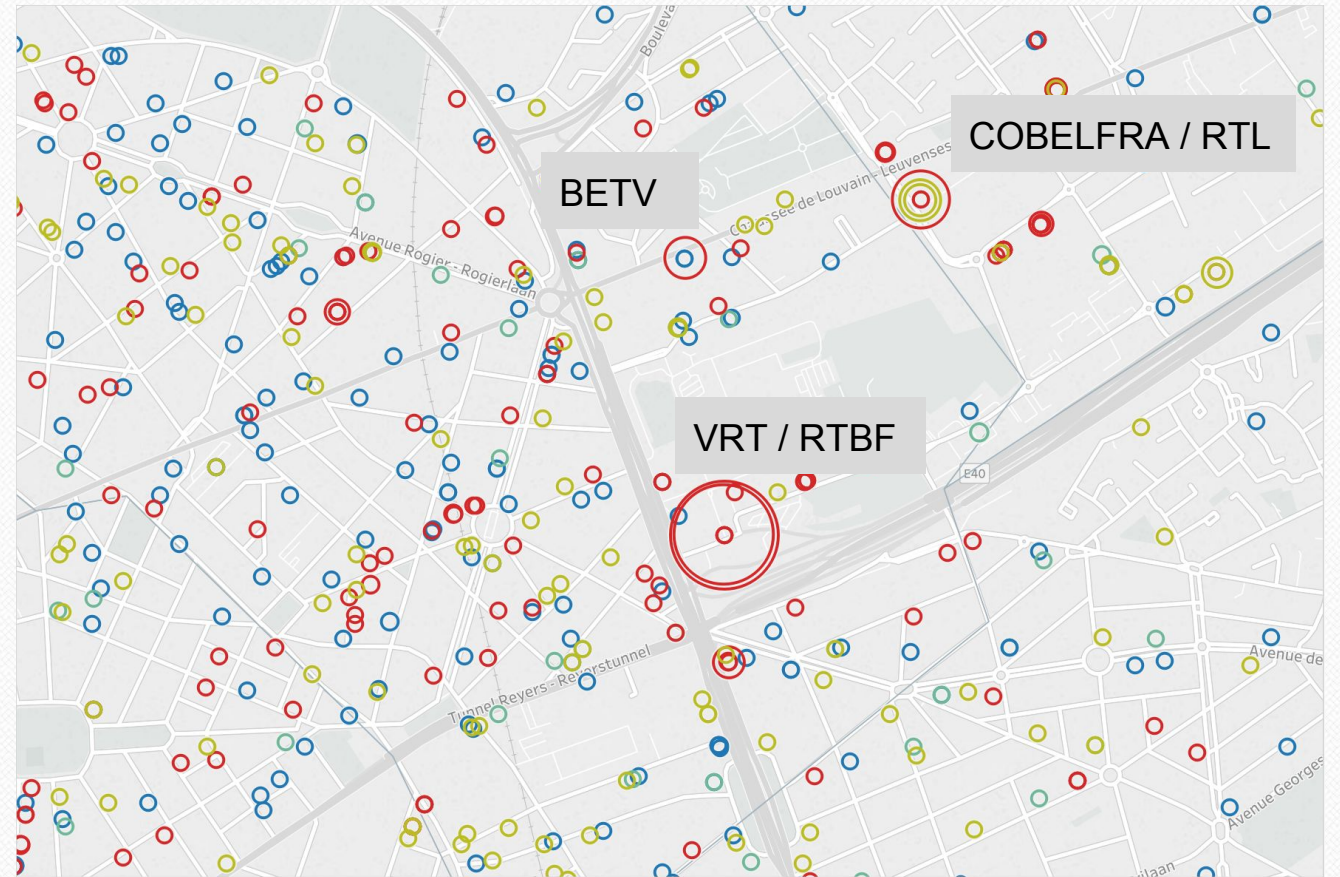
Brussels' main clusters at the company level

- (1) AV media cluster around the public broadcasters at Reyers
- (2) news media cluster in the European Quarter
- (3) AV media cluster in Flagey, Étangs – Porte de Namur
- (4) media cluster at the canal.



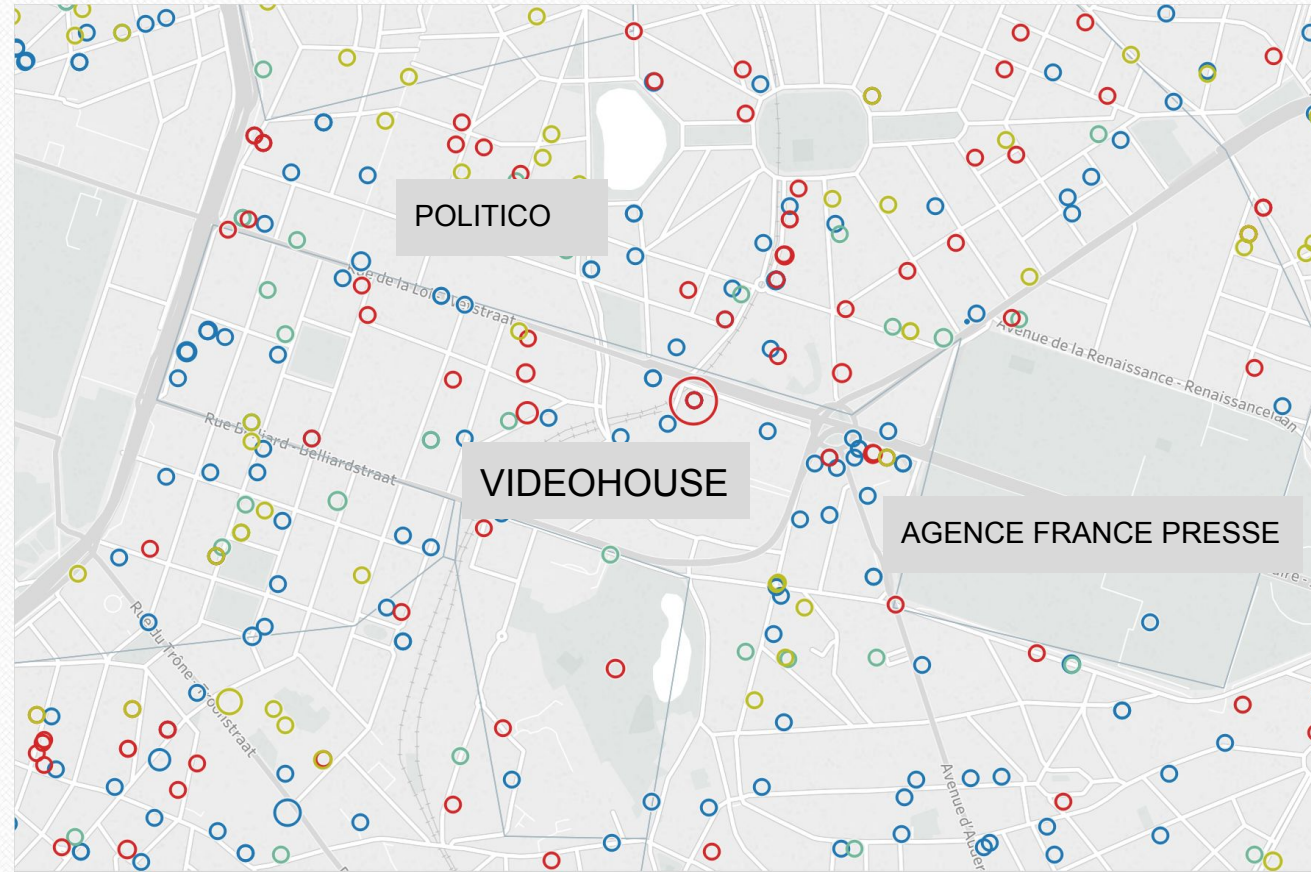
A media cluster at Reyers

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



A media cluster at the European Quarter

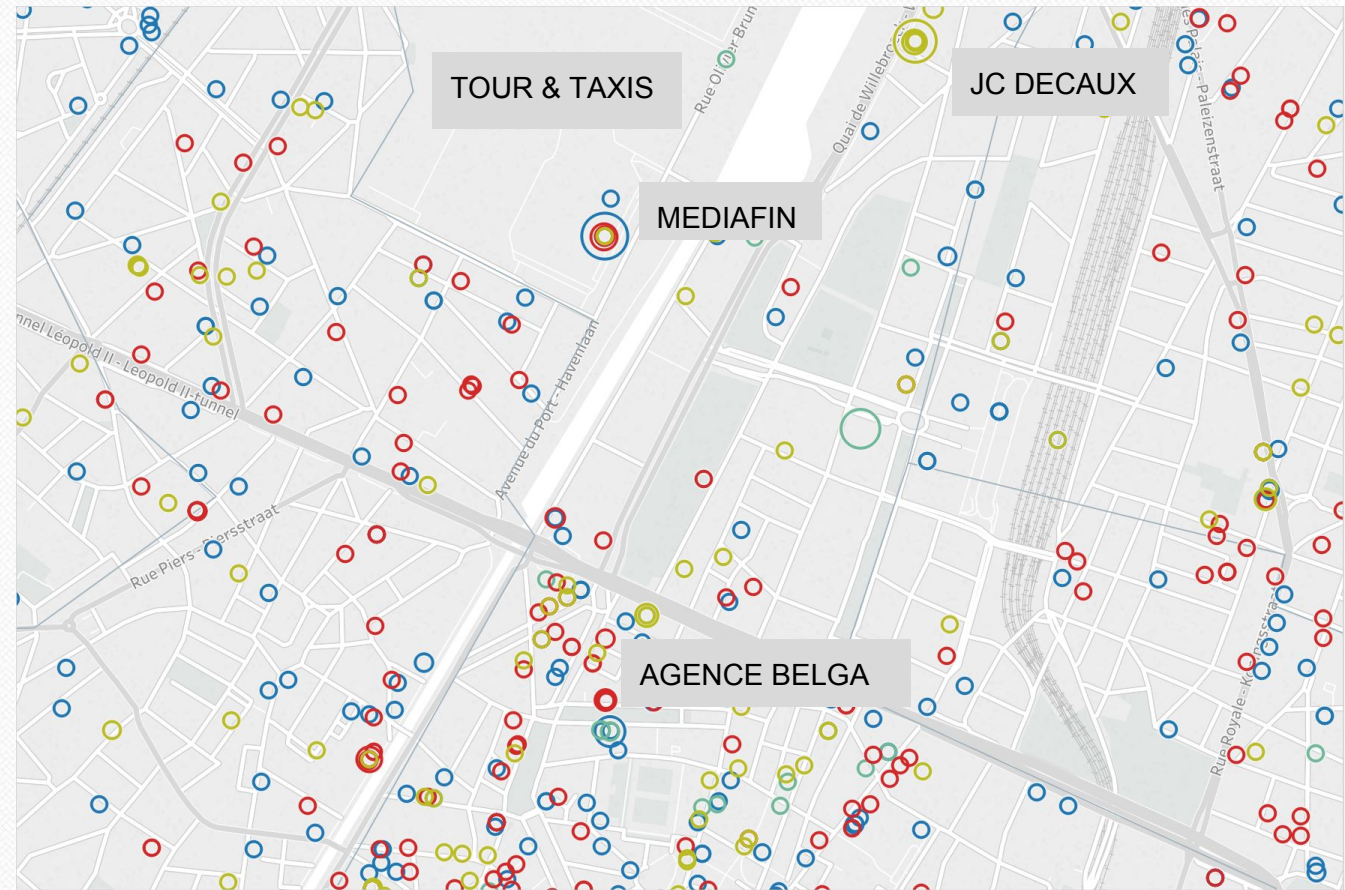
The European Quarter (2) has been identified as a media cluster, as many international media outlets have their offices there and journalists are located in this area. This is unsurprising, as it is estimated that around 1 000 journalists, cameramen and other press personnel are connected to the European institutions.



Media Clusters Brussels

A media cluster at the canal

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).

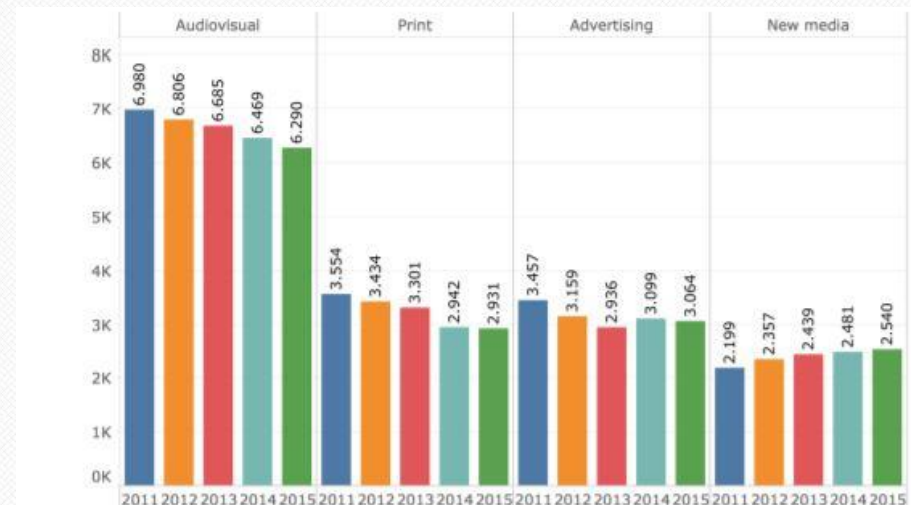
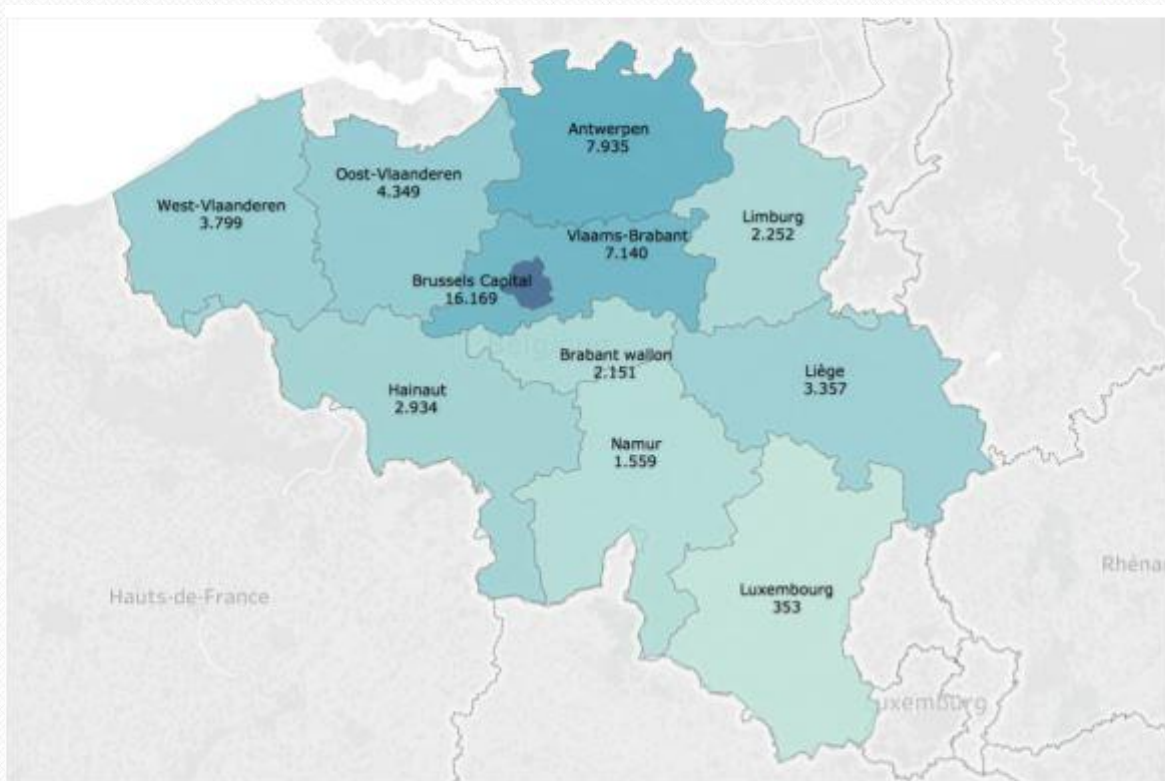


- Focus
 - Profiles
 - Working conditions
 - Skills
 - Mobility
- Data
 - Database analysis (ONSS / INASTI)
 - Survey (n=577)
 - Semi-directive interviews (n=15)
 - Observations, ...



Workers of media companies

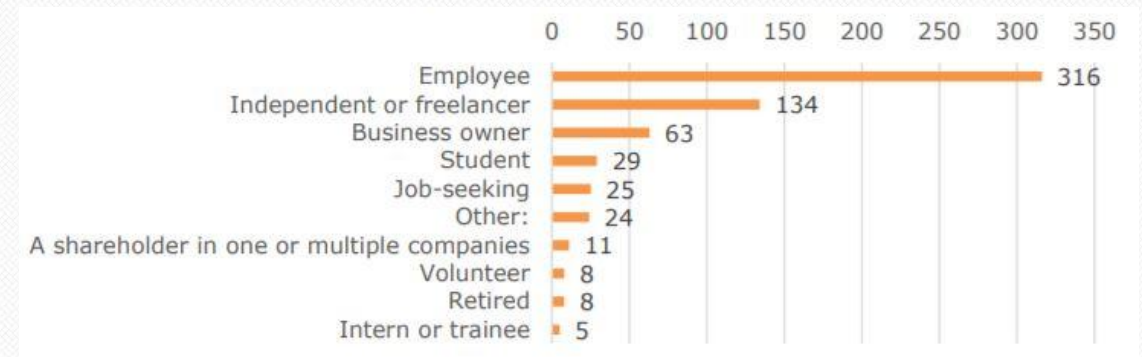
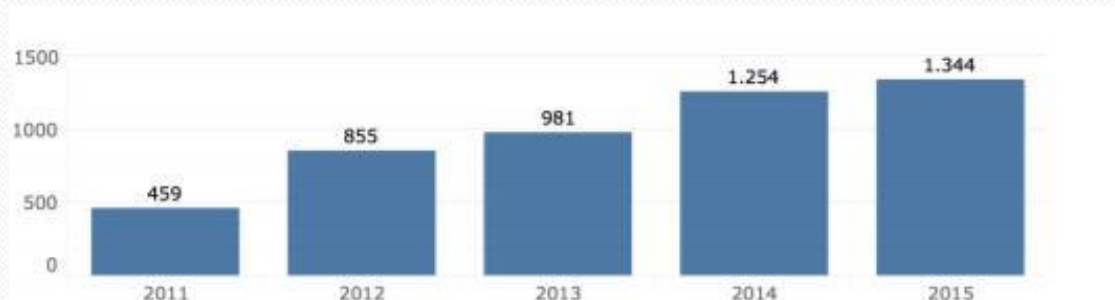
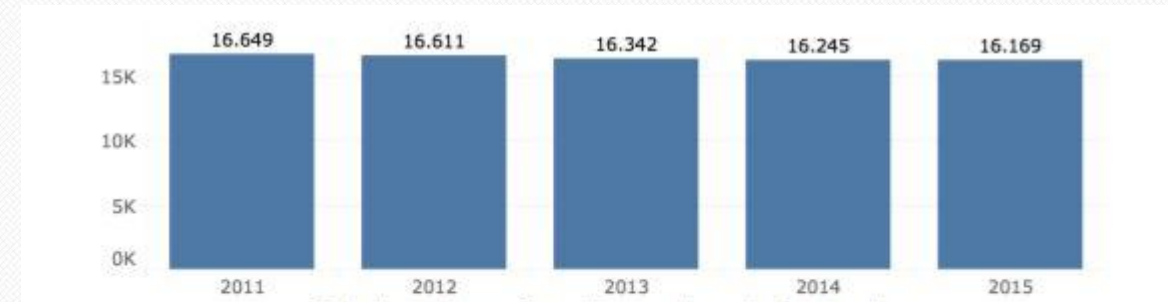
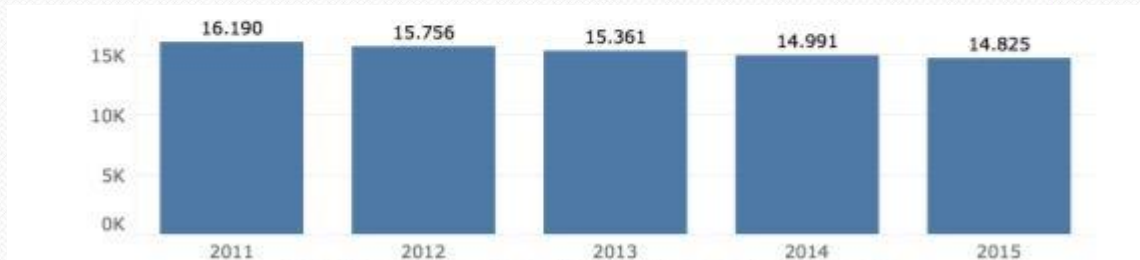
A strong workforce



	Sector				Total
	New media	Advertising	Print	Audiovisual	
Total	2540	3064	2931	6290	14825
Core	1	3064	1794	5713	10572
Support	2539	0	1137	577	4.253

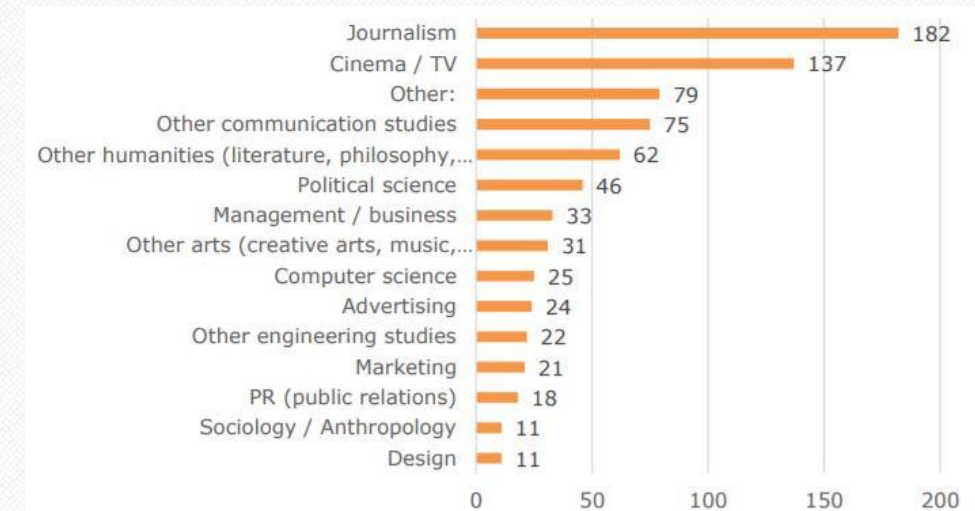
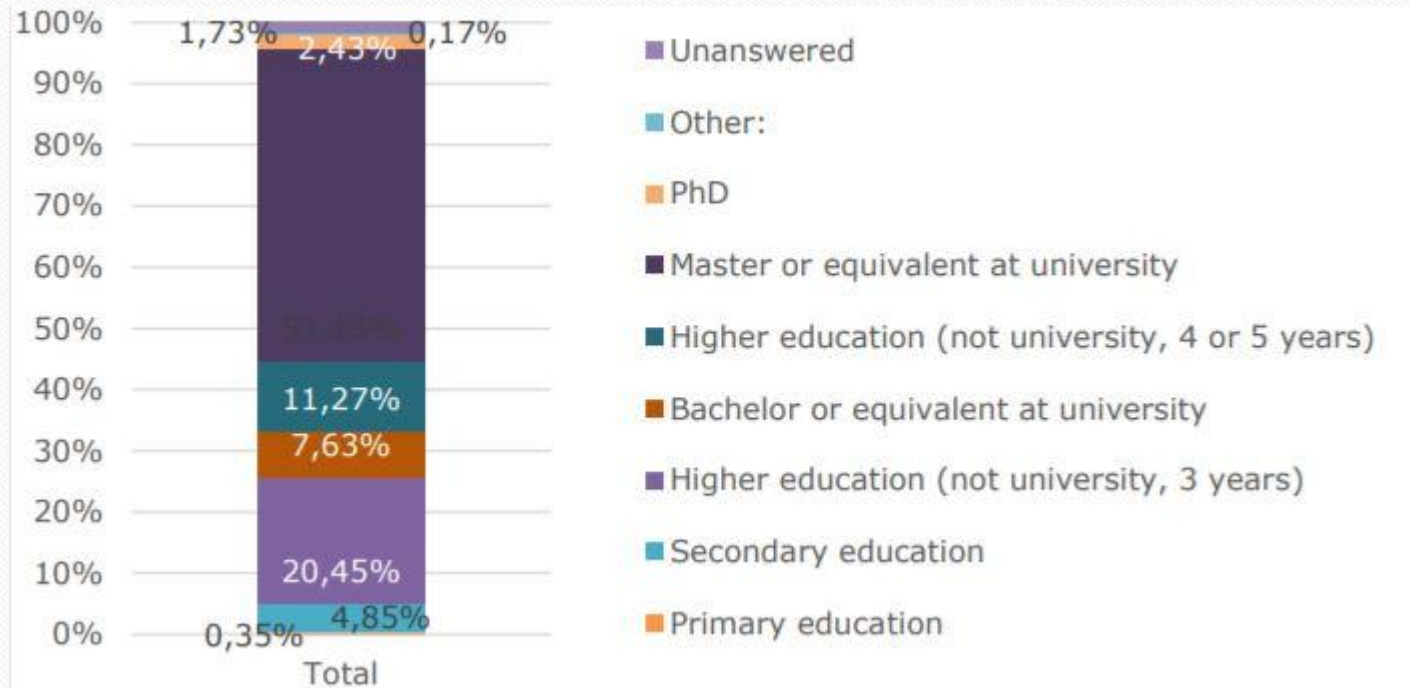
Workers: a diverse workforce

Relatively precarious?



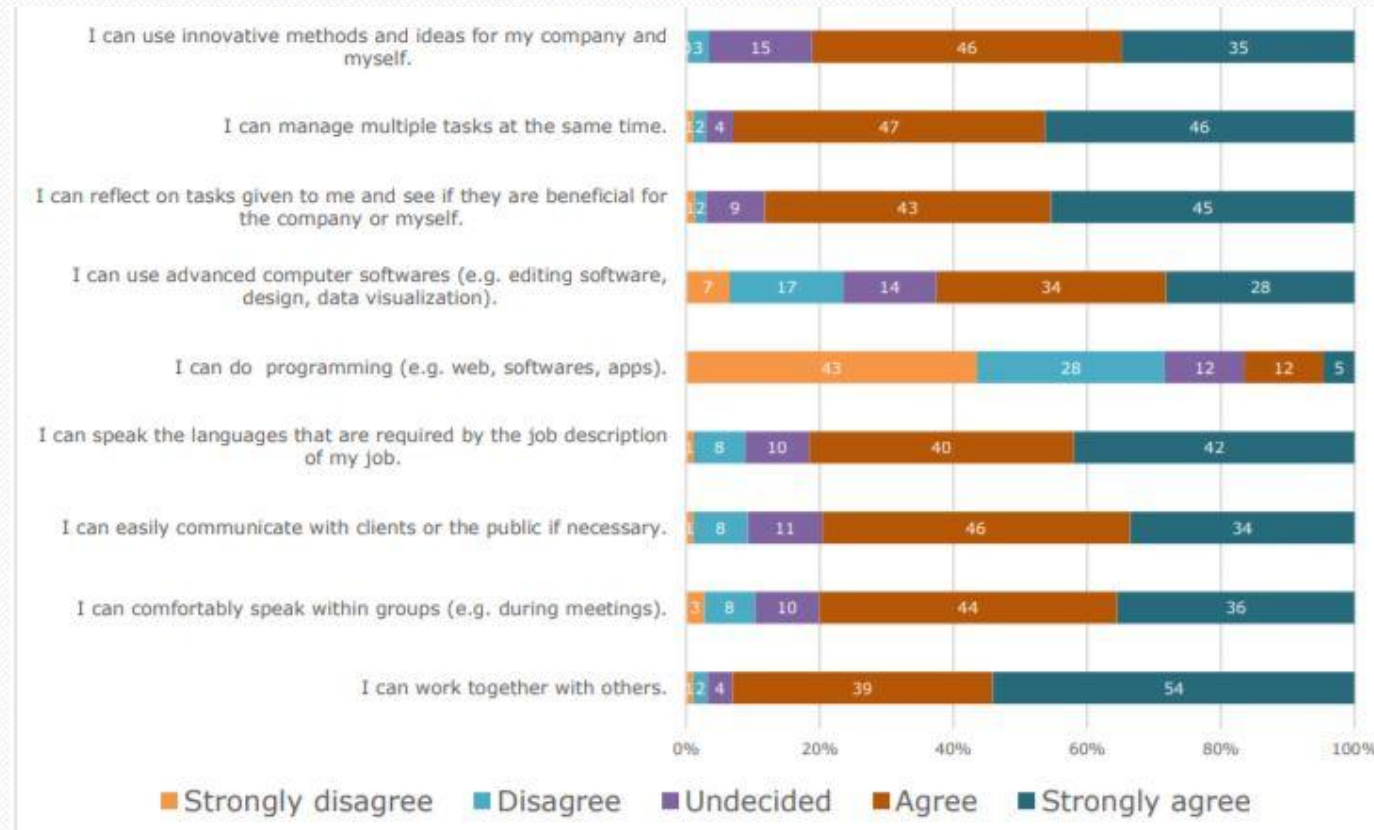
Workers: a diverse workforce

Though highly educated and skilled



Workers: a diverse workforce

...Except for computer stuff

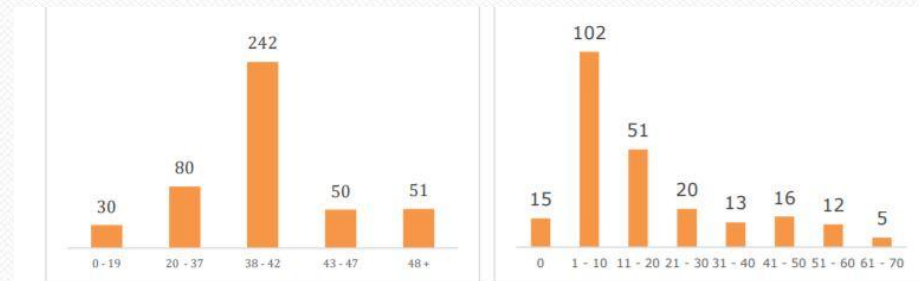
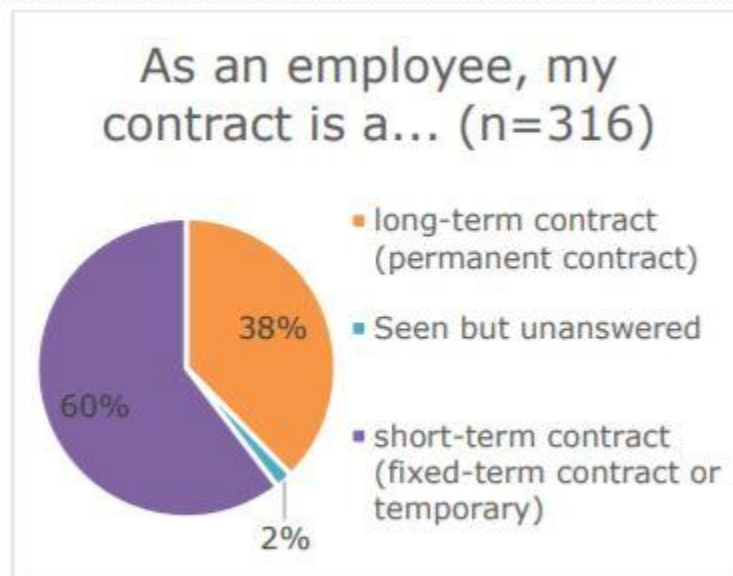
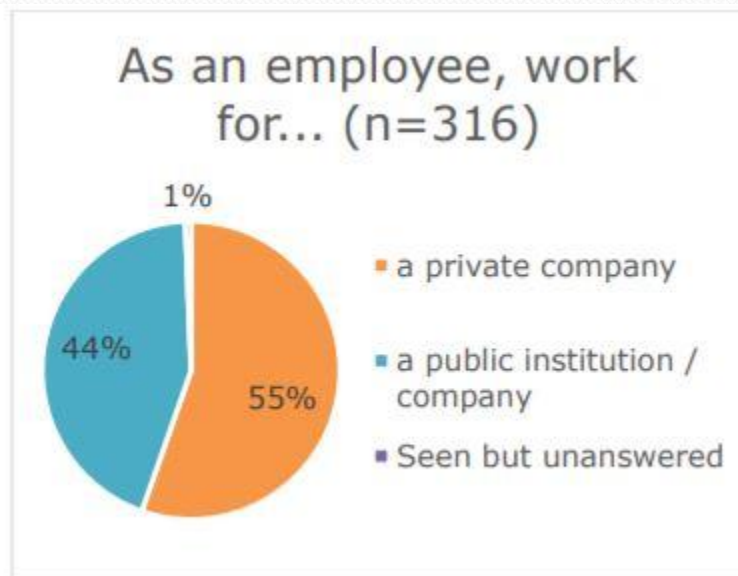


Media Clusters Brussels

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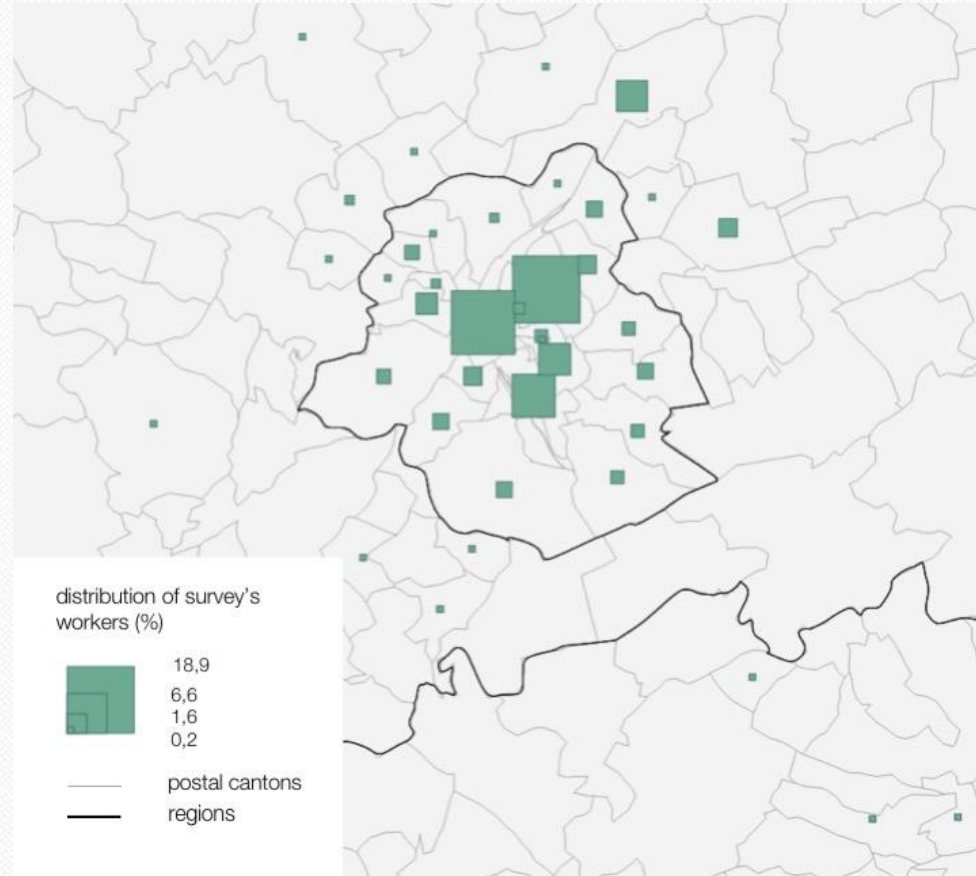
Workers: a diverse workforce

With various working conditions



Workers: a diverse workforce

Rooted in the city, living all over



Top-down approach (institutionalized, intentional)

- Coming from a public stakeholder and/or a domain-related institution
- Fulfil a specific need that has been identified
- Dedicated resources that help them to fulfil their mission

Ex: **Plan TV**: A trimestral event targeting TV producers, centred around workshops and networking, hosted initially by the French Community audio-visual regulator, the Conseil Supérieur de l'Audiovisuel (CSA)



Communities of practice

Bottom-up approach (spontaneous, informal)

- Coming from a personal initiative...
- ... that is the only structure to support its development
- Limited access to resources.

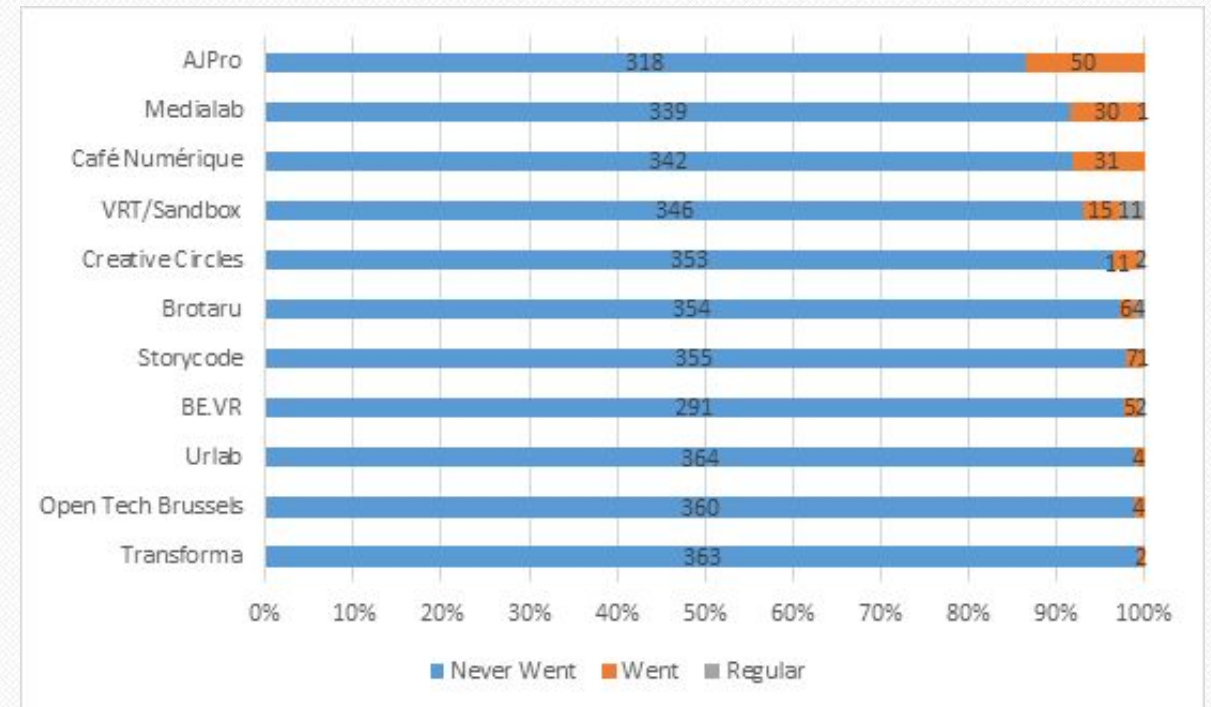
Ex: **Brotaru**: a monthly networking event for game developers that takes place in cafés in Brussels. It allows people to show and test each other's games (some kind of quality assurance), as well as discuss business and everything related to the job, in a casual setting.



Communities of practice

Barely known, but useful

- Most of the survey respondents (over 70 %) do not attend CoP events
- Among them, most do not know about CoP events
- Nevertheless, media workers who attend CoP events do experience a range of benefits from their participation

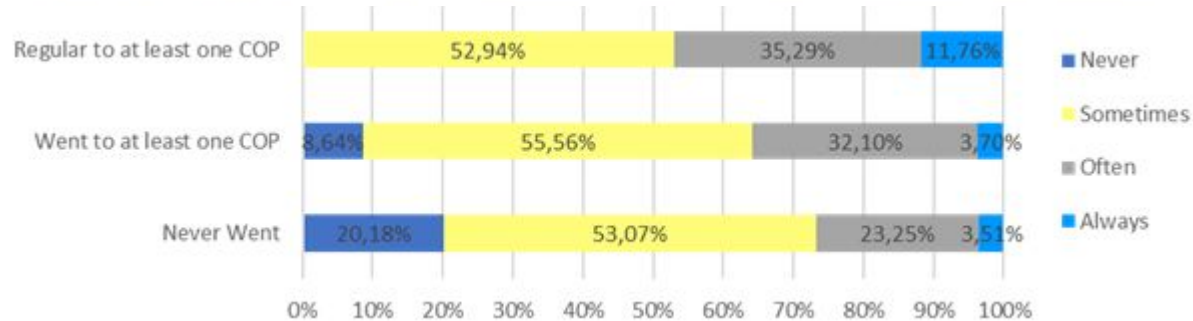


Participation in events organised by CoPs according to our definition

Communities of practice

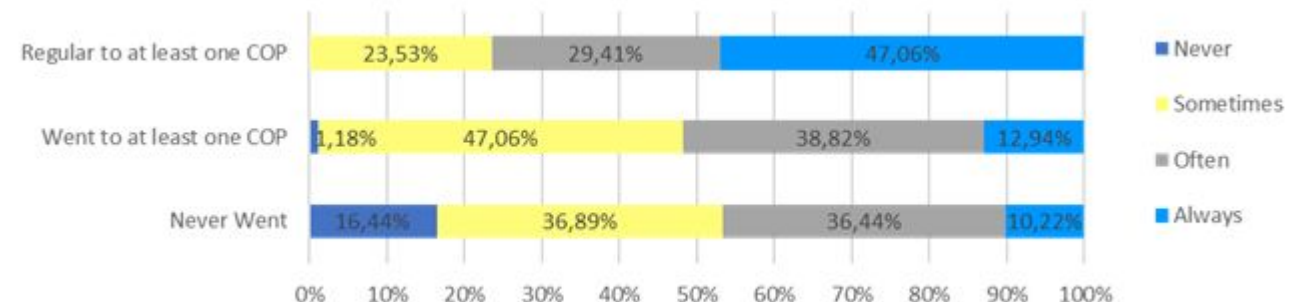
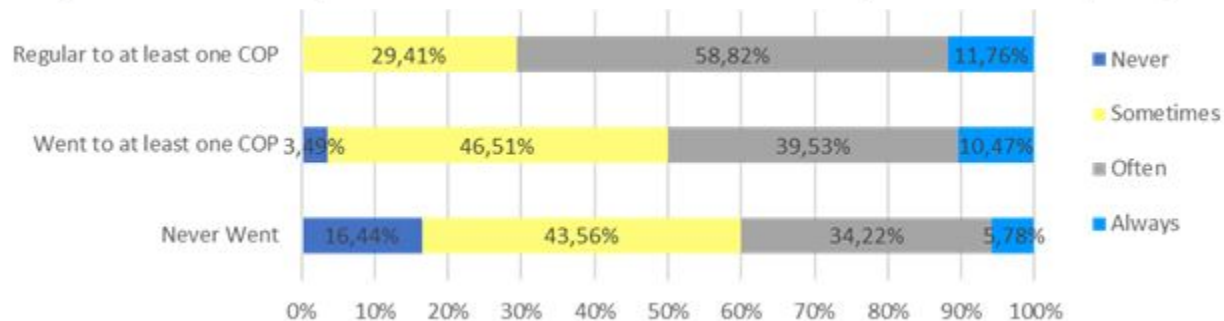
Perceived benefits of CoPs

"I find help or expertise" in the communities or social networks, in relation to the participation in CoP events (n=326)



"I go to network" in the communities or social networks, in relation to the participation in CoP events (n=329)

"I get new ideas and inspired" in the communities or social networks, in relation to the participation in CoP events (n=328)

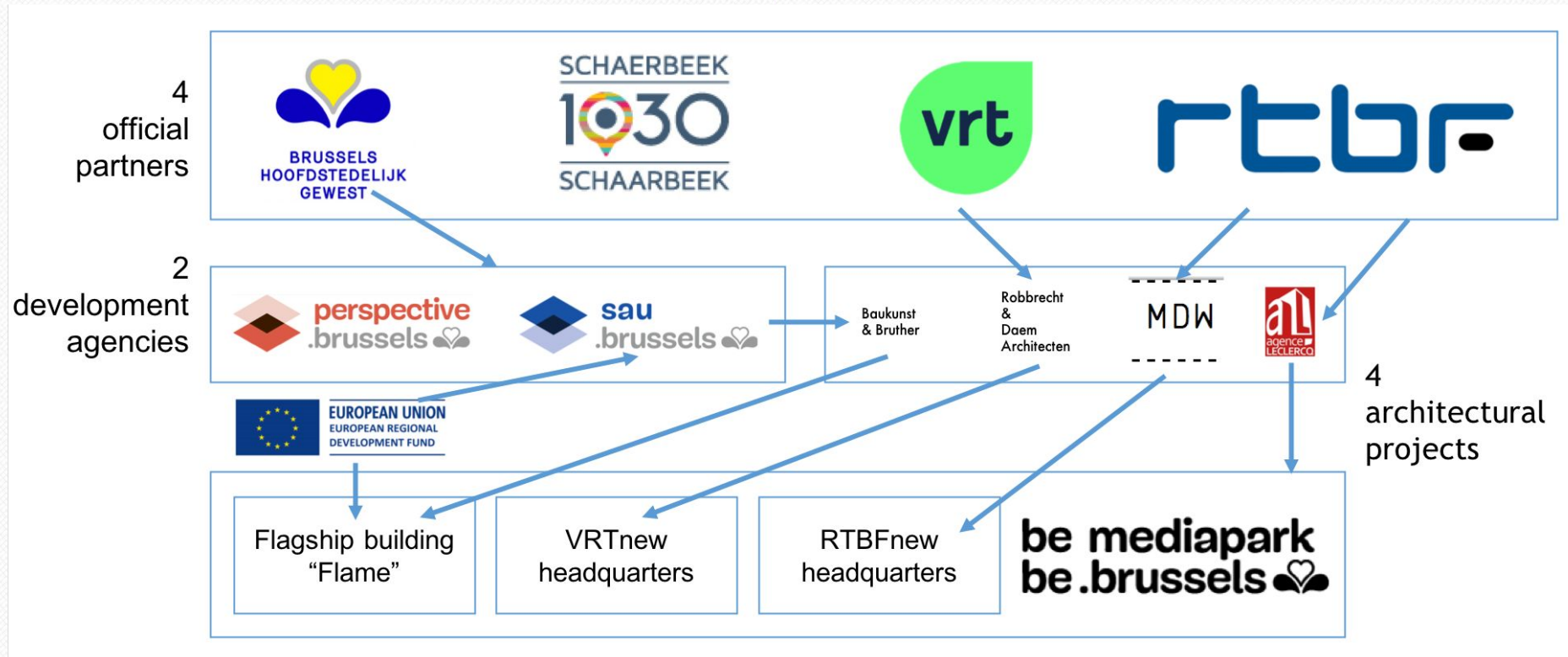
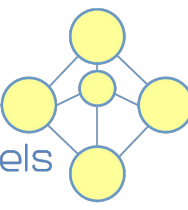


"My company or my job benefits from" the communities or social networks, in relation to the participation in CoP events (n=327)

Tensions in the development of mediapark.brussels

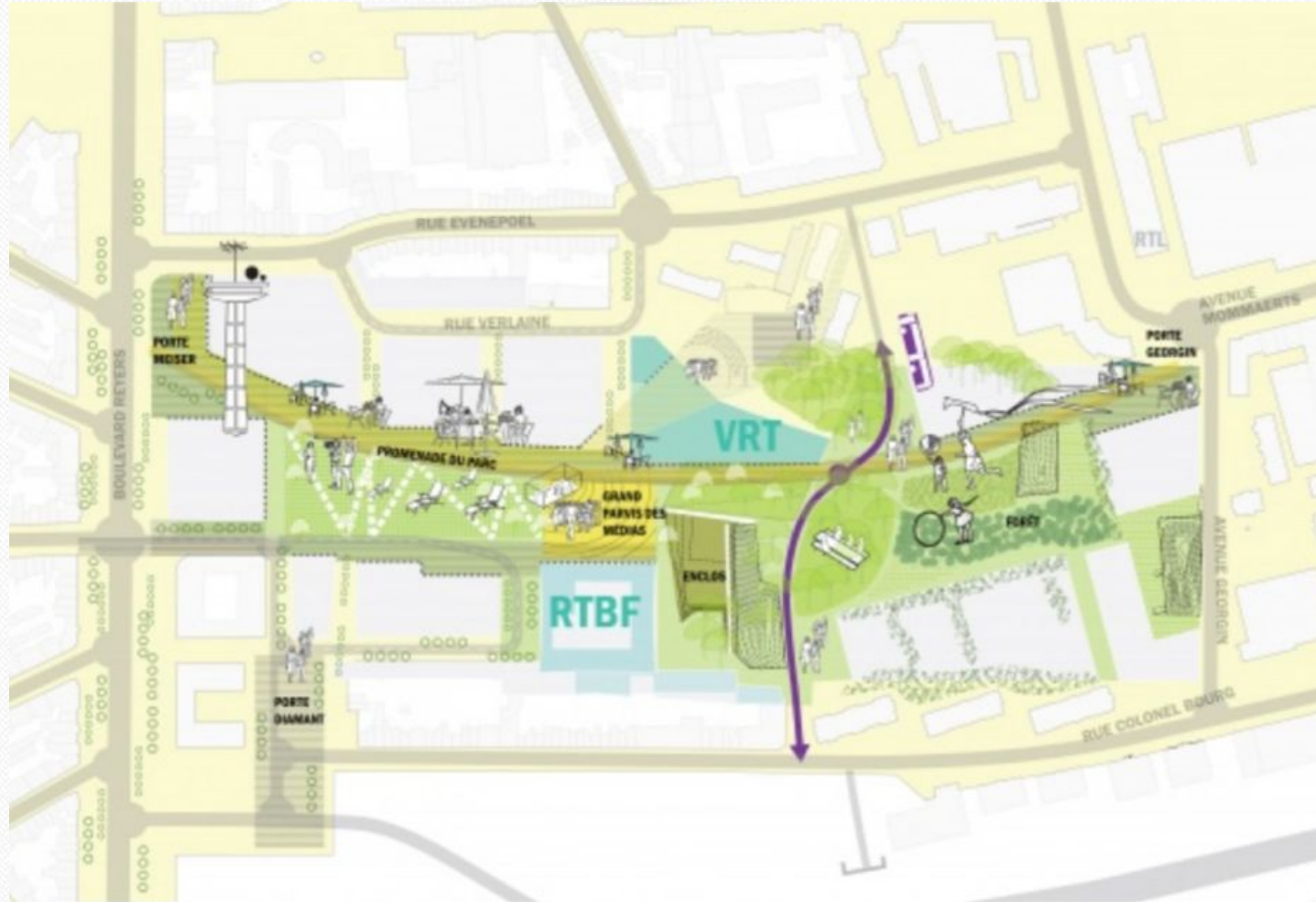
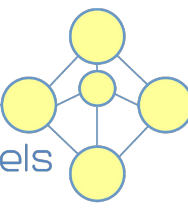
Project partners and future plans

Media Clusters Brussels



Project partners and future plans

Media Clusters Brussels



Urban development or community project ?

- Several layers of competence, risk of asynchronies :
 - Region - urban and economic development
 - Communities - media and culture policy
- Overlap and opportunity: innovation acceleration policies
 - ICAB and iDrops could develop media-specific initiatives
 - Connecting technology to formats and content
- CoPs could also help bridge the gap
 - Detecting needs, sharing knowledge and fostering networking across media sectors
 - screen.brussels and mediahub.brussels could support their development

Supporting the local industry or international ambitions ?

- Two possible strategies for the media cluster:
 - Local: Urban development around the media cluster will create more attractive conditions for local media organizations and workers to relocate in a much more welcoming space than Reyers currently is.
 - Global: Brussels could also aspire to increase its international position as a journalistic hub to become a global media hub.
- Compatible, but full of potential contradictions and risks.
 - Local: Competition and weakening of existing media clusters in Brussels, rather than growth.
 - Global: Relationship between local and global media organizations, big and small.

Opening up or specializing ?

- Brussels media industry is diverse, with a strong of the AV sector at the core.
- The media cluster at Reyers implicitly suggests a focus on specialization, with VRT and RTBF as the central actors of mediapark.brussels.
- Two strategies possible:
 - A more explicit AV specialization, specially if attracting global investment is sought.
 - A more open cluster, fostering diversity, creating synergies at the local level.
- In both scenarios non-core activities need to be included in the policies.

Clusters are more than bricks and technologies

- Future developments should take into closer consideration **the three kinds of entity** that constitute media clusters: companies, workers and communities of practice
 - Data gathered by public institutions needs to be more specific about the structure and the needs of the media industry to better inform policy
- Workers tend to be an afterthought in policy development although they face **changes and challenges** that need to be addressed, e.g.
 - The media industry is constantly evolving, increasing the pressure on creativity and innovation
 - The working conditions of media workers have tended to worsen in the last ten years (more precarious contracts, increase in the number of freelance workers...)

THANK YOU FOR YOUR ATTENTION



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Time for discussion!