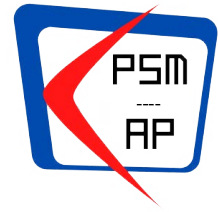# Adapting Public Service Media in Belgium

Meeting technology and audience needs in the Age of Platforms

Catalina Iordache and Tim Raats
imec-SMIT, Vrije Universiteit Brussel

Public service media (PSM) worldwide have consistently been subject to societal and technological changes. Recent years have confronted PSM with radical transformations in media use, competition with transnational streaming services, and the dominance of big tech. New competitors for the attention of citizens have challenged both the PSM mission and values as well as the organisation, requiring broadcasters to transform into fully digital, online-first organisations. In this context, we present results from research conducted during the second year of PSM-AP, a large-scale comparative research project analysing 'Public Service Media in the Age of Platforms'. In this brief, we put forward a series of findings and recommendations on the organisational and cultural challenges facing PSM in the two main language communities of Belgium. This report is based on in-depth interviews with employees (top and middle management, conducted in May-August 2024) in two PSM organisations: RTBF (French-speaking Community of Belgium) and VRT (Dutch-speaking Community). The collected data was analysed in line with country-specific organisational reports and industry documents.

Transforming PSM Organisations in the Age of Platforms

The transformation of the media ecosystem, dominated by technology giants such as Netflix, Apple, Alphabet and Amazon, challenges the established operating practices and organisational structures of PSM. Both RTBF and VRT are increasingly shifting towards internet-delivered television through their video-on-demand services. Our study suggests that this requires the PSM organisations to transform their operating practices, including integrating digital tools and personnel with digital skills. Structures and cultures rooted in the broadcast context challenge this adaptation, particularly in the face of departmentalisation, bureaucracy, and silo-based communications inherited from the past. Both RTBF and VRT indicate that their developing digital strategies prioritise responding to different audience needs and managing brand perceptions. These efforts are also leading to shifts in commissioning and distribution strategies. Moreover, they need to be navigated in relation to extant public service remits and obligations set out in policy.

Despite these shared concerns, the trajectory towards online-only delivery varied for the two PSM organisations in Belgium. Generally, their transition towards digital-first is more incremental than other cases in our project, such as Denmark and the UK. However, the VRT MAX service is increasingly discussed as the 'front door' to all VRT content, and its role in the company-wide strategy is visibly growing. For RTBF, the image of RTBF Auvio as essentially a catch-up service remains difficult to alter with audiences, and the wider reach on linear limits the resources invested in the VoD service.

Our study identified four key factors that are shaping the ways in which the rise of internet delivery and competition from streamers is managed within the Belgian PSM organisations.

Funding available to the PSM portal

For both broadcasters, the online portal plays a growing role in generating commercial revenue—an aspect frequently criticised by competitors. Additionally, a structural shift is underway, with these portals receiving increased financial support as they move toward a more central role in commissioning future titles.

Audience behaviour

The extent and rate at which audiences are shifting to online viewing or continuing to view broadcast television impacts strategies adopted by PSM because requirements for universality mandate continued provision for all audiences, also online.

Prominence

Belgian policymakers and industry stakeholders are concerned about the limited visibility of Belgian PSM apps, as smart TV and in-car interfaces prioritise their own or global services. In response, the Flemish media regulator and local broadcasters advocate for due prominence regulations, which the new Minister of Media plans to explore in 2025.

Uptake and use of high-speed internet

The uptake and use of high-speed internet impacts audience behaviours and affects PSM strategies. Thus, market context is instrumental in the development and implementation of digital strategy.

Key findings

A digital logic, but legal constraints and funding found to inhibit development

Both PSM organisations are aiming to become 'digital-first' rather than broadcasting organisations. However, both retain a certain level of attachment to broadcasting legacies, including in the continued structural separation of broadcast and digital services, as well as technology and content, more evident in the RTBF case. Meanwhile, funding challenges and policy frameworks were often seen as inhibiting the potential for technological and organisational innovation.

> *Entertainment is not just about doing what the private sector does, it's also about helping the discoverability of talent in French-speaking Belgium. Today, singing talent, comedy talent and others in the Wallonia-Brussels Federation, many come from here. Today, in our public service mission, we have education, we have entertainment, and we have information. [If policymakers want] us to remove entertainment from our mission, I think it's a mistake because entertainment brings people together and it's free. [...] And I think they're wrong in thinking that reducing it will have a positive impact.*
>
> —— Director Research, RTBF

Digital-first content strategies are still being developed

RTBF and VRT try to maintain a balance in their content strategies between the broadcast channels and the VoD. Both PSM have experimented with short-form content and other online formats in the past, but have more recently shifted back to prioritising long-form drama and entertainment, also online. VRT has borrowed the notion of 'bullseye content' from the Swedish PSM and focuses more on content that will reach different audience groups, both on linear and online, with programmes that become brands themselves. RTBF has also adapted its content acquisition strategy for Auvio, as a means to complement its linear programming and reach audiences who have primarily shifted to on-demand viewing.

> *We still need [linear-specific content], but we try to do a lot of 'bullseye content', which performs well both on the platform as on linear, and we feel like, more than before, the content in itself has to have a certain pull for the viewer. [...] Right now, viewers are more critical than they used to be, and I think that's good news for everyone. [...] So we have to look at content that much more stands out on its own.*
>
> —— Channel Manager VRT1 & VRT Canvas, VRT

Despite restructuring to become more agile, digital skills remain a challenge

Both Belgian PSM organisations have undergone restructuring to remove silos in internal communication systems and use more agile approaches adopted from the tech sector. Nevertheless, they continue to be editorially led. Additionally, the extension of digital skills across the organisation remains a significant challenge. Integrating digital skillsets and technologies typically developed in commercial settings involves negotiating a divergence between commercial and PSM mindsets.

> *I think it's not only a matter of skills, of mindset, also of company culture, but even the structure. Our organisation is really based on a linear structure and that goes very deep and not only in terms of staff, but our entire financial architecture. […] this digital-first logic is much easier to reach for a new initiative, for a streaming platform or for a startup. […] we are changing the organisation of the financial architecture, so that it follows a bit more the value chain of media today. So that is a very structural intervention. Secondly, there is a lot of training, and we have invested massively in reskilling and retraining people. And thirdly, we have also hired quite some new people.*
>
> —— Director of Public Value, Talent & Organisation, VRT

Balancing audience needs and brand perceptions are central challenges for PSM

Reaching and maintaining audiences was a challenge across all the PSM case studies in our project, particularly as audiences are moving away from broadcast viewing at different rates. Engaging younger audiences that are turning away from broadcast television and PSM was a common concern for both VRT and RTBF, including 30-40 year-old professionals who are increasingly shifting from PSM to SVoD. At the same time, achieving universal reach still involves maintaining a broadcast offer to meet the needs of older audiences. Brand perceptions were positioned as essential for widening VoD reach.

> *The problem for Auvio, and not just for Auvio, but also other media platforms, is that we are not [seen as] a streaming platform, we are seen as a catch-up platform. So the people who come to Auvio already know what they want to watch […] There's still work for us [to do here] and it's difficult to find budget to promote the exclusive content on Auvio for the moment. For us, it's very complicated and we have big discussions about that.*
>
> —— Responsible for Publishing, Applications & Players, RTBF

Different approaches to social media, but monetisation and ethical concerns arise

There are different approaches to third party distribution, as the two PSM are adjusting strategy according to content, platform and target audience. Through their use, RTBF and VRT aim to increasingly attract audiences to their own VoD services. But challenges remain, including access to user data, concerns about data protection and lack of transparency, as well as the difficulties of ensuring content.

> *Of course we want to have as many people on our own platforms. But at the moment, it's not the case. So I think we have to go on third party platforms more and more, but with the purpose to get them back at a certain point in time […] Let me put it like this: I'd rather reach 75% of the young adults on TikTok than reach 20-25% of them only on our own platforms.*
>
> —— Director Connection, VRT

Recommendations

Policymakers need to create regulatory and organisational regimes that enable PSM to innovate without diluting their core principles and values to citizens. PSM should be able to respond quickly to emerging technological trends, with sufficient financial support and forward-looking policy frameworks.

Flatter organisational structures and greater integration of technology and digital skills are required for PSM to adapt to the challenges of the platform age. Organisational change must be accompanied by a shift in organisational culture thinking and greater integration of digital skills across the workforce.

In an increasingly competitive online media context, brand perceptions of PSM are crucial for its future legitimacy. PSM organisations need to effectively communicate their brand values, including that of the VoD portal, across multi-generational and diverse audiences. Ensuring sufficient independence from political interference (EMFA implementation in the EU context) and clear accountability to the public are both essential to securing and maintaining trust in PSM brands.

There is no 'one-size-fits-all' solution, as the balance between broadcasting and digital commissioning and distribution is highly context-specific. There is the risk that commissioning fewer/bigger titles will reduce the range and diversity of PSM content which could also diminish the ability to serve the needs of all audiences. Moreover, there is a need for clear Key Performance Indicators to define and measure success and these should be clearly aligned with PSM remits, also when it comes to assessing the VoD service. Among the critical factors for PSM success is to emphasise and engage with the audience's digital and civic literacies.

Regulation needs to address the distribution of PSM content on third-party platforms, especially social media platforms that may become the first 'point of reference' for younger audiences. Policymakers should explore interventions to facilitate the development of cooperative frameworks for the distribution of PSM content on social media, particularly in relation to PSM content integrity and visibility, as well as data sharing, data protection and monetisation.

About our project