CHAPTER 6

Public service media caught between public and market objectives

The case of the "Flemish Netflix"

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ABSTRACT

Public service media (PSM) have been increasingly propagating their market importance in policy and public rhetoric to legitimate their relevance in times of cutbacks and increasing pressure. This chapter presents an in-depth case study of the policy and strategic process leading up to Streamz, a joint subscription video-on-demand service put forward as a strategy to economically sustain local content in an increasingly platform-dominated media environment in Flanders. The chapter follows a policy-analysis approach. I provide a chronological account based on an analysis of public documents, written and oral records of industry events, and a close reading of policy documents and newspaper articles. The case demonstrates the complexities PSM face in defending their multiplatform strategy, while at the same time being increasingly intertwined in different forms of competition with media players. The case study adds evidence to the research field investigating PSM's role in the digital marketplace and has wider significance for PSM in various European markets that are facing a policy push to increasingly support market activities.

KEYWORDS: public service media, contribution to society, multiplatform strategies, video-on-demand, media policy

Raats, T. (2023). Public service media caught between public and market objectives: The case of the "Flemish Netflix". In M. Puppis, & C. Ali (Eds.), *Public service media's contribution to society: RIPE@2021* (pp. 111–130). Nordicom, University of Gothenburg.
https://doi.org/10.48335/9789188855756-6

Introduction

Public service media (PSM) have expanded their offerings to mobile and on-demand services since the transition from analogue to digital (Debrett, 2009; Jakubowicz, 2007; Lowe & Bardoel, 2008; Moe, 2008), which accommodated a gradually shifting audience as linear television still held significant market shares in most European markets. However, a lot has changed since the growing dominance of subscription video-on-demand (SVoD) services such as Netflix, Amazon Prime Video, and Disney+. PSM have seen increasing competition with these players to reach audiences, especially younger audiences (Donders, 2019). PSM are responding to these challenges by, amongst other things, increasing investments in high-budget exportable scripted content (D'Arma et al., 2021), accommodating personalisation, algorithm-based and customised on-demand viewing, or experimenting with binge-viewing and online-only exclusive content (Michalis, 2022; see also Lin & Tsai, Chapter 7 in this volume).

For commercial broadcasters, on the other hand, the competition with streaming services only adds to existing challenges brought on by decreasing advertisement spending, due to ad-skipping and delayed viewing, and a shift of ad-spending to platforms such as Google and Facebook (Raats & Evens, 2021). This led to increasing claims for additional government support and relaxed advertisement rules from broadcasters, as well as independent producers for whom broadcasters are the main financiers. As a response, governments have increasingly tied the public broadcaster's remit to the health of its surrounding media ecosystem in various countries. This has resulted in, amongst other things, encouragement or explicit obligations for PSM to partner with local broadcasters or publishers, take part in joint ventures on media innovation and sharing of research and development output, or make increased commitments to commission content with the independent television production industry (Enli et al., 2019; Raats & Donders, 2017; Wauters & Raats, 2018). Public media themselves have been increasingly propagating their economic importance in policy and public rhetoric to legitimate their relevance in times of cutbacks and increasing pressure. The European Broadcasting Union included collaborations with other private media partners, as well as economic impact, as part of its contribution to society strategy (EBU, 2015), a framework that brings PSM's relevance to the forefront and prioritises impact over output. The strategy advocates for strong policy support (and funding) for PSM-based observable societal and market relevance.

For media scholars, it thus becomes relevant to analyse 1) the tensions that arise from partnering with market players and strengthening the market sustainability of media players as a form of societal contribution, with other aspects of the public remit, such as content diversity, access, or trust; 2) whether and when this economic and public impact are complementary or contradictory; and 3) how these tensions are managed at the level of PSM policy, strategy, and practice.

In this chapter, I present an in-depth case study of the policy and strategic process leading up to a so-called Flemish Netflix, a joint SVoD service put forward as a strategy to economically sustain local content in an increasingly platform-dominated media environment. As such, I aim to answer the following research question:

RQ1. What do discussions surrounding the launch of a joint SVoD initiative reveal about policy and market perspectives on the role and legitimacy of public service media and how this impacts VRT's own universality objective?

The case clearly demonstrates the tensions between Flemish broadcaster VRT's own public remit and its role to sustain the local media ecosystem, which were central in the previous and current management agreements from 2016–2020 (Flemish Government & VRT, 2016) and 2021–2025 (Flemish Government & VRT, 2021). The chapter follows a policy-analysis approach (Dunn, 2018; Van den Bulck et al., 2019). I provide a chronological account based on an analysis of public documents, written and oral records of industry events, and a close reading of the 2019 Government agreement (Flemish Government, 2019), the Media Cabinet's Policy Vision note (Dalle, 2019), VRT's management agreements (Flemish Government & VRT, 2016; 2021), and newspaper articles. There are also limitations to this approach, as a document analysis only reveals what has been written and not necessarily what has been discussed (Karppinen & Moe, 2019); however, this is not the emphasis of this chapter. Rather, the emphasis lies on how discussions surrounding a joint Flemish SVoD initiative were framed in public statements, and how these statements reflect specific stances on the role and position of PSM. As stated by Dunn (2018: 20): "By analyzing policy arguments, we can identify and probe the assumptions underlying competing policy claims, recognize and evaluate objections to these claims, and synthesize knowledge from different sources". I explicitly use combinations of different sources to reflect the multitude of claims and viewpoints regarding the policy discussion (Karppinen & Moe, 2019).

In the first part of the chapter, I set out from the market failure and social responsibility perspectives on the role and value of PSM today (Donders, 2012), and I link both perspectives to current scholarly work on PSM's shift to on-demand audiovisual services and the respective impact on production and distribution. In the second part, I briefly contextualise the Flemish market and VRT's position. I then present the case study analysis in the third part, followed by an evaluation where I reflect on what the debate on the Flemish Netflix initiative says about the role and position of VRT in Flanders, specifically. In the conclusion, I reflect on the legitimacy of universality and market strengthening as vital parts of the PSM remit more generally.

Of market failure and social responsibility in the platform age

Public service media must be online if they want to be effective

Within policy perspectives on the role and position of public service broadcasting, Donders (2012) distinguishes two large categories: market failure and social responsibility. Within media studies, most perspectives on PSM set out from the latter, as does the Council of Europe, which basically prescribes that PSM must be as broad and financially large as required to serve "the values of democratic societies, in particular respect for human rights, cultures and political pluralism", which in turn presupposes "a wide choice of programmes and services to all sectors of the public, promoting social cohesion, cultural diversity and pluralist communication accessible to everyone" (Council of Europe, 2007: para. 11).

Defenders of the social responsibility perspective consider PSM's traditional modernist values and emancipatory remit as still legitimate. Yet, in order to fulfil that remit, PSM must expand the scope of their activities across all platforms and develop a renewed understanding of audiences that transcends simple user interaction. More recent work within the field has increasingly emphasised and questioned the role of PSM in the platform age, not only with regard to PSM's strategic responses to new players such as Netflix, Facebook, and YouTube, but also to how PSM struggle with, and at the same time adopt, some of the platform strategies themselves. D'Arma and colleagues (2021), for example, building on the framework of Napoli (1998), have identified combinations of resistance (lobbying for increased regulation on prominence, quota for SVoDs, and additional support), diversification (focusing on domestic content to differentiate from global players), collaboration (seeking partnerships with YouTube, Netflix, and others), and mimicry strategies (copying strategies of large catalogues, exclusive content, and user-friendly algorithm-based distribution).

One strand of recent contributions within the social responsibility perspective has focused on PSM's struggle to connect with audiences, given the enormous competition with, amongst others, global platforms. Moreover, services like YouTube and Netflix interact with users in an entirely different way and use algorithms to curate content and allow personalisation. From a PSM point of view, this raises questions not only about the extent to which user data could be employed as part of a distribution strategy, but also about how to continue to play a role in guiding audiences to public service content, and thus balance universalism and personalisation (Hutchinson & Sørensen, 2020; Sørensen, 2020; Sørensen & Van den Bulck, 2020; Van den Bulck & Moe, 2018; see also Lassen & Sørensen, Chapter 5 in this volume). A prioritisation of online-first strategies warrants another difficult balance between a continued appeal to a significantly large (usually older) audience that is still watching on linear television, with the necessity to appeal to (mostly younger) audiences, for whom online viewing has become the main form of content consumption (Lassen, 2020; Lowe & Savage, 2020).

On top of that, scholars have also pointed to the fact that PSM themselves have become a battlefield of increasingly complex and polarised societies, in which the legacy of "mainstream media" is being challenged by populist discourse, fake news, and disinformation (Holtz-Bacha, 2021; Sehl et al., 2022). Policy-makers have entrusted PSM with additional tasks to combat fake news and increase media literacy amongst viewers, while at the same time requiring PSM to be more impartial and more explicitly represent all views in society. Sceptics have accused PSM of over-emphasising urban, young, progressive voices while insufficiently capturing the broad diversity of opinions (Raats et al. 2022). Part of these "hidden audiences" are also lower-educated people with a limited digital and media literacy skillset, as well as ethnic-cultural minorities, who often disconnect completely from PSM news and other (local) offerings. In that regard, Hokka (2019) emphasised the importance of a more "nuanced universality" that replaces a strategy of reaching most audiences all the time, with a development of services that appeal to smaller audiences but manage to capture society as a whole.

This prioritisation of online over linear also comes, secondly, with a series of organisational and strategic challenges, not least because of organisational resistance to breaking through the silos of radio and television (Donders, 2019; see also Künzler et al., Chapter 12 in this volume). Managers stick to brands that have built up a reputation over decades, fearing the loss of market share and considering audience engagement opportunities valuable (Ramsey, 2018; Vanhaeght, 2019). The increasingly competitive global media environment (Lobato, 2019; Lotz, 2018) has also instigated new partnerships between broadcasters. On the one hand, some of these partnerships have fuelled more commercial behaviour by PSM, for example, in favouring exportable high-concept content (Raats & Jensen, 2021), or by negotiating profitable global deals with the same players that they accuse of impeding the production of original content on the domestic market (Donders & Van den Bulck, 2016; Steemers, 2005). On the other hand, the partnerships with global SVoD players, social media, and video-sharing platforms have also made PSM dependent on platforms such as Facebook or YouTube, whose revenue is not re-invested in public service content and whose uses of audience data often conflict with the core values of PSM.

Distinctiveness and market sustainability as the drivers for contemporary market failure arguments on public service media

Another strand of perspectives is rooted in neo-classical economics and strongly emphasises the importance of consumer choice. According to these perspectives, public service broadcasting is only legitimate in those areas where the market insufficiently provides specific services of public interest, due to high costs, low consumption levels, or both (Armstrong, 2005; Armstrong & Weeds, 2007; Elstein, 2000). In the 1990s, these perspectives resulted in demands for PSM to be restricted to a limited number of core tasks. In the digital age, where spectrum scarcity is no longer a valid argument, defenders of this view consider the abundance of content and different forms of online services as a confirmation of a reduced need for PSM. Media policy-makers in most democracies have thus far only rarely adopted a strict market failure interpretation to legitimise structural transformations in the position of PSM. An example is the distributed public service models such as New Zealand On Air in New Zealand (Dunleavy, 2012). However, arguments of market failure have been continuously visible in governmental attempts to limit online offerings or digital services, in response to criticism from market players who accuse PSM of distorting the market in areas where they have been expanding in order to survive (Sjøvaag et al., 2019; Donders et al., 2020). This resulted in, amongst other things, the adoption of a set of prescribed requirements in the Broadcasting Communications as part of the European Commission's State Aid policy in 2001 and 2009 (Donders, 2012).

More recently, a market-failure-in-disguise argumentation took shape in discussions on distinctiveness, a concept that arose during BBC's previous charter renewal. This was also adopted in other countries, such as Belgium and Denmark, and aimed to define PSM's position in an increasingly competitive media market. Whereas BBC attached distinctiveness to its aim to set high standards in all its services, to "enable content of the highest quality, made in Britain, for audiences to enjoy" (BBC, 2015: 5), the concept was mostly adopted to urge PSM to be distinguishable, rather than distinctive, from market players. This reduced the distinctiveness discussion to a discussion on genre. It presented the Reithian adage (to inform, educate, and entertain) as a hierarchical one, and paved the way for anecdotal discussions on specific entertainment programmes or the acquisition of expensive sports rights (for a relevant critical account on the discussion on distinctiveness, see, e.g., Tambini, 2016).

Interestingly, market failure has also been used to make the case for strong and well-funded PSM. Wauters and Raats (2018) emphasised the growing importance of an ecosystem perspective that uses arguments of market failure, predominantly related to the sustainability of domestic original programming and the economic importance of PSM (i.e., market failure perspective) to support a strong, well-funded, and holistic public broadcaster (i.e., social responsibility perspective) (similar arguments can be found in, e.g., Barwise & Picard, 2014; Davies, 2002, 2005; Raats & Jensen, 2021). PSM themselves have increasingly adopted this more positive market failure position, especially in defending their role as drivers of domestic content in a global competitive marketplace. Partnerships with the market to sustain the plurality of domestic offerings, as well as showcasing their own economic impact, have been central in this strategy.

Characteristics of market and policy in Flanders

As the Flemish (Dutch-speaking part of Belgium) and Wallonian (French-speaking part of Belgium) media markets are different in terms of market structure, language, and audience consumption, media policy in Belgium is a competence of the different Communities. The Flemish media market portrays the fragility of a small market, with few players, limited budgets, dependence on public support mechanisms, and continuous pressure on domestic production (Raats & Jensen, 2021). Yet, at same time, it can be characterised as a vibrant, highly competitive market with a strong independent production industry, high volumes of local content, and increasing international exports following the expansion of global SVoD services (Raats & Iordache, 2020). The public service broadcaster VRT takes up a large market share in both television and radio. Its online offering, VRTNU (rebranded VRT MAX in 2022), has gradually gained popularity amongst Flemish audiences. The two main commercial rivals are VTM (part of DPG Media group) and SBS (part of Telenet), a subsidiary of Liberty Global and the largest Flemish television distributor. The production landscape is scattered, with over 50 companies active in the production of Flemish film and television content. Netflix has been active in Flanders since 2014, while Disney+ started its service in Belgium in September 2020.

Media policy in Flanders is traditionally characterised by a strong market-oriented focus. However, at the same time, that market is heavily supported by various public mechanisms in the form of subsidies, investment obligations, or fiscal advantages (Raats et al., 2016). Since 2010, governments have been adhering to partnership strategies to address pressure on private players, but these have only partly resulted in successful collaborations, given the fierce competition in the Flemish market. The 2016–2020 management contract formulated the VRT's strategic objective as follows: "VRT plays its role as lever in the media sector. It stimulates a strong and economically viable media landscape to guarantee a pluralistic and diverse offer in an increasingly international context [translated]" (Flemish Government & VRT, 2016: 14). The VRT management contract 2021–2025 describes a need to sustain the media industry as a whole, not as a complementary task, but as a part of the public remit: "as part of its societal remit, the public broadcaster has the duty to support the Flemish media ecosystem through partnerships with private players [translated]" (Flemish Government & VRT, 2021). To date, the public broadcaster in Flanders has been left sufficient leeway in terms of its remit, yet at the same time, it has been confronted with significant cutbacks, which have only partly been compensated for by commercial income.

This in turn has increasingly fuelled frustration amongst private players, ironically going against the very partnership agenda that governments had attempted to achieve.

Analysis of arguments

The need for a Flemish Netflix as a way out

The two main private broadcasters in Flanders (DPG Media and SBS) have increasingly voiced concerns about their business models since the 2010s. Three shifts were considered detrimental and leading to a perfect storm: the uptake of delayed viewing and ad-skipping, which resulted in less advertisement income; the dominance of global players like Google and YouTube in the advertising market, taking away more than a third of all advertisement spending in Belgium already in 2016 (Caudron et al., 2014); and the launch of Netflix in Belgium. Following several claims from independent producers and broadcasters on the increasing pressure for production of domestic content, the Flemish Government increased the budget of the Flanders Media Fund to support the production of mainly scripted television series. Producers and broadcasters (including VRT) presented themselves as actively propagating a rhetoric of shared fate against a common new adversary, supported by terms such as "ecosystem" to underline the existing fragility and need for balance. The unity between DPG Media and SBS somehow broke, as SBS was fully acquired by Telenet, who vetoed the proposed solution in the form of blocking ad-skipping, fearing it would cost them subscribers. An interview with Telenet CEO John Porter officially killed the idea of imposing some sort of restrictions on ad-skipping:

> We cannot take away a service that our customers have had for ten years, that would be commercial suicide. Why are we always singled out when it comes to delayed viewing and ad-skipping? Broadcasters' programming strategies facilitate ad-skipping by offering their programmes online with much less advertising [translated]. (John Porter, as cited in Dumon, 2018)

Noteworthy as well is that the deadlock between broadcaster VTM and Telenet added to an already difficult relationship, caused by heated conflicts on the remuneration of broadcasters for distributing the broadcasting signal (Donders & Evens, 2011). It was at that time that DPG Media (owner of VTM) actively started voicing the need for a domestic SVoD initiative.

A clear policy push pro Flemish Netflix

The push from private players and the government for VRT to collaborate in a joint SVoD initiative dates already from 2008. The then minister of media, Ingrid Lieten, heavily favouring a collaborative agenda as well (Raats & Donders, 2017), had been encouraging VRT to participate in a joint on-demand service with private players, who at the time heavily criticised VRT's online free offerings. Conflicting interests related to rights and revenues delayed the service but ultimately resulted in the launch of a separate, more modest collaborative venture between the three broadcasters, called Stievie. With Stievie, the broadcasters were able to offer an alternative to the cable and telco-controlled services that had become more successful in the mobile-TV market (Baccarne et al., 2013; Raats & Donders, 2020).[1]

It was only after commercial broadcaster VTM surprisingly launched its own online ad-based video-on-demand service, that VRT initiated a stand-alone online on-demand service similar to the iPlayer, SVTPlay, and other successful examples across Europe at the time.

The uptake of delayed viewing accelerated rapidly from 2017 onwards in Flanders. This was confirmed by a report commissioned by the Flemish Government. The report mostly emphasised the need for a solution for the increased ad-skipping, urging for an agreement between distributors and broadcasters (Econopolis, 2018). The possibility of launching a Flemish SVoD initiative was also explored in the study, however, only if sufficient scale and exclusive content would be included, with the additional precaution that existing examples of joint SVoD initiatives were all based in larger markets. Large scale and large volumes would presuppose all Flemish broadcasters, including VRT, to be included in the service. However, the media cabinet explicitly put forward the study as the proof that a Flemish Netflix would be feasible. In the different public discussions on a joint Flemish SVoD service that followed since then, feasibility of launching a joint service gradually became a necessity to launch a joint venture. The call for a joint streaming service was most prominently pushed by DPG Media, which presented a joint SVoD initiative as the panacea for sustainability of the Flemish audiovisual market (see, e.g., Raats et al., 2019). The fact that the SVoD initiative was dubbed "the Flemish Netflix" in public and policy communications further added to the idea of a feasible Flemish alternative, providing proverbial arms to defend Flemish players against common global adversaries. For the then minister of media, Sven Gatz, a shift in discourse toward a Flemish Netflix was also useful, as Gatz had received a lot of criticism following a public statement that the government would intervene and block delayed viewing if the industry would not come to an agreement – something that caused concern in public discussions, including within his own liberal party (see, e.g., Flemish Parliament, 2018).

Another explicit nudge from the government in favour of the joint SVoD initiative came just before the most recent elections in 2019, as the cabinet pushed for an additional article in the Media Decree, enforcing television distributors to carry a joint Flemish SVoD initiative in their packages (Flemish Government, 2021).

With DPG Media successfully lobbying for a joint SVoD initiative, and with the government now clearly defending the project, the path was paved for involving the public broadcaster in the joint initiative.

A highly ambiguous VRT

Only, VRT portrayed an ambiguous position, switching arguments more than once during the debates. VRT initially backed the plans for a Flemish Netflix. Paul Lembrechts, CEO of VRT at the time, expressed clear enthusiasm about the project in the press, and called it a "necessary collaboration" (Bonneure, 2018). However, VRT later shied away from contributing to the service, as strategic concerns were raised regarding the lack of return-of-investment for the public broadcaster (De Preter, 2019). In an interview with newspaper *De Standaard*, Lembrechts expressed concerns on "the viability of a separate streaming platform in a small market [translated]" and suggested a European partnership as a better solution, yet immediately admitted this would take years and would be as unlikely an option (Droeven, 2018: 4).

It is clear that VRT's biggest strategic concern was that a collaboration would impede VRT's own strategy to expand its online player VRTNU, which was considered of crucial importance to attract especially young audiences, and that provided VRT with an enormous amount of valuable user data. Adding to that, Lembrechts and the government clashed over a conflict with the director of media, Peter Claes. According to statements in the press, part of the growing conflict between the number one and two of VRT grew out of conflicting views on the participation of VRT in a Flemish SVoD initiative.

However, after the newly elected government took office in May 2019, the government agreement explicitly obliged VRT to collaborate in a joint SVoD initiative in its government agreement, "given VRT's large catalogue of Flemish quality fiction productions [translated]" (HLN, 2019; Flemish Government, 2019).

Following months of public silence on the Flemish SVoD initiative, in February 2020, the biggest rivals – distributor Telenet and broadcaster DPG Media – caught everyone by surprise when they announced they would combine forces to finally launch a Flemish Netflix, regardless of whether VRT participated. The SVoD would basically take over all subscriptions of Telenet's existing video-on-demand offering (which were estimated at about 480,000) and would expand that catalogue with SBS, VTM's back-catalogue, and new premium titles. In August 2020, the European Commission greenlit the partnership between Telenet and DPG (Feyten, 2020).

The newly appointed minister of media, Benjamin Dalle, was also highly visible during the launch of the joint SVoD service, now called Streamz. During a presentation of the service's launch on 3 September 2020, the Christian-Democrat announced Streamz as "a historic moment. A milestone in Flemish television history, the biggest milestone since the launch of VTM [translated]" [i.e., the first commercial television station in Flanders] (Dalle, 2020). In fact, despite a promising number of exclusive Flemish titles (which would later appear on linear broadcasting), the service was mostly the rebranding of an existing service with additional catalogue titles (Raats & Evens, 2021). The minister and his media cabinet also actively defended Streamz against criticism from the opposition on the service in subsequent discussions in parliament.

Interestingly, only a few days prior to the launch of the service, VRT announced it would also provide content for Streamz, however, as part of a collaboration in the form of license deals rather than actively taking part in the joint venture (Rombaut, 2020). The participation of VRT was picked up and discussed in the press and the parliament. The VRT board of governors voiced concerns that they were unaware of these management plans, but the CEO refuted this claim by arguing that the joint venture with Streamz was an operational decision and thus not under the board's authority.

A "strong partner" with clipped wings? The position of VRT

VRT's role to participate in Streamz was negotiated in parallel with VRT and the government's discussions on the management contract renewal. The Flemish Netflix, unsurprisingly, was hyped in the press and dominated public discussions at the end of 2019 up until mid-2020, both in parliament and the press, thus feeding the discourse as well as the criticism of Streamz being a holy grail for the future of Flemish television.

The opposition parties (Groen [green], Vlaams Belang [ultra-right], and Vooruit [social democrats]) voiced concerns about VRT's participation in Streamz, calling on the universality principle of the public remit. Social Democrats defended the argument that VRT content needed to be widely available on any platform, including online, for all Flemish households. Vlaams Belang emphasised the fact that content paid for by taxpayer money must be available to taxpayers. While both arguments are valid, they do surpass the fact that scripted content (which is the only content that VRT would be offering) in Flanders is not actually owned by VRT. Instead, every drama series in Flanders is a coproduction initiated by Flemish producers and backed by public support in the form of the Flemish media fund, tax shelter funding, or both, thus leaving approximately one-third of the total financing for the broadcasters (Raats & Iordache, 2020). Private broadcasters, during the parliamentary hearings on the role of VRT, unambiguously advocated to limit VRT's own video-on-demand offering to give the new Streamz the opportunity to grow. The fact that VRT had been offering its own shows online entirely to binge-watch and had been increasingly active in negotiating rights deals to acquire non-domestic quality scripted content was considered market distortive by DPG Media. In a newspaper interview, the CEO of DPG Media voiced this as follows:

> If people have paid to get access to previews of good Flemish drama, and one player gives that content away for free, you undermine the business model. We plead for a healthy balance with clear rules for the three models: linear, digital-free, and digital-paid. And according to me, one of these rules is that binge-watching strong Flemish drama in preview for free is not an option [translated]. (Heremans & Deckmyn, 2020)

This time, however, VRT was able to hold the reins and enable significant expansion of VRT MAX as part of its online-first portal strategy. The new VRT management contract (2021–2025), agreed upon when VRT had already confirmed participation in Streamz, stipulates VRT's obligation to deliver content to the SVoD service Streamz. Yet, it does not significantly limit VRT's own online freely accessible service VRT MAX, something that private players actively lobbied for. On the other hand, VRT, according to its most recent management contract, is not allowed to provide previews of entire seasons of foreign scripted content for free online, so the government did follow private players to some extent in their claim to give Streamz all potential chances.

What Streamz says about views on public service media in Flanders

From the analysis of the process preceding the launch of a joint SVoD initiative in Flanders, relevant lessons can be drawn with regard to PSM's role and position in Flanders today.

First, the discussions show both the government's and private players' perception of VRT's economic role as self-evident. In policy discourse – by the parliament, the government, and competitors – VRT was discussed as a large catalogue of content and intellectual property, and it was rarely talked about as a media player with distinct strategic objectives, let alone public interest objectives. Arguments clearly reflected the ecosystem perspective (keeping the middle ground between market failure and social responsibility perspectives) in which VRT seems to be considered a part of the problem, as long as it does not open up or partner up to help sustain private players in the market.

Second, the case of Streamz confirms the importance of context, pragmatism, and path-dependency in policy-makers' vision on the role and position of PSM, much more than a long-term vision on what PSM needs to be in today's society (D'Arma et al., 2021; Van den Bulck & Moe, 2012). The most recent management contract between the government and VRT does show strong support still. However, the fact that VRT has been entrusted with ever more responsibilities and obligations, including investing in Streamz, while at the same time continuously being confronted with increased budget cuts, clearly shows policy-makers' ambivalence towards VRT and the role of PSM in contemporary societies.

Third, and most importantly, the Streamz case has shown that VRT itself is struggling with developing a clear vision on the role it wants to play in the platform age as well. Following the conceptualisation of D'Arma and colleagues (2021), during the process preceding the launch of Streamz, VRT's position shifted from complacency, to resistance, to eventually a combination of collaboration and mimicry strategies. The discussions on the partnership in Streamz led to significant criticism of the public broadcaster in the press and public opinion. Various statements reflected the difficult fit of putting taxpayer-paid content behind paywalls. Ironically, VRT's hesitancy to join the project was more informed by a lack of financial return-of-investments for VRT, rather than the difficult fit with its own public remit, although those concerns were repeatedly voiced internally. This reduces the discussion on participation in Streamz from a fundamental one to merely operational. In this particular case, VRT insufficiently developed a clear rhetoric on how it saw its own role in the market, and how and why a partnership with Streamz did not necessarily go against its mission.

Fourth, the case of Streamz shows the difficult balance between the core value of PSM, universality, and a new entrusted task in the form of market sustainability – two forms of contribution to society that might be complementary but that might also clearly contradict each other. From a core rationale point of view, the idea of providing VRT programmes in preview on a Flemish Netflix is contradictory to a shift towards a technology-neutral public remit, which is central in defenders' claims for strong PSM (see, e.g., Donders, 2012). However, participating in Streamz does not necessarily contradict that ambition. The current collaboration – much more than an actual joint venture – can simply be considered a form of additional licensing content, aiming to recoup revenue to fund public content, and to meet the significant costs for scripted drama in a small but vibrant audiovisual market (Raats & Iordache, 2020).

However, it does become problematic when the universality principle and a holistic strong public broadcaster is being submitted to a strict market sustainability perspective entirely, which would have been the case if the PSM's own online portal, VRTNU, would not be allowed to grow further because of Streamz. In the most recent management contract, the government partly followed private players' demands by prohibiting VRTNU from acquiring full foreign scripted series in preview on its service, to give Streamz more chances to develop a commercially viable service. This limitation still gives the public broadcaster sufficient leeway to further develop its online portal. Yet, it is likely that – given the persistence of the market logic in defining the PSM remit – the autonomy of VRT with regard to its online SVoD service could eventually erode, should Streamz struggle to succeed as a sustainable project (Raats & Evens, 2021).

Conclusion

The discussions preceding the launch of Streamz in Flanders provide a relevant case for analysing media policy-making on PSM in a small market confronted with severe pressure from digitalisation and new market challengers since the 2010s. Furthermore, the case also provides good insight on the complexities PSM faces in defending its multiplatform strategy, on the one hand, while at the same time being increasingly intertwined in different forms of competition with media players, on the other. This chapter demonstrates how a survival strategy of one private media company (DPG Media) resulted in a government push in which a Flemish on-demand streaming service was presented as a "no alternative" solution. This resulted in a strategic deadlock for VRT, ultimately contributing to an already heated conflict at management level. At the same time, the case also shows VRT's struggle to publicly defend and position itself in its collaborations with private players. As such, the case study adds evidence to the research field investigating PSM's role in the digital marketplace and could have wider significance for PSM in various European markets that are facing a policy push to increasingly support market activities. From a more theoretical point of view, the chapter invites readers to reflect on whether universality also means freely available. I argue that a more contemporary interpretation of universality could encompass a vision of PSM needing to make content freely accessible to its audiences. However, for PSM strategy, it is important to put the proverbial money where its mouth is and to reinvent core values and adapt them to the platform age. What are the red lines and what are the areas where collaboration would be beneficial? The same goes for collaborations with players like YouTube and Facebook, which PSM have been increasingly dependent on.

The case of Streamz again underlines the problematic nature of the ways policy-makers have pushed a partnership agenda on PSM (i.e., a policy strategy in which PSM is considered pivotal to sustain the media ecosystem), and the findings confirm other findings on PSM partnership strategies in Flanders, the Netherlands, and the UK (see Raats & Donders, 2017; Wauters & Raats, 2018). A partnership agenda remains problematic if the reasons to partner with private players are not tied to clear objectives (such as plurality, quality, trust, diversity, and innovativeness of content), and if a partnership agenda is solely considered as a push for public broadcasters to collaborate and open up, regardless of the public broadcasters' own interest. Additionally, increased media concentration following the competition with global SVoD players might provide a case for a more independent, instead of a more connected, public broadcaster. With the Belgian DPG Media becoming a continuously larger European media conglomerate, collaboration with the public broadcaster with the objective to sustain the market seems ironic, to say the least. Already, in France, public broadcaster France Télévisions announced it would give up its stake in the French joint SVoD service Salto, after the two largest private broadcasters in 2021 (TF1 and M6) announced plans to merge (Easton, 2022).

On a more strategic level, the case raises questions as to whether economic value can be seen as a form of PSM's contribution to society, and thus part of the core rationale of a twenty-first-century–proof PSM project. It is problematic for three reasons. A focus on the economic contribution of PSM contributes to a worrying shift, where PSM value is reduced to measurable impact, while it is clear that not everything meaningful can be measured. Moreover, it creates unrealistic expectations from PSM as a panacea for all private media players' economic problems in a highly competitive, highly uncertain, and increasingly global media market. And lastly, an emphasis on market impact paves the way for a more market-oriented interpretation for policy-makers. The trade-off between economic and public value is often overlapping but also contradictory. PSM, for example, play an important role for music industries; yet a focus on contributing economically to the music industry could favour a strategy providing significant airplay for national "winners" and big upcoming artists, whereas a purely public-interest objective could prioritise showing the biggest diversity in genres, artists, and voices in the music industry. In a similar vein, a more economic focus on television drama could privilege big exportable collaborations with Netflix, return on investment, and big bold commercial productions, but might also impede purely domestic content or experimental comedy, for example. The question is whether both could be combined. In some cases, they can, but in a lot of cases, the trade-off is difficult if put on the same level. Economic contribution is useful as a legitimising instrument, however, only when it is considered a by-product of the public remit, not as something standing hierarchically on the same level.

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Endnote

[1] Because of a lack of subscribers, DPG Media gave up on the AVoD version of Stievie in 2019 and the paid platform Stievie Premium in 2020 (Haeck, 2020).