

MAPPING DIGITAL MEDIA: NETHERLANDS



Mapping Digital Media: Netherlands

A REPORT BY THE OPEN SOCIETY FOUNDATIONS

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Contents

Mapping Digital Media.....	4
Executive Summary.....	6
Context.....	10
Social Indicators.....	12
Economic Indicators	14
1. Media Consumption: The Digital Factor	15
1.1 Digital Take-up.....	15
1.2 Media Preferences.....	17
1.3 News Providers.....	20
1.4 Assessments	26
2. Digital Media and Public or State-Administered Broadcasters.....	28
2.1 Public Service and State Institutions	28
2.2 Public Service Provision.....	33
2.3 Assessments	34
3. Digital Media and Society.....	36
3.1 User-Generated Content (UGC)	36
3.2 Digital Activism.....	41
3.3 Assessments	44

4.	Digital Media and Journalism	46
4.1	Impact on Journalists and Newsrooms.....	46
4.2	Investigative Journalism.....	49
4.3	Social and Cultural Diversity	51
4.4	Political Diversity	55
4.5	Assessments	58
5.	Digital Media and Technology	60
5.1	Spectrum.....	60
5.2	Digital Gatekeeping.....	63
5.3	Telecommunications.....	64
5.4	Assessments	66
6.	Digital Business	68
6.1	Ownership.....	68
6.2	Media Funding.....	73
6.3	Media Business Models.....	76
6.4	Assessments	77
7.	Policies, Laws, and Regulators.....	79
7.1	Policies and Laws.....	79
7.2	Regulators	83
7.3	Government Interference.....	88
7.4	Assessments	90
8.	Conclusions.....	92
8.1	Media Today.....	92
8.2	Media Tomorrow.....	94
9.	Recommendations	96
9.1	Media Law and Regulation.....	96
9.2	Journalism	97
9.3	Digital Media Literacy.....	97
Appendices		
	Appendix A: Further Reading	98
	Appendix B: List of Interviews	101
	List of Abbreviations, Figures, Tables, and Companies.....	103

Mapping Digital Media

The values that underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-bearings for anyone trying to make sense of current changes across the media landscape.

The standards in the profession are in the process of being set. Most of the effects on journalism imposed by new technology are shaped in the most developed societies, but these changes are equally influencing the media in less developed societies.

The **Mapping Digital Media** project, which examines the changes in-depth, aims to build bridges between researchers and policymakers, activists, academics and standard-setters across the world. It also builds policy capacity in countries where this is less developed, encouraging stakeholders to participate and influence change. At the same time, this research creates a knowledge base, laying foundations for advocacy work, building capacity and enhancing debate.

The Media Program of the Open Society Foundations has seen how changes and continuity affect the media in different places, redefining the way they can operate sustainably while staying true to values of pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service, and high professional standards.

The Mapping Digital Media project assesses, in the light of these values, the global opportunities and risks that are created for media by the following developments:

- the switch-over from analog broadcasting to digital broadcasting;
- growth of new media platforms as sources of news;
- convergence of traditional broadcasting with telecommunications.

Covering 60 countries, the project examines how these changes affect the core democratic service that any media system should provide—news about political, economic and social affairs.

The **Mapping Digital Media** reports are produced by local researchers and partner organizations in each country. Cumulatively, these reports will provide a much-needed resource on the democratic role of digital media.

In addition to the country reports, the Open Society Media Program has commissioned research papers on a range of topics related to digital media. These papers are published as the **MDM Reference Series**.

Mapping Digital Media: Netherlands

Executive Summary

This is an exciting and difficult time for independent journalism and civil society in the Netherlands. Thanks to unprecedented opportunities for new ways of doing journalism, connecting to audiences or mobilizing civil society, and getting one's voice heard, a new media ecology seems to be taking shape.

However, the challenges are great. Although newspapers still reach significant readerships, they are face grave economic threats from decreasing subscriptions and sales, and shrinking revenue from advertising. “Shocklogs” are making sectors of public debate less civilized, and intensified competition is changing the tone of much news reporting. There is a looming threat of concentration in the distribution market, mostly by foreign companies such as Apple and Google. The rise of PR influence and wire stories, meanwhile, undermines original news-gathering, and poses a particular danger to independent news at the local level.

The means of countering these threats have not yet realized their potential, and may never do so. Investigative journalism on blogs exists, but is for most part still marginal, crowd-funding and other innovative techniques are promising, but it remains to be seen whether they can offset the negative developments.

Public broadcasting has so far preserved its traditional standards, but there is no guarantee that it will be able to fill any of the emerging gaps—due to budget cuts and the threat of having to curtail its internet activities.

* * *

In 2006, the Netherlands became the second country in Europe (after Luxembourg) to switch off analog terrestrial television. Digitization caused no difficulties, since only 1.5 percent of households depended on terrestrial analog transmission. Most households already had a subscription to (analog) cable. No public subsidy scheme was developed; the average cost of a set-top box (€150) was considered to be affordable.

By the end of 2010, 58.5 percent of households had access to digital television: a lower figure than in neighbouring countries. Digital cable is more expensive than analog cable subscriptions with packages of 20 to 25 channels. A key incentive for people to subscribe to digital services is the triple-play deals now available (with internet and telephone).

Television is still the most widely dispersed media device in the Netherlands. In 2010, 98 percent of all households had at least one television set. Viewing has been fairly constant at an average of three hours per day over the last five years, with on-demand viewing increasing slowly but steadily.

There is been negligible if any decline in TV news audiences as a result of digitization. Seven mainstream media organizations account for 80 percent of all news consumption, suggesting that while digital media have to some extent changed the way news is consumed, they have much less impact on who provides it. Yet the number of total voices is, of course, on the increase. However, it remains the case that most opinions are only received by the wider public if and when they are amplified by conventional media.

Public broadcasting remains by far the most widely used news source across all platforms. (In 2007, it reached 78.1 percent of the population and amounted to 44.5 percent of daily news consumption.) NPO, the national public service broadcaster, offers a 24-hour digital cable news channel, around 10 other digital cable TV channels and some mobile news services.

Despite right-wing political attacks on “leftist” public service broadcasting, Dutch society is mostly supportive.

Three quarters of the population believe public broadcasting provision is important for the country. It is also mostly trusted by its audiences, even though there are some groups in society—young people, ethnic minorities and supporters of populist parties—which feel unrepresented. Younger generations value commercial news providers slightly more than public ones, though they are less willing to pay for news.

This dominance of news does not extend online, however, although the public broadcasting portal (omroep.nl) is one of the most visited sites in the Netherlands (currently in the top 30) and reaches 60 percent of the population. However the most popular online news source (Nu.nl) is owned by Sanoma, a Finnish publisher that also owns a majority stake in three Dutch television stations.

The drastic cuts in the public broadcasting budget, promised by the current government, may affect the broadcaster’s ambitions to remake itself as a production center in and for Dutch society, linked with other public-interest institutions. Its position as a dominant news provider is further challenged by proposals to limit public broadcasting’s online activities. (A strong lobby for such limits, set up by commercial newspaper publishers, has struck a chord with the current government.)

Regional broadcasters only play a minor role in television news provision. In 2010, their combined market share was 2.0 percent.

Newspapers—always an important source of news in the Netherlands—continue to reach critical mass audiences. Although circulations are falling under pressure from freesheets and online outlets, the quality press still reaches over 2 million readers, or 12 percent of the population, with other titles commanding a circulation of 3.7 million. Regional newspapers reach over 4.5 million readers, or around 27 percent of the population.

Radio lost its prime importance as a news platform in the 1980s, long before digitization.

In 2009, 91 percent of households had a computer and access to the internet. Broadband reached 77 percent of all households by 2009. There is a clear generational divide in internet use. People born before 1965 spend less than 10 percent of their total media usage on new media. People born after that spend more than 20 percent of their media time on new media, teenagers and those in their twenties even more. As elsewhere, research into consumption of online news is not far advanced. In 2005, 49 percent of active internet users visited news websites. Commercial television news is notably weak online.

As a whole, Dutch media still offer a reasonable quality of news, current affairs and opinion, although journalism is increasingly commoditized and influenced by the PR industry. There are 150,000 communication professionals in the Netherlands—excluding marketing and advertising employees. This is ten times more than the number of professional journalists. While they do not all work directly with the press, they influence the news agenda and how stories are framed. This development is not caused by digitization, but reflects the same wider trend that erodes professional standards.

Independent journalism faces exciting as well as difficult challenges. Digital media have opened up a range of new opportunities. The explosion in the number of platforms where people can express themselves, along with the rise of User Generated Content (UGC) and social networking websites, has changed the dynamics of news provision and public debate. The mainstream outlets have lost their monopoly as the moderators and guardians of public debate.

Yet, although a few innovative weblog sites such as Sargasso.nl have succeeded in getting investigative stories into the mainstream media, most of the new approaches from online media have yet to prove their relevance and commercial viability for news production. An exception is the infamous ‘shocklog’ Geenstijl.nl, which has succeeded in attracting a wider audience as well as wider mainstream media attention with its unconventional and anti-authoritarian approach.

Meanwhile, editorial budgets are under pressure, and this has consequences for costly forms of journalism such as investigative reporting. And research has found that newspapers rely increasingly on newswire bulletins from services such as the Netherlands National News Agency. As in other countries such as the United Kingdom, there are particular concerns that quality local journalism is becoming unviable.

The press is under severe financial pressure. (Forecasts say that most newspapers will be loss-making by 2013 under their current business models.) Will they succeed in finding new business models? And what can be done about the decrease in investigative journalism that both the NVJ and the VVOJ are seeing, especially at local level? Will new private funds emerge? Will crowd-funding provide alternative means of income? Will the state step in—as has happened in France—to subsidize media functions that can no longer support themselves? Answers to these and other questions have yet to emerge.

While there are clear signs that online civic activism has a certain social influence, the established structures of public communication have not been overturned. Rather, a complex media-ecology is emerging, with online platforms influencing the broader public and the core political institutions through experimental projects, policy advice, research, and—most importantly—the mainstream press.

Although digitization has led to concentration of media companies, there are currently no media monopolies. Yet there is a risk that a few companies will control or strongly influence what audiences are exposed to.

There is an observable increase in cross-media ownership, and this trend is likely to accelerate with the recent abolition of the Media Concentration Act of 2007, which limited cross-media ownership. Over the last five years international investment companies as well as publishers have stepped into the Dutch media market. Today, only one of the three largest newspaper companies is Dutch-owned.

In June 2011, Parliament voted to amend a government proposal to revise the Telecommunication Law on net neutrality. This makes the Netherlands one of the first countries where net neutrality will become statutory. The government is now preparing legislation to merge the competition (anti-trust) regulator, the Post and Telecommunication Authority, and the Consumer Authority into a single body.

Despite the direct government influence on appointments in the boards of regulatory authorities, members are first and foremost appointed because of their knowledge of the field and/or their experience in public administration or management. Pluralism and diversity remain important guiding principles in shaping media policy and regulation, as does finding a balance between public service and commercial interests. These principles continue to apply in the digital era, concerning distribution and content. Action is needed to safeguard the future of independent news & investigative journalism.

Context

The Netherlands is a small, affluent country in north-western Europe, with 16.6 million inhabitants. Its GDP per head of US\$ 46,400 (2010) is one of the highest in the world. Unemployment—at 4.2 percent in 2010—is low. Income inequality is modest and few people face social disadvantages. The Netherlands Institute for Social Research (*Sociaal Cultureel Planbureau*, SCP) found that in 2008, the country achieved the lowest score of all European countries on a so-called “misery-index.” Even in the middle of the financial crisis, three-quarters of the Dutch still find their country prosperous.¹ In 2006, 75 percent of the population was satisfied with the state of democracy in the Netherlands.² And in 2009, 84 percent described themselves “happy” or “very happy.”³ Membership of civil society organizations is higher than in other European countries.⁴ Almost half the population is involved in some form of organized volunteering; another third of the population regularly helps out others on an informal basis.⁵

At the same time, since the beginning of this century, the country has found itself in the midst of social and political controversies. Over the last two decades, globalization, economic liberalization and immigration have changed the social and political landscape. Two politically motivated murders (the populist politician Pim Fortuyn in 2002, and film-maker, columnist and Islam critic Theo van Gogh in 2004) have—in a country known for its consensus-seeking politics—accentuated political differences.

While part of the population has embraced multiculturalism, others are searching for their separate cultural and national identities, which they see as threatened by globalization and immigration, and as poorly defended by the elite that dominated political debate until the end of the 1990s. Since the turn of the century, a number of populist movements have sprung up that positioned themselves as outsiders to the dominant paternalistic system, boldly identifying themes that were formerly avoided (especially criticism of Islam and multicultural society). The Freedom Party (*Partij voor de Vrijheid*, PVV) led by Geert Wilders is the most prominent, attracting about one-sixth of all votes in the 2010 parliamentary elections. (See section 4.3.1.)

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1. R. Bijl, J. Boelhouwer, E. Pommer and P. Schyns, “*The Social State of the Netherlands 2009*”, Netherlands Institute for Social Research, The Hague, 2010 (hereafter Bijl et al., *Social State of the Netherlands 2009*).
 2. Source: Statistics Netherlands, available at www.cbs.nl (accessed 23 February 2011).
 3. Bijl et al., “*Social State of the Netherlands 2009*.”
 4. Bijl et al., *Social State of the Netherlands 2009*.
 5. Source: Statistics Netherlands, available at www.cbs.nl (accessed 23 February 2011).

Several developments (economic, social and cultural) lie behind these social shifts that are beyond the scope of this report. One trend in particular, however, is important to understand the shifts in the Dutch media landscape: a steady rise of individualism.

The Netherlands had often been described as a collectivist country, characterized by the “pillarization” of society. For a long time, the country was divided into a number of pillars (or silos): social and religious movements, with Catholics, socialists and Protestants being the main ones. Each of these pillars had their own social organizations, schools, churches, sporting clubs, unions, newspapers, political parties, housing associations and broadcasting organizations. Catholics, for instance, would vote for the Catholic party, listen to the programs of the Catholic broadcasting organization on the radio, live in a house rented from a Catholic housing association, and play soccer at a Catholic soccer club. These pillars often had clear hierarchies, and their spiritual and political leaders were often respected authorities that had a huge impact on the beliefs and attitudes of their followers. In everyday life, social interaction between pillars was minimal.

Since the 1960s, this system has lost most of its social meaning. By 2011, people feel less and less connected to these traditional institutions and their authoritative figures. Especially over the last three decades, the diversity in lifestyles and family situations has increased and social cohesion has decreased. Self-fulfilment has become a more prominent ideal.⁶ Yet some fundamentals of pillarization can still be found in today’s society: for instance, some political parties and many public broadcasting organizations have their roots in one of these pillars.

Up to the 1960s, journalism was also organized in accordance with the pillarized system of society, with each pillar having its own newspaper and broadcasting organization, where journalists often acted as mouthpieces for their pillar’s leaders. Since the 1960s, journalists have emancipated themselves from their pillars and increasingly embraced independent professional standards.

Journalists were not alone in freeing themselves from their social and religious movements. Over the last two decades the Dutch public in general has also been emancipated and grown more individualistic. Overall, institutions and their leaders have lost part of their authority. This emancipatory move by the public has also affected the institutions of journalism.⁷ All in all, for many in the Netherlands, the added value of journalists, their status as natural organizers of public debate and their legitimacy have diminished.⁸

This is the social and cultural background against which the digitization of Dutch media and its impact on the public sphere should be understood.

6. Ruben Koning, Jo Bardoel, Koos Nuijten and Saskia Borger, “De Schuivende Achterban Van De Nederlandse Publieke Omroep” (The Shifting Backing of Dutch Public Broadcasting), *Tijdschrift voor Communicatiewetenschap* 37(2009), p. 2 (hereafter Koning et al., “De Schuivende Achterban”).

7. Jo Bardoel, *Zonder Pen of Papier. Journalistiek Op De Drempel Van Een Nieuwe Eeuw* (Without Pen or Paper. Journalism at the Threshold of a New Century), Otto Cramwinckel, Amsterdam, 1993; H. Wansink, “*De Erfenis Van Fortuyn*” (Fortuyn’s Heritage), University of Amsterdam, 2004.

8. Tijdelijke Commissie Innovatie en Toekomst Pers (Temporary Committee on Innovation and Future Press), “De Volgende Editie” (Next Edition) The Hague, 23 June 2009, p. 48 (hereafter Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie”).

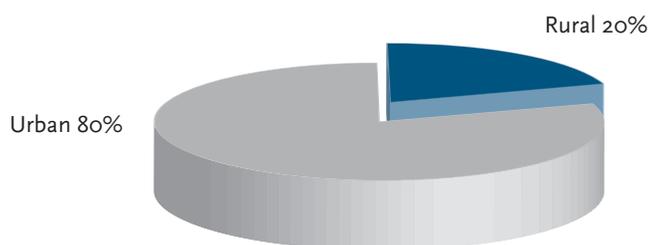
Social Indicators

Population (number of inhabitants): 16.6 million

Number of households: 7.4 million

Figure 1.

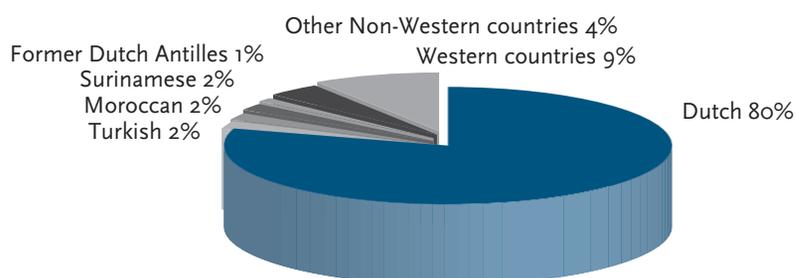
Rural/urban breakdown (% of total population)



Sources: Cijfers; Kernindicatoren (Figures; Main indicators) Statistics Netherlands (*Centraal Bureau voor de Statistiek*, CBS), June 2011.

Figure 2.

Ethnic composition (% of total population)

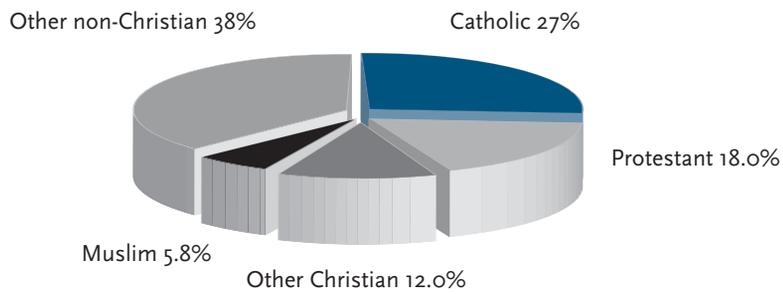


Source: Population figures 2010, CBS (Statistic Netherlands).

The national language is Dutch. There are a few minority languages, such as Fries (Frisian) and Limburgs, as well as a number of dialects. Of the minority languages, Fries has the most speakers—some 450,000, mainly in Friesland province. It is also the only language beside Dutch which is recognized at the highest level, meaning that those who live in Friesland province are allowed to choose Fries as their standard language for interaction with the government.

Figure 3.

Religious composition (% of adult population, 18+)



Source: Religion 2009, percentage of population, CBS.

Economic Indicators

Table 1.
Economic indicators

	2005	2006	2007	2008	2009	2010	2011f	2012f
GDP (current prices), in US\$ billion	639.5	678.3	783.6	877.4	796.5	783.2	832.1	852.4
GDP (current prices), per head in US\$	39,189	41,497	47,838	53,354	48,188	47,172	49,949	51,024
Gross National Income (GNI) (current prices), per head in US\$	39,880	43,390	46,310	49,000	48,380	49,750	n/a	n/a
Unemployment (% of total labor force)	4.7	3.9	3.1	2.7	3.4	4.4	4.3	4.3
Inflation (average annual rate in % against previous year)	2.0	1.6	1.5	1.6	0.7	1.8	2.2	2.1

Notes: f: forecast; n/a: not available.

Sources: International Monetary Fund, *World Economic Outlook Database*, June 2011; World Bank (for GNI).

1. Media Consumption: The Digital Factor

1.1 Digital Take-up

1.1.1 Equipment

Television is still the most widely dispersed media device in the Netherlands. In 2010, 98 percent of all Dutch households had at least one television set.⁹ In 2009, 91 percent of Dutch households had a computer, while a similarly large group had access to the internet.

Table 2.
Households owning equipment in the Netherlands, 2005–2010

	2005		2006		2007		2008		2009		2010	
	No. of HH ('000) ¹⁰	% of HH ¹¹	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH
TV sets	7,020	99	7,003	98	7,006	99	7,019	99	7,046	99	n/a	n/a
PCs	5,530	78	5,716	80	6,086	86	6,239	88	6,477	91	6,572	92

Note: HH = Households; n/a = not available.

Source: Editors' calculations based on data from the International Telecommunication Union (ITU), 2011.

1.1.2 Platforms

In 2006, the Netherlands became the second country in Europe (after Luxembourg) to end analog terrestrial transmission of television broadcasts.

9. Audience Research Foundation (*Stichting KijkOnderzoek*, SKO), "Tv in Nederland 2010," 2011 (hereafter SKO, "Tv in Nederland 2010"); 39.9 percent of the main television sets are still based on CRT-technology, LCD and plasma screens are now to be found in 40.8 percent and 10.7 percent of all households respectively; 0.2 percent of households use a beamer.

10. Number of households owning the equipment.

11. Percentage of total number of households in the country.

This switch to digital hardly caused any disruption, since at the time only 1.5 percent of Dutch households were dependent on terrestrial analog transmission. The vast majority of households already had a subscription to (analog) cable.¹² Digital cable was introduced in the early 2000s. By the end of 2010, 58.5 percent of households had access to some form of digital television.¹³ Section 7.1 describes how switch-over took place in the Netherlands. The striking growth in terrestrial take-up and decline in cable, shown in Table 3, reflect the fact that digital terrestrial reception is a cheaper option for consumers than digital cable.

Table 3.
Platform for the main TV reception and digital take-up

	2005		2006		2007		2008		2009		2010	
	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH	No. of HH ('000)	% of HH
Terrestrial reception	n/a	n/a	n/a	n/a	285	4.6	458	7.5	601	9.6	818	11.7
– of which digital	41	1.2	75	1.2	285	4.6	458	7.5	601	9.6	818	11.7
Cable reception	2,962	87.6	5,264	84.2	4,880	78.7	4,438	72.7	3,883	62.0	3,851	55.1
– of which digital	128	3.8	413	6.6	775	12.5	1,129	18.5	1,453	23.2	1,971	28.2
Satellite reception	n/a	n/a										
– of which digital	223	6.6	469	7.5	496	8.0	476	7.8	489	6.8	433	6.2
IPTV	10	0.3	31	0.5	87	1.4	116	1.9	113	1.8	210	3
Total digital	582	17.2	1,538	24.6	2,046	33.0	2,521	41.3	3,069	49.0	3,977	56.9

Note: HH = Households; n/a = not available.

Source: Médiamétrie, Eurodata TV Worldwide.

Explanations: The data in this table come from a local survey canvassing Dutch households that asked two questions: about the reception type, and about the presence of a set-top box. The total number of digital TV households combines the replies, which is why the totals in the table are higher than the sum of figures on specific platforms.

The introduction of Digital Audio Broadcasting (DAB) standards in radio has not been a success so far. In the fall of 2011, only the radio stations of Dutch Public Broadcasting (*Nederlandse Publieke Omroep*, NPO) were distributing a digital ether signal. (See section 5.1.1 for more on the reluctance of commercial broadcasters to embrace digital radio.) Public interest so far has been limited: in 2007, only a few hundred DAB-capable radios were sold each month.¹⁴

In 2011, 94 percent of Dutch households had access to the internet.¹⁵ Broadband saw rapid growth in the second half of the last decade, and had (in 2009) reached 77 percent of all households.¹⁶ Only 1 percent

12. N. van Eijk and B. van der Sloot, *Case Study: How Television Went Digital in the Netherlands*, London, Open Society Media Policy Program, 2011, available at www.mediapolicy.org (accessed 23 February 2011). (Hereafter Van Eijk and Van der Sloot, *Case Study*). At that time, 93 percent of households had a cable subscription, while 7 percent gained access to television through a satellite dish and 3.5 percent of households subscribed to both analog cable and satellite services.

13. SKO, "Tv in Nederland 2010."

14. Office for Radio Auditing (*Radio Advies Bureau*, RAB), "Digitale Radio: Sterke Groei Internetradio Versus Onduidelijke Dab Toekomst (Digital Radio: Strong Growth of Internet Radio Versus Unclear Future for Dab)," Amstelveen, 2007.

15. Statistics Netherlands, available at www.cbs.nl (accessed 15 November 2011).

16. Statistics Netherlands, available at www.cbs.nl (accessed 23 February 2011).

of the population has indicated that high costs are the main reason for not taking up an internet subscription.¹⁷

Table 4.
Internet and mobile penetration rates, 2005–2009

	2005	2006	2007	2008	2009
Internet subscriptions per 100 inhabitants	34	36	34	n/a	37
of which broadband (percentage)	73	87	98	n/a	96
Mobile subscriptions per 100 inhabitants	97	106	117	125	128
of which mobile subscriptions with 3GG	2	5	13	15	22

Note: n/a = not available.

Source: International Telecommunication Union.

1.2 Media Preferences

1.2.1 Main Shifts in News Consumption

Research by NPO found that in 2008 Dutch people spent an average of seven hours per day on media usage. One of the most important recent shifts is the take-up of internet. By 2008, digital media was occupying around 1.2 hours of a person's average day. The same study shows significant differences between age groups, with older people over 50 years of age spending more time on media in general, but less time on the internet.

Table 5.
Media usage daily reach

	Daily reach (%)	Hours per day
Printed media	73	1.1
Radio and music	70	2.5
Television	89	2.9
Communication	47	0.4
Surfing	43	0.4
Gaming	16	0.2
Other	12	0.2

Source: Dutch Public Broadcasting (*Nederlandse Publieke Omroep*, NPO), *Media Needs Research*, Hilversum, 2008.

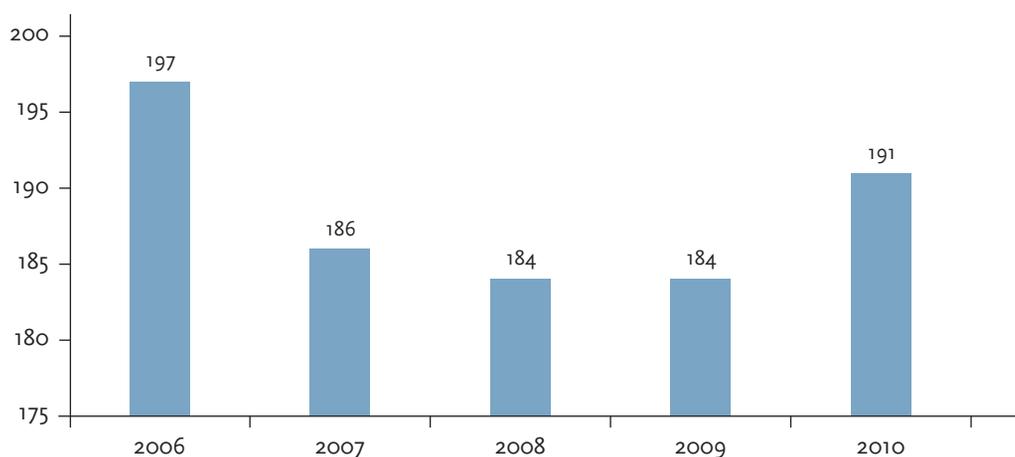
Television watching has been more or less constant at a total of three hours per day in the last five years, according to studies by the Audience Research Foundation (*Stichting KijkOnderzoek*, SKO).¹⁸

17. Statistics Netherlands, available at www.cbs.nl (accessed 23 February 2011).

18. SKO, "Jaarrapport 2010" (Annual Report 2010), 2011, p. 67.

Figure 4.

Average time spent watching television per day (minutes), 2006–2010



Source: SKO, *Jaarrapporten 2006–2010*, Amsterdam, 2011.

Television is still mainly used to watch scheduled broadcasts, although there has been a slow but steady increase in on-demand viewing. In 2010 around 3–6 percent of total television time was spent watching television outside regular schedules.¹⁹ People who have access to digital television still spend most of their time watching the main channels, with only a small increase in the total number of channels watched.²⁰

Television is increasingly watched on alternative platforms. In 2010, 40 percent of all viewers used a computer at least once to watch a television program. For some particular titles, internet figures have already amounted to 40 percent of total viewership.²¹ The mobile platform for television is still in its nascent stages. Only 3.2 percent of all viewers have used their mobile phone to watch television.²²

According to the SCP, time spent on radio listening has decreased in the last three decades, down to 9.5 hours a week in 2005 from 15 hours in 1975. Overall, the reach of radio is still strong, with around 92 percent of the population tuning in to a radio station on a weekly basis in 2010.²³

A report by the Office for Radio Auditing (*Radio Advies Bureau*, RAB), the leading Dutch agency for the auditing of radio audiences, concludes that radio is listened to on a large variety of platforms, including digital ones.²⁴

19. Telephone interview with Bas de Vos, director of SKO, 11 February 2011.

20. Telephone interview with Bas de Vos, director of SKO, 11 February 2011.

21. Telephone interview with Bas de Vos, director of SKO, 11 February 2011.

22. SKO, "TV in Nederland 2010."

23. CLO Analysetool, figures from October and November 2010, available at <http://www.rab.fm/CLO/CLO-Luistercijfers/> (accessed 20 June 2011).

24. CLO Analysetool, figures from October and November 2010.

Table 6.
Radio listening by platform 2009

	% that has used this platform	Hours per week	% share of total listening time
Analog	73	20	56
Portable	28	10.1	10
PC	32	7.7	12
Car	66	7.4	18
Digital Television	2	6.9	1
iPod/MP3 player	8	3.2	1
Mobile phone	2	3.2	2

Source: Office for Radio Auditing (*Radio Advies Bureau, RAB*), *Radioplatform onderzoek 2009* (Radio Research Platform 2009), Amsterdam, 2009.

According to SCP research, the total time Dutch people spent reading newspapers almost halved between 1975 and 2005, from 2.7 hours to 1.5 hours a week.

It should be noted that different studies have produced widely differing assessments of the impact of internet usage upon other media. In 2005, the SCP found that the total time that Dutch people spend on media consumption had been stable for decades at 19 hours a week, which was considerably less than the seven hours a day found in 2008 by NPO. SCP found that an increase in time spent on computing and internet came at the cost of watching television.²⁵ Research by SKO, however, found that television viewing time has been relatively steady over recent years. NPO claims that internet usage is linked to a decrease in print usage, but has not led to a shift in television watching behavior.²⁶

Younger readers especially spend less time consuming newspapers. For those aged under 50, newspaper reading time has halved in the last decade, and in 2005 was down to 1.1 hours per week for those aged 25–49 and totaled 0.4 hours for 20–34 year olds.²⁷

In 2005, Dutch people spent an average of 3.8 hours a week behind their computers in their leisure time. Of this total, 2.5 hours were spent online. More recent numbers from a study commissioned by NPO in 2008 show that people spend about 1.2 hours per day on digital media, or 15 percent of their media time.²⁸ It is likely that these numbers have increased significantly since then. There is a clear generational divide that lies somewhere around 1965. People born before that year spend less than 10 percent of their total media

25. F. Huysmans and Jos de Haan, “Alle Kanalen Staan Open” (All Channels Are Open), Institute for Social Research (*Sociaal Cultureel Planbureau*), The Hague, 2010 (hereafter Huysmans and de Haan, “Alle Kanalen Staan Open”).

26. Dutch Public Broadcasting (*Nederlandse Publieke Omroep, NPO*), *Verbinden, Verrijken, Verrassen. Concessiebeleidsplan 2010–2016* (Connecting, Enriching, Surprising. Concession Policy Plan 2010–2016), Veenendaal, 2010 (hereafter NPO, *Verbinden, Verrijken, Verrassen*).

27. According to research dated in 2005.

28. Department of Audience Research (*Afdeling Kijk- en Luisteronderzoek*), “Mediabehoefte Onderzoek” (Media Needs Research), NPO, Hilversum, 2008).

usage on new media. People born after that spend more than 20 percent of their media time on new media, teenagers and those in their twenties even more.²⁹

1.2.2 Availability of a Diverse Range of News Sources

The numbers given above show a slow but steady shift in media practices and growth in digital media consumption. Audiences have started to use multiple media platforms to access traditional media content. According to CBS, 49 percent of the population went online to read the websites of news providers in 2009, and 57 percent used the web to access audio or radio content. However, media skills and media literacy are not evenly distributed throughout the population. Although online media consumption is being taken up by various parts of the population, the SCP expects that skills to actively contribute to online media, such as wikis or blogs or editing and uploading videos to YouTube, will remain restricted to a small part of the population.³⁰

1.3. News Providers

1.3.1 Leading Sources of News

1.3.1.1 Television

The Netherlands has three main players in the television market. Public broadcasting has three national channels: Nederland 1, Nederland 2 and Nederland 3. Together these three channels in 2010 had a market share of 34.8 percent. The main alternatives to public broadcasting are offered by two commercial players: RTL Broadcasting group (currently operating four main channels: RTL 4, RTL 5, RTL 7 and RTL 8, with a total market share of 24.6 percent in 2010) and the SBS Broadcasting Group (with three main channels, Net 5, SBS and Veronica TV, and a combined market share of 16.6 percent). SBS was bought in April 2011 by the Finnish company Sanoma, one of the largest magazine publishers in the Netherlands, which also owns the most popular news website in the country.

Table 7.
Information as percentage of total programming, 2010

	Total hours	Total hours of information	Information as % of total output	Information as % of output watched
Public Broadcasting	22,148	12,151	54.9	51.9
RTL	16,059	8,546	53.2	43.2
SBS	11,978	5,339	44.6	40.5

Note: "Information" is a very broad category, not limited to news and current affairs.

Sources: SKO, NPO.

29. Huysmans and de Haan, "Alle Kanalen Staan Open."

30. Huysmans and de Haan, "Alle Kanalen Staan Open," p. 180.

Developments in public broadcasting are worth analysing. At the beginning of the 2000s, public broadcasting saw a decline in audiences. The percentage of time Dutch audiences spent on watching public broadcasting dropped from a market share of a little under 40 percent to a third. Recently this figure rebounded, and in 2010 public broadcasting had a market share of 34.8 percent. During prime time (6 p.m. to midnight) it was even 2 percent higher. The rebound is partly the result of a new programming model in which the three main television channels are more clearly targeted at particular socio-demographic groups. In order to reach the public at large, NPO has divided the population into eight lifestyles: *Kritische Verdiepingzoekers* ('Critical self-realizers'), *Onbezorgde Trendbewusten* ('Happy-go-lucky trendsetters'), *Praktische Familiemensen* ('Pragmatic family members'), *Zorgzame Duizendpoten* ('Caring jack-of-all-trades'), *Jonge Connectors* ('Young connectors'), *Traditionele Streekbewoners* ('Traditional locals'), *Betrokken Gelovigen* ('Engaged believers') and *Drukke Forenzen* ('Busy commuters'). Each category represents a segment of the population with a particular outlook on life, behavioral characteristics and media preferences. The categories are hard to translate, but do share some features with commercial lifestyle typologies provided by companies such as Experian and Claritas.³¹

NPO has drawn up an intricate scheme that promises to reach all these categories through programs specifically catered for one or more of them. This system has replaced more traditional sociological audience categories based on age, ethnicity, gender, income level and education, although some of these are still used as well as.

Despite this new model, public broadcasting still has some problems attracting younger audiences. At prime time, in the 20–49 age group, public broadcasting had a market share of 26.8 percent in 2009. The under-40 group also prefers commercial television news to public news provision.³²

Table 8.

Television market share of the three largest providers (%), 2006–2010

	2006	2007	2008	2009	2010
Public Broadcasting	32.8	31.3	34.9	33.9	34.8
RTL Nederland	23.1	23.5	23.6	24.2	24.6
SBS	16.9	18.2	19.3	18.3	16.6

Source: SKO, *Jaarrapporten 2006–2010*, 2011.

1.3.1.2 Radio

Over recent decades, radio has lost its dominant position as a news provider. This change came largely about during the 1980s as television news prevailed.³³ In 2010, public regional stations, which devote large parts of their programming to local and regional news, reached around 22 percent of the population. Radio 1, the national public broadcasting news station, is listened to by about a fifth of the population each week.

31. See, for instance, <http://www.experian.com/marketing-services/consumer-segmentation.html> (accessed 12 October 2011).

32. NPO, *Verbinden, Verrijken, Verrassen*.

33. Huysmans and de Haan, "Alle Kanalen Staan Open," p. 42.

Business News Radio (BNR) is a commercial news station in the Netherlands and was reaching 4.4 percent of the population on a weekly basis in 2010.

Table 9.
Weekly reach of radio news (% of population), 2006–2010

	2006	2007	2008	2009	2010
Regional Radio	24.2	24.3	23.1	23.1	21.9
Radio 1	19.2	18.5	17.9	18.1	19.9
Business News Radio	2.3	3.3	3.9	4.2	4.4

Source: Continu Luisteronderzoek, RAB, figures from Oct–Nov of each year, available at <http://www.rab.fm/CLO/CLO-Luistercijfers/>.

1.3.1.3 Print Media

There are 10 national newspapers and 18 regional dailies in the Netherlands, supplemented by three free dailies mainly circulating around public transportation networks and numerous local weekly newsmagazines.³⁴ The newspaper landscape is often divided between so-called quality newspapers (*NRC Handelsblad*, *NRC Next*, *De Volkskrant*, *Trouw*), other national newspapers (*De Telegraaf* and *AD*), regional newspapers and free daily newspapers. The Netherlands does not have a true tabloid culture, with sensationalist newspapers, although national newspapers such as *De Telegraaf*, the largest newspaper in the Netherlands, and *AD* are sometimes reproached for sensationalism.

Newspapers have always been an important source of news in the Netherlands and this still remained true in 2010. They continue to reach critical mass audiences, with regional newspapers reaching over 4.5 million readers, or around 27 percent of the total population. The quality newspapers reach over 2 million readers, or 12 percent of the population, with other newspapers commanding of a circulation of 3.7 million.³⁵

At the same time, newspapers in the Netherlands are under pressure. Over the last decade circulation has decreased substantially and the average reader is aging. For the quality newspapers, circulation decreased 8 percent. The combined print run of *De Telegraaf* and *AD* declined by 5 percent, and regional dailies went down by 9 percent.

34. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie.”

35. CEBUCO, available at http://www.cebucoco.nl/dagbladen/oplage_en_bereikcijfers (accessed 23 February 2011).

Table 10.

Newspaper circulation (million, inclusive of digital subscriptions), 2007–2010

	2007	2008	2009	2010*	Change (% 2010/2007)
Regional newspapers	1.697	1.655	1.610	1.545	–9
Free newspapers	1.418	1.330	1.141	0.991	–30
<i>De Telegraaf</i>	0.704	0.696	0.672	0.672	–5
AD	0.479	0.461	0.443	0.449	–6
<i>De Volkskrant</i>	0.308	0.305	0.298	0.297	–4
<i>NRC Handelsblad</i>	0.236	0.225	0.215	0.211	–11
<i>Trouw</i>	0.109	0.108	0.107	0.103	–5
<i>NRC Next</i>	0.083	0.083	0.082	0.080	–3

Note: * Third-quarter figures.

Source: Institute for Media Auditing (*Instituut voor Media Auditing*, HOI), *Opvraagmodule* (Request Module), Amstelveen, January 2011, available at <http://www.hoi-online.nl/798/Opvraagmodule.html>.

Free newspapers were introduced in the Netherlands in 1999 and by 2004 they made up 15 percent of the total newspaper circulation. Their introduction caused a loss in circulation of the four main morning papers by about 70,000 between 1999 and 2004.³⁶ In addition, they have attracted criticism from established “legacy” journalists for supposedly encouraging a lowering of standards: employing a relatively small number of staff that largely regurgitates stories from the news wires, while reserving no budget for more in-depth journalism.

Digital subscriptions have made up for some of the losses of printed circulation. Two of the main quality newspapers (*De Volkskrant* and *NRC Handelsblad*) offer a subscription-based web edition. Subscription to their e-papers reached 52,544 in the third quarter of 2010, amounting to 10.4 percent of total paid subscriptions.

In the end of 2010, both these titles also launched *iPad* versions. Publishers have expressed high hopes for this new “tablet” market.

1.3.1.4 News Websites

The internet has gained in importance as an information medium. In 2005, 49 percent of active internet users visited news websites.³⁷ Given the fact that the internet has gained in prominence since then, it is reasonable to assume that it has become more significant as a news medium as well.

36. Piet Bakker, “Vijf Jaar Gratis Dagbladen in Nederland. Gevolgen Voor Uitgevers En Lezers” (Five Years of Free Newspapers in the Netherlands. Consequences for Publishers and Readers), *Etmaal van de Communicatiewetenschap*, Enschede, 2004.

37. Statistics Netherlands, available at www.cbs.nl, quoted in Huysmans and de Haan, “Alle Kanalen Staan Open,” p. 51.

Table 11 shows the monthly reach of the most prominent news sites.³⁸ This ranking has been headed for some time by Nu.nl (Now.nl), an internet-only news site that mainly gives an overview of the most recent news stories from the wires. The site is owned by Sanoma. The remainder of the top five consists of traditional newspapers and the public broadcaster website Nos.nl. The most notable absentees in this overview are the news sites accompanying commercial television news programs, which have so far failed to make significant inroads into online news audiences.

Table 11.
Monthly reach of Dutch news websites (% of population), 2005–2009

	2005	2006	2007	2008	2009
Nu.nl	22.2	28.2	32.3	30.0	34.2
Telegraaf.nl	21.3	24.9	24.9	27.4	29.2
Nos.nl	18.6	22.8	23.5	20.9	23.6
Ad.nl	8.2	14.0	20.1	17.7	18.3
Volkskrant.nl	7.7	9.2	15.5	12.8	15.0

Source: Commissariaat voor de Media (Media Authority), *Mediamonitor 2009* (Media Monitor 2009), Hilversum 2010.

All news sites that reached more than 5 percent of the audience in 2009 are institutional players. That does not mean that their opinion power is unchallenged. Social media and user-generated content (UGC) also constitute important news sources that exist outside the institutional framework of conventional news providers (see section 3). Most research provides us with quantitative figures about web use but relatively little about the variety and quality of information that audiences consume and especially what they make of it. What is lacking is a media anthropology approach in research that can give us such insights.

1.3.2 Television News Programs

There are three main television news providers in the Netherlands. Public broadcasting offers a number of daily news bulletins on its three national public broadcasting stations but its daily “8 Uur Journaal” (8 O’Clock News) provided by the NOS broadcasting organization is the most popular, often topping the daily overall audience ratings.

The daily evening *Journaal op 3* has a faster pace and its topics are more attuned to the lifestyles of young people. In 2009, the newly formed public broadcast organization Powned (a spin-off of weblog *GeenStijl.nl*) started broadcasting its own daily news bulletin *Pownews*, translating the infamous anti-establishment blog rhetoric of *Geenstijl.nl* to a television format. So far, however, it has failed to attract a critical mass audience (see section 4.2.3).

38. The ranking is based on monthly reach. There is currently a discussion going on about the value of these figures. Some prefer measuring independent visitors, and/or the total time visitors spent on a website.

Overall, NOS is a respected and trusted news source. There has been some criticism over the past years that their approach has become too light and more focussed on everyday local news at the expense of more serious news and international topics. In an interview for this research, Giselle van Cann (deputy editor-in-chief of NOS Nieuws) explained that NOS has indeed shifted its approach in the last few years. But this was conceived as a shift away from a traditional focus on institutional news sources towards news provision more attuned to the life worlds of its viewers. Rather than lightening its approach to news, NOS has, in the words of editor-in-chief Hans Laroes, moved its focus “from the state to the street”. Accompanying this has been an expansion in the leeway afforded to reporters for offering their own interpretations of events and stories.³⁹

Until 1989, NOS maintained a monopoly on television news. But with the introduction of commercial television in that year, it gained a competitor. From the beginning of commercial television, RTL Media Group has taken news provision seriously and it has built a respected news organization that broadcasts a main news edition on *RTL 4* daily at 7.30 p.m., and a shorter late-night bulletin. RTL also broadcasts a daily news magazine called *Editie.nl* focused on “soft news” and news stories that are told from a personal point of view.

SBS Broadcasting entered the television news market in the mid-1990s with “*Hart van Nederland*” (The Heart of Holland), broadcasting twice daily at 7 p.m. and 10.30 p.m. on SBS 6. This news program has a more emotional focus, with lots of attention for national and regional affairs and the everyday life issues of the common person.⁴⁰

Apart from the news bulletins, there are a large number of programs—especially on public broadcasting channels—that contain news, information and opinion content, including current affairs programs. In addition, public broadcasting talk shows have become popular and influential programs, combining interviews with news makers such as politicians with those from the worlds of sports, culture and show business. Contrary to the radio sector, regional broadcasters only play a minor role in television news provision. In 2010, their combined market share was 2.0 percent.⁴¹

1.3.3 Impact of Digital Media on Good-quality News

Digital media does not appear to have affected the endurance and popularity of public service news. When the various news platforms of suppliers are combined, Dutch public broadcasting (including regional radio and television stations) is the most widely used news source. In 2007, it reached 78.1 percent of the population and amounted to 44.5 percent of daily news consumption.

39. Huub Wijfjes, “Vijftig Jaar Televisienieuws” (Fifty Years of Television News), *Tijdschrift voor Mediageschiedenis* 8(2) (2005).

40. Mirjam Keunen, “Camping-Tv Als Geuzennaam; Nieuwsrubriek Hart Van Nederland Brengt Vijftien Jaar Klein En Groot Nieuws Met Emotie,” *NRC Handelsblad*, 4 May 2010; “Het DNA Van Sbs; Nieuwsbazen Rtl En Nos over 5000e Hart Van Nederland” (The DNA of SBS; Editors of RTL and NOS on the 5000th Edition of “Hearth of Holland”), *De Telegraaf*, 10 May 2010.

41. Media Authority (*Commissariaat voor de Media*, CvdM), “Mediamonitor” (Media Monitor), CvdM, Hilversum, 2010, p. 51.

What is striking is that seven news organizations account for 80 percent of all news consumption across platforms, suggesting that while digital media have changed the way news is consumed to some extent, they have much less impact on who provides it. There is, however, a generational difference. Younger people prefer commercial news sources to public ones as well as those that are free at the point of consumption rather than paid subscriptions. The elderly more often tune in to public broadcasting titles (radio, television and online). They are also more willing to pay for news content.⁴²

Table 12.
Reach and timeshare of news providers, across platforms (%)

	Timeshare (% of time spent watching TV news)	Reach
Public broadcasting (NOS)	44.5	78.1
RTL Nederland	15.4	53.0
Telegraaf Media Groep	8.0	32.1
SBS Nederland	7.3	32.3
Mecom	5.7	19.2
PCM Uitgevers	4.4	12.9
Sanoma	3.0	18.1

Source: Commissariaat voor de Media (Media Authority, CvdM), “Nieuwsgebruik” (News usage), Hilversum 2008, available at <http://www.mediamonitor.nl/content.jsp?objectid=9845>.

Internet-only providers hardly make a dent: Google’s news provisions come in at 0.4 percent of all news consumption time and a daily reach of 2.9 percent of the population. Microsoft’s news services account for only 0.1 percent of time, with a population reach of 1.4 percent. These sites may not be significant in terms of news consumption on their own, but increasingly they do play a role as gatekeepers in guiding people to news content elsewhere. For many online news sources Google is their most important referrer site. In recent years, social media platforms such as Facebook and Hyves.nl have also become important points of entry into the broader online news sphere.⁴³

1.4 Assessments

In the last decade, digital media technologies have reached the majority of Dutch households. Internet penetration is approaching universal levels, and around 60 percent of households have access to digital television.

42. CvdM, “Nieuwsgebruik” (News Usage), available at <http://www.mediamonitor.nl/content.jsp?objectid=9845> (accessed 23 February 2011) (hereafter CvdM, “Nieuwsgebruik”).

43. Interview with Heleen van Lier, Social Media Editor at *De Volkskrant*, Amsterdam, 25 February 2011.

Media practices are also changing: audiences now use a variety of platforms to access media content, although traditional media use such as watching live television on the main television set still dominates.

When all platforms are taken together, seven mainstream media organizations account for 80 percent of all news consumption, suggesting that while digital media have to some extent changed the way news is consumed, they have much less impact on who provides it. The introduction of commercial television in 1989 and the advent of the internet have increased the amount of content available and thus, also, the competition among news providers. This intensifies the pressure to generate a sense of urgency, in order to attract audiences. A quantitative analysis by Koos Nuijten of Dutch television news between 1980 and 2004 showed that news became both more sensationalist as well as more democratic and less institutionalized, with an increase in dramatic subjects and sounds and close-ups. Yet he also found that this sensationalism was less prominent than some critics had argued. He ascribes the increase in sensationalism partially to the increasing market pressure. The multiplication of television channels forced news providers to compete for attention.⁴⁴ In 2003, the Council for Social Development (*Raad voor Maatschappelijke Ontwikkeling*, RMO) drew similar conclusions in its report, *Media Logic*.⁴⁵

In general, over the years, news organizations have started to pay more attention to the experiences and emotions of ordinary people, and less to institutionalized news sources.

An additional change is that news providers are under pressure from competitors that do less for less. Free daily newspapers or a web-only provider such as Nu.nl, the most popular news site in the Netherlands, have smaller editorial staffs and budgets and heavily rely on wire stories. Yet, they attract fairly large audiences, sometimes at the cost of other news providers. Their emergence is in turn related to shifting news consumption patterns, particularly among younger age groups who prefer free over paid-for newspapers, as well as commercial over public broadcasting news.

Because of these shifts, newspaper publishers are going through difficult times, with significant decreases in their circulation. The reach and prominence of news from public service organizations has so far not been affected much by digitization. It remains by far the most widely used news source across all platforms, although when we look at the internet as a stand-alone platform, public service news has been outstripped by Sanoma's Nu.nl.

44. Koos Nuijten, "Sensatie in Het Nederlandse Televisienieuws 1980-2004" (Sensation in Dutch TV News 1980-2004)," Dissertation, Radboud University, 2007.

45. Council for Social Development (*Raad voor Maatschappelijke Ontwikkeling*, RMO), "Medialogica. Over Het Krachtenveld Tussen Burgers, Media En Politiek" (Medialogic. On the Force Field between Citizens, Media and Politics)," RMO, The Hague, 2003.

2. Digital Media and Public or State-Administered Broadcasters

2.1 Public Service and State Institutions

2.1.1 Overview of Public Service Media; News and Current Affairs Output

In the Netherlands, the position and organization of public broadcasting is laid out in the Media Act of 2008. This act sets out a number of functions that public broadcasting is to fulfill:

- It should provide a balanced view of Dutch society, representing all social and religious groupings.
- Its content should be varied, and of high quality.
- It should make an effort to reach the population at large as well as make provisions for all age groups and residents of varying (sub)cultural identities.
- Its content should be accessible for all, and produced independently from either state or commercial interventions.⁴⁶

To implement this order, the government grants a concession to NPO for a period of 10 years. Before and halfway through this period, the concession holder has to provide a detailed description of how it plans to realize the public functions mentioned above. This plan has to be assessed by the Media Authority (*Commissariaat voor de Media*, CvdM) and the Council for Culture (*Raad voor Cultuur*, RvC). During the concession period, NPO has to divide the total budget and broadcast time (currently for three main national television channels, five main radio stations and a number of digital media services) between more than 20 independent broadcasting organizations, according to a formula described in the Media Act. These broadcasting organizations are to represent the various social or religious groups that make up Dutch society. Most of these organizations are member-based and have their roots in the era of pillarization (see Context, above).⁴⁷

46. Mediawet 2008 (Media Act 2008).

47. The most prominent organizations are the General Association of Radio Broadcasting (*Algemene Vereniging Radio Omroep*, AVRO) with 403,000 members in 2009; Bart's Neverending Network (BNN), with 303,000 members; Evangelical Broadcasting (*Evangelische Omroep*, EO), 439,000 members; Catholic Radio Broadcasting (*Katolieke Radio Omroep*, KRO), 456,000 members; MAX, 238,000 members; Dutch Christian Radio Association (*Nederlandse Christelijke Radio Vereniging*, NCRV), 365,000 members; Television Radio Broadcasting Foundation (*Televisie Radio Omroep Stichting*, TROS), 465,000 members; Association of Amateur Radio Workers (*Vereniging van Arbeiders Radio Amateurs*, VARA), 360,000 members; and the Liberal Protestant Radio Broadcasting Company (*Vrijzinnig Protestantse Radio Omroep*, VPRO), 362,000 members. Source: CvdM., August 2011.

The member-based broadcasting associations are supplemented by two public broadcasting associations without members that are assigned particular public tasks, such as the provision of information, education and culture (provided by NTR) and the provision of a reliable and independent news service (provided by NOS). In addition, there are a number of broadcasting organizations representing religious movements who are allotted a small percentage of air time.

The broadcasting system is open for new entrants. At the beginning of and halfway through each concession period, broadcast organizations that claim to represent a social or religious grouping that is not yet represented by any of the current broadcasting organizations, and have 50,000 or more members, can acquire the status of “aspirant broadcasting organization”.

Before the end of a concession period, both the CvdM and the RvC assess whether the various broadcasting organizations (and the content they have produced) still represent a social or religious grouping and add a characteristic point of view to the media landscape at large. An independent evaluation committee (*Visitatiecommissie*) also evaluates the performance of public broadcasting as a whole every five years, as well as the efforts of the individual broadcasting organizations. (For the financing of public broadcasting, see section 6.2.1.)

In 2010, public broadcasting television channels reached 50.3 percent of the Dutch population on a daily basis, staying ahead of their two main competitors: RTL Nederland reached 40.3 percent and SBS Nederland 31.3 percent.⁴⁸ In 2010, the three channels of national public broadcasting had a market share of 34.8 percent. However, for those aged 20–49, public broadcasting had a significantly lower market share of 26.8 percent in 2009.⁴⁹

In 1992, 61 percent of all households were a member of one of the broadcasting organizations. In 2004 this was down to 46 percent. The decline has been reversed since, and in 2009 the proportion of households affiliated to broadcasting organizations was 51 percent.⁵⁰ In one study, Koning et al. found that even though fewer people are now members of broadcasting organizations compared with two decades ago, in general the member base of the public broadcasting organizations has followed the general social and cultural trends in Dutch society. However, some groups—notably older and more educated citizens—are over-represented, and the membership base of broadcasting associations has not completely followed the increasing plurality of lifestyles in Dutch society.⁵¹ This has led to some concern as to whether the various broadcasting organizations still represent the population at large. Younger generations in particular, as well as foreign-born citizens

48. SKO, “Jaarraport 2010,” p. 31.

49. NPO, *Verbinden, Verrijken, Verrassen*.

50. Koning et al., “De Schuivende Achterban”; Ministry of Education, Culture and Science, “Consultatie Toekomst Landelijke Publieke Omroep” (Consultation on the Future of National Public Broadcasting), The Hague, 2010 (hereafter Ministry of Education, Culture and Science, “Consultatie Toekomst Landelijke Publieke Omroep”).

51. Koning et al., “De Schuivende Achterban.”

and the followers of the various populist movements that the Netherlands has seen in the last decade, feel unrepresented by public broadcasting.⁵²

Public broadcasting spends a little over half of its broadcasting time on information, a category that is defined very broadly. Through its diverse platforms (radio, internet, television), its news provision reaches 78.1 percent of the population. Television is the most popular news platform, with a reach of 61.4 percent of the population.⁵³ Its daily “*8 Uur Journaal*” is one of the most watched regular television programs in the Netherlands, excluding sports events. NPO has set news apart from opinion and current affairs programs. (See section 1.3.2.)

After the elections of 2010 a new minority government was formed consisting of Christian Democrats (*Christen-Democratisch Appèl*, CDA) and the conservative-liberal People’s Party for Freedom and Democracy (*Volkspartij voor Vrijheid en Democratie*, VVD), tolerated by the populist-nationalistic Freedom Party (*Partij voor de Vrijheid*, PVV). They have announced drastic cutbacks in the budget for public broadcasting, amounting to €200 million (i.e. 20–25 percent of its present budget).

There are periodic calls for the public broadcasting system to be completely reformed, on the grounds that—with its 20-plus broadcasting organizations—it is inefficient and has been superseded by social developments such as the end of social pillarization.⁵⁴ In line with this reasoning, the current government has announced that the 21 broadcasting organizations in the current system will merge into eight organizations, of which six are member-based, and two will be assigned specific tasks such as news provision.

Another point of discussion is whether public broadcasting should be restricted to audiovisual tasks, as mentioned in the coalition agreement, and what exactly that means. A member of parliament of one of the coalition partners has suggested that public broadcasters should stop publishing online news sites, as they are an unfair form of competition for newspapers (for a more detailed discussion about claims of unfair competition in the news market by public broadcasting, see section 6.2.1).⁵⁵ In a letter to parliament, the Minister of Education has downplayed this argument somewhat, stating that public broadcasting will be allowed to distribute its content online. However, she has also indicated that the number of NPO websites should be cut down.⁵⁶ The public broadcasting sector itself has stated it wants to be present on all media

52. I. Costera Meijer, “Waardevolle Journalistiek. Op Zoek Naar Kwaliteit Vanuit Het Gezichtspunt Van De Gebruiker” (Valuable Journalism. Searching for Quality from the Perspective of Users), Visitatiecommissie landelijke publieke omroep 2004-2008, “De Publieke Omroep: Het Spel, De Spelers, Het Doel. Rapport Van De Visitatiecommissie Landelijke Publieke Omroep 2004-2008” (Report of the Evaluation Committee for National Public Broadcasting 2004-2008).

53. CvdM, “Nieuwsgebruik.”

54. See for instance Jan Kuitenbrouwer, “Het Gesprek Heeft Nooit Een Kans Gehad; Publieke Omroep Slurpt Geld Op” (Het Gesprek Never Had a Chance; Public Broadcasting Consumes All Resources), *NRC Handelsblad*, 27 October 2010.

55. “De Publieke Omroep Moet Weg Van Internet, Vindt De Grootste Regeringspartij; Elf Vragen En Antwoorden” (Public Broadcasting Should Leave the Internet Alone, Says Biggest Coalition Party), *De Volkskrant*, 2 October 2009.

56. M. van Bijsterveld, “Brief Aan De Tweede Kamer, Uitvoering Regeerakkoord Onderdeel Media” (Letter to the Dutch Parliament, Execution of the Coalition Agreement on Media), Ministry of Education, Culture and Science, 2010.

platforms and transform itself from a “bulwark to a network”.⁵⁷ This means that it actively wants to engage all sorts of (civic society) organizations and organize communities around issues and themes on various platforms.⁵⁸

2.1.2 Digitization and Services

In its “concession policy plan” for 2010–2016, the NPO no longer divides the media landscape according to platforms (television, radio, internet), but along the lines of audio and video as platform-independent typologies. The main video strategy of NPO is still centered on its flagship outlets, the three main national television channels. The goal is to use these channels to draw in audiences and to refer them to additional media platforms for more in-depth or complementary programming (e.g. towards specialized theme channels or websites).

The most well-known new service provided by NPO is “Uitzending Gemist”. It is an on-demand service that is currently available online, through an iPhone application and through digital television set-top boxes. Programs broadcast during the last four to 10 days can be accessed on demand.

Public broadcasting currently offers 12 thematic video (television) channels. Four of them are focussed on news and information: Holland Doc 24 (documentaries), Geschiedenis 24 (history), Journaal 24 (news), Politiek/Sport 24 (politics and sports). There has been some discussion about the effectiveness of these channels, which are usually offered in so-called “plus-packages” through digital television providers, meaning that viewers have to pay extra to receive them. So far their reach has been modest, ranging between 4.6 and 13.5 percent of the viewing population month to month.⁵⁹ The government that took office in 2010 has decided that they are no longer to be financed through public funds.

The main public broadcasting portal (Omroep.nl) is one of the most visited websites in the Netherlands (currently in the top 30) and reaches 60 percent of the population.⁶⁰ In addition to a main portal, there are websites for each individual broadcasting association and a number of thematic portals that repackage some of the public broadcasting content, varying from Cultura (for Culture) to Gezond 24 (Health). In March 2010, NPO maintained over 1,074 different websites. The majority of these (89 percent) were websites that provided information about television or radio programming; 4 percent added extra depth or interactive modules that extended a television or radio broadcast; 7 percent provided web-only content, produced especially for online audiences.

William Valkenburg, Director of Innovation and New Media at NPO, argues that ideally public broadcasting should not just be an organization that produces audio and video, for its function is to play a role in the

57. Ministry of Education, Culture and Science, “Consultatie Toekomst Landelijke Publieke Omroep.”

58. Ministry of Education, Culture and Science, “Consultatie Toekomst Landelijke Publieke Omroep.”

59. SKO, “Jaarrapport 2010,” 2011.

60. Internet Audience Measurement (STIR), Webmeter jaaroverzicht 2010 and Marktmeter jaaroverzicht 2010 (Web statistics yearly review and Market review yearly review), Haarlem, March 2011 (hereafter STIR, Webmeter and Markmeter).

public sphere at large.⁶¹ This means that public broadcasting should provide good-quality content, collaborate with organizations and networks outside broadcasting, engage the public at large and safeguard the quality of the public debate on a variety of platforms.⁶² Examples of this new direction are an investigation NPO is currently undertaking into a joint venture between the Royal Netherlands Academy of Arts and Sciences (*Koninklijke Nederlandse Akademie van Wetenschappen*, KNAW) and the NEMO Science Center. They are collaborating to set up a portal that will make scientific research accessible and understandable to a larger public. Similarly, there is an initiative to set up a health portal together with health organizations.

Mr Valkenburg hopes that public broadcasting will be able to engage all possible media to fulfill its public functions, including productions for tablets and computer games. This could be done in private–public partnerships where commercial publishers can build upon public broadcasting television programs to develop games.

Recently, public broadcasting has experimented with several new trans-media genres. Collapsus is a trans-media story-telling project that was released together with a television documentary on energy politics.⁶³ In January 2011, the broadcaster VPRO also launched *Money & Speed*, an iPad documentary about the financial industry that made extensive use of data visualizations.⁶⁴ However, due to the upcoming budget cuts many of public broadcasting's plans for innovation and extension of its functions into new domains have come under threat.

2.1.3 Government Support

The revised Media Act of 2008 enabled public broadcasting to play a more prominent role in the digital domain. An earlier version of this law differentiated between the primary tasks (providing radio and television services) and secondary tasks (e.g. internet) of public broadcasting organizations. In 2008 this disparity was discontinued, meaning that financial resources may be allocated by public broadcasting companies to produce content especially for the internet. When public broadcasting organizations want to roll out a new digital service, permission has to be granted by the government. The CvdM and the RvC will assess applications for new services and advise the minister, who will publish her position in the state newspaper. Third parties are then given six weeks to respond.⁶⁵

2.1.4 Public Service Media and Digital Switch-over

The digitization of television so far has not led to major shifts in the reach and market shares of public broadcasting.

61. Interview with William Valkenburg, Director of Innovation and New Media at NPO, Hilversum, 23 March 2011.

62. Interview with William Valkenburg, Director of Innovation and New Media at NPO, Hilversum, 23 March 2011.

63. See <http://www.collapsus.com/press.pdf> (accessed 20 March 2011).

64. See <http://itunes.apple.com/nl/app/money-speed-inside-black-box/id411884445?mt=8> (assessed 20 March 2011).

65. See <http://www.rijksoverheid.nl/onderwerpen/omroepen/publieke-omroep/nieuwe-diensten-publieke-omroep> for a detailed description of the procedure and an overview of services that have been approved (accessed 20 March 2011).

2.2 Public Service Provision

2.2.1 Perception of Public Service Media

In general, public broadcasting in the Netherlands is trusted and valued as an independent news source. In 2009, about 75 percent of the population said it is important that there is public broadcasting provision in the Netherlands.⁶⁶ Irene Costera Meijer in her qualitative research studies has also found that the news provision of public broadcasting has a strong image and is generally trusted.⁶⁷ At the same time, public broadcasting is not immune to a more general shift in attitude as a result of which many establishment institutions in society are losing some of their credibility and authority. Whereas up to the end of the 1980s its existence and legitimacy was relatively unquestioned, public broadcasting has since then been under increasing pressure to publicly justify its function in society.⁶⁸

Amongst certain groups in society, public broadcasting has a leftist reputation. Every now and then politicians on the right claim that talk shows and current affairs programs of public broadcasting favor leftist opinions and guests. In its electoral program for the national parliamentary elections, the right-wing party PVV went so far as to call public broadcasting “the propaganda department for the multicultural society” and reproached public broadcasting for only giving voice to “*linksmensen*” (leftist people).⁶⁹ However, a study by the Netherlands News Monitor (*De Nederlandse Nieuwsmonitor*, DNN) found that most current affairs programs represent the middle of the political spectrum. There certainly is no over-representation of either leftist or rightist angles in the news.⁷⁰

2.2.2 Public Service Provision in Commercial Media

Until 1989 public broadcasting maintained a monopoly. Since then, commercial media providers have been able to apply for a license from the Media Authority. Licenses are provided for a period of five years. The Media Act of 2008 regulates commercial media and includes a number of provisions, although there are no specific obligations with regard to public service content. Commercial broadcasters do have to draw up an editorial statute regulating the journalistic rights and duties of their employees and advertising is limited to 15 percent of total air time. The Act states that 50 percent of a commercial broadcaster’s air time must be reserved for European-produced programming, of which 40 percent should be Dutch-language productions.

66. The outcomes of this study are not published publicly; NPO only refers to it in some of its official documents, such as *Nederlandse Publieke Omroep* (‘Dutch Public Broadcasting’). “Terugblik 2009 (2009 in Review).” Hilversum: Nederlandse Publieke Omroep (‘Dutch Public Broadcasting’), 2010.

67. I. Costera Meijer, *De Toekomst Van Het Nieuws* (The Future of News), Otto Cramwinckel, Amsterdam, 2006.

68. Y. De Haan and J. Bardoel, “Publieke Verantwoording of Politieke Opzet? Evaluatie Van De Eerste Visite van De Nederlandse Publieke Omroep” (Public Justification or Political Scheme? Evaluation of the First Visitation of Dutch Public Broadcasting), *Tijdschrift voor Communicatiewetenschap* 37(3) (2009), p. 197

69. PVV, “De Agenda Van Hoop En Optimisme. Een Tijd Om Te Kiezen: PVV 2010–2015” (An Agenda of Hope and Optimism. Time to Choose: PVV 2010–2015), 2010 (hereafter Freedom Party, “De Agenda”). See also the comment sections in right-leaning newspapers and weblogs, such as *Geenstijl.nl* and *Telegraaf.nl*.

70. Netherlands News Monitor (*De Nederlandse Nieuwsmonitor*, DNN), “Nieuws & Actualiteiten Op Televisie: Pluriformiteit Rond De Middenstip,” (News and Current Affairs on Television), Netherlands News Monitor, Amsterdam, 2011.

2.3 Assessments

Public broadcasting has a strong presence in the Dutch media landscape, reaching large parts of society. Many regard it as a trusted and independent news source (see section 1.3.2).

At the same time, competition from other media sources is increasing, and there is also a certain distrust of public broadcasting among some parts of the population. Public broadcasters have difficulty reaching younger generations, audiences of foreign descent and the followers of the various populist movements that the Netherlands has seen in the last decade. Younger audiences also prefer commercial news providers to public broadcasting.

Although conservative politicians regularly accuse the sector of harboring a left-wing ideological bias, several studies have found this reproach to be unjustified.

Digitization has led public broadcasting to provide its content on an increasing number of platforms. The shift from analog to digital broadcasting so far has not had a major impact on its reach or position in society.

The year 2011 may prove to be a pivotal year for the future of the sector. The most acute challenge facing public broadcasting concerns the announced cutback of around 20 percent in state funding. Several basic principles of public broadcasting are due to come under scrutiny as well. The number of member-based broadcast organizations, representing various cultural and religious movements, will be cut down to six in the near future.

While this is part of a general budgetary pullback, the cuts in the public broadcasting budget are proportionally larger than those in other policy areas. This may reflect the fact that two of the three parties in government do not wholeheartedly support public broadcasting, putting constant pressure on NPO to justify its existence. Of the three parties, CDA is most attached to the current system of member-based broadcasting associations (see footnote 42).⁷¹ The neo-liberal VVD, currently the largest party in the Netherlands, sees an important role for public broadcasting to provide information, education, arts and cultural programming of high quality. However, the provisions of public broadcasting should not be allowed to disturb market forces and should mainly be supplementary to commercial stations.⁷² PVV is known for its anti-public broadcasting rhetoric, including a manifesto promise to slash the budget of the “leftist” public broadcaster.⁷³

A linked debate centers on the functions that public broadcasting is to fulfill. Will it be limited—as some politicians would prefer—to a broadcasting institution, functioning as an audiovisual content production platform? Or will it be given a number of public functions to fulfill in the media landscape at large, engaging

71. CDA, “Slagvaardig Samen. Verkiezingsprogramma 2010–2015” (Decisive Together. Electoral Programme 2010–2015),” 2010.

72. VVD, “Orde Op Zaken. Verkiezingsprogramma 2010–2014” (Putting Affairs in Order. Electoral Programme 2010–2014),” 2010.

73. Freedom Party, “De Agenda.”

with all sorts of social organizations, staging public discussions and guaranteeing high-quality content on all platforms (and extending its reach in new media generally)? In the Netherlands, as elsewhere, the outcome is still unknown.

In its own policy plans, NPO leans to the public side of this equation. However, the current government appears to prefer to reinforce the broadcasting aspects of public broadcasting. That position runs a certain risk, especially in combination with the budget cuts that might threaten more innovative approaches to trans-media productions. Public broadcasting already has a hard time reaching younger audiences. Unless it connects to the changing media preferences of Dutch audiences, it risks marginalization.

3. Digital Media and Society

3.1 User-Generated Content (UGC)

3.1.1 UGC Overview

The top 100 websites in 2010 (based on monthly reach) include several UGC platforms.⁷⁴ YouTube and Wikipedia are in the top 10, and further down in the top 100 a number of blog platforms and forums appear, such as Blogspot.com, Web-log.nl and Wordpress.com. Web-log is a national provider which claims to host more than 200,000 active blogs.⁷⁵ Fok.nl is a news site, mostly run by volunteers, that also hosts a popular forum where all kinds of issues are discussed, from dating to recent developments in the Middle East. Further down we find a number of specialist sites, ranging from discussion forums on computer hardware (Tweakers.net) to review sites for travel destinations (Zoover.nl) and consumer products (Kieskeurig.nl).

Table 13.

Most popular websites 2010, based on monthly reach

Top 100 ranking	Site	Type
1	Google.nl	Search
2	Google.com	Search
3	Hyves.nl	Social network
4	YouTube.com	Video sharing
5	Hotmail.com	Email
6	Marktplaats.nl	Classifieds
7	Passport.net	Microsoft
8	Facebook.com	Social network
9	Ing.nl	Banking
10	Wikipedia.org	Encyclopedia

Source: JIC STIR Internet Audience Measurement, *Webmeter jaaroverzicht 2010* & *Marktmeter jaaroverzicht 2010*, Haarlem, March 2011.

74. Source: STIR, Webmeter and Marktmeter.

75. Source: <http://www.sanomadigital.nl/en-web-Adverteren-Productinformatie-web-log.nl.php> (accessed 20 March 2011).

Table 14.
Most popular UGC sites 2010, based on monthly reach

Top 100 ranking	Site	Type
4	YouTube.com	Video sharing
10	Wikipedia.org	Encyclopedia
27	Blogspot.com	Blog platform
32	Web-log.nl	Blog platform
43	Fok.nl	General forum
47	Kieskeurig.nl	Consumer reviews
50	Wordpress.com	Blog platform
74	Zoover.nl	Travel reviews
75	Photobucket.com	Photo sharing
77	Flickr.com	Photo sharing
93	Smulweb.nl	Recipe sharing
95	Tweakers.net	Computer forum
97	Blog.nl	Blogplatform

Source: JIC STIR Internet Audience Measurement, *Webmeter jaaroverzicht 2010* & *Marktmeter jaaroverzicht 2010*, Haarlem, March 2011.

When we look at audience attitudes towards UGC, a list of user typologies by Forrester Research is a valuable tool.⁷⁶ Forrester has divided the online population into a number of overlapping profiles it calls social technographics, describing different activities undertaken online. In 2010, it found that 19 percent of Dutch web users belong to the category of “creators”, those who actively upload videos or write blogs, etc.; 39 percent are “conversationalists”, those who regularly update their status on social networks; 22 percent are “critics”, those who rate, comment on or contribute to content provided by others; 9 percent are “collectors”, those who assemble and/or share blog-rolls, link collections, bookmarks and so forth; 47 percent are “joiners”, those who joined and visit social networks without actively contributing; 66 percent are “spectators”, those who passively consume UGC content; and 21 percent are inactive with regard to UGC sites.

There is considerable overlap between these groups, but the data do suggest that, although quite a large part of the population is confronted with UGC in one way or another, most use it passively, with a smaller number of active contributors: around 20 percent actively create content, and around 40 percent take part in online conversations.

By 2011, almost all news organizations had incorporated at least some aspect of UGC into their websites, varying from polls and comments to the opportunity for readers to publish their blogs or send in pictures.⁷⁷

76. Forrester’s European Technographics Benchmark Survey, Base: 2,063 Dutch adult internet users, 2010.

77. For an overview of UGC on Dutch news sites, see Emiel van Oers and Alexander Pleijter, “User Generated Content. Lezers Spreken Een Woordje Mee Op Nederlandse Nieuwssites,” (User Generated Content. Readers are becoming writers on Dutch News Websites), *De Nieuwe Pers* 1(2) (2011), pp. 8–13.

However, recent years have seen some shifts in the use of UGC at news organizations. Whereas initially users were given a platform to express themselves almost without restrictions, at some news organizations journalists are now taking a more central role in the organization and moderation of UGC. In general, examples of crowd-sourced journalism, where readers contribute new information or points of view to the original article, work best on niche sites that attract audiences with specific interests and knowledge.⁷⁸ However, a number of experiments at mass media such as newspapers turned out somewhat disappointing. Journalists liked citizens contributing fresh angles to the news, but were often disappointed by the quality. For citizens, their main goal was usually not to work according to professional journalist standards, but rather to be involved in the local community. Another disappointment was that the general audience often remained unfamiliar with these initiatives.⁷⁹ By 2011 flagship projects such as the regional Dorpsleinen (set up by Wegener) and Volkskrant Blogs (initiated by *De Volkskrant*) had been discontinued or divested.

Similarly, the practice of commenting has recently been re-evaluated by a number of news organizations. For instance, “Nova,” a PSB current affairs television program, decided in May 2010 to disable the comment function on their website because of the disappointing quality of the discussion. “It has turned out that a freely accessible discussion platform is not the best way to achieve a meaningful exchange of opinions,” the editors wrote when closing down the forum.⁸⁰ *De Volkskrant* has recently started moderating the comments in its opinion section.

Recently some publishers have started a series of new initiatives that aim to actively engage readers at a local level. The most prominent of these is the “hyper-local” project Dichtbij.nl⁸¹ (Nearby), managed by the Telegraaf Media Group (*Telegraaf Media Groep*, TMG). Editions of Dichtbij.nl have been rolled out in several cities. These local subsites are headed by a community manager who is not a journalist in the traditional sense. Their role is to spur debate and news provision by readers themselves, for instance by using social media to trace discussions about local issues and trying to engage their authors. These projects were launched very recently and it is too early to tell whether they will be successful.

3.1.2 Social Networks

Social networks have become extremely popular over the last few years, especially among younger audiences. For several years, Hyves.nl, a Dutch company, has had the largest social network. In 2009, almost 90 percent of 16–25-year-old internet users had an account at Hyves. Figures released by the social network in April 2011 show that its users spend around 260 minutes a month on its website, outperforming sites such as YouTube

78. Council for Social Development (Raad voor Maatschappelijke Ontwikkeling, RMO), “Internetlogica” (Internet Logic), RMO, The Hague, 2011 (hereafter RMO, “Internetlogica”).

79. I. Costera Meijer and J. Arendsen, “Succesvolle Participatieve Journalistiek: Faciliteren in Plaats Van Reguleren” (Successful Participatory Journalism: Facilitating Rather Than Regulating), available at <http://www.denieuwewereporter.nl/> (accessed 20 March 2011).

80. Editorial staff, Nova, “Niet Meer Reageren Op De Nova-Site” (No More Commenting on Nova-Website), available at <http://www.novatv.nl/page/detailreacties/opinie/11693/Niet%20meer%20reageren%20op%20de%20NOVA-site> (accessed 20 March 2011).

81. See <http://www.dichtbij.nl/over.php> (accessed 20 March 2011).

and Nu.nl (the most popular news site in the Netherlands).⁸² Since 2009, the network has faced rising international competition. Facebook has increased in popularity to become the second most popular social network. LinkedIn is popular with professionals, attracting more than 3 million users a month. Although Twitter is much discussed in the mainstream media, the actual number of users still lags behind Facebook and Hyves.

Table 15.
Social media use in the Netherlands, Aged 15+, March 2011

	Total unique visitors per month (million)	Average daily visitors (million)	Average minutes per visitor per month
Hyves	7.643	2.827	259.5
Facebook	6.556	1.835	109.6
Twitter	3.207	520	20.3
LinkedIn	3.118	461	27.7

Source: Comscore, published on <http://www.yme.nl/ymerce/2011/04/14/social-media-in-nederland-in-cijfers-deel-7/>

3.1.3 News in Social Media

News organizations have embraced social networks in at least two different ways. First, they are using it as a distribution channel and as a way to connect with their audiences. Second, social networks are increasingly used as a news source. Most newspapers, broadcast associations and news programs have Twitter accounts and dedicated pages on Facebook or Hyves. Twitter is also used by some individual journalists. The tables below give an indication of the activity of news organizations on social networks.

Table 16.
News organizations on Hyves

Organization	Category	Number of fans
RTL	Television news	180,000
<i>De Pers</i>	Free newspaper	21,750
<i>De Telegraaf</i>	Newspaper	121,328
<i>Spits</i>	Free newspaper	92,890
<i>Metro</i>	Free newspaper	84,011
AD	Newspaper	80,715
<i>De Volkskrant</i>	Newspaper	45,484
<i>NRC Next</i>	Newspaper	21,467
Nos Headlines	Public broadcaster	5,779
Nos Net	Public broadcaster	2,859

Source: Data collected from information on Hyves.nl, 28 February 2011.

82. Figures measured by comScore.com, available at <http://www.yme.nl/ymerce/2010/12/15/social-media-in-nederland-in-cijfers-deel-6/> (accessed 22 March 2011).

Table 17.

News organizations on Twitter

Organization	Category	Total followers	Total tweets
Nu.nl	Internet news	57,525	44,399
Teletekst	Public broadcasting	26,938	31,408
<i>NRC Next</i>	Newspaper	25,994	5,746
<i>De Telegraaf</i>	Newspaper	21,980	225,767
RTL Nieuws	Television news	19,493	43,105
<i>NRC</i>	Newspaper	13,164	35,803
<i>De Volkskrant</i>	Newspaper	12,724	91,552

Source: Data collected from information on Twitter, 28 February 2011.

Social networks are becoming an increasingly important driver of traffic to news websites. Currently it is estimated that 10–15 percent of all visits to the website of *De Volkskrant* stem from referrals (either by news organizations themselves or by readers) on social media networks. In 2012, social networks look set to overtake Google as the most important source of referrals.⁸³

Social networks are also used to engage audiences. For instance, journalists at *De Volkskrant* are encouraged to express themselves through social media such as Twitter. The goal is not to disclose personal stories, but rather to write about their work and area of expertise. This way they can establish themselves as an authority in a particular subject area and connect with communities of people that are interested in that topic. It also allows them to interact with readers, ask them for input, or use the social network to hunt for possible sources for their stories. Readers are also encouraged to share stories by *De Volkskrant* authors within their own networks.⁸⁴

NOS Nieuws, the PSB news service, also tries to be more transparent in their news provision, by explaining editorial choices through—among others—weblogs and Twitter accounts. It is also currently setting up a nationwide (digital) network of contacts with different professions and of various political and social backgrounds. This network is used to stay in touch with citizens and engage them with their output. Journalists can check the network for input into their stories, or to corroborate institutional or company press releases with the everyday reality experienced on the shop floor.⁸⁵ This enables journalists to put out their social antennae, without giving up their central role of evaluating and comparing contributions.

Step by step, news organizations are increasing their use of social media as a news source. Journalists are increasingly following the twitter stream of regular sources, particularly politicians. In addition, journalists are using social media to research general sentiments and current issues in society. Marc Schreuder, deputy

83. Interview with Heleen van Lier, Social Media Editor at *De Volkskrant*, Amsterdam, 25 February 2011.

84. Interview with Heleen van Lier, Social Media Editor at *De Volkskrant*, Amsterdam, 25 February 2011.

85. Interview with Giselle van Cann, deputy editor in chief at NOS Nieuws, Hilversum, 8 March 2011.

editor of the television newscast “*RTL Nieuws*”, has found that his editors often start the day with checking feeds and trending topics on social networks, just like they have always checked the feeds from several press services. It is a way to quickly get a sense of what Dutch people are talking about, and these insights are useful in compiling the newscast.⁸⁶ Twitter contributions have also started to show up in news articles in place of traditional vox pop interviews on the street, and a few newspapers and magazines have a tweet of the day feature. On some occasions—such as the coverage of election night—tweets are broadcast along an on-screen banner, or read aloud by the program presenters. In this way, the reactions of both prominent politicians and lay people are incorporated in the broadcast (see section 4.4). It is not uncommon for many conventional news providers to publish Twitter streams of eyewitnesses on their websites when breaking news occurs. For instance, during the earthquake in Japan in March 2011, the website of *De Telegraaf* published a live stream of tweets by a Dutch celebrity who happened to be in Japan. As a consequence, Twitter is slowly turning into a feedback channel for society. Although only a small part of the population uses the network, the impact of certain contributors is felt beyond the Twitter-sphere itself.

We have not found any studies measuring the total contribution of UGC and social media to news provision and the public debate. But a cursory view suggests that the overwhelming majority of content on UGC websites and social media platforms has nothing to do with news. Nor should that be expected. Many sites are simply devoted to hobbies, humor, sex, specialist issues or everyday conversation, and they are the domain of personal expression and identity politics rather than that of an organized democratic debate.

That does not mean that UGC and social media do not play any role in public debates. For instance, some small-scale news initiatives—often at a local level—have emerged. In some cities residents have used the web to start their own local news organizations, with various rates of success and various approaches to journalism. And on many web forums political issues are regularly—and often vehemently—discussed.

3.2 Digital Activism

3.2.1 Digital Platforms and Civil Society Activism

From the early 1990s onwards, there has been a wide variety of online platforms and initiatives, many based in Amsterdam, focussed on facilitating civil society activism in the Netherlands. Efforts to stimulate the development of online platforms for civil activism obtained institutional backing with the establishment of Waag Society, Virtueel Platform and the Digitale Pioniers program.⁸⁷ The latter has been especially important in stimulating institutional forms of civil activism. Between 2002 and 2010 it has supported 211 non-profit start-up ventures. This program, which aims to further plural debate, social inclusion and open-source technology, was the result of a close collaboration between the think-tank Kennisland (Kennisland) and the Ministry of Education, Culture and Science.

86. Interview with Marc Schreuder, deputy editor in chief at RTL Nieuws, Hilversum, 23 March 2011.

87. N. Timmermans and K. Moerbeek, “The State of Social Media,” Kennisland, Amsterdam, 2011 (hereafter Timmermans and Moerbeek, “The State of Social Media”).

One of the most successful ventures that resulted from this program is Petities.nl, which allows users to start a petition about a matter of general concern. The most prominent organization supported by Digitale Pioniers is Maroc.nl, an online platform for Moroccan immigrants, aimed at contributing to the integration of this group into Dutch society.⁸⁸

At the time of writing, the future of some of these institutions and initiatives is far from assured. Organizations such as the Waag Society and Virtueel Platform derive a large part of their income from public subsidies. These are in jeopardy as the Dutch government plans to severely cut investment in the cultural sector from 2013 onwards.⁸⁹ All structural subsidies for e-culture institutions will be completely cut from 2013 onwards. Besides these institutional forms of civil society activism, there have also been important bottom-up initiatives, which have especially been aimed at counterbalancing mainstream news reporting. Two particularly prominent alternative platforms are Indymedia.nl and the Video Journalism (VJ) Movement, which are both part of global networks. The VJ Movement, which has its headquarters in The Hague, is a collaboration of more than 150 professional journalists and cartoonists from almost 100 countries. These journalists work together under the slogan “There is more than one truth”, which “means offering different perspectives on a story and letting you, the user, decide”⁹⁰ (www.vjmovement.com). Indymedia.nl is especially used by left-wing activists for reporting about protest activities concerning squatting, animal rights, antimilitarism and anti-racism, among other topics. It explicitly aims to contribute to the diversity of critical media voices.⁹¹

Finally, it is important to note that popular social media platforms such as Facebook, Hyves and Twitter are increasingly used in the Netherlands for political activism. In particular, high-school and university students use these platforms to coordinate and communicate their protest activities. For example, in January 2011, when a student demonstration was organized in The Hague against government cuts in higher education, more than 10,000 students indicated in advance through Facebook that they would join the demonstration. Moreover, Twitter, through the hashtags #kenniscrisis (knowledge crisis) and #studentenprotest (student protest), was heavily used to report about the demonstration and express discontent over the proposed cuts.⁹²

3.2.2 The Importance of Digital Mobilizations

At first sight, the relevance of online civic activism appears self-evident. Some of the recent student protests, promoted through Facebook and Twitter, drew thousands of demonstrators and received mainstream media attention. Another example in which social media have had a large impact is the 2009 counter-campaign against government efforts to vaccinate young girls against cervical cancer. The orchestrated counter-campaign

88. Timmermans and Moerbeek, “The State of Social Media.”

89. “Dossier Bezuinigingen”, available at http://www.cultuurbeleid.nl/index.php?option=com_tag&task=tag&tag=Bezuinigingen (accessed 22 March 2011).

90. <http://www.vjmovement.com/about> (accessed 6 May 2011).

91. “Een korte inleiding over Indymedia NL,” available at <http://www.indymedia.nl/nl/static/help.intro.shtml> (accessed 18 March 2011).

92. Heleen van Lier, “Uitgelicht,” *De Volkskrant*, 21 January 2011. See also L. van der Does, “Demonstreren: Wat Doet Ons De Straat Op Gaan? (Protesting: What Makes Us Take to the Streets?)” *Het Parool*, 11 April 2009.

by concerned citizens on social network sites and web forums put a negative spin on the government's vaccination program, which ultimately had a disappointing response rate of less than 50 percent.⁹³

While there thus have been some examples in which large groups of people have been mobilized for a particular cause, a researcher, Chris Aalberts, cautions that the commitment of those mobilized through social media is often minimal. In his research on the political activity of Hyves members, he found that they often join the *hyves* (pages) of organizations, issues or politicians, but after this initial act there is little follow-up. Mr Aalberts emphasizes that the availability of new communication technologies does not change the motivation of citizens in itself. Technologies might be used to mobilize people, but if they are not motivated to take part in a demonstration in the first place, technology will do little to change this by itself.⁹⁴

One of the main problems of smaller online activist projects is resource constraints. The 2010 report *State of Social Media*, which concluded the Digitale Pioniers program, maintained that it “is a major struggle to find a working ‘business model’ for open governance initiatives.”⁹⁵ (These are initiatives that try to enhance the transparency of government, and facilitate citizen participation in social and political life.) In fact, a substantial number of the 211 non-profit start-up ventures funded by the Digitale Pioniers program are no longer operative.

Of the more institutionalized civil society projects, Petities.nl has had a particularly broad impact in terms of reach. It is currently hosting several petitions that have been signed by more than 100,000 people. The most popular petition, which aims to lower the age for standard breast cancer check-ups, has received 370,000 signatures. As a result of this success, Petities.nl is also gaining mainstream media attention. The site has been mentioned in 58 national newspaper articles over recent years.⁹⁶ Moreover, particular petitions have also featured in various public television programs.

The relationship between civil society activism and conventional media provides a useful tool in discerning the former's broader societal impact. In fact, Reinder Rustema, founder of Petities.nl, has suggested that attention in mainstream media is still a prerequisite for ultimately successful online petitions.⁹⁷ While online civic platforms have become increasingly important sources for mainstream journalism, the latter still functions as an interface to put issues that have been addressed through online activism on to the broader public agenda. For instance, activist websites like Indymedia.nl have not succeeded in growing into alternative news sources that reach large audiences, even though professional journalists are following them. Journalists interviewed for this research project emphasized that they are particularly careful when using these platforms as sources. A journalist from the newspaper *De Telegraaf*, for example, maintains that while he has used Indymedia.nl in

93. A year later, officials revised their campaign and were more aware of the role of chatsites and social networks. The official campaign site now also shows up higher in Google. Frank Hermans, “Informatiecampagne Vooroordelen Bestrijden Rondom Inenting Tegen Baarmoederhalskanker—Offensief Voor Hoge Opkomst Inenting” (Fighting the Prejudices against Cervical Cancer Vaccination), *De Gelderlander*, 13 October 2010.

94. Interview with Chris Aalberts, researcher and lecturer on politics and citizenship, Amsterdam, 11 March 2011.

95. See <http://www.digitalepioniers.nl/ssms/> (accessed 12 October 2011).

96. Query for “Petities.nl” on LexisNexis *Academic NL* for National Newspapers, 2005–2011.

97. Interview with Reinder Rustema, founder of Petities.nl, Amsterdam, 8 March 2011.

the past, he would be hesitant to directly quote from the site, as the identity of the contributors is often not revealed.⁹⁸ Furthermore, one of the executive editors from the General Press Agency (*Algemeen Persbureau*, ANP) argues, for example, that Indymedia and other activist sites are “useful to contextualize protests, but they are too ideologically colored to be used directly by ANP”. Instead, ANP along with other conventional news organizations uses these sites for background research, and to get into contact with particular groups of demonstrators.⁹⁹

Taken together, even though there are clear signs that online civic activism has a broader societal influence, the established structures of public communication have certainly not been overturned. Rather, a complex media ecology is emerging, in which the wide variety of online platforms often influence the larger public and the core political institutions in indirect ways through experimental projects, policy advice, research and, most importantly, the mainstream press.

3.3 Assessments

The rise of UGC and social networking websites has changed the dynamics of both news provision and public debates. News organizations have embraced several forms of UGC and social networking, which they use to distribute their content, build up relations with audiences and ask their readers for information (although specific approaches vary from organization to organization). Social networks are also used to get a sense of what issues people are currently debating, or to find out how people in specific groups (such as migrant youths) are thinking about particular issues. Twitter is emerging as the feedback channel of society. It is used both by elite news sources such as politicians as well as lay persons to voice their opinions on current affairs. Increasingly these expressions find their way into news stories in newspapers and television news broadcasts as vox pop contributions.

More broadly, we are witnessing an explosion in the number of platforms through which people can express their opinions, interests and observations. The mainstream press has in this sense lost its monopoly as the moderator and guardian of public debate. As such, an intricate media ecology has emerged, reflecting the dynamic relationship between new and traditional forms of journalism. Much of the debate on UGC sites and social network sites revolves around issues brought up by the mainstream press. At the same time, journalists monitor these networks in search of new angles and issues to address.

We have also seen a number of examples of mobilization through social networks and, in particular, Twitter. Both through and alongside these, there are a large number of online initiatives that enable people to organize themselves around specific issues and get their voices heard. Institutional organizations in the Netherlands often play a stimulating role in these online structures.

98. Interview with an editor of *De Telegraaf*, Amsterdam, 26 June 2009.

99. Interview with an executive editor of ANP, Rijswijk, 22 June 2009.

However, there is some doubt about the commitment of social media activists. Similarly it is a challenge to make the institutional interventions sustainable. Interesting experiments abound, but it has proven hard to set up projects that surpass the fleeting character of most internet activism.

4. Digital Media and Journalism

4.1 Impact on Journalists and Newsrooms

4.1.1 Journalists

The Dutch Association of Journalists (*Nederlandse Vereniging van Journalisten*, NVJ) estimates there are about 15,000 professional journalists in the Netherlands.¹⁰⁰ However, the Brinkman Commission, researching the challenges for newspaper publishing in the Netherlands, reported a “significant” loss of journalism jobs in the last five years.¹⁰¹ The NVJ estimates that between 600 and 700 editorial positions at national and regional newspapers were axed in the same period, representing about 25 percent of the total. The rates freelancers charge for their work has also come under severe pressure, making it increasingly difficult to make a living from journalism alone. Many freelancers now work as commercial copy-writers or provide PR services on the side.

The editorial cuts have been accompanied by a development that Frank van Vree and Mirjam Prenger have called the “commodification of the news.” By this they mean a tendency to see news as “content” that is to be monetized on an information market, rather than as having a public value in itself.¹⁰² A recent example is “Lux,” a new lifestyle weekend section at *NRC Handelsblad*. According to Rob Wijnberg, editor-in-chief of *NRC Next*, a spin-off of *NRC Handelsblad*, the main goal of this new section is to attract advertisers such as Louis Vuitton and Rolex, who prefer lifestyle stories as an environment for their ads. Seeing this as evidence of the growing influence of advertisers, Mr Wijnberg indicates that he seeks to counter this trend, and is investigating the feasibility of an ad-free newspaper.¹⁰³

100. Thomas Bruning, secretary general at the NVJ, telephone interview 4 March 2011. See also Mirjam Prenger, Leender van der Valk, Frank van Vree and Laura van der Wal, *Gevaarlijk Spel. De Verhouding Tussen Pr & Voorlichting En Journalistiek*. (Dangerous Liaisons. The Relations between PR & Journalism), 2011 (Diemen: AMB) (hereafter Prenger et al., *Gevaarlijk Spel*).

101. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie.”

102. Frank van Vree and Mirjam Prenger, *Schuivende Grenzen. De Vrijheid Van De Journalist in Een Veranderend Medialandschap* (Shifting Boundaries. The Freedom of Journalists in a Changing Media Landscape), NVJ / Prometheus, Amsterdam, 2004, p. 16 (hereafter Vree and Prenger, *Schuivende Grenzen*).

103. Interview with Rob Wijnberg, editor-in-chief at *NRC Next*, Rotterdam, 22 March 2011.

Not only is the relation with advertisers changing, but so too is the interaction between journalists and the public relations departments of companies and governments. The public relations industry has professionalized and there are now at least three times and perhaps ten times as many PR officials compared with journalists in the Netherlands.¹⁰⁴ In 2011, Prenger et al. counted more than 150,000 communication professionals in the Netherlands—excluding marketing and advertising employees. This figure had doubled over the previous ten years.¹⁰⁵ Not all of them are working directly with the press, but there is a legitimate concern that they have a significant influence over the agenda setting and framing of some news stories.¹⁰⁶ Various journalists interviewed for this research complained about the growing power of PR. It has, among other things, become increasingly more difficult for journalists to make contact with relevant civil servants without involving press officers.¹⁰⁷

In the newsroom, digitization has also led to significant changes, with perhaps the most important being the waning of once-a-day deadlines. Almost all news organizations today publish their news on a continuous basis. Newspapers like *NRC Handelsblad* and *De Volkskrant* have added live blogs to the homepages of their websites. Using tools such as Coveritlive and Storify, editors provide live updates of breaking news events. Some journalists maintain that although institutions have changed their formats, many mid- or late-career journalists still have not adjusted to this new work rhythm.¹⁰⁸ Mr Wijnberg says he is trying to find a new equilibrium between web and print. The website is the platform for news and continuous updates which allow readers to witness live events while they are unfolding. The newspaper—either in print or in a digital version—is a daily summary of the news with a focus on context and in-depth articles.

According to some, the developments described above have led to a decrease in the quality of news. The NVJ's Secretary General, Thomas Bruning, is especially worried about the quality of local journalism. Mergers of local newspapers have left some major towns without a paper. Many local authorities are no longer routinely covered by the press at all. This has been compensated for by an increase in third-party content that is no longer critically treated, such as press releases. In conjunction with the decreasing rates for freelancers, this has led to a situation where “probably the same journalists are still writing the paper, however no longer as journalists, but rather in their newly found roles as PR officers sending out press releases.”¹⁰⁹

On a national level, the Media Authority and the Netherlands News Monitor (*De Nederlandse Nieuwsmonitor*, DNN) have found that Dutch newspapers increasingly rely on stories published by press services such as the Netherlands National News Agency (*Algemeen Nederlands Persbureau*, ANP). In 2008, on average 27.6 percent of all newspaper stories directly or indirectly originated with ANP, up from 23.9 percent two years

104. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie.” See also Prenger et al., *Gevaarlijk Spel; De Verhouding Tussen Pr & Voorlichting En Journalistiek*. (*Dangerous Liaisons. The Relations between Pr & Journalism*).

105. Prenger et al., *Gevaarlijk Spel*.

106. This point was first made in Vree and Prenger, *Schuivende Grenzen*, and later elaborated upon in Scientific Council for Government Policy (Wetenschappelijke Raad voor het Regeringsbeleid, “Focus Op Functies. Uitdagingen Voor Een Toekomstbestendig Mediabeleid. (“Focus on Functions. The Challenges for a Future-Proof Media Policy”).”

107. Interview with editor of *NRC Handelsblad*, Rotterdam, 19 June 2009.

108. Interview with Bart Brouwers, editor in chief of *Dichtbij.nl* at TMG, Amsterdam, 25 February 2011.

109. Thomas Bruning, secretary general at the NVJ, telephone interview 4 March 2011. See also NVJ, “Brief Aan De Minister Van Onderwijs, Cultuur En Wetenschap” (Letter to the Minister of Education, Culture and Science), Amsterdam 2011.

earlier. The increasing importance of the ANP as a news source does not necessarily mean an increase in unchecked news stories. Wire services themselves employ journalists who act critically and in many of these instances newspaper journalists also check the stories or add information themselves. However, it does mean that an increasingly high proportion of the news—even across various titles and publishers—is originating from a single source.¹¹⁰

According to Frank van Vree, professor of journalism and culture in the department of media studies at the University of Amsterdam, the overall effects of the changes in the media landscape are mixed. Especially at a local level, independent news provision is structurally undermined. Yet taken as a whole, the Dutch media landscape still offers a reasonable quality of news, current affairs and opinion. But he, too, is concerned about the changing position and independence of journalists, who have to work in a media landscape that is increasingly commoditized and where the influence of the PR industry is on the rise.¹¹¹

4.1.2 Ethics

According to some observers, the professional codes of journalism are equally under pressure.¹¹² In some genres of journalism (for instance travel journalism in the good-quality newspapers or on some news blogs), the traditional divide between editorial and commercial departments has been slackening. This does not always mean that journalists can no longer work independently, but it is a development that carries a degree of ethical risk. Although there is no sign that there is an increase in outright corruption in journalism, according to Van Vree and Prenger there is a tendency that journalists in their urge to get access to a scoop sometimes act as “willing horses” for the PR industry and commercial players.¹¹³

Decreasing revenues for local media have in some cases led to local or provincial governments stepping in to support the sector financially. In some incidental cases this has led to officials expecting positive coverage of local governments in return for financial assistance. Jan van Cuilenburg, commissioner at the CvdM, does not consider that this has so far had an impact on coverage: “There is a strong tradition of journalists wanting to be independent, and when this happens, you will find them complaining rather quickly and effectively.”¹¹⁴

While it is difficult to assess how far digitization is responsible in the developments above, many of them seem directly or indirectly related to the rise of new media. The commodification of the news, the cutbacks in jobs and the increase of local government funding are all a result of the decrease in traditional revenues. Subscription revenues have decreased, partly because of the advent of (free) news alternatives online.

110. Otto Scholten and Nel Ruigrok, “Nieuwsmonitor 2009; Bronnen in Het Nieuws: Een Onderzoek Naar ANP-Berichten in Nieuws En Achtergrondinformatie in Nederlandse Dagbladen 2006–2008” (Newsmonitor 2009. News Sources: Study of ANP-Stories in Dutch Newspapers 2006–2008), CvdM, Hilversum, 2009.

111. Frank van Vree, professor of Journalism and Culture in the Department of Media Studies at the University of Amsterdam, email interview 16 March 2011.

112. For instance, as formulated by the NVJ in their “Journalism Code of Ethics,” available at <http://www.villamedia.nl/journalist/n/2008.07.code.shtm> (accessed 22 March 2011).

113. Vree and Prenger, *Schuivende Grenzen*, p. 125.

114. Interview Jan van Cuilenburg, Commissioner, CvdM, Hilversum, 3 March 2011.

Advertising revenue is under pressure, partially because advertisers also have alternatives, such as specialized websites for classified advertising. The increase in (digital and online) media channels has also increased the power of PR departments, who now have more channels to choose from for their messages. In addition, digital media gives them potentially a direct channel to the audience as well. This also means that the function of newspapers is changing. They are no longer the sole intermediary between newsmakers and the public, or the guardians of the public sphere, a development that was also examined in section 3.

4.2 Investigative Journalism

4.2.1 Opportunities

One of the great promises of the digital era is the opportunity for journalists and citizens to get access to all sorts of databases, which can open investigative doors and lead to new insights. In the Netherlands, this discipline of data journalism is still in its infancy. There are some initiatives, both by traditional journalist organizations as well as by citizens, but it is not currently a major force within the sector. According to some, data journalism is hard to do and costly. It requires a team that combines a number of competencies: from harvesting data, analyzing it and asking the right questions, to presenting the findings and making them accessible in attractive ways.¹¹⁵ There is the promise that perhaps some of the analysis of data can be crowd-sourced, but also the organization of such a process is no sinecure.

The advance of data journalism is partly hampered by the reluctance of some government agencies to provide access to their databases.¹¹⁶ Henk van Ess, chairman of the Association of Investigative Journalists (*Vereniging van Onderzoeksjournalisten*, VVOJ), considers that the debate on the availability of data is a pivotal one and that governments need to make their data available through open protocols that are easily and universally accessible.¹¹⁷

4.2.2 Threats

In general, editorial budgets are under pressure, and this certainly has consequences for costly forms of journalism such as investigative reporting. Some news organizations, however, have actively declared an intention to counter this trend. When *NRC Handelsblad* changed format from broadsheet to tabloid in March 2011, they promised to dedicate more of their columns in the weekend edition to investigative journalism.¹¹⁸ Similarly Nu.nl, an online news service, has announced it wants to broaden its scope beyond publishing wire stories. Ms van Cann says the NOS still highly values investigative journalism. They currently have three

115. Interview with Henk van Ess, chairman of the VVOJ, Amsterdam, 15 March 2011.

116. This reluctance is not found in all government organizations; attitudes vary widely within and between different agencies. A number of government organizations are also concerned with open data. See for instance <http://www.overheid.nl/opendata/> (accessed 20 June 2011). Yet not all government officials see the use or urgency of making data available. At the same time, government agencies sometimes find themselves torn between the ideal of transparency and a culture of preventing liabilities.

117. Interview with Henk van Ess, chairman of the VVOJ, Amsterdam, 15 March 2011.

118. Nico Postma, "Handelsblad Vanaf Maandag Op Tabloid" (Starting Monday, NRC Handelsblad will appear in tabloid), ANP, Rijswijk, 2011. See also the weblog of editor in chief Peter Vandermeersch at <http://weblogs.nrc.nl/hoofdredacteur/> (accessed 22 March 2011).

full-time positions dedicated to investigative journalism projects.¹¹⁹ *RTL Nieuws* also has five or six editorial positions devoted to research journalism.¹²⁰

At the same time, the NVJ has found that overall resources for investigative journalism have been on the decline. They urge the government to take account of this trend in its media policy, for instance by providing tax-deductibles for research journalism, or by increasing its contribution to the Fund for Special Journalistic Projects (*Fonds Bijzondere Journalistieke Projecten*, FBJP).¹²¹ Mr van Ess also has a strong impression that budgets and time available for investigative journalism are decreasing.¹²² This has led the VVOJ to contemplate establishing an independent foundation (along the lines of US examples Pro Publica and the Center for Public Integrity).¹²³ The goal is to fund investigative journalism that is vital for the democratic process through such an organization, while publishing the results through the traditional press.¹²⁴

4.2.3 New Platforms

The contribution of the Dutch blogosphere to investigative journalism is relatively modest. There is no lack of UGC (see section 3.1), and there are some theme-based blogs (for instance Foodlog.nl) that provide in-depth discussion on specialist issues. Every once in a while they succeed in getting broad attention for some of the issues they have addressed. Increasingly, blogs are also cited in newspapers. For instance, on its editorial pages, *De Volkskrant* has a section that provides quotes on current issues from other media. Often these are quotes from international newspapers, but sometimes also Dutch (or international) weblogs are quoted. Yet there are few successes in the vein of US campaigning news sites such as Huffingtonpost.com, Moveon.org, or other widely influential political blogs.

The exception is the weblog *Geenstijl.nl*, now part of the TMG. *Geenstijl.nl* was founded in 2003 by a group of journalists and hackers. Although this weblog became known for its uncompromising coverage of politics by breaking regular journalistic conventions (see section 4.4 for more on this), on some occasions it has also made use of its community of readers to address issues of corruption and abuse of power. For instance, together with its readers, *GeenStijl.nl* has composed a “black book of higher education”. When the website claimed that the standards of education at several institutions were not up to par, it asked readers to report abuses at their particular colleges. These were then collected in a document that was published on the site.¹²⁵

Another weblog that has made a contribution to investigative journalism is *Sargasso.nl*. *Sargasso* was founded in 2001 and could be placed at the liberal/progressive end of the political spectrum. It has experimented with

119. Interview with Giselle van Cann, deputy editor-in-chief at NOS Nieuws, Hilversum, 8 March 2011.

120. Interview with Marc Schreuder, deputy editor in chief, RTL Nieuws, Hilversum, 23 March 2011.

121. Telephone interview with Thomas Bruning, secretary general at the NVJ, 4 March 2011.

122. Interview with Henk van Ess, chairman of the VVOJ, Amsterdam, 15 March 2011.

123. See <http://www.publicintegrity.org/>, and <http://www.propublica.org/> (accessed 22 March 20).

124. Interview with Henk van Ess, chairman of the VVOJ, Amsterdam, 15 March 2011.

125. Bert Brussen, “Hbo-Gate (Slot): Het Zwartboek (Higher Education-Gate: Blackbook),” at *Geenstijl.nl*, 2010. Available at http://www.geenstijl.nl/mt/archieven/2010/07/hbogate_het_zwartboek_slot.html (accessed 14 April 2011).

several forms of data journalism (for instance, analyzing large databases and document flows of institutions like the EU). Its editors are especially interested in engaging communities of experts in certain fields of public and political debate. They have succeeded in placing a number of issues on the political agenda or adding depth to existing discussions.¹²⁶ The hard part for weblogs like Sargasso is to get the credit for its contributions to the general debate, according to Stephan Okhuijsen, one of the website's editors. Often, mainstream media will simply report on issues that had surfaced on Sargasso without referring to the site itself as a source. This also makes it hard to quantify the exact influence of investigative journalism done by weblogs.

4.2.4 Dissemination and Impact

A possible advantage of digitization for some investigative journalism projects could be that mass media and niche media can be combined in a dynamic way. A feature story about a general trend can be personalized online by making a database available that can show the personal consequences of this trend for individual readers or viewers. For instance, *De Volkskrant* newspaper has assembled and analyzed the evaluation reports of Dutch nursing homes. This has led to a number of stories in the newspaper describing general trends and issues. Online readers can access reports for all individual nursing homes, thus finding the data that are directly relevant to them. This approach is promising, but also still in its infancy.¹²⁷

A last development is crowd-funding and crowd-sourcing. Both could—again, theoretically—be used to engage readers with projects and enable them to contribute to the investigation. There are some experiments in this field and some individual journalists have set up crowd-funding campaigns.¹²⁸ In March 2011, Nieuwspost.nl was launched, a Dutch crowd-funding site for journalism that somewhat resembles initiatives like Spot.us. Again, it is too early to report any major breakthroughs or failures in these emerging formats.

4.3 Social and Cultural Diversity

4.3.1 Sensitive Issues

One of the most sensitive issues is the position of cultural and religious minorities. The rights and duties of Muslims are a particular and persistent focus of public debate. This should be seen against a background of several decades of multiculturalist politics in the Netherlands. In the 1970s and 1980s, the Dutch government, particularly at the local level, developed a multiculturalist approach to the integration and emancipation of ethnic minorities focused on “integration, with retention of cultural identity”.¹²⁹

126. See <http://sargasso.nl/archief/2005/04/05/daily-dose-of-eu-constitution-cyclus/> (accessed 14 April 2011).

127. Interview with Henk van Ess, chairman of the VVOJ, Amsterdam, 15 March 2011.

128. For instance, the journalist Olaf Koens used social media to gather funds for a research trip to Azerbaijan, see <http://www.denieuwreporter.nl/2010/12/crowdfunded-op-reis-naar-azerbeidzjan-met-113-lezers/> (accessed 14 April 2011). The writer Arnold van Bruggen and photographer Rob Hornstra set up a crowd funding “slow-journalism” project on the developments in the Caucasus, leading up to the Olympic Winter Games in Sochi in 2014. See <http://www.thesochiproject.org/home/> (accessed 23 April 2011).

129. P. Scholten and R. Holzhaacker, “Bonding, Bridging and Ethnic Minorities in the Netherlands: Changing Discourses in a Changing Nation,” *Nations and Nationalism* 15(1) (2009), p. 82 (hereafter Scholten and Holzhaacker, “Bonding, Bridging and Ethnic Minorities”).

From the late 1980s onwards, this approach to multiculturalism was increasingly criticized by right-wing and eventually also left-wing politicians, opinion-makers and academics. In contemporary academic discourse, a more liberal-egalitarian notion of citizenship started to prevail, which stressed the need for immigrants to be able to stand on their own feet.¹³⁰ Simultaneously, various public figures started to explicitly question the effectiveness of the government's multicultural policies, and more specifically the integration, or lack thereof, of Muslims into Dutch society.¹³¹

The critique of multiculturalism further intensified after the 9/11 attacks in the United States, and the assassination of the Dutch film director, publicist and Islam critic Theo Van Gogh by a young Dutch Moroccan in November 2004. These terrorist attacks effectively facilitated the rise of a wave of populist-conservative politicians, of whom Pim Fortuyn, Rita Verdonk, Ayaan Hirsi Ali and Geert Wilders have been the most prominent. These politicians and their followers have maintained that there is actually a “clash of civilizations” within Dutch society.¹³² In terms of this clash, Islam was presented as a backward culture, and a growing threat to core Western values, such as freedom of expression, equal gender relations and tolerance towards homosexuality. As a solution to this threat, the populist politicians have argued for restricting religion to the private sphere, stressing the neutrality of the state, and potentially closing Dutch borders to Muslim immigrants.¹³³

4.3.2 Coverage of Sensitive Issues

In public broadcasting, broadcasting time is for a large part divided between member-based broadcasting organizations. Their ambition is to represent different social and religious movements in Dutch society. In addition, the central organization NPO also has an extra budget for programs focusing on specific target groups of the Dutch population as well as for specific program categories that are not produced sufficiently by the various broadcast organizations. In this report, the broadcasting system is discussed in more detail in section 2.

There is no regulation governing media coverage of sensitive issues by law, save constitutional provisions such as the freedom of press as well as the right of individuals or groups not to be discriminated against. The debates discussed above over multiculturalism were for a large part played out through the mainstream press. Politicians and public figures who expressed concerns about the integration of immigrants in Dutch society used national newspapers and broadcasting news outlets as a platform for their views. The shifts in the discourse on multiculturalism were, consequently, reflected in the mainstream media.¹³⁴ As the debate

130. Scholten and Holzhaacker, “Bonding, Bridging and Ethnic Minorities,” p. 82.

131. Conny Roggeband and Rens Vliegthart, “Divergent Framing: The Evolution of the Public Debate on Migration and Integration in the Dutch Parliament and Media, 1995–2004,” *West European Politics* 30(3) (2007), pp. 524–48 (hereafter Roggeband and Vliegthart, “Divergent Framing”).

132. H. Entzinger, “Changing the Rules While the Game Is on; from Multiculturalism to Assimilation in the Netherlands,” in M. Bodemann and G. Yurkadul, eds, *Migration, Citizenship, Ethnos: Incorporation Regimes in Germany, Western Europe and North America*, Palgrave, New York, 2005.

133. Roggeband and Vliegthart, “Divergent Framing,” p. 531.

134. Roggeband and Vliegthart, “Divergent Framing,” pp. 524–548.

became more polarized, and the discourse more critical, the tone of reports, even by public service media, changed accordingly. As the public service media became less accommodating, ethnic minorities sought to establish their own outlets.

As a result, these minorities have become increasingly disconnected from, and unrepresented in, the mainstream media. This was reflected in a demand in January 2003 by a group of Dutch Moroccans, calling on the mainstream media to change their negative approach to minority groups.¹³⁵ (Along with citizens of Surinamese and Turkish descent, Dutch Moroccans are the largest ethnic minority; their social position is particularly problematic.)

4.3.3 Space for Public Expression

It was around the turn of the century, as the public debate over Islam became more critical and polarized, that a variety of online platforms began to target particular ethnic minorities. The creation of these platforms, mostly by members of those minorities themselves, also coincided with growing internet use among immigrant youths.¹³⁶

The research, marketing, and communication agency Motivaction found in 2007 that culturally bound online media are particularly popular with Dutch Moroccans. The largest site is Marokko.nl, which is visited by 24 percent of the sample surveyed on a daily basis and in March 2011 the site had around 210,000 members.¹³⁷ Maroc.nl is the second most popular site, with approximately 68,000 members, ahead of Maghreb.nl with around 15,000. All of these online communities have a number of common features: news specifically focused on Moroccan communities; individual blogs; and a forum which is characterized by lively topics in religion, sexuality, relationships, the news and education, among other things.¹³⁸ Particularly interesting is also the lifestyle magazine *Yasmina*, which was established in 2001 as part of Marokko.nl. The magazine was originally set up as a marriage magazine, with a wealth of information about the arrangement of marriage receptions. Currently, it has a much broader lifestyle focus, and a forum with topics about youth relationships, women and Islam, marriage, etc.¹³⁹

The 2007 enquiry by Motivaction also made clear that Waterkant.nl is the most popular Dutch Surinamese platform online. This site is visited by 16 percent of the Dutch Surinamese interviewees on a daily basis, and it receives around 100,000 unique visitors a month. In turn, migrants from the Netherlands Antilles prefer Amigoe.com, although it should be noted that overall this migrant group is not among the most

135. L. Linders and N. Goossens, "Bruggen Bouwen Met Virtuele Middelen" (Building Bridges with Virtual Means), in J. de Haan and O. Klumper, eds, *Jaarboek ICT En Samenleving: Beleid in Praktijk* (ICT Yearbook and Society: Policy and Practice), Boom, Amsterdam, 2004, pp. 121–139 (hereafter Linders and Goossens, "Bruggen Bouwen").

136. Linders and Goossens, "Bruggen Bouwen."

137. Motivaction, *Nieuwe Nederlanders zeer gebedt aan cultuurgebonden media*. Persbericht, 16 November. Motivaction, Amsterdam, 2007 (hereafter Motivaction, *Nieuwe Nederlanders zeer*).

138. Motivaction, *Nieuwe Nederlanders zeer*, p. 7.

139. L. Brouwer, "Giving Voice to Dutch Moroccan Girls on the Internet," *Globe Media Journal* 5 (9) (2006) (hereafter Brouwer, "Giving Voice to Dutch Moroccan Girls on the Internet").

frequent internet users. The same can also be said about Dutch Turks, who mostly gather their news from Turkish newspapers and magazines. The favorite Dutch Turkish websites for young people are Lokum.nl and Hababam.nl.¹⁴⁰

Young minorities in the Netherlands not only use particular culturally bound platforms, but also create their own spaces within larger social media platforms. Striking examples are: the *Marokkaanse Meiden* (Moroccan Girls) *hyve* with 2,776 members, and the *HijaabStyle hyve* with 804 members, providing an online community of support for those wearing a veil/hijab, or considering doing so. Another example is the *Onderweg naar Marokko* (On the Road to Morocco) *hyve*, which invites its 2,828 members to share their experiences traveling to Morocco for the summer holiday.

Serkei and Bink argue that these kinds of online platforms constitute spaces in which minority youths can be proud of their cultural and national background. These are spaces in which they can give each other advice, find mutual support, exchange experiences and meet new people.¹⁴¹ Lenie Brouwer makes clear that these kinds of spaces are particularly important for Muslim women, who are often portrayed in the mainstream media as passive and repressed. Forums like Yasmina.nl and social network groups such as HijaabStyle allow Muslim women to present themselves in a more empowered fashion than that associated with mainstream media discourse and images. Moreover, it allows them to raise issues which they would never discuss in public or in the presence of their parents. Finally, these spaces make it possible to discuss their individual choices without having their religion called into question.¹⁴²

Fears that the public sphere is jeopardized by the development of culturally homogenous online spaces have been raised by research into culturally defined internet forums, around the time when Theo van Gogh was assassinated.¹⁴³ However, more general research into internet use suggests that minority youths not only use culturally bound sites, but also other sites. The Qrius market research agency found in 2008 that migrant youths actually prefer general sites such as Google and YouTube over sites such as Marokko.nl.¹⁴⁴ This finding corresponds with 2006 research by the SCP, which found that minority youths mostly use general Dutch sites.¹⁴⁵

140. C. Serkei and S. Bink, "De Emanciperende Werking Van Online Media. Over De Functie Van Online Media in Het Publieke Debat" (The Emancipating Function of Online Media. About the Role of Online Media in Public Debate)," Mira Media, Utrecht, p. 7 (hereafter Serkei and Bink, "De Emanciperende Werking").

141. Serkei and Bink, "De Emanciperende Werking," p. 7.

142. Brouwer, "Giving Voice to Dutch Moroccan Girls on the Internet," p. 6.

143. A. Benschop, "Chronicle of a Political Murder Foretold," *SocioSite* (2005), Social Science Information System based at the University of Amsterdam. Available at http://www.sociosite.org/jihad_nl_en.php (accessed 3 November 2011); T. Poel, "Conceptualizing Forums and Blogs as Public Sphere," in M. Boomen et al., eds, *Digital Material, Tracing New Media in Everyday Life and Technology*, Amsterdam University Press, Amsterdam, 2009.

144. Qrius, *Allochtone jongeren 2007*. Qrius, Amsterdam, 2008.

145. Sociaal en Cultureel Planbureau, "Digitale contacten en integratie van allochtone jongeren," (Digital integration of foreign-born youth) in J. de Haan and C. van 't Hof, eds, *Jaarboek ICT en samenleving 2006: De digitale generatie* (2006 Yearbook for ICT in Society: The Digital Generation), Sociaal en Cultureel Planbureau, The Hague, 2006, pp. 83–106. Susan Bink notes that this is not particularly surprising, given that second-generation immigrants were born in the Netherlands, often speak fluent Dutch and follow the Dutch media. See S. Bink, "Feiten & Cijfers: Je Eigen Wereld Op Het Wereldwijde Web: Digitale Media in De Multiculturele Samenleving" (Facts & Figures; Your Own World on the World Wide Web: Digital Media in the Multicultural Society)," Mira Media, Utrecht, 2008.

4.4 Political Diversity

4.4.1 Elections and Political Coverage

Digitization has not led to any major changes in the regulation of media coverage of elections and politics, except perhaps for one exception. An updated version of the Media Act allowed public broadcasting to set up digital television theme channels. One of these channels is called Politics 24 and broadcasts live discussions from the Dutch parliament.

4.4.2 Digital Political Communications

One of the promises of digital media is that it would make it easier for both journalists and citizens to hold the government to account through, for instance, digitally available government documents. This could also make journalists themselves more accountable by embedding links in their stories to official documents and sources that would enable readers to verify the journalists' conclusions or judge for themselves. As of 2011, this ideal has not been fully realized.

Newspapers are somewhat reluctantly linking to outside sources, although this seems to be changing, and the Dutch government is making some efforts to open up its databases, but there is still a long way to go. Some public initiatives have emerged that try to fill this gap, for instance by aggregating press releases, tweets and other information about politics, by republishing parliamentary documents or by keeping track of the voting.¹⁴⁶

Another opportunity that arose with the advent of digital media was the promise of direct communication between political organizations and citizens. By 2011, all political parties and movements in the Netherlands were active online. Major political groups not only have their own websites, but also dedicated channels on YouTube and accounts on social networks. Digital media are mostly used to broadcast the point of view of the parties to interested citizens, or to attract attention by sending out "virals," usually in the form of funny videos that are meant to be redistributed by the viewers to their friends, colleagues and online contacts.

Interactive elements, where citizens can feed back or engage in discussions with political figures do exist, albeit in a relatively rare and limited capacity. And although many citizens do visit the websites of political parties in election times, no major Obama-style mobilizations of voters have taken place through digital media in the Netherlands.¹⁴⁷ There have, however, been some small and incidental instances of bottom-up campaigning through social media. For instance, in the spring of 2011 the Socialist Party started using crowd-sourcing as a tool in its policymaking. On a special website, the public is asked to contribute practical tips to improve policy in a number of fields.¹⁴⁸ Individual politicians have also started using social media to make themselves known. Many candidates up for election have uploaded YouTube videos explaining their points of view and

146. See, for example, <http://publitiiek.nl/>, <http://ikregeer.nl/>, <http://politix.nl/> (accessed 23 April 2011).

147. See M.G.W.T. van den Brand, "Nederlandse Politieke Partijen Vertegenwoordigd Op Internet" (Dutch Political Parties on the Internet)" (University of Utrecht, 2010) for an impression of the political websites of the four main political parties.

148. SP Queetz, a crowdsourcing website set up by the Dutch Socialist Party, at <http://sp.queetz.com/> (accessed 30 June 2011).

almost all members of parliament have Twitter accounts. Some of the more prominent politicians have tens of thousands of followers and use their Twitter accounts to publish their vision or reaction to news events, sometimes interspersed with details from their personal lives.

However, despite substantive followings achieved by some politicians, their total reach through social media is still relatively low. Only 3 percent of the population uses social media to keep track of politicians,¹⁴⁹ although journalists do keep an active eye on the Twitter accounts of leading politicians. Indeed, many use this communication channel to reach out to the traditional press and tweets are used as instant 140-character press releases. Geert Wilders of PVV is especially known for his sharp Twitter messages that are often picked up by conventional media. DNN figured that in the period August 2009–March 2010, in six national newspapers and one online news site, 272 news articles appeared that dealt with political affairs and mentioned either the medium Twitter or individual tweets by politicians.¹⁵⁰

Relatively new digital tools that have become a fixture of the political media landscape are the online vote selectors. In times of elections, these sites, *Stemwijzer.nl* or *Kieswijzer.nl*, quiz visitors for their stances on particular political issues. The answers are compared with the points of view put forward in the electoral programs of various political parties, and advice is then given as to which party or parties most closely match the political views of the visitor.

In 2006, almost 40 percent of all voters in the national elections made use of one of these websites. A study from 2006 found that one third of the users said that the advice provided by *Stemwijzer* played a part in their electoral decision and 15 percent indicated that they planned to vote for a different party after they had consulted the site.¹⁵¹ In the same study, almost half of the visitors said the voting application had pointed out the most important issues at stake in the election. For 43 percent, their use of *Stemwijzer* led to a debate about the elections with their friends and a similar number of users said that the site had urged them to search for more information about the campaign.¹⁵² The main contribution of these sites may thus not lie in their official function (advising on whom to vote), but rather in the way these websites act as conversation pieces; in how they engage citizens with the political debate and urge them to research and debate the issues at stake. By 2011, their significance had become such that before the provincial elections of that year, the supposedly misleading framing of some of the questions put to users was discussed on the front page of a national newspaper.¹⁵³

Some journalist organizations participated in these voting-aid applications. “*Een Vandaag*,” a public broadcasting current affairs television program, cooperated with *Stemwijzer.nl*, set up by the IPP. *Trouw*, a national newspaper, was involved in setting up *Kieskompas.nl* (Vote Compass), together with VU University Amsterdam.

149. RMO, “Internetlogica.”

150. The period measured partly coincides with the campaigns for the local and national elections in 2010. See Nel Ruigrok, Joep Schaper, Maurits Denekamp and Kasper Welbers, “E-Politici: Getwitter in Het Nieuws” (E-Politicians: Tweets in the News), DNN, Amsterdam, 2010.

151. Marcel Boogers, “Enquête Bezoekers Stemwijzer” (Stemwijzer Visitors Questionnaire), Tilburg University, Tilburg School of Politics and Public Administration, Tilburg, 2006 (hereafter Boogers, “Enquête”).

152. Boogers, “Enquête.”

153. Kees Versteegh, “Beroering over Vraag Kieskompas” (Commotion About Question on Vote Compass), *NRC Handelsblad*, 29 December 2010.

Shocklogs

A final influential development on the coverage of politics has been the rise of the so-called shocklogs, weblogs that like to shock and challenge the established order. These shocklogs appeared at the beginning of this century against a backdrop of a changing political and social climate that had started to favor an anti-establishment rhetoric. They take pride in their snarky, unscrupulous attitude. As Dutch media critic Geert Lovink has analyzed: “[these shocklogs’] entries are written to test the boundaries of the politically correct consensus culture of Western media.” The same could be said for the passionate community of commentators that these weblogs have attracted, generating hundreds of comments to many of the posts, in which readers are often trying to outsmart each other in their coarseness.

Over the years, *Geenstijl.nl* (founded in 2003) has become the most popular of these, winning several “best weblog” awards and reaching close to a fifth of the Dutch internet population in 2010.¹⁵⁴ In 2006 the founders sold 40 percent of their shares to the TMG and in 2008 founded a public broadcasting organization named Powned.¹⁵⁵ The offensive tone of shocklogs—both in their articles and in user comments—has been much discussed in the Netherlands. While some laud their critical approach towards the authorities, others reproach them for poisoning the public sphere with their confrontational and cynical approach.¹⁵⁶ *Geenstijl.nl* has been credited as playing a decisive part in the discharge of the Minister of Integration, Ella Vogelaar. A video clip in which she was stalked by a reporter of *GeenStijl* became a hit online and was also broadcast on national television. According to some observers, the fact that Ms Vogelaar did not succeed in producing an effective response to the questions of the reporter—as ill-behaved as he might have been—contributed to her image as an incapable administrator. In the end, she was forced to resign after the party leadership lost faith in her.

More indirectly, these shocklogs, in combination with a much wider online discourse of distrust and vicious personal attacks, are thought to have an influence on (political) journalism at large. Peter Vasterman describes how these weblogs and forums have led to the emergence of “digital pillories.”¹⁵⁷ Outside the domain of traditional journalism, digital muckrakers can nail public officials to their digital pillories. Often their accusations—whether correct or not—lead to discussions on forums, other weblogs and eventually even the mainstream media. Even when scandals are first reported by the traditional media, discussions on weblogs soon follow with additional accusations and denunciations.

154. STIR, op. cit.

155. For a detailed history and analysis of *Geenstijl.nl* see Paula van Rooij, “Keihard Uit Het Hart. Zoektocht Naar De Manier Waarop *Geenstijl* De Nederlandse Journalistiek Vernieuwde (2003-Nu)” (Straight from the Bottom of the Heart. Searching for the Impact of *Geenstijl.Nl* on Dutch Journalism), University of Amsterdam, 2010 (hereafter Van Rooij, “Keihard Uit Het Hart”).

156. Van Rooij, “Keihard Uit Het Hart.”

157. Peter Vasterman, “De Digitale Schandpaal; De Invloed Van Internet Op Het Verloop Van Affaires En Schandalen” (The Digital Pillory. The Effect of the Internet on Scandals), *Tijdschrift voor Communicatiewetenschap* 38(2) (2010) (hereafter Vasterman, “De Digitale Schandpaal”).

Shocklogs (continued)

An example is a story Geenstijl.nl published on a sexual relationship between a local government official and a member of the city council (of opposing parties). Their interactions had been taped by a CCTV camera in a bicycle parking garage. The conventional media had learned about the affair, but decided not to run the story. Yet after Geenstijl published it, *De Telegraaf* decided to report it as well, and a national scandal was born. After the city councillor gave up her position, the so-called quality press followed up on the story, claiming that the resignation of the council member had made the affair a political news event.

Traditional media do not blindly copy all allegations made online. Yet, the digital pillories do play a role in setting the tone of the debate and at times can force the mainstream media's hand.¹⁵⁸ Whereas journalists used to exercise restraint over scandals about the private life of public officials or the naming of suspects, once these details are published on (non-journalist) websites, they will sometimes abandon restraint, and let the event enter the official news cycle.

In response to the rise of shocklogs, in 2009 the public broadcasting association VARA (*Vereniging van Arbeiders Radio Amateurs* Association of Worker Radio Amateurs) launched its own opinion blog called Joop.nl (partially modeled after the Huffingtonpost.com). The goal of this website is to stimulate a lively debate, and Joop.nl explicitly does not want to provide a platform for aggressive commentaries or act as a digital pillory. Comments are therefore moderated.¹⁵⁹ Over the last year, Joop.nl has attracted quite a bit of media attention as well: over the period of one year it was mentioned 348 times in various Dutch national and regional newspapers.¹⁶⁰ This was partly caused by a few controversial cartoons on the website that critically depicted Mr Wilders. One of those compared a policy proposal of Wilders with the Nazi concentration camps.

4.5 Assessments

Overall, journalism in the Netherlands—especially at a national level—has maintained a certain degree of quality in the middle of digitization. However, there is a general concern that the journalistic infrastructure is under sustained pressure. There have been numerous cutbacks in editorial budgets and staff positions. The influence of advertisers and PR professionals is increasing, whereas the variety of sources seems to be decreasing. These changes are especially felt at a local level, where the independent news provision and coverage of local governments in particular is structurally undermined.

158. See Vasterman, "De Digitale Schandpaal," for an analysis of the effects of the internet on political scandals.

159. Francisco van Jole, "Dit Is Joop" (This Is Joop), Joop.nl, VARA, 2009. http://www.joop.nl/opinies/detail/artikel/dit_is_joop/ (accessed 24 April 2011).

160. Lexis Nexus Academic NL.

Good-quality newspapers are losing income due to decreasing circulation, thanks to digitization, the availability of free news (and other content) online, and free newspapers such as *Metro* (also related to digitization, which has simplified the production flow so much that a profitable newspaper can be produced with relatively few staff). At the same time, advertising revenue has fallen due to the economic downturn, but also to digitization, which offers advertisers new channels (such as specialized websites for classifieds). Under this pressure, the good-quality press is forced to look for new business models and new ways to engage audiences. Especially in the Netherlands, journalists at the quality newspapers used to see themselves as working for society rather than for their shareholders; in fact, some quality newspapers were owned by foundations rather than investment companies. Their publishers have become much more commercially oriented, a process that is at least to some extent related to digitization.

With regard to political journalism, on the one hand the emergence of shocklogs has hardened the tone of political debate. On the other hand, citizens have gained access to new tools such as the very popular online vote selectors that have inspired political debates both offline as well as online. Politicians have taken up social media and Twitter and these are now an important part of their communications with the public and—most importantly—the press and other news media. Nonetheless, it is fair to say that anyone now has the opportunity to have a voice somewhere in the new media landscape. Particularly noteworthy in this respect is the emergence of specific platforms for minority groups, whose members tend to consume their output in conjunction with mainstream media. Fears of social fragmentation in the Netherlands appear in this sense overblown.

The picture is less rosy with regard to investigative journalism. Both the VVOJ and the NVJ warn that investigative journalism is under threat and that measures are necessary to safeguard the specific function investigative journalism has to check those in power. Although editors find that this crisis is not felt across the board of journalism, independent journalism at the local level especially is severely under threat.

Some weblogs have taken up investigative journalism, and there are some experiments with data journalism, crowd-sourcing and crowd-funding. Open data are still in their infancy, and many government databases are not easily accessible yet. None of these developments has so far had a major impact or counterbalanced some of the challenges facing professional journalism.

5. Digital Media and Technology

5.1 Spectrum

5.1.1 Spectrum Allocation Policy

The Minister for Economic Affairs, Agriculture and Innovation is responsible for spectrum policy and determines the distribution of spectrum according to a spectrum plan, in which the different spectrum uses are determined.¹⁶¹ These have to conform to international agreements aimed at coordinating spectrum use and preventing interference (especially those by the **International Telecommunication Union**) in which particular terrestrial frequencies are allocated for broadcasting.

For spectrum use, a license is required that is issued by the ministry. The Dutch Telecom Act stipulates that within the spectrum allocated to broadcasting, frequencies for PSB channels should be given priority.¹⁶² This priority position is also laid down in the Media Act of 2008, in which PSB frequencies are guaranteed for three analog national television channels and five national radio channels.¹⁶³ In addition, regional and local public service radio broadcasters are each allocated one analog channel in their respective distribution areas.¹⁶⁴

Since the introduction of digital terrestrial television, there are also terrestrial frequencies for commercial television. Frequencies can be allocated in order of application, or, where demand for a frequency outstrips supply, by organizing an auction or by organizing a “beauty contest”, in which a number of criteria are set beforehand and the allocation of frequencies is awarded to the party with the most favourable offer. Responsibilities are divided between the Minister for Economic Affairs and the Minister of Education, Culture and Science. The latter is only involved to the extent that content-related issues are at stake (for instance, when determining the criteria for a “beauty contest”).

161. Until 2010 this was the Ministry of Economic Affairs. In 2010, the new government reorganized the ministries and combined the Ministry of Economic Affairs and the Ministry of Agriculture into one bigger Ministry for Economic Affairs, Agriculture and Innovation.

162. Telecom Act, art. 3.2.2.

163. Media Act, arts 6.12 and 6.13.

164. Media Act, art. 2.1.

In 2003, the state organized a “beauty contest”, including a financial bid, for reallocation of FM radio frequencies with national coverage. Of the nine available national frequency allocations for commercial radio, the government decided that five should be destined for particular (vulnerable) content genres: news and specialized music formats such as alternative, jazz and classical music (see section 5.1.2). For the remaining frequencies, no criteria were set concerning the content that the holder of the allotment should broadcast. In this “beauty contest”, the state collected over €300 million in revenues.

The government has supported the introduction of digital radio in various policy documents¹⁶⁵. However, the only broadcaster that has launched digital radio so far is the national PSB, which in 2004 started to broadcast nine channels in digital. Commercial radio operators have been reluctant to make the move, primarily because they see little benefit in using the extra spectrum capacity for increasing the number of radio channels. For them this would only mean more competition in an already highly competitive market.

In order to stimulate the introduction of digital radio, the government decided in 2010 to adopt an industry proposal not to organize a new auction for the reallocation of FM frequencies when these are about to end in 2011, but to extend the current FM licenses for the national commercial radio channels, on the condition that the radio channels will also start digital radio broadcasts through simulcasting digital and analog radio as well as providing an additional radio channel.¹⁶⁶ To what extent this initiative will succeed is still unknown.

In 2006, analog terrestrial television was phased out in the Netherlands (see chapter 7). As in the analog era, the licensing of multiplexes for digital television is governed by the Telecommunications Act and ministerial authority. The national PSB is entitled to one multiplex for digital terrestrial transmission (DTT) on the DVB-T standard; the regional PSB also has access to DVB-T. The remaining digital multiplexes for DVB-T were awarded through a beauty contest. This instrument was chosen because the commercial value of DTT was still uncertain and the government wanted to ensure an innovative service which could become a competitor to the dominant cable operators (see section 7.1.1.3).

The terrestrial network operator Nozema, which in 2002 was still 51 percent state-owned,¹⁶⁷ created a consortium, including the former telecom incumbent KPN and the national public and commercial broadcasters, which became the only applicant. In 2002, the license to operate the multiplex and to deliver terrestrial digital TV to consumers was awarded to Digitenne. Since 2006, KPN has been the major (90 percent) owner of Digitenne.¹⁶⁸ In 2003, Digitenne started broadcasting digital terrestrial television and now offers a package of 24 encrypted digital television channels and 16 digital radio channels. The digital terrestrial PSB channels are available free-to-air.

165. Minister of Economy, Agriculture and Innovation, *Frequentiebeleid, Kamerstukken, Tweede Kamer, vergaderjaar 2010–2011* (Debate on Frequency Policy, Parliamentary Papers, 2010–2011), 24095 no. 263.

166. “Letter to Parliament on Frequency Policy,” *Kamerstukken, vergaderjaar 2008–2009* (Parliamentary Papers, 2008–2009) 24095, no. 241; “Letter to Parliament, January 13th, 2011,” *Kamerstukken, vergaderjaar 2010–2011* (Parliamentary Papers, 2010–2011) 24095, no. 263.

167. In 2004, Nozema was split into a private broadcast operator—which was taken over by telecom operator KPN in 2006—and a public company that owns the transmission towers.

168. Van Eijk and B. van der Sloot, *Case Study*.

Initially digital terrestrial television grew relatively slowly. Only after the former telecom incumbent KPN took full control of Digitenne in 2008, started an aggressive marketing campaign and lowered the subscription fee to € 8 per month, did its market share rise.¹⁶⁹

With the introduction of digital terrestrial television, a debate emerged over whether uses other than broadcasting would be feasible in the newly freed spectrum after analog switch-off. Other uses, such as mobile broadband, could well be more profitable and efficient than exploiting more digital television channels.

In the Netherlands, just like in many other EU countries, alternative uses of the digital dividend have been made legally possible. There are some concerns, however, that if the digital dividend is made available for mobile services, this may cause interference with cable television. It might also affect Digitenne, which will have to move a number of channels to other frequencies, with the result that consumers will have to adapt their receivers or buy a new one.

Another concern is that when Digitenne is unable to expand its services or even has to scale down, its attractiveness as a competitor for cable and satellite would decrease. The question is how big a problem that will be for the license holder whose owner (KPN) also exploits IPTV services and might be willing to give up DTT and focus on IPTV instead.

5.1.2 Transparency

Spectrum is awarded according to the procedures described in 5.1.1. These procedures are codified in the Telecommunication and Media Acts, as well as in spectrum plans and in more specific implementations by regulatory authorities. Procedures are generally speaking transparent and non-biased. Any privileges such as the spectrum reserved for public services broadcasters, or special requirements that can be applied in “beauty contests” for new allocations, are grounded in statute law. Decisions on which award instrument will be used, and the requirements that are part of these instruments, including pricing mechanisms for spectrum, are taken by Parliament.

Citizens have occasionally been involved in frequency issues, for instance when commercial radio stations Sky Radio and Radio 538 were at risk of losing their designated FM frequencies in 2001, and successfully mobilized their listeners to defend them.

5.1.3 Competition for Spectrum

There are no proven cases of operators that have tried to reduce broadcasting spectrum for potential rivals, although there have been cases of radio stations accusing radio stations on neighboring frequencies of interfering with their signal. This issue might become relevant when the digital dividend is awarded. If more spectrum is to be allocated in a technology-neutral way and can be used for purposes other than broadcasting,

169. Van Eijk and Van der Sloot, *Case Study*.

there might be reason and scope for Digitenne to privilege mobile broadband uses of its multiplex over broadcast transmission.

5.2 Digital Gatekeeping

5.2.1 Technical Standards

Digital television broadcasts in the Netherlands transmit in accordance with the European standard DVB, which is used for cable, satellite and terrestrial distribution. The licenses for terrestrial frequencies are to be used for DVB-T but can also be used for DVB-H, a standard for mobile reception of television. This latter standard was used by KPN, but has failed to achieve mass circulation and the service was ended in mid-2011. For digital radio, frequencies are allocated for TDAB, the European standard for digital radio, but the licenses are made technology-neutral, enabling the use for TDAB+, a more recent standard with improved audio quality.¹⁷⁰

Standards for digital televisions and set-top boxes have not been harmonized. Cable operator UPC and KPN (Digitenne) use their own proprietary standards. Requests from Parliament for standardization in order to protect consumer interests and the interests of (interactive) content providers have led to some dialogue between network operators and the government. The consumer authority and some stakeholders have urged more active government involvement to promote interoperability and open standards. These concerns were reflected in several policy documents.¹⁷¹ But the government has been reluctant to impose the harmonization of standards, mainly out of concern that state intervention might distort the market. In the Netherlands both the open standard MHP as well as the proprietary standard Open TV are used (the latter by UPC). This has meant that content providers and broadcasters have to produce their interactive services in different formats, which makes their development more costly. Apart from the debate between consumer organisations, industrial stakeholders and the government, there has not been a wider public debate on these issues.

5.2.2 Gatekeepers

Although digitization means an increase of network capacity, access issues remain, particularly in respect of access to networks and related facilities, such as Electronic Program Guides (EPG) or Conditional Access Systems (CAS). (See section 5.3.1.)

5.2.3 Transmission Networks

As of 2011, there were two companies that operate terrestrial television and radio networks in the Netherlands: Nozema (currently owned by KPN) and Broadcast Partners. Nozema is the main, formerly state-owned, terrestrial network operator. Broadcast Partners entered the market much later and has in the past often accused Nozema of anti-competitive behavior. In 2005, the competition authority fined both network

170. L. Kool, A. van der Giessen, S. de Munck, T. van den Broek, S. Huveneers, A. Holtzer, "Marktrapportage Elektronische Communicatie," (Market Report Electronic Communication) TNO, Delft, 2010.

171. "Kabel en Consument, marktwerking en digitalisering. Kamerstukken, vergaderjaar 1999–2000" (Parliamentary Papers 1999–2000), 27 088 no. 2; "Kabel en Consument, marktwerking en digitalisering." Kamerstukken, vergaderjaar 2000–2001 (Cable and Consumer, market and digitization. Parliamentary Papers), 27088 no. 18.

operators for having conducted pricing agreements with regard to transmission of commercial RTL radio channels and thereby harming RTL. They were each fined €1 million, although these fines were withdrawn in 2007, because the competition authority could not prove reduced competition in the market for broadcast transmission. There are no other recent cases in which terrestrial network operators have intervened to privilege particular groups, companies or individuals.

5.3 Telecommunications

5.3.1 Telecoms and News

In the Netherlands, cable networks are the dominant television broadcasters. In order to safeguard public access to information, cable operators have a must-carry obligation for three national PSB television channels, one regional and one local PSB television channel, as well as for the two Flemish PSB channels. Five national PSB radio channels, regional and local PSB radio and two Flemish PSB radio channels also fall under the legal obligations of digital cable providers. They have to offer as a basic package a minimum amount of 15 television and 25 radio channels and have to seek advice from local program councils¹⁷² on the composition of these packages.¹⁷³ In contrast, there are no must-carry rules for DVB-T or satellite transmission.

In addition to the must-carry channels, the network operators' basic packages include some foreign news channels, such as CNN, BBC World, Euronews, Al Jazeera and the public service general interest channels from neighboring countries (BBC, ZDF, ARD). Other (foreign) news channels and digital PSB news channels are mostly part of the extra digital television packages. The cable operator UPC also owns digital (on-demand) television/film services, but no news channels; the other network operators do not own television channels or other audiovisual content services.

Although cable operators are still dominant in offering digital television packages, competition is increasing. At the same time, there are new concerns regarding the position of cable companies and other gatekeepers in the market.

Local PSBs have experienced some negative effects from the gatekeeper role that cable operators have in this market. They are not always part of the digital package, so in order to receive local television, viewers need to switch from digital to analog cable reception, which in practice few people seem to do.

When more than 50 percent of cable network subscribers have turned to digital, must-carry obligations for local (and regional) PSB channels are extended to digital cable networks. Particularly during the transition period from analog to digital, local broadcasters find themselves in a difficult position and risk losing large numbers of viewers that have already switched to digital reception but can no longer easily find the analog

172. See Kabelraden.nl, which is the expertise center that provides local council programs with information and advice on developments in the broadcasting market and distribution networks.

173. Media Act, arts 6.12–6.14.

channels on their television sets. This is not yet the case in all regions. But even when the threshold has been reached, the two largest cable operators (UPC and Ziggo) require local public radio and television channels to finance the connection to the digital networks themselves. Although most local radio and television stations are already operating digital production systems, they have to bear the extra costs for transporting their signals to the cable operators' connection points for digital networks and for installing and renting an encoder from the cable operator, which can amount to a one-off amount of a couple of thousand euros and a monthly amount of several hundred euros, which is a large amount for poorly funded local PSBs.^{174, 175} A report in 2009 showed that less than 10 percent of local PSB television channels were distributed digitally and in 2011 only a minority of local PSBs are being distributed over digital cable networks. The Association for Local Public Broadcasters (*Organisatie voor Lokale Omroep*, OLON) has urged the government to lower the threshold for cable operators' must-carry obligations on their digital networks and to put pressure on cable operators to make better technological arrangements against lower costs for distribution of local channels. So far, however, the lobby group has not succeeded in gaining sufficient political support.

Regional PSBs also have some complaints about cable companies in their role as digital gatekeepers. In digital television packages, regional PSB television channels have been put in position number 30 in the default order in which digital channels are positioned on television sets. Regional PSBs have protested against this, because they fear a loss of viewers.¹⁷⁶

One advantage of digital cable distribution is that the major cable companies can now offer all regional PSBs in one digital package, so that viewers who live outside a particular region but maintain some personal connection to it, can now access that region's PSB channel.

NPO, the national PSB, has on occasion indicated that it is concerned over its position in digital networks.¹⁷⁷ In its negotiations with cable operators, it wants to offer all its channels as one package, and does not want cable operators to determine which channels to select for their television packages. This would allow cable operators to only select the most popular channels and not the less popular ones, which may nevertheless belong to the core of the PSB offer (such as its documentary or parliamentary channels).

Broadcasters also have to negotiate their position on the cable operators' EPGs. A cable operator sometimes puts third-party content on less favorable pages in the EPG, especially when the operator also offers its own television channels or other digital content services.¹⁷⁸ When offering its television channels and other

174. According to OLON, Ziggo charges € 3,500 and then € 410 per month. UPC charges € 8,524 and then €200–300 per month. (Personal communication from Toos Bastiaansen, OLON, 30 June 2011.)

175. Letter from OLON to Minister of Education, Culture and Sciences, "Toegang digitale kabelpakketten lokale publieke media-instellingen" (Access digital cable packages and local media), 23 November 2009, available at http://www.olon.nl/publiekdocs2/Plasterk_23-11-2009.pdf (accessed 24 April 2011); "Streekomroepen in Nederland" (Regional Broadcasters in the Netherlands)," Dialogic, IVIR, TNO, 2009.

176. J. Atsma, "Stemmen Uit De Regio. Over De Regionale Publieke Omroep" (Voices from the Region. On Regional Public Broadcasting), ed. Tweede Kamer der Staten-Generaal (Parliamentary Papers), The Hague, 2009.

177. Telephone interview with Egon Verharen, policy adviser on distribution, technology and broadcasting, NPO, 23 March 2011.

178. See for Legal context: Telecom Act, chapter 8 for provisions on access to systems for conditional access, EPGs and APIs.

content to platform owners, the PSB also insists on the integrity of the content, which for instance means that it does not want its content to be presented in a commercial or otherwise unfitting context. NPO foresees that these issues will gain importance in the near future. The outcome of negotiations on such issues is still uncertain. This depends very much on future market developments concerning the availability and use of distribution networks and audiovisual services. Increasing competition between distribution networks, increasing bandwidth and the emergence of numerous digital channels and (online) video-on-demand services have intensified the competition for content and content rights. This puts PSBs with large audiovisual archives in a favorable position. At the same time PSB channels, in order to meet the legal public service remit, need to be available on all relevant networks, which shifts the balance in negotiation power to the network operator. Apart from market position, the PSBs' position on EPGs also depends on potential regulatory measures, such as must-carry obligations and legislation concerning, for instance, due prominence on EPGs. The latter have so far not been implemented in Dutch media regulation.

5.3.2 Pressure of Telecoms on News Providers

Cable and telecoms operators are essential for news and content providers to reach their customers. This can become problematic, especially when they have a dominant market position. Examples were discussed above in respect of problems for local and regional PSBs, and national PSBs' problems with digital cable television. For net neutrality issues, where ISPs might discriminate between different forms of traffic and thereby negatively impact on PSB and other content providers, see section 7.1.2. There are no known examples of network operators putting pressure on news providers for giving favorable coverage.

5.4 Assessments

Generally speaking, laws and regulations concerning spectrum allocation are clear and transparent. FM frequencies are still the most important distribution means for radio, and scarcity of these frequencies makes their allocation a contested process that periodically leads to upheaval and public debate. The introduction of digital radio is still in its infancy and surrounded with uncertainties. Analog television has been phased out rather smoothly, due to the low number of households that depended on this network for television reception. Licenses for digital terrestrial multiplexes have been allocated to Digitenne and the national PSB.

Although spectrum is allocated according to a spectrum plan determined by the government, there has not so far been any direct political intervention in the allocation of spectrum. Parliament decided to organize a “beauty contest” in order to achieve a diverse radio market, in which niche stations would be able to survive alongside more mainstream formats. This objective was enshrined in the Telecommunication Act, and criteria for the “beauty contest” were decided by Parliament. In developing these policies, the government usually extensively consults with stakeholders in the market.

The position of cable network operators as the dominant players in the distribution of television has periodically raised controversy and political debate in the Netherlands. At the same time, competition between networks has increased, and more alternative options to watch television have become available. Cable operators still

have a dominant position in the market for television distribution and bundling strategies can make it difficult for customers to switch to other providers.

There is concern from public service broadcasters and consumer organizations about how the intermediary position of cable network operators will affect the position of broadcasters or other audiovisual content providers on EPGs in the digital era. Similar concerns emerge regarding the question of which players will determine the access to, searchability of, and the positions in content and program listings on other platforms, such as the platforms run by mobile operators, ISPs and online services such as YouTube.

In the Netherlands, just like in many other EU countries, alternative uses of the digital dividend have been made possible. There are some concerns, however, that if the digital dividend is made available for mobile services, this may cause interference with cable television and affect Digitenne's service to the extent that channels may have to be moved to different frequencies. So far, there is no sign of consensus in the debate over whether the digital dividend should be made available for mobile data services, or be reserved for broadcast or even non-commercial public interest purposes.

6. Digital Business

6.1 Ownership

6.1.1 Legal Developments in Media Ownership

Compared with most other European countries, there are few policy instruments in the Netherlands to reduce the concentration of media ownership, aside from general competition law.¹⁷⁹ The Netherlands Competition Authority (*Nederlandse Mededingingsautoriteit*, NMA) monitors the concentration of media ownership from an economic perspective and enforces compliance with the competition regulations enshrined in the Dutch Competition Act of 2009. The Media Concentration Act of 2007 was repealed in January 2011. This act set limitations on cross-media ownership. It prohibited, inter alia, newspaper publishers from having a market share greater than 35 percent. The Act was abolished in January 2011 on the basis that it could lead to the disappearance of (regional) newspaper titles, if acquisitions by larger companies are blocked by the 35 percent market share cap.

As a result of this lack of policy instruments, the CvdM has a strong focus on monitoring the concentration of power in public opinion formation.¹⁸⁰ In this field, the CvdM has expressed a concern for the formation of an emerging monopoly with regard to audience exposure. Although there currently is no concentration in media provision, there is a risk that a few companies will control or strongly influence what audiences are exposed to.¹⁸¹

Parties such as Google and Apple and increasingly social networks such as Facebook play an important role as mediators that guide audiences to particular content. This development is all the more problematic, since the digital domain is dominated by international players that fall outside the power of Dutch regulators and governments.¹⁸² Mr Van Cuilenburg thinks it is only possible to intervene in these developments

179. CvdM, “Mediamonitor 2010,” p. 32.

180. CvdM, “Mediamonitor 2010,” p. 16.

181. The CvdM measures media concentration in four phases of production and consumption. “The inverse of media diversity is concentration, and this can be found throughout all phases in the media production process, starting with content creation and ending with consumer exposure. In relation to each of these phases, four types of concentration are distinguished, each with its specific statistical indicators: 1) supplier (or ownership) concentration; 2) editorial programming concentration; 3) diversity of media content; and 4) audience (exposure) concentration.” CvdM, “Mediamonitor 2010,” p. 6.

182. Interview Jan van Cuilenburg, Commissioner, CvdM, Hilversum, 3 March 2011

at a European level, and that it is essential to monitor these developments at a European level as well.¹⁸³ Digitization has enlarged the playing field of media corporations, and indirectly resulted in the legal changes mentioned above.

In the Netherlands, no Dutch politicians or political parties own any major media companies.

6.1.2 New Entrants in the News Market

In recent years, the Netherlands have seen a number of significant changes in the organization and ownership of newspaper publishers. Two of the three largest publishers are now foreign-owned, and both companies combined have a share of 40 percent of the total circulation of newspapers.¹⁸⁴ Publicly-floated Wegener, one of the main publishers of regional newspapers, was acquired in 2008 by the British media group Mecom. In 2009, Belgian publisher De Persgroep took over PCM—the publisher of among others *de Volkskrant* and *Trouw*, two national quality newspapers. TMG, publisher of the largest newspaper in the Netherlands, *De Telegraaf*, is still a Dutch-owned company.

The change in ownership of the PCM is one of the most important developments in the past five years. Between 1995 and 2009 PCM was the largest newspaper publisher in the Netherlands, owning five national titles: *Trouw*, *NRC Handelsblad*, *De Volkskrant*, *Algemeen Dagblad* and *NRC Next*.¹⁸⁵ A partnership of three foundations—Volkskrant Foundation (*Stichting de Volkskrant*, SdV), Foundation for the Promotion of Christian Press in the Netherlands (*Stichting ter Bevordering van de Christelijke Pers in Nederland*, SBCPN), and the Foundation for Democracy and Media (*Stichting Democratie en Media*, SDM)—originated from the Het Parool Foundation (*Stichting Het Parool*). SDM had a majority stake in PCM. These foundations' stake in the newspaper business was motivated by their concern for the role of journalism in a democratic society, not by profit-making as a goal in itself.

In 2004, to strengthen PCM's position in the market, including an intended broadening outside the newspaper market, a majority stake of PCM was sold to the Apax private equity fund.¹⁸⁶ This takeover was not a success. In 2007, after disagreements between SDM and Apax about the future of PCM, the private-equity fund sold its interest in PCM for about €100 million to SDM. The responses of the PCM-owned newspapers to this move were overwhelmingly positive. Editors hoped it would allow them to dedicate themselves to their journalistic goals again, rather than acting as a cash-cow for a distant investor.¹⁸⁷

183. Interview with Jan van Cuilenburg, Commissioner, CvdM, Hilversum, 3 March 2011

184. CvdM, "Mediamonitor 2010," p. 8.

185. CvdM, "Mediamonitor 2010," p. 48.

186. Steven Derix and Tom Kreling, "PCM Deed Het Vooral Zelf Fout Bij De Apax-Deal" (PCM Itself Was to Blame in Apax Deal)," *NRC Handelsblad*, 23 December 2008.

187. *Trouw*, "Lezer Mag Ook Blij Zijn Met Vertrek Apax" (Readers Should Also Be Happy with Departure Apax), *Trouw*, 27 January 2007; Jan Benjamin and Herman Staal, "Apax Dwong Verzakelijking Uitgever Af" (Apax Forced Publisher to Become More Commercial), *NRC Handelsblad*, 24 January 2007.

On the negative side, the buy-out left PCM with a negative equity of €55 million and long-term loans. On top of that, due to the buy-out, several directors of PCM received large bonuses. In 2008, the Enterprise Chamber of the Amsterdam Court of Appeal investigated the events surrounding Apax and PCM. The Enterprise Chamber criticized the lack of strategy and the payment of bonuses, and concluded PCM had taken risks that were too great. The Enterprise Chamber specifically stated that PCM is not a normal business, but an institution that is an important public function with regard to opinion formation in the Netherlands.¹⁸⁸

In 2009, PCM was looking for acquisition candidates in order to purge its debts. For €100 million the Belgian Persgroep took a majority stake in PCM, which changed its name to De Persgroep Nederland and became a subsidiary of the Belgian Persgroep NV. Through its purchase of PCM, the Persgroep assumed ownership of five national newspapers. However, the NMA decided that because of competition concerns the Persgroep had to sell *NRC Handelsblad* and *NRC Next*. Both newspapers were sold to NRC Media, owned by the Dutch investment company Egeria.

Wegener, the third largest publisher in the Netherlands, has had a dominant market position in regional newspapers. In 2005, Wegener started a joint venture with PCM to integrate the regional dailies of Utrecht and The Hague with the PCM title *Algemeen Dagblad*. In 2008, in order to become a cross-media content company that focusses on both regional and local markets, the British investor Mecom bought a stake of almost 87 percent in Wegener for around €800 million.¹⁸⁹ In 2009, Wegener sold its share in AD Nieuwsmedia to PCM. The fact that a large number of Dutch regional newspapers came under British ownership provoked some controversy.

Since 2005, three major new titles have been launched in the national newspaper market. In 2007 *De Pers* started a free daily newspaper, founded by the billionaire investor Marcel Boekhoorn. Although the title began as a nationwide newspaper, it is now only distributed within the Randstad, a dense urban region in the west of the country. Currently, *De Pers* has a circulation of around 200,000 copies.¹⁹⁰

In 2007, *DAG* (a joint venture of PCM and KPN) was launched as a multi-platform newspaper distributed through mobile, web and print. However, due to strong competition from other newspapers, *DAG* did not generate sufficient advertising revenue and ceased all its activities in 2008.

Another new entrant into the newspaper market, *NRC Next*, initiated by *NRC Handelsblad*, successfully started in 2006 and currently has a circulation of around 84,000 copies.¹⁹¹ *NRC Next* targets young, better educated adults, mainly providing background information and context to the news.

188. W.J.M. Van Andel and J. Den Hoed, "Onderzoeksrapport PCM" (Investigative Report PCM)," Ondernemingskamer, Amsterdam, 2008, p. 367.

189. CvdM, "Mediamonitor 2010."

190. "De Pers Doet Druk En Distributie over Aan Wegener" (De Pers Hands Printing and Distribution over to Wegener)," *NRC Handelsblad*, 9 April 2009.

191. Edwin Rietberg, ed., *Mediafeitenboekje 2010* (Media Facts Book 2010), Carat Nederland, Amsterdam: 2009, p. 95.

Compared with other media companies, TMG has actively expanded its internet activities in recent years. In 2008, TMG acquired the popular blog *Geenstijl.nl* from Nieuwsmedia, the company set up by the founders of the blog, for an undisclosed sum and in 2010, it acquired the popular social-networking site *Hyves.nl* for around €44 million. *Het Gesprek* was a commercial channel that commenced broadcasting in 2007, focussing on political and current affairs. However, it ceased operations in 2010 due to ongoing financial difficulties. In early 2011, SBS Netherlands (including the television channels SBS 6, Net 5 and Veronica) was put up for sale by its owner ProSiebenSat.1, which is based in Germany. Among others, TMG and De Persgroep prepared a bid, but Sanoma and Talpa (owned by Dutch media entrepreneur and the billionaire John de Mol) took over SBS Netherlands for about €1.2 billion in January 2011. Sanoma owns 67 percent of the shares, Talpa 33 percent.¹⁹² In the past five years, no major new radio stations have entered the news market.

6.1.3 Ownership Consolidation

The CvdM distinguishes between three types of ownership convergence: horizontal, vertical and diagonal.¹⁹³ Section 6.1.2 showed that in the past few years Dutch media companies have been mainly involved in horizontal concentration, as illustrated by the acquisition of PCM by De Persgroep. No important vertical concentrations of media companies have taken place. Currently, however, there is an observable increase in diagonal concentration (cross-media ownership). For example, TMG has expanded beyond publishing newspapers into radio, internet and television, and the online and magazine publisher Sanoma has bought the television stations of SBS.

6.1.4 Telecoms Business and the Media

A substantial part of the Dutch population has access to television and radio through cable providers such as UPC and Ziggo. In the Netherlands there is no open cable, which means that cable companies are local monopolists. Ziggo (nationally 40–50 percent), UPC (20–30 percent) and KPN (10–20 percent) currently hold the largest market shares for the transmission of radio and television in the Netherlands.¹⁹⁴

A significant issue as yet unresolved concerns whether cable companies should allow competitors to use their networks. The Dutch government indeed wanted to oblige cable operators with significant market power to re-sell analog and digital network capacity to alternative program packagers and enable those packagers to have a direct relationship with the customer.¹⁹⁵ The Independent Post and Telecommunication Authority's

192. See <http://nos.nl/artikel/234353-sanoma-en-talpa-nemen-sbs-over.html> (accessed 24 April 2011).

193. CvdM explains: "The most common type of media concentration is horizontal concentration in one link of the production value chain. A second type of media concentration is vertical concentration in two or more links of the media value chain. A third form of media concentration is diagonal concentration (i.e. cross-media ownership), that is a publisher or a broadcaster entering into other media types in addition to its usual operations; for instance, a publisher that becomes active in a radio or television station in addition to a daily paper." (Mediamonitor, 2010, p. 18.)

194. Bram Semeijn, "Ziggo En UPC Blijven Klanten Winnen Van KPN" (Ziggo and UPC Continue to Win Customers from KPN)," *Telecompaper*, available at <http://www.telecompaper.com/achtergrond/ziggo-en-upc-blijven-klanten-winnen-van-kpn> (accessed 28 April 2011).

195. "Kamerstukken II," *Kamerstukken Tweede Kamer vergaderjaar 2006–2007* (Parliamentary Papers, 2006–2007) 24095, no. 212.

(*Onafhankelijke Post en Telecommunicatie Autoriteit*, OPTA) decisions¹⁹⁶ to effect this have received the European Commission's consent at a second round stage, but have nevertheless been rejected by the court, that is, the Trade and Industry Appeals Tribunal (*Het College van Beroep voor het Bedrijfsleven*, CBB). The court found that there is already sufficient nationwide competition with satellite and terrestrial television operators such as Digitenne. The tribunal also expects that the market share of cable operators will decrease due to new emerging platforms.¹⁹⁷ In 2011, OPTA revised its position and concluded that due to digitization and the increasing availability of alternatives to cable, regulation of cable providers was no longer necessary.¹⁹⁸

One of the proposals put forward by the Brinkman Commission to safeguard the future of journalism was to levy a tax on internet subscriptions to fund innovative projects for the news media. The minister ultimately rejected this proposal, but it opened a discussion about the dominant role of news content distributors online, including cable companies and other ISPs, as well as content aggregators such as Google.

In discussions with the Brinkman Commission, the newspaper industry criticizes Google over its supposedly parasitic behavior: Google uses the content of news providers without being part of the news market itself, according to industry lobbyists. However, the commission nuanced the criticism on aggregation services with the argument that these also drive traffic to content owners. Therefore the commission advised print media to seek close cooperation with third parties, including search operators, in order to generate revenue through the online exploitation of their content.¹⁹⁹

Currently there are no concrete activities by telecoms providers in the mobile phone market with regard to news content, nor do they own media companies that play an important part in the provision of news in the Netherlands. There are some more complex ownership links between cable companies and media companies. For instance, the cable company UPC is owned by Liberty Global, an international media company that also owns Chellomedia, a number of themed television channels such as the Food Network and the movie channel Film 1.

6.1.5 Transparency of Media Ownership

Under the General Administrative Law, media companies are obliged to provide the CvdM with all the information necessary to perform their supervisory functions, as defined in the Media Act 2008. Media companies are not, however, obliged to disclose information about ownership and media concentration, because the CvdM is not tasked under the law to collect this kind of information. The CvdM collects such information from, among others, business records provided by the Chamber of Commerce which are accessible to the general public for a small fee. The CvdM makes this information available to the public through its website, Mediamonitor.nl.

196. OPTA, "Besluiten Marktanalyse Omroep," 9 March 2009 <http://www.opta.nl/nl/actueel/alle-publicaties/publicatie/?id> (accessed 28 April 2011).

197. Jan Benjamin, "Rechter Vernietigt Opening Kabelmarkt" (Judge Annulled Opening Cable Market)," *NRC Handelsblad*, 18 August 2010.

198. OPTA, "Digitalisering stimuleert concurrentie, scherp toezicht zakelijke markten blijft nodig" (OPTA digitalization stimulates competition), available at <http://www.opta.nl/nl/actueel/alle-publicaties/publicatie/?id=3434> (accessed 3 July 2011).

199. Tijdelijke Commissie Innovatie en Toekomst Pers, "De Volgende Editie," p. 42.

Broadcasting ownership is monitored by the CvdM, which regularly publishes reports on diverse aspects of media concentration. However, Mr Van Cuilenburg (the Authority's commissioner) acknowledged that basic information about ownership and cross-ownership of media is not always communicated clearly to the public by media owners. He favors the introduction of a compulsory disclaimer (for instance in the masthead) that informs citizens about the ownership of the media they are consuming.²⁰⁰

6.2 Media Funding

6.2.1 Public and Private Funding

Most media advertising markets in the Netherlands experienced varying declines in revenue in 2008-2009 but are forecast to recover quickly, suggesting the fall was attributable largely to cyclical pressures. The market for advertising on television for both commercial and public broadcasters is particularly healthy, and in keeping with the global trend, internet advertising has grown the fastest over the last five years (approximately 100 percent between 2005 and 2010).

Table 18.
Gross advertising spend (€ million), 2005–2010

	2005	2006	2007	2008	2009	2010f
Television	2,757	2,781	3,020	3,067	3,046	3,072
Radio	454	483	534	572	525	540
Newspapers	764	783	881	879	879	885
Internet	97	134	144	200	182	196
Total	4,072	4,181	4,579	4,718	4,632	4,693

Note: f: forecast.

Source: Nielsen, quoted in *Mediafeitenboekje 2010 (Media Facts Book 2010)*, Amsterdam, Carat, 2010.

Although the advertising revenues for newspapers in 2010 were expected to increase, the structural trends are a cause for concern. The decline in 2008 and 2009 appears to be more than a cyclical dip and the Brinkman Commission concluded that newspapers are dealing with multifaceted problems. Besides decreasing advertising revenue, the sector faces long-term declining circulations, debt burdens of publishers, increasing competition from new players on the internet and mobile services, competition from broadcasting organizations, media convergence and changes in the public perception of newspapers' role and function. The last is partly due to the increasing amount of accessible news online.²⁰¹

200. Interview with Jan van Cuilenburg, Commissioner, CvdM, Hilversum, 3 March 2011

201. Tijdelijke Commissie Innovatie en Toekomst Pers, "De Volgende Editie," p. 16.

The decrease in advertising revenue has several causes. First, the main readership of newspapers is the over-50 age group, which is a less important target group for advertisers, compared with 20–49 year olds. In addition, newspapers have to deal with media agencies which function as an intermediary between advertisers and newspapers, thereby collecting high fees that amount to a leak of potential revenues.²⁰² According to Bart Brouwers, online editor at TMG, newspapers are also faced with a new attitude among advertisers. There is increasing attention paid to innovation in reaching audiences, rather than to the advertising content itself.²⁰³ Nowadays advertisers have more opportunities to advertise alongside newspapers, for example, via the internet, television or mobile media. This has particularly affected classified and employment sections because this type of advertising is considered significantly more effective online.²⁰⁴ Furthermore, in the past five years advertisers have also developed their own online and print media to directly access the consumer.²⁰⁵

Up until the turn of the century, PSB was financed by a license fee that owners of radio or television sets were required to pay. From 2000 onwards, this system was discontinued and public broadcasting now receives a yearly grant directly from the government. The NPO itself, however, is in favor of reinstating the license fee, arguing that it makes public broadcasting less dependent on the government and its changing (budgetary) politics after each election cycle.²⁰⁶

NPO is financed by three flows of funds: government funding, advertising and income generated by the broadcasting organizations. The government has provided a media budget of €711 million for 2011. In addition, commercially sold air time, arranged through the Broadcasting Advertisement Foundation (*Stichting Ether Reclame*, STER), is estimated to yield €190 million in 2011, leading to a total PSB budget of €902 million. The majority of this is allocated to NPO,²⁰⁷ though the government also finances regional broadcasters (to the tune of €130 million in 2010). The remainder of the media budget is spent on several funds and regulatory organizations. Broadcasting organizations themselves bring in a revenue stream of around €40 million (for instance, through membership dues and interest on their savings). NPO has pointed out that in 2008, public broadcasting cost citizens around €50 per year.²⁰⁸ In 2011, the government announced a major cut of around €200 million to its media budget as part of general government budget cuts. (On the political background of this cut, see sections 2.1.1 and 2.3.)

202. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie,” p. 16.

203. Interview with Bart Brouwers, editor in chief at *Dichtbij.nl*, Online Media TMG, Amsterdam, 25 February 2011.

204. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie,” p. 38.

205. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie,” p. 39.

206. This claim is made for instance on the NPO website, http://corporate.publiekeomroep.nl/page/organisatie/historie_1999-2003 (accessed 25 March 2011). The NPO chairman, Henk Hagoort, has also publicly made statements in favor of the reinstatement of the license fee: see for instance Wilco Dekker, “Omroepbaas Wil Weer Kijk- En Luistergeld” (Broadcasting Chief Wants License Fee Back), *De Volkskrant*, 14 April 2010, p. 8.

207. The remainder is spent on local public broadcasting services, the World Service (€ 46 million), the Cultural Media Fund and the Press Fund (total € 23 million), the National Audiovisual Institute (€ 20 million), the CvdM (€ 4 million) and other policy measures such as a center for media expertise (€ 2 million). See “Mediabegroting 2011” (Media Budget 2011), Ministry of Education, Culture and Science, 2010.

208. NPO, *Verbinden, Verrijken, Verrassen*, p. 68. Compared internationally, the Netherlands comes in 13th in a group of 15 European countries, led by Switzerland and Austria, where public broadcasting costs € 139 and € 121 a head per year.

Table 19.
Media budget for public broadcasting, 2007–2011 (€ million)

	2007	2008	2009	2010	2011
Government-provided media budget	586	654	688	695	711
Income from advertising	196	200	209	197	190
Total budget including income from interest and temporary provisions such as budget for the switch-over	783	858	901	897	902

Source: Ministry of Education, Culture and Science, media budgets 2007–2011.

Public broadcasting has become a dominant sector in the Dutch media market and there is ongoing debate as to the amount and legitimacy of funding for NPO. Top executives from commercial players such as newspaper publishers and commercial broadcasters often publicly complain that the public sector constitutes unfair competition.²⁰⁹ There is even some discussion over whether public broadcasting should be allowed to be active online at all. (See section 2.1.1.) The main issue in this debate is an ideological one: should the market be given priority in all domains of society? Or are some public functions—such as the provision of independent news and the organization of the public debate—of such importance that this justifies intervention in the market, thus legitimizing the existence of independent institutions that are to fulfill these tasks.

The Netherlands has several funds and temporary projects to support the press. Two of these measures have been installed as a result of the recommendations by the Brinkman Commission. First, Ronald Plasterk, Minister of Education, Culture and Science, introduced a €4 million arrangement for two years, funding 60 young journalists to work for newspapers and opinion magazines. The minister also ordered the Press Fund (*Stimuleringsfonds voor de Pers, SvdP*) to distribute €8 million to fund innovation in the press and media.²¹⁰ In three rounds, the funding was distributed to both public and private parties (publishers, media companies and foundations).

Besides these impermanent measures, the government also supports the Fund for Special Journalistic Projects Fund (*Fonds Bijzondere Journalistieke Projecten, FBJP*). Founded in 1990, the fund receives an annual contribution of €450,000 from the Ministry of Education, Culture and Science, including specific support for investigative journalism.

The decline in newspaper revenue has prompted the question of whether the state should intervene to protect the sector. Some argue in favor of extending the budgets of funds such as the FBJP, contingent on support for the specific aspects of the press that confer public value—namely independent journalism. Government funds can then be distributed to companies and institutions that prioritize these functions. However, many

209. For instance, in 2009 at the presentation of the annual figures of TMG, one of the largest media companies in the Netherlands, the top executive Ad Swartjes argued that the budget of public broadcasting should be halved.

210. SdvP provides grants and conducts research into the functioning of the press. The fund aims to innovate and modernize the press. See <http://www.stimuleringsfondspers.nl/Internet/English/page.aspx/999> (accessed 19 September 2011).

newspaper publishers are wary of this idea, since they fear that additional state intervention will lead, if anything, to a loss of journalists' independence.

6.2.2 Other Sources of Funding

A new model of financing journalistic productions is crowd-funding platforms, which allow audiences to financially support journalism projects. In 2010 Nieuwspost.nl emerged. Hans van Moorsel, consultant at Thaesis, a Utrecht-based consultancy firm, expects that crowd-funding might work, but mainly for niche genres like investigative journalism, partly because it takes time to raise funds for a particular project, in a way that does not suit the rigors of day-to-day reporting.²¹¹ Consequently, although there is quite a lot of attention in the media for crowd-funding projects, it is still a marginal practice in the Netherlands, although of course this might change in the future.

6.3 Media Business Models

6.3.1 Changes in Media Business Models

Newspaper publishers are investigating opportunities for greater commercial exploitation of their content. Although other quality newspapers distribute their content via apps and web-based subscriptions, *FD*, a financial newspaper, is the first and so far only good-quality newspaper to put all its content behind a pay wall. Furthermore, there are also innovations such as online shops. For example, quality newspapers like *NRC Handelsblad* sell books, film, music, wine, travel and art via their websites. It is still uncertain whether consumers will be willing to pay for online news products in their current form. A survey by PricewaterhouseCoopers (PwC) on behalf of SvdP shows that newspapers should focus on product diversification and pricing strategies, so that readers can compile their own package of news. For example, the survey showed that consumers are especially willing to pay for custom-made regional news.²¹²

Whilst developing new products and new business models, for newspapers the key question remains to what extent their commercial sustainability will depend on co-operation with new players in the distribution market such as Apple and Google, as well as telecoms and cable companies. Newspaper publishers have expressed their concern that Apple, as a quasi-monopolist in the field of tablets, is able to dictate contracts for the distribution of newspaper apps, resulting in high (up to 30 percent of subscription fees) distribution fees. However, the barriers to entering this market are quite low, according to Mr Van Moorsel, so there is a significant chance that more disruptive players will enter the market. Consequently, the threat of monopoly power in the distribution of news content is negligible: there is and will remain a huge supply of news that can serve as a counterweight to the dominance of platforms and aggregators.²¹³

211. Interview with Hans van Moorsel, consultant at Thaesis, Utrecht, 10 March 2011.

212. Erik Brouwer and Marieke Van der Donk, "De Transitie Naar Digitale Proposities in De Krantenindustrie" (The Transition to Digital Propositions in the Newspaper Industry)," Stimuleringsfonds voor de Pers/PwC, Amsterdam, 2010.

213. Interview with Hans van Moorsel, consultant at Thaesis, Utrecht, 10 March 2011.

René van Zanten, director of the Svdp, sees a weakening of the divide between the editorial and commercial departments in the press. According to him, this is not a bad development, as long as publications are transparent about what they are doing. Therefore, he argues in favor of the inclusion of disclaimers in which publishers disclose the commercial interests involved in the production of each article.²¹⁴

An example of the closer cooperation between publishers and advertisers is the local news platform Dichtbij.nl, a project of TMG. Mr Brouwers (of TMG) is involved in the implementation of several of these local, partly user-generated news platforms. He explained that in order to make the provision of local news commercially viable, each local team consists of a journalist, a community manager and a sales person, who work in close cooperation with each other. During the pilot of Dichtbij.nl, various forms of merging advertising with editorial content have been tried. These range from straightforward advertorials (identifiable as such), to specific editorials “sold” in exchange for advertising revenue. Indeed, pilot experiments have yielded satisfying results, according to Mr Brouwers. He maintains that for local governments and companies, it might be relevant to communicate through a local platform by using new forms of paid content.²¹⁵ Others have found this way of working controversial and a possible threat to the independence of the journalist.

There are no revolutionary new business models in television or radio in the Netherlands, which has only a few paid-for subscription channels (for sports and movies). Apart from advertising and sponsorship, broadcasters also make money from audiences sending SMS messages, for instance to vote for candidates in programs such as “*Idols*” or “*Holland’s Got Talent*.” At night, commercial television stations turn into advertising channels for telephone sex-lines.

6.4 Assessments

Although digitization has led to the concentration of media companies, there are currently no media monopolies in the Netherlands. The major media corporations are currently concerned with diagonal or cross-media convergence: merging print, radio, television and internet activities. This approach requires large infrastructures and financial resources.

Over the last five years international investment companies as well as publishers have stepped into the Dutch media market with the consequence that of the three largest newspaper companies in the Netherlands, only one is currently Dutch-owned. International companies such as Google and Apple are playing an increasingly important role as distributors and aggregators as well as organizers of the advertising market. This has led to concern among newspaper publishers, who fear companies like Apple and Google might monopolize media distribution and advertising. Due to the internationalization, regulation of media companies and distributors is becoming more difficult.

214. Interview with René van Zanten, Director of the Svdp, The Hague, 4 March 2011.

215. Interview with Bart Brouwers, editor in chief at Dichtbij.nl, Amsterdam, 25 February 2011.

For newspapers, circulation and income from advertising are under structural pressure, threatening the financial stability of regional media in particular. In response, some newspaper publishers—especially TMG—have become active in diversifying their activities across platforms. But although digital media do provide new opportunities to reach audiences, new business models are still at an experimental stage and have yet to prove themselves sustainable. The Brinkman Commission has forecast that by 2013 most newspapers will be loss-making under their current business models.²¹⁶ This has raised the question of whether state protection would be warranted, but most newspaper publishers are themselves wary of this idea, due to concerns about independence.

On the positive side, the market for advertising on television for both commercial broadcasters and public broadcasting has proved healthy and resilient in the challenging climate of recent years.

Public broadcasting has invested in the digitization of content, using new distribution platforms such as thematic channels, mobile services and on-demand services. This has attracted criticism from commercial publishers and broadcasters. They believe that NPO has an unfair competitive position in the advertisement market, given its dual funding structure. But the debate is ideological at its heart, turning on the question of whether the market should be given priority at all times, or whether journalism is perceived as an essentially public function justifying state intervention.

Against this backdrop of ideological debate, the future of the NPO is uncertain, not least because of announced budget cuts of €200 million. The NPO has expressed its wish for the license fee to be reinstated in order to enhance its political independence. It argues that independence is diminished by the current system of direct public funding from the annual budget, sensitive as it is to political swings and roundabouts.

216. Tijdelijke Commissie Innovatie en Toekomst Pers, “De Volgende Editie (Next Edition),” 2009, p. 23.

7. Policies, Laws, and Regulators

7.1 Policies and Laws

7.1.1 Digital Switch-over of Terrestrial Transmission

7.1.1.1 Access and Affordability

The Netherlands was the second EU country to switch off analog television broadcasting signals, in December 2006. At that time, however, less than 1.5 percent of households used terrestrial broadcasting as their main reception mode for television, rendering the impact of switch-off negligible. Of these households, a considerable number (approximately 65,000) did nonetheless rely on analog television reception exclusively, mainly in remote areas where no cable networks were available. In addition, switch-off affected holiday homes, second television sets and mobile homes, such as river crafts and sometimes second television sets outside the living room unconnected to cable (of which there were an estimated total of 500,000).²¹⁷

Switch-off proceeded in three phases, starting in the densely populated north-western part of the Netherlands.

7.1.1.2 Subsidies for Equipment

There was some degree of debate as to what extent the affected households should be remunerated, but in the end, following recommendations by an expert Switch-off Committee, no public subsidy scheme was developed.²¹⁸ Relatively few households were affected and prices for equipment—a digital set-top box—were, at an average of €150, not considered to be insurmountable and expected to be dropping. The only (state-funded) operation was a well prepared information campaign and the installation of a temporary “commission on interference”. This was set up to receive and respond to complaints regarding technical interference by DTT with cable connections, due, for instance, to the use of low quality plugs.

217. H. Koetje et al., “Advies Commissie Switch-off. Afschakelen Om Digitaal Door Te Starten” (Advisory Switch-Off Committee. Switch off to Start Up Again), Ministry of Economic Affairs, The Hague, 2004 (hereafter Koetje et al., “Advies Commissie Switch-off”).

218. Koetje et al., “Advies Commissie Switch-off.”

7.1.1.3 Legal Provisions on Public Interest

In 2002, the government organized a “beauty contest” for the award of the digital terrestrial television licenses. This instrument was chosen because it enabled the government to set a number of public interest conditions for the use of digital terrestrial spectrum, regarding among other things a diverse program offer, a roll-out scheme resulting in universal coverage, use of open and inter-operable standards, cooperation with the PSB, and the introduction of new services.

There was in the end, however, only one applicant. Digitenne, which is a consortium of the terrestrial network operator Nozema, telecoms incumbent KPN, and various public and commercial broadcasters, was awarded the license for four digital multiplexes for a period of 15 years. Digitenne also manages the multiplex that is licensed to the national PSB. Households can receive the digital PSB channels for free, after they have bought a set-top box. The award of licenses for digital terrestrial broadcasting is guided by the general licensing principles laid down in the national frequency policy and national frequency plan. There are no separate public interest provisions in digital licensing.

7.1.1.4 Public Consultation

No public consultation was organized in respect of switch-over. Aside from expert consultation established through the Switch-off Committee,²¹⁹ there was some public debate in Parliament on the time frame, costs, license conditions and roll-out obligations on established broadcasters, and the main stakeholders, including broadcasters, cable and telecom operators, were consulted by the government. Controversial issues included the costs of switch-over, aired by the consumer association and some members of parliament, and the participation of KPN, the former telecom incumbent, in the Digitenne consortium. There was—and still is—some concern about potential anti-competitive behavior, especially because KPN has also invested in broadband and IPTV. Because of the low number of households affected and the free-to-air availability of the PSB channels, the switch-over was relatively uncomplicated and did not cause much public protest. When the new license period approaches (the current one ends in 2017), the conditions for obtaining a new license will have to be reconsidered in the light of changed circumstances.

7.1.2 The Internet

7.1.2.1 Regulation of News on the Internet

There is no specific regulation concerning news on the internet and mobile platforms. However, general laws on libel, or inciting violence, hatred or racism, apply as well as laws on consumer protection and competition law. In 2010, the Ministry of Justice and Safety launched a legal proposal to protect consumers against cyber-crime, by making it unlawful to publish private data, by allowing the prosecution to block internet sites without a court decision, and by forbidding taping telephone conversations without consent.²²⁰ The internet

219. Koetje et al., “Advies Commissie Switch-off.”

220. Ministerie van Veiligheid en Justitie (Ministry of Security and Justice), “Wetsvoorstel bestrijding computercriminaliteit” (Bill on Countering Computer Crime), available at: <http://www.rijksoverheid.nl/documenten-en-publicaties/kamerstukken/2010/07/28/wetsvoorstel-versterking-bestrijding-computercriminaliteit.html> (accessed 2 September 2011).

consultation of this proposal resulted in over 1,000, mostly very critical, responses, including many by media organizations, media experts, academics and journalists' associations, who pointed at the risks for freedom of speech of this legal proposal.²²¹ The proposal has not yet been discussed in Parliament.

NPO has a substantial online news offer as well as a 24-hour digital cable news channel, 10 other digital cable television channels and some mobile news services. For all of these, the same or similar rules as those concerning PSB radio and television content apply. For instance, internet advertising on PSB websites is allowed, but only to a limited extent, with a strict distinction between commercial and editorial content. There are no specific restrictions for the online content of commercial broadcasters.

7.1.2.2 Legal Liability for Internet Content

There has been some debate over the responsibility of ISPs for illegal material on their networks and their obligations to filter content, store content and provide access to user information for criminal investigators. This debate focuses on cyber-crime, terrorism, child pornography and copyright infringements, and has not affected news and journalism.

The lobbying organization for the film and music industries, Protection Rights for the Entertainment Industry of the Netherlands (*Bescherming Rechten Entertainment Industrie Nederland*, BREIN), wants ISPs to block sites that allow file-sharing of potentially copyright protected content, or to limit the amount of traffic that the users of these networks can generate. This would mean that ISPs had to implement inspection techniques, which, according to the internet watchdog Bits of Freedom (BOF), an NGO that operates as a watchdog against policies that could threaten openness on the internet, would violate privacy rights.²²² The current policy is to stimulate the development of “notice and take down” agreements, and is thus based on a form of self-regulation.

Although there are minimal regulations that directly affect news delivery on the internet and mobile platforms, the issue of net neutrality is increasingly relevant for content distribution. At its core, net neutrality concerns the principle that all internet traffic is treated without discrimination and no techniques for prioritization or blocking of certain types of content or services are applied.²²³

One reason for concern about net neutrality is the fact that telecoms markets tend toward oligopoly, due to the importance of economies of scale and the high investments required for the “last mile” infrastructure of connectivity. Although there are many competing ISPs, the networks on which they operate are mainly

221. D. van der Kroft, “Persbericht: Nederlandse internetgemeenschap protesteert tegen overheids censuur” (Press Release: Dutch Internet Community Protests Against Government Censorship), 15 September 2010, available at <https://www.bof.nl/2010/09/15/persbericht-nederlandse-internetgemeenschap-protesteert-tegen-overheids-censuur/> (accessed 2 September 2011). See also W. Hins, M. Groothuis and C. Wiersma, *Persvrijheidsmonitor Nederland 2010*, AMB, Diemen, 2011 (hereafter Hins et al., *Persvrijheidsmonitor Nederland 2010*).

222. See the speech by the BOF director Ot van Dalen during a debate in The Balie, Amsterdam on 27 May 2010, available at <https://www.bof.nl/2010/05/27/tekst-bits-of-freedom-downloaddebat-genoeg-is-genoeg/> (accessed 26 April 2011).

223. R. Bekkers, R. Brennenraedts, S. Smeets and R. te Velde, *Netwerknutraliteit: Stand Van Zaken in Nederland* (Network Neutrality in the Netherlands), Dialogic, Utrecht, 2009.

owned by the incumbent operator KPN and cable providers, which also run their own ISPs. As the Office for Economic Policy Analysis (*Centraal Plan Bureau*, CPB) explains, “network operators have incentives to abandon network neutrality in order to charge end users and content providers different prices, based on the value of the content to them”.²²⁴ Moreover, some telecoms operators offer IPTV and VoIP services that compete with those offered by online providers that do not possess their own networks. This might lead to a situation where an ever larger part of the internet becomes a private lane for managed services and where traffic on the public internet lane is prioritized according to business interests. Also problematic is that it is often unclear for end users (individual customers as well as content and service providers) when, why and how ISPs apply different forms of prioritizing or blocking internet traffic.

The government has refrained from prohibitions on interfering with internet traffic, as well as from setting a minimum quality of service norms or prohibiting unreasonable discrimination, but instead relies on a lighter form of regulation by imposing transparency requirements.²²⁵ By obliging ISPs to inform their customers about the traffic management policies in their contracts, it hopes to encourage better informed consumer choices and leave the preservation of neutrality to market forces.²²⁶ This policy presupposes that so long as there is sufficient competition within the wholesale market for internet service provision, and as long as consumer demand aligns with minimal traffic management, neutrality will be preserved.

Some experts, however, argue for stricter regulation:²²⁷ for instance, BOF has also called for stronger regulation.²²⁸ They argue that ISPs should be prohibited from discriminating between internet traffic, except where this is necessary for rational network management.

Until recently, net neutrality was discussed among experts, active members of the internet community and policymakers. This changed after an announcement by KPN that it would charge extra for the free voice internet telephony service Skype and the free SMS service Whatsapp. In June 2011, Parliament voted to amend a government proposal to revise the Telecommunication Law on net neutrality. This makes the Netherlands one of the first countries where net neutrality will become statutory. The proposal prohibits ISPs from blocking or restricting services or charging users extra for particular services. Charging differential tariffs, depending on use or speed, and reserving bandwidth for particular services such as IPTV remain possible, but providers cannot differentiate between internet services that consumers are able to access on the internet.²²⁹

224. CPB, “Memo: Response to Public Consultation on Internet and Net Neutrality,” CPB, The Hague, 2010.

225. By way of implementing the EU Universal Services Directive.

226. TNO, *Transparantie over netneutraliteit*, TNO, Delft, 2010.

227. N. van Eijk, “About Net Neutrality 1.0, 2.0, 3.0 and 4.0. The IT Law Community,” *SCL Forum*, 2011; O. van Dalen, “Verbod Alle Censuurtechnologie Op Internet—Ook in Nederland” (Prohibit All Censorship Technologies—Also in the Netherlands), *NRC Handelsblad*, 24 February 2011.

228. BOF, “Position Paper Netwerkneutraliteit” (Position Paper Network Neutrality), Amsterdam, 2010.

229. *Wijziging van de Telecommunicatiewet ter implementatie van de herziene telecommunicatierichtlijnen* (Changes in the Telecommunication Act to implement revised guidelines for telecommunications), Kamerstuk (Parliamentary Papers) 32 549 nr. 17, 8 juni 2011, vergaderjaar 2010-2011, available at <https://zoek.officielebekendmakingen.nl/dossier/32549/kst-32549-17> (accessed 30 June 2011). For an unofficial translation, see <https://www.bof.nl/2011/06/27/translations-of-key-dutch-internet-freedom-provisions/> (accessed 30 June 2011).

7.2 Regulators

7.2.1 Changes in Content Regulation

Four regulatory authorities are involved in overseeing the media sector: the NMA, OPTA, the CvdM and the Radiocommunications Agency (*Agentschap Telecom*, AT). The Consumer Authority (*Consumentenautoriteit*) may also be involved.

Of these, only the CvdM is directly concerned with regulating media content. However, decisions by the other regulators may affect the availability of and access to content, when dealing with issues of, for instance, broadcasters' access to communication networks (OPTA) or setting conditions for mergers between media companies (NMA).

The CvdM was founded in 1988 as an autonomous body responsible for executing the Media Act. It was founded in order to create more distance between the government and the media. Tasks that used to be performed by the Ministry of Education, Culture and Science were now delegated to the CvdM, which is essentially concerned with the content that is transmitted through networks. Its most important tasks in this context are awarding licenses to commercial broadcasters, monitoring public and commercial broadcasters' programming obligations, and advertisement and sponsorship restrictions. It also oversees the NPO's finances and advises the government on the budget and policy plans of the PSBs.

The CvdM is also responsible for monitoring the level of diversity and pluralism in media markets. If broadcasters are in breach of rules, the CvdM can apply sanctions which include administrative fines (up to €225,000), reduction of air time and license revocation. The last two sanctions are only applied in rare cases. In response to the converging media landscape, both the Telecommunication Act and the Media Act 2008 have instituted a relatively platform-neutral and technology-independent regulatory regime. This means, for instance, that the remit of PSBs is no longer confined to radio and television but can also include other information services such as online and mobile services. It also means that must-carry obligations will apply to digital cable networks as soon as more than 50 percent of households are upgraded from analog to digital cable.²³⁰

The changes have also affected the scope of audiovisual media services that have to comply with certain requirements in the Media Act. With the implementation of the EU Audiovisual Media Services Directive in 2009, relevant online and mobile services have become subject to the Media Act. In this way, the government wants to create a level playing field for all television-like services, regardless of whether they are offered through traditional distribution networks or through new digital platforms. The same requirements of the Media Act apply, regardless of whether the signal is analog or digital, or whether channels are offered via cable, terrestrial, satellite, or IP networks. All channels need to be licensed by the CvdM.

230. Cable operators have a must-carry obligation for analog and digital program packages when at least 50 percent of households watch these program packages: Media Act, 2008.

The government also wants to guarantee a certain level of consumer protection concerning advertising, the protection of minors and quotas for European productions on all platforms. The Media Act distinguishes between the provision of linear and on-demand, or non-linear, commercial media services. Non-linear services are subject to lighter regulations than linear services.²³¹ At the same time, content regulation for linear services was somewhat weakened compared with that of analog television, allowing for instance for more in-program advertisements. In addition, the constellation of regulatory authorities might be subject to some changes resulting from digitization and increased competition between network operators. The current government is preparing legislation to merge NMA, OPTA and the Consumer Authority into one regulatory body. One of the reasons is that telecoms regulations, in response to increased competition with the emergence of new platforms, are moving more and more towards general competition regulation. Specific ex-ante regulation for operators of telecoms networks is decreasing, making it more logical to have one regulatory body that applies (to a large extent) the same principles to each economic market.

To ensure consistency, there are, however, coordination agreements between the regulators in a number of (partly) overlapping domains.

7.2.2 Regulatory Independence

The CvdM and OPTA are autonomous administrative bodies, performing a number of legal tasks at arm's length from the government. The regulators are subject to the laws that define their status, their responsibilities, and their operations and procedures, as well as their administration and management. The boards of the regulatory authorities are, however, appointed by the state.

The CvdM is run by three commissioners, appointed by the Queen on the recommendation of the Minister of Education, Culture and Science for a term of five years, with the possibility of one reappointment. Commissioners are required to be independent from both politics and media organizations.

OPTA's board has three independent experts, appointed by the Minister of Economic Affairs, Agriculture and Innovation for a period of four years. They usually come from different expert backgrounds. Daily management is executed by the chair and two managers.

Despite the direct government influence on appointments in the boards of regulatory authorities, the political culture that has developed in the Netherlands since the decline of pillarization is such that their members are first and foremost appointed because of their knowledge of the field and/or their experience in public administration or management and not because of their loyalty towards the government or a particular political party. Direct political appointments in these bodies have not taken place over the past decades, although informally some balance is sought in the composition of boards between expert members with different (political) views or affiliations, to the extent that these are known.

231. See the CvdM's brochure on on-demand audiovisual services at <http://www.cvdM.nl/dsresource?objectid=11318&type=org> (accessed 24 April 2011).

7.2.3 Digital Licensing

Commercial broadcasters have to apply for a license with the CvdM. They are permitted a license if they fulfill some administrative requirements (such as proving that they are a legal person) and if they can be expected to follow the legal obligations and restrictions which are laid down in the Media Act. A broadcaster's political, religious or ethnic affiliations play no role. In awarding licenses, the CvdM does not distinguish between analog or digital broadcasts. The CvdM only comes into play if a commercial broadcaster is denied access to the cable operators' basic program package, in disregard of the binding program council's advice. Likewise, OPTA can intervene if a broadcaster is refused access to the cable operators' network on unfair grounds.

7.2.4 Role of Self-regulatory Mechanisms

There are a number of self-regulatory bodies in the media landscape. They originated in the analog era and were thus concerned principally with the traditional media, television radio and the press. But they have all, to some extent, branched out into new media such as the internet and gaming.

The Advertising Code Authority (*Stichting Reclamecode*, SRC) is a self-regulatory body for advertisers. It was founded in 1963 and its board is made up of people from advertising agencies, media companies, advertisers and consumer organizations.²³² The advertising authority developed a code which aims to ensure responsible advertising and prevention of misleading or aggressive techniques. It has also developed specific codes for alcohol and tobacco advertisements, as well as for those aimed at children. In recent years, the SRC has also introduced specific guidelines for advertising by email and text messaging, specifying how to prevent misleading information concerning the nature and price of services, such as games and subscription services.²³³ With the revision of the Audiovisual Media Services Directive, non-linear content is also subject to the code.

The Netherlands Institute for the Classification of Audiovisual Media (*Nederlands Instituut voor de Classificatie van Audiovisuele Media*, NICAM) is a prominent example of self-regulation in the audiovisual sector.²³⁴ Since its launch in 1999, a team of independent experts has developed a uniform classification system for audiovisual content. Its goal is to warn parents against potentially harmful content, by providing age indicators and indicators of the level of violence, explicitly sexual material, use of bad language, fear, alcohol or drugs and minority discrimination. Content rated "12" cannot be broadcast on television before 8 p.m. and content rated "16" cannot be broadcast before 10 p.m.

Since 2003, NICAM has also implemented the Pan-European Game Information system (PEGI) for the classification of games (including online casual games). Although formally it does not cover the internet, NICAM participates in national and international consultations on this issue.

232. See www.reclamecode.nl (accessed 24 April 2011).

233. See <http://www.reclamecode.nl/nrc/pagina.asp?paginaID=275%20&deel=2> (accessed 24 April 2011).

234. See www.kijkwijzer.nl (accessed 24 April 2011).

The Press Council (*Raad voor de Journalistiek*, RVDJ) is an independent commission, consisting of journalists and non-journalists and a lawyer, which deals with complaints about the violation of good journalistic practice.²³⁵ The RDVJ bases its judgments on a set of journalistic guidelines and with its judgments it can provide ethical guidance, by widely publishing its opinion and sending it to all news organizations. It can also act as a mediator between complainants and the accused, but it cannot impose any sanctions or rectifications and is thus not a disciplinary body. It can only deal with complaints from people who are directly involved in the matter. In recent years, the RDVJ has dealt with dozens of complaints about both print and broadcast media. As it can deal with all complaints about journalists, online news providers are in principle not excluded.

Journalists are considered to be those professionals who are members of the NVJ, which implies that a blogger who publishes without being paid will not automatically fall under the jurisdiction of the RDVJ. In a 2009 case, the RDVJ included the responsibility for placing a hyperlink to compromising pictures as a medium-related consideration in its decision. It ruled that in placing the hyperlink, the author of the online article should have taken into account the regular journalistic principles regarding the proportionate importance of public interest versus respect for privacy. The 2008, 2009 and 2010 year reports of the RDVJ do not indicate major new, internet-related issues, and the complaints about internet publications are judged with the same set of guidelines as journalism content in broadcast and print media.²³⁶

A number of individual media organizations employ a so-called ombudsman who responds to complaints by readers, viewers or listeners and sometimes discusses ethical issues on his or her own initiative. NOS used to have such an ombudsman as well as a number of newspapers, including the national titles *De Volkskrant*, *NRC Handelsblad*, *Algemeen Dagblad* and a number of regionals. Recently, however, the NOS ombudsman was made redundant and research into ombudsmen in the media has showed that their number has decreased from 12 in 2008 to a mere five in 2010, mainly due to cost-cutting operations, but also motivated by the argument that in the internet era online options for direct comments concerning journalistic content by citizens and bloggers are a more direct and cheaper way to accommodate criticism and complaints.²³⁷ There is also a Netherlands Media Ombudsman Foundation which stimulates debate about ethical journalism and self-regulation in the sector, among others.

Other self-regulatory mechanisms include editorial codes of conduct and the practice of clearly highlighting sponsored content and separating editorials from advertisements. A model for an editorial code is made available by the NVJ on its website.²³⁸ Guidelines for good practice with regard to advertising are published by the Advertising Code Committee (*Reclame Code Commissie*, RCC).

235. See www.rvdj.nl (accessed 24 April 2011).

236. Press Council, "*Jaarverslagen*" (Annual Reports) 2008, 2009 and 2010, available at <http://www.rvdj.nl/katern/46> (accessed 3 September 2011).

237. H. Evers, H. Groenhart and J. van Groesen, "De Nieuws Ombudsman; Waakhond of Schaamplap" (The News Ombudsman. Watchdog or Decoy?), AMB, Diemen, 2009, available at www.newsombudsmen.org/wp-content/.../Nieuwsombudsman_engels.pdf (accessed 24 April 2011).

238. See <http://www.nvj.nl/caos/voorbeeld-redactiestatuut-dagblad> (accessed 24 April 2011).

Online news services, such as the largest online news provider in the Netherlands, Nu.nl, often also have codes of conduct. These explain their editorial policies and specify in particular if and how they moderate UGC, how they will act if their editorial policies are violated and how they will treat legal offenses and infringements.

The boards of the self-regulatory bodies usually consist of representatives from the industry, professional associations and sometimes also from consumer associations. They are usually financed and appointed by the stakeholders themselves and sometimes receive some additional government funding.

The Netherlands has quite an intricate system of regulation and self-regulation with respect to the media. Self-regulatory mechanisms have become a lot more popular in recent years, also influenced by a declining belief in the regulatory powers of the state and a more liberal view on the functioning of markets. More reliance on self-regulation does not necessarily mean less social concern with media content, though. Especially after the murder of Pim Fortuyn in 2002, a public debate evolved in the Netherlands as to what extent the media had been responsible for, or at least contributed to, creating a climate in which such a crime could happen. Some accused the media of having polarized the debate between his supporters and adversaries and of picturing Fortuyn as a dangerous, anti-Islam and racist politician. Others thought the media failed to adequately represent multicultural society and produced mainly stereotypes of (Moroccan) Muslims in particular.²³⁹

Publications by government advisory bodies provided a more in-depth analysis of the dynamics between politics and media and in response to this debate, the government endorsed the media's self-regulatory processes.²⁴⁰ In its 2008 policy paper on the press, the Ministry of Education, Culture and Science provided subsidies for a journalism debating bureau (which was abolished in 2010)²⁴¹ and temporary financial support to the RDVJ in order to strengthen its functioning; the Press Fund provided a subsidy for the News Monitor (*Nieuwsmonitor*), which conducts periodic research on the ways in which the media report on particular events or issues.²⁴²

239. See S. Bink and C. Serkei, "Verbinden of Polariseren? Over De Multiculturele Kwaliteit Van De Media in Nederland" (Connecting or Polarizing? On the Multicultural Quality of the Media in the Netherlands)," MiraMedia, Utrecht, 2009; MiraMedia's yearly reports on media and minorities provide an overview of incidents and debate on how media report on the Dutch multicultural society, available at www.miramedia.nl; A. Leurdijk, "Van Marge Naar Mainstream Essay over Mediabeleid En Culturele Diversiteit 1999–2008" (From Margin to Mainstream. Essay on Media Policy and Cultural Diversity 1999–2008)," Ministry of Education, Culture and Science, The Hague, 1999.

240. Scientific Council for Government Policy (Wetenschappelijke Raad voor het Regeringsbeleid), "Focus Op Functies. Uitdagingen Voor Een Toekomstbestendig Mediabeleid" ("Focus on Functions. The Challenges for a Future-Proof Media Policy") Amsterdam, 2005; RMO, "Medialogica. Over Het Krachtenveld Tussen Burgers, Media En Politiek" (Medialogic. On the Force Field between Citizens, Media and Politics)," Den Haag, 2003.

241. The abolition of the bureau was due to a combination of reasons, including cuts in the media budget, lack of (financial) support from the sector itself and too few tangible results.

242. "Kamerstukken II," (Parliamentary Papers II) *Kamerstukken Tweede Kamer vergaderjaar 2008–2009* (Parliamentary Papers 2008–2009) 31777, no. 1.

7.3 Government Interference

7.3.1 The Market

There are no cases known in which government interference unduly distorts the media market by granting or withholding financial support to media outlets for political reasons.

7.3.2 The Regulator

As a rule, the state does not exert legal pressure on digital media content providers (see section 7.3.4).

7.3.3 Other Forms of Interference

In principle, the government refrains from interference with media content, and freedom of speech is adhered to as much as possible. In practice, however, there have been a few incidents over the last few years which have raised concerns regarding undue interference, as well as an increasing interest of members of parliament in the content of public broadcasters. Finally, there have been a few cases in which freedom of speech concerns have been disputed where it has been considered incompatible with the constitutional right not to be discriminated against.

The NVJ lists a number of cases on its website in which the state has interfered with media (www.villamedia.nl). Incidents are also compiled in a yearly monitor of press freedom, issued by the Press Freedom Fund (*Persvrijheidsfonds*), an association created by the NVJ and the Dutch Association of editors-in-chief (*Nederlands Genootschap van Hoofredacteuren*). In 2008, a cartoonist was arrested and detained for 30 hours on the accusation of violating anti-hate speech laws in his cartoon drawings on Islam. The cartoons were found punishable, but the prosecutor refrained from further prosecution because the cartoons had been removed from the internet and no further complaints were filed.

In 2009, three journalists from the largest newspaper, *De Telegraaf*, were monitored by the state security services (General Intelligence and Security Service, *Algemene Inlichtingen- en Veiligheidsdienst*, AIVD). This followed publication of information from confidential documents of the secret service.²⁴³ A court ruled that there had been insufficient grounds for eavesdropping, while the secret service's own supervisory committee declared that the actions had been justified, but that the decision to monitor the journalists had been taken too early. The secret service employees who had been laid off for leaking the information to the newspaper were acquitted in a 2010 court case.²⁴⁴ *De Telegraaf* launched a complaint with the European Court of Human Rights, which has not yet ruled on the case.

In 2008, employees of the Ministry of Social Affairs broke into the editorial computer system of the Associated Press Services (*Geassocieerde Pers Diensten*, GPD) to get access to articles that were in preparation. Several media outlets, as well as the NVJ, expressed concern over this illegal act. Both employees were suspended

243. See www.nvj.nl/persvrijheid/the-freedom-of-expression-in-the-netherlands, accessed 7 April 2011.

244. For more details, see Hins et al., *Persvrijheidsmonitor Nederland 2010*; W. Hins, M. Groothuis and C. Wiersma, *Persvrijheidsmonitor Nederland 2009*. AMB, Diemen, 2010.

by the Ministry of Social Affairs and were later found guilty by the court and sentenced to conditional punishments of 100–150 hours of community services.

In 2009, the mayor of Utrecht tried on two occasions to stop the publication in local newspapers of articles about his alleged abuse of personal expenses. This behavior led to some political upheaval in the local council, but did not have any substantive consequences.

Another reported incident was the threat by the National Police (*Korps Landelijke Politiediensten*, KLPD) to shut down the website PublicIntelligence.net if it would not remove all content related to *Inspire* magazine. According to the KLPD, the magazine would be considered as illegal under Dutch law, due to the inciting content related to Al Qaeda in the Arabian Peninsula. The magazine is still available on the website. These are a selection of examples of state interference with the media. For some of these incidents, it is not yet clear whether they were unlawful or can be legally justified. Others were solved in court or Parliament. There is no systematic abuse by regulatory authorities or the state of their powers with regard to media and freedom of speech. In this respect, there is no difference between the analog and the digital era and—although research in this area is lacking—there seems to be no increase or decrease in these incidents that could be attributed to the use of digital technologies or the increase in the use and reach of digital media.

Although direct government interference with the media is scarce, there are some concerns over increasing indirect influence. This is related in part to the change from a license-funded PSB to a tax-funded system. Since this change, the budget for public broadcasting has been considerably more volatile as it is reviewed on an annual basis as part of overall government spending decisions.

There seems to have been a parallel increase in the level of scrutiny of the PSBs' performance, which is in line with more demands for transparency and accountability in publicly funded institutions, but which may also lead to over-detailed performance and reporting obligations.

Another symptom of political interference is the frequent questioning in Parliament over the content of PSB programs. In recent years these derived primarily from the anti-Islam party PVV, which objected to a number of programs on Islam, as well as to the supposedly left-wing bias of PSB news and current affairs reporting. But other political parties have also raised questions which may be seen as an implicit threat to the editorial independence of public broadcasters.

Over the past decade there have been questions in Parliament about particular entertainment or comedy programs which were thought to be insulting for the royal family, tasteless, unethical or of too low quality and thus unfitting for a public broadcaster. These debates have, however, not led to any direct state interference and were usually met with strictly formal replies from the government that it cannot interfere in the media's editorial content.

In recent years there has been some debate over legal or moral restrictions to freedom of speech with regard to, for instance, discrimination, religious offense and hate speech. Freedom of speech and the prohibition of discrimination are both secured in the constitution and have to be balanced in cases where media outlets are accused of discrimination or of inciting hatred. This concerns not so much pressure on media by state

authorities as the application of sometimes conflicting legal principles. The surrounding political and moral debate can, however, indirectly affect the media and cause changes in their performance or self-censorship by journalists, for better or worse.

A prominent case of such a conflict between freedom of speech and prevention of discrimination was the release of the anti-Islamic propaganda film *Fitna* in 2007, produced by the right-wing and anti-Islamic politician Geert Wilders. The film and a number of statements Mr Wilders made in newspapers met with complaints from several individuals and Muslim organizations. Although the prosecution initially decided not to prosecute him, this decision was overruled by the court in 2010. However, in June 2011 the court acquitted him of charges of inciting hatred and discrimination against Muslims. It ruled that Mr Wilders' statements were "insulting", but most condemned Islam as a religion, rather than Muslims, and thus his statements were protected by freedom of speech.

There are also concerns about the level of openness of government information, especially following a proposal to restrict the official procedures for obtaining undisclosed documents through freedom of information legislation. Also, recent legal proposals regarding the prevention of cyber-crime are thought to affect freedom of speech.²⁴⁵

7.4 Assessments

In general, the legal processes in the Netherlands and the roles of the state and regulatory bodies concerning the media are balanced and well defined by law. Laws and regulations as well as the procedures implemented by these bodies are by and large transparent. The licensing processes for digital radio and digital television are guided by similar principles as in the analog era. There is a preferential position for PSB and the goal of balancing public and private interests is enshrined in the legal framework. Since commercial interest in digital radio has been low and there has so far been only one serious candidate for digital terrestrial television, the licensing processes for digital frequencies have not caused major upheaval or contestation. This is likely to change in the allocation of the digital dividend, as here telecoms and other providers have strong commercial interests which might impact negatively on terrestrial broadcasters.

In 2008, the Media Act was revised and made more technology-neutral. With regard to content regulation, there has been some widening of the scope of audiovisual content that falls under the Media Act, following from the revisions in the European Audiovisual Media Services Directive. Self-regulatory bodies have also in many cases expanded their scope to cover online news and content. This sometimes raises questions regarding the definition of services, the exact scope of and the enforceability of regulations and codes, but has not (yet) led to fundamental changes in the framework and basic principles.

An issue that will gain importance in the future with regard to online news provision is the way in which principles of net neutrality are applied to providers of digital mobile and fixed broadband networks. The Netherlands has been the first European country to lay down net neutrality in law. However, implementation

245. See Persvrijheidsfonds at <http://persvrijheidsfonds.nl/pvfv/welkom> (accessed 24 April 2011).

details are still unclear. Moreover, the legislation only concerns internet services, and does not impinge on the capacity that network operators reserve for digital managed VOD or IPTV services. When congestion problems increase due to an increased use of online audiovisual content, among other reasons, and especially when network providers are vertically integrated with content providers, this might become an obstacle in the market for news and other content providers.

There is a relatively high degree of protection against undue state interference. Nevertheless, there have been a number of incidents in recent years in which there seems to have been unlawful state interference in the media. The politicians or government bodies responsible for these incidents have in most cases been duly reprimanded and held to account. But the incidents as well as recent legal proposals concerning stronger protection against cyber-crime, which might affect freedom of speech principles, show that freedom of speech cannot be taken for granted and requires continuous vigilance.

There have also been some developments that have negatively affected the level of PSB independence, such as the change from a license- to a tax-funded system and increasing political questions raised over both the output and scope of PSB services. These developments, however, do not seem to be directly linked to digitization.

The growing impact of the media on society, in combination with the undesirability of direct state interference, has led to an increased reliance on self-regulatory mechanisms such as editorial codes of conduct, a press council, an advertising code and a new system for the classification of audiovisual media.

Stakeholder consultation in policy development and implementation is a relatively common practice and media policies are no exception. This means that the industry, commercial and public service broadcasters, civil society organizations and other stakeholders are regularly consulted over the process of spectrum allocation, changes in media and telecommunication laws, net neutrality, cyber-crime, or the liability of ISPs for internet content. Issues concerning new media technologies also receive media attention, especially in the specialized press and in online blogs and discussion groups, and are gradually also entering a wider public debate, as evidenced in the recent parliamentary interventions on net neutrality.

Pluralism and diversity remain important guiding principles, as does finding a balance between public service and commercial interests. These principles continue to guide media policymaking in the digital era concerning distribution and content.

The amount of news and information has increased enormously; users have access to this information in many more ways than before, and can more easily contribute to content production and dissemination. However, scarcity has not completely disappeared and news and other content providers come increasingly into conflict with intermediaries such as cable operators, ISPs or mobile platform owners concerning the integrity and accessibility of their content, or the conditions under which this content will be made available to consumers. These issues are now still predominantly negotiated between market players, but might require more active government involvement in the future.

8. Conclusions

8.1 Media Today

Digitization of the media landscape has become a dominant force in the Netherlands over the last five years. Internet access is above 90 percent, and will become close to universal in the near future. Almost 60 percent of households now have access to digital television. The switch-over from analog to digital broadcasting for television has been smooth, due to the low number of households that depended on the analog network for television reception.

Media practices are changing as well. Both television and radio are on their way to become multimedia platforms that are accessed through a variety of devices, from the traditional television or radio set to the computer and portable devices, although traditional media use such as watching live television on the main television set still dominates. Changes are most prominent with younger generations, who—apart from being the most avid digital media users—have also shifted their media preferences: they value commercial news providers slightly more than public ones and are also less willing to pay for news than older people.

When all platforms are taken together, seven mainstream media organizations still account for 80 percent of all news consumption, suggesting that while digital media have changed the way news is consumed to some extent, so far they have had much less impact on who provides it. Yet there is a concurrent development as well: in the digital media landscape the number of total voices is on the increase. There is hardly a cultural, activist or political grouping without an online presence. Social networks such as Twitter have become influential channels on which current events are discussed both by news-makers such as politicians and by the general audience. The mainstream press has in this sense lost its monopoly as the moderator and guardian of public debate. However, ultimately most opinions are only received by the wider public when amplified by conventional media. As such, an intricate media ecology has been emerging which reflects the dynamic relationship between new and traditional forms of journalism. Much of the debate on UGC sites and social network sites revolves around issues brought up by the mainstream press. At the same time, journalists monitor these networks in search for new angles and issues to address.

Because of the increase of channels and platforms in the digital media landscape, new parties have emerged as organizers of the digital sphere, varying from search engines such as Google and social networks such

as Hyves and Facebook to cable providers who determine the line-up of their EPGs. So, although media ownership concentration and media diversity are not prominent issues, some fear for the emergence of an audience concentration where a limited number of often international companies dominates the audience exposure to sources.

Independent journalism is going through both exciting as well as difficult times. On the positive side, digital media have opened up a range of new opportunities, such as crowd-sourcing, data journalism and new ways to engage the public in conversations, for instance through the use of social networks or with tools such as online vote selectors. However, most of these new approaches have so far been embraced only experimentally and have yet to prove themselves as commercially viable ways of news production or as relevant sources of information.

The largest challenge for independent journalism is to find new business models. Newspapers in particular are going through difficult times, with decreasing subscriptions, aging readership and a decrease in income from advertisers. Horizontal and diagonal convergence has led to a dominance of larger, partly foreign-owned media companies. Some of these are more attuned to selling audiences to advertisers on a range of platforms than to bringing independent news to citizens. As a result of these concurrent developments, many journalists have lost their jobs, editorial departments have been merged, the total number of sources is on the decrease and journalists have less time to check third-party content such as press releases. At a local level in particular, independent journalism as a watchdog of the democratic process is structurally undermined.

The reach and prominence of public service news has so far not been affected much by digitization. Public broadcasting remains by far the most widely used news source across all platforms. It is also mostly trusted by its audiences, even though there are some groups in society—young people, ethnic minorities and supporters of populist parties—which feel unrepresented by public broadcasting. When we look at the internet as an independent platform, the news provision of PBS has been surpassed by several other players, such as Sanoma's nu.nl. The prominent position of PBS might also come under pressure since the government has announced a cut of about 20–25 percent of its total budget. There is also much discussion on whether public broadcasting's online presence should be curtailed. Commercial publishers claim that the presence of PBS on the internet is a form of unfair competition. However, if PBS is not able to connect to the changing media practices of audiences which are clearly moving into the digital domain, in the long run it risks marginalization.

Recent legal proposals to strengthen regulation concerning the prevention of cyber-crime and restrictions on the instruments to request access to undisclosed government documents show that, although they have not yet turned into law and are still under discussion, freedom of speech cannot be taken for granted and requires constant vigilance.

8.2 Media Tomorrow

In the digital landscape, the amount of news and information has increased enormously, yet scarcity has not completely disappeared and news and other content providers increasingly come into conflict with intermediaries such as cable operators, ISPs or mobile platform owners concerning the integrity and accessibility of their content, or the conditions under which their content will be made available to consumers. There is concern from public service broadcasters and consumer organizations over how the intermediary position of cable network operators will affect the position of broadcasters or other audiovisual content providers on EPGs in the digital era.

Similar concerns emerge regarding the question of which players will determine the access to, searchability and the positions in content and program listings on other platforms, such as the platforms run by mobile operators, ISPs and online aggregators such as YouTube and Google. Newspaper publishers are worried about the possible dominance of companies like Apple on the market for tablets. These issues are now still predominantly negotiated between market players, but might require more active government involvement in the future. At the same time, due to the internationalization of the digital media landscape, regulation of media companies and distributors on a national level is becoming more difficult.

An issue that might become more important with regard to online news provision is the way in which principles of net neutrality are applied to providers of digital mobile and fixed broadband networks. The Netherlands is the first European country to lay down net neutrality in law. However, implementation details are still unclear. Moreover, the legislation only concerns internet services, and does not impinge on the capacity that network operators reserve for digital managed VOD or IPTV services. When congestion problems increase, amongst other reasons, due to an increased use of online audio-visual content, and in particular when network providers are vertically integrated with content providers, this might become an obstacle in the market for news and other content providers.

On the side of the provision of news, the coming years might be pivotal. The business models of traditional newspapers are under severe pressure and they face the risk of structurally writing red numbers. Will they be able to find new business models? And what can be done about the decrease in investigative journalism that both the NVJ and the VVOJ are seeing, especially at a local level? Will new private funds emerge? Will crowd-funding provide alternative means of income? So far, no breakthroughs have been made.

One of the issues that will likely come up for debate in the coming five years is the role of the state in the financing of independent media. Will the state limit itself to financing public broadcasting? Or will it open up its budget to other institutions that provide important media functions in society, such as independent journalism, but that are no longer able to come up with a viable business model? And will these journalist organizations be willing to accept state funding, or will they see it as unwanted state interference?

Another important discussion is the future of public broadcasting. Will public broadcasting be restrained to a broadcasting institution, that is, to function as an audiovisual content production platform? Or will it rather

be given a number of public functions that it is to fulfill in the media landscape at large, engaging with all sorts of social organizations, organizing public discussions and guaranteeing content of high quality on all platforms (and extending its reach in new media generally)? Will the balance that the government has always sought between the safeguarding of commercial enterprise and the provision of public services be maintained? Finally, non-interference with media content by the state is a common principle in media governance, but it has not always been sufficiently safeguarded in law. In recent years there have been a number of examples of undue government intervention and, on occasion, PSB media content has been discussed in Parliament. Some formal arrangements, such as the appointment of the boards of media, telecoms and competition regulators and the board of the national PSB as well as the allocation of spectrum by the government, could in theory also enable more direct state interference.

9. Recommendations

9.1 Media Law and Regulation

9.1.1 Media Ownership

9.1.1.1 Media Transparency

Issue

On a national level cross-media ownership is on the rise, and it is not always clear to audiences who owns what. On a local level, close and interdependent relationships have emerged between commercial local news organizations, companies and local governments.

Recommendation

Regulators such as the CvdM should encourage or oblige news organizations to develop a disclaimer that reveals ownership of the media outlet and also indicates whether and by whom articles are sponsored.

9.1.2 Regulation

9.1.2.1 Monitoring of Audience Exposure

Issue

In the digital media landscape, new parties have taken up the role of middlemen who play an important part in exposing audiences to media content. These are cable television providers who decide on the line-up of channels in their packages as well as parties such as Google and Facebook, which play an important part in guiding audiences to (news) content on the web, and companies such as Apple that act as gatekeepers for the appstore on devices such as the iPad.

Recommendation

Dutch regulators should extend their monitoring activities to these domains, both nationally as well as on a pan-European level.

9.2 Journalism

9.2.1 Sustainable Business Models for Online and Investigative Journalism

Issue

The business models of traditional journalism institutions are under pressure. At a local level, the function of journalism as a watchdog of government is under threat, but also on a national level budgets for investigative journalism are far from assured.

Recommendation

Government, journalism and social institutions should identify a means of protecting the critical journalism functions of the media, for instance by creating a new journalism fund (or extending the tasks and budgets of the existing funds), introducing tax breaks for media that carry out such journalism, earmarking financial means for media innovation, or introducing legal provisions that stimulate public-private partnerships (PPP) in the media

9.3 Digital Media Literacy

9.3.1 Knowledge about Online Media Use and News Consumption

Issue

The Dutch media landscape is turning into an intricate ecology in which social networks, forums and blogs play an increasing role in the production, dissemination, validation and discussion of news and opinion. Journalists monitor these networks in search of new angles and issues to address. Much of this discourse takes place on sites that fall outside the traditional categories of news media, and apart from audience metrics, not much is known about what role exactly these digital venues play in news production, validation and consumption. We do not yet quite understand how exactly this emergent media ecology functions, and traditional research categories and methodologies are not able to get a grip on these issues.

Recommendations

A special fund or program should be created for research into online news consumption and production. This program should encourage the development of new methodologies, such as online media ethnography, “digital methods” or network analysis that help researchers gather insights in the role that informal media such as social networks and blogs play in the production, validation, and appropriation of news and opinions. Such a program could be initiated by organizations such as the Netherlands Organization for Scientific Research (*Nederlandse Organisatie voor Wetenschappelijk Onderzoek*, NWO), the SvdP, or the NVJ.

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Appendix B: List of Interviews

For this study interviews were conducted with the following persons.

Chris Aalberts, researcher and lecturer on politics and citizenship, Amsterdam, 11 March 2011

Bart Brouwers, editor in chief at Dichtbij.nl, part of Telegraph Media Group, Amsterdam, 25 February 2011

Thomas Bruning, secretary general at the NVJ, telephone interview 4 March 2011

Giselle van Cann, deputy editor-in-chief at NOS Nieuws, Hilversum, 8 March 2011

Irene Costera Meijer, Professor of Journalism at VU University, Amsterdam, 9 March 2011

Jan van Cuilenburg, Commissioner, CvdM, Hilversum, 3 March 2011

Marieke van der Donk, media expert at PwC, Amsterdam, 14 February 2011

Henk van Ess, chairman of the VVOJ, Amsterdam, 15 March 2011

Heleen van Lier, Social Media Editor at *De Volkskrant*, Amsterdam, 25 February 2011

Hans van Moorsel, consultant at Thaeisis, Utrecht, 10 March 2011

Merel Noorman, research manager at the RMO, Amsterdam, 25 February 2011

Stephan Okhuijsen, editor of Sargasso.nl weblog, Amsterdam, 3 March 2011

Alexander Pleijter, editor-in-chief of DeNieuweReporter.nl, Amsterdam, 18 March 2011

Reinder Rustema, founder of Petities.nl, Amsterdam, 8 March 2011

Marc Schreuder, deputy editor in chief at *RTL Nieuws*, Hilversum, 23 March 2011

John Stevens, senior policy adviser, and **Marit Vochteloo**, senior policy adviser, at Ministry of Education, Culture and Science, The Hague, 9 March 2011

William Valkenburg, Director of Innovation and New Media at NPO, Hilversum, 23 March 2011

Egon Verharen, policy adviser on distribution, technology and broadcasting, NPO, telephone interview 23 March 2011

Bas de Vos, director of SKO, telephone interview 11 February 2011

Frank van Vree, professor of Journalism and Culture in the Department of Media Studies at the University of Amsterdam, email interview 16 March 2011

Rob Wijnberg, editor-in-chief at *NRC Next*, Rotterdam, 22 March 2011

René van Zanten, Director of the SvdP, The Hague, 4 March 2011

We have also drawn on three interviews made for an earlier study:

Interview with an editor of *De Telegraaf*, Amsterdam, 26 June 2009

Interview with an executive editor of ANP, Rijswijk, 22 June 2009

Interview with an editor of *NRC Handelsblad*, Rotterdam, 19 June 2009

List of Abbreviations, Figures, Tables, and Companies

Abbreviations

AIVD	General Intelligence and Security Service (<i>Algemene Inlichtingen- en Veiligheidsdienst</i>)
ANP	Netherlands National News Agency (<i>Algemeen Nederlands Persbureau</i>)
AT	Radiocommunications Agency (<i>Agentschap Telecom</i>)
BOF	Bits of Freedom
BREIN	Protection Rights for the Entertainment Industry of the Netherlands (<i>Bescherming Rechten Entertainment Industrie Nederland</i>)
CBS	Central Statistics Office (<i>Centraal Bureau voor de Statistiek</i>)
CEBUCO	Marketing organization for Dutch private media companies
CPB	Office for Economic Policy Analysis (<i>Centraal Plan Bureau</i>)
CvdM	Media Authority (<i>Commissariaat voor de Media</i>)
DNN	The Netherlands News Monitor (<i>De Nederlandse Nieuwsmonitor</i>)
FBJP	Fund for Special Journalistic Projects (<i>Fonds Bijzondere Journalistieke Projecten</i>)
GPD	Associated Press Services (<i>Geassocieerde Pers Diensten</i>)
HOI	Institute for Media Auditing (<i>Instituut voor Media Auditing</i>)
IPP	Institute for Political Participation (<i>Instituut for Publiek en Politiek</i>)
KL	Knowledgeland (<i>Kennisland</i>)
KLPD	National Police Force (<i>Korps Landelijke Politiediensten</i>)
NICAM	Netherlands Institute for the Classification of Audiovisual Media (<i>Nederlands Instituut voor de Classificatie van Audiovisuele Media</i>)
NMA	The Netherlands Competition Authority (<i>Nederlandse Mededingingsautoriteit</i>)
NOS	Netherlands Broadcasting Foundation (<i>Nederlandse Omroep Stichting</i>)
NPO	Dutch Public Broadcasting (<i>Nederlandse Publieke Omroep</i>)
NTR	Dutch public service broadcaster specializing in information, education and culture. Its name derives from the first initials of the three public service broadcasters which merged in 2010 to form NTR: NPS, Teleac and RVU
NVJ	Dutch Association of Journalists (<i>Nederlandse Vereniging van Journalisten</i>)
OLON	Association for Local Public Broadcasters (<i>Organisatie voor Lokale Omroep</i>)

OPTA	Independent Post and Telecommunication Authority (<i>Onafhankelijke Post en Telecommunicatie Autoriteit</i>)
PEGI	Pan-European Game Information system
RAB	Office for Radio Auditing (<i>Radio Advies Bureau</i>)
RCC	Advertising Code Committee (<i>Reclame Code Commissie</i>)
RDVJ	Press Council (<i>Raad voor de Journalistiek</i>)
RMO	Council for Social Development (<i>Raad voor Maatschappelijke Ontwikkeling</i>)
RvC	Council for Culture (<i>Raad voor Cultuur</i>)
SCP	Institute for Social Research (<i>Sociaal Cultureel Planbureau</i>)
SDM	Foundation for Democracy and Media (<i>Stichting Democratie en Media</i>)
SKO	Audience Research Foundation (<i>Stichting KijkOnderzoek</i>)
SRC	Advertising Code Authority (<i>Stichting Reclamecode</i>)
STER	Broadcasting Advertisement Foundation (<i>Stichting Ether Reclame</i>)
STIR	Internet Audience Measurement
SvdP	Press Fund (<i>Stimuleringsfonds voor de Pers</i>)
VARA	Association of Worker Radio Amateurs (<i>Vereniging van Arbeiders Radio Amateurs</i>)
VVOJ	Association of Investigative Journalists (<i>Vereniging van Onderzoeksjournalisten</i>)
WRR	Scientific Council for Government Policy (<i>Wetenschappelijke Raad voor het Regeringsbeleid</i>)

Figures

Figure 1.	Rural/urban breakdown (% of total population).....	12
Figure 2.	Ethnic composition (% of total population)	12
Figure 3.	Religious composition (% of total population, 18+)	13
Figure 4.	Average time spent watching television per day (minutes), 2006–2010.....	18

Tables

Table 1.	Economic indicators.....	14
Table 2.	Households owning equipment in the Netherlands, 2005–2010	15
Table 3.	Platform for the main TV reception and digital take-up, 2005–2010	16
Table 4.	Internet and mobile penetration rates, 2005–2009	17
Table 5.	Media usage daily reach	17
Table 6.	Radio listening by platform 2009	19
Table 7.	Information as percentage of total programming, 2010	20
Table 8.	Television market share of the three largest providers (%), 2006–2010	21
Table 9.	Weekly reach of radio news (% of population), 2006–2010.....	22
Table 10.	Newspaper circulation (million, inclusive of digital subscriptions), 2007–2010	23
Table 11.	Monthly reach of Dutch news websites (% of population), 2005–2009.....	24
Table 12.	Reach and timeshare of news providers, across platforms (%)	26
Table 13.	Most popular websites 2010, based on monthly reach	36

Table 14.	Most popular UGC sites 2010, based on monthly reach.....	37
Table 15.	Social media use in the Netherlands, Aged 15+, March 2011	39
Table 16.	News organizations on Hyves	39
Table 17.	News organizations on Twitter.....	40
Table 18.	Gross advertising spend (€ million), 2005–2010	73
Table 19.	Media budget for public broadcasting, 2007–2011 (€ million).....	75

Companies

AD Nieuwsmedia	Nieuwsmedia
Apax	NOS (Nos Headlines, Nos Net, NOS Nieuws)
Apple	Nova
ARD	Nozema
Bart's Neverending Network	NRC Media
Broadcast Partners	NRC Next
Business News Radio	NTR
Catholic Radio Broadcasting (KRO)	PCM/PCM Uitgevers
CEBUKO	Persgroep NV
Chellomedia (Food Network, Film 1)	Powned
Claritas	RTL Broadcasting/Media Group (RTL 4, 5, 7, 8)
De Persgroep Nederland	Sanoma
Digitale Pioniers	Sargasso
Digitenne	SBS Broadcasting Group (Net 5, SBS, SBS 6,
Egeria	Veronica TV)
Experian	SBS Nederland
Forrester Research	Sky Radio
Het Gesprek	SP Queetz
HijaabStyle	Talpa
Hyves	Telegraaf Media Group
Indymedia	TNO
KPN	Trouw
Liberal Protestant Radio Broadcasting Company (VPRO)	UPC
Liberty Global	Virtueel Platform
MAX	Waag Society
Mecom	Wegener
Metro	Whatsapp
MiraMedia	Yasmina
Motivaction	ZDF
NEMO Science Center	Ziggo

Mapping Digital Media: Country Reports

1. Romania
2. Thailand
3. Mexico
4. Morocco
5. United Kingdom
6. Sweden
7. Russia
8. Lithuania
9. Italy
10. Germany
11. United States
12. Latvia
13. Serbia

Mapping Digital Media is a project of the **Open Society Media Program** and the **Open Society Information Program**.

Open Society Media Program

The Media Program works globally to support independent and professional media as crucial players for informing citizens and allowing for their democratic participation in debate. The program provides operational and developmental support to independent media outlets and networks around the world, proposes engaging media policies, and engages in efforts towards improving media laws and creating an enabling legal environment for good, brave and enterprising journalism to flourish. In order to promote transparency and accountability, and tackle issues of organized crime and corruption the Program also fosters quality investigative journalism.

Open Society Information Program

The Open Society Information Program works to increase public access to knowledge, facilitate civil society communication, and protect civil liberties and the freedom to communicate in the digital environment. The Program pays particular attention to the information needs of disadvantaged groups and people in less developed parts of the world. The Program also uses new tools and techniques to empower civil society groups in their various international, national, and local efforts to promote open society.

Open Society Foundations

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