WHAT IS THE FUTURE OF MEDIA IN THE BELGIAN CAPITAL?
A collaborative research project of the three leading universities in Brussels, VUB, ULB and USL-B funded by Innoviris (city of Brussels) and in collaboration with the Agency for Urban Development (SAU-MSI) and Perspective.brussels (Brussels Planning Agency) (4 year project, till end of 2018).
Research Context

MEDIA CLUSTERS:
AN AGGLOMERATION OF MEDIA ACTIVITIES THAT CO-LOCATES FOR MUTUAL ADVANTAGES

Trends: REGIONAL GOVERNMENTS trying to replicate the success in their own regions.
Research Question

Is Brussels ready to become a media city that can compete with London, Paris and Berlin in Europe?

THE IMPACT OF MEDIA IN BRUSSELS
THE GROWING ECONOMIC IMPORTANCE OF MEDIA FOR BRUSSELS

1.669 million EUR

Net added value is created by the Brussels’ media industry in 2014, which contributed 2.4% to Brussels’ total economy.

GROWTH

Brussels’ media industry grows faster (2.5%) than Brussels’ or Belgium’s economy making the sector more important every year.

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<th>2.1</th>
<th>2.2</th>
<th>2.5</th>
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<tbody>
<tr>
<td>BXL</td>
<td>economy</td>
<td>BE</td>
<td>economy</td>
</tr>
</tbody>
</table>

LABOUR PRODUCTIVITY

The labour productivity of employed and self-employed in Brussels’ media industry increased from 2007 till 2014 by more than 19.7%.

*2014
**MARKET ENTRIES AND EXITS**

| Entry rate: | 7% |
| Exit rate: | 3% |
| Survival rate: | 15 years |

The data shows that on average 7.0% of all self-employed and institutions in Brussels’ media industry are new to the market every year.

*2014*
MARKET STRUCTURE

Only 17 enterprises create around 50% of total net added value of the industry. However, 90% of media institutions are small in size.

*2014
People work in the media industry in Brussels, which contributes 2.7% to the total working population of the city.
THE AUDIO-VISUAL SECTOR EMPLOYS MOST PEOPLE IN THE MEDIA INDUSTRY

EMPLOYMENT

In 2015, the biggest sector in terms of media employees is the audio-visual sector (6,290 employees).

*2015
Out of 1,344 self-employed individuals in Brussels media industry, most are active as journalists/writers and Web developers.

*2015
MORE INDEPENDENTS AND LESS EMPLOYEES

EVOLUTION of media workers
Several key media professionals communities have been identified in Brussels. These can be identified as Communities of practice (CoP): “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly”.

COMMUNITIES

<table>
<thead>
<tr>
<th>AUDIOVISUAL</th>
<th>NEW MEDIA</th>
<th>MEDIA</th>
<th>VIDEO GAMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>VRT Sandbox</td>
<td>Medialab Session</td>
<td>Café Numérique</td>
<td>Brotaré</td>
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<tr>
<td></td>
<td>Urlab</td>
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<td></td>
<td>Open Tech School</td>
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<td></td>
<td>Storycode</td>
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<td></td>
<td>Transforma labs</td>
<td></td>
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</tr>
</tbody>
</table>

City Centre (Pentagone)

<table>
<thead>
<tr>
<th>Louise</th>
<th>Tour &amp; Taxi / Canal</th>
<th>ULB / VUB</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Schuman</td>
<td>Gare du Midi</td>
</tr>
<tr>
<td></td>
<td>Flagey</td>
<td>Parvis de Saint-Gilles</td>
</tr>
</tbody>
</table>
BRUSSELS HAS THE HIGHEST CONCENTRATION OF MEDIA WORKERS

GEOGRAPHY

Across provinces, Brussels encompasses most workers far in front of Antwerp and Flemish-Brabant.

<table>
<thead>
<tr>
<th>Region</th>
<th>Province</th>
<th>Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brussels</td>
<td>Brussels Capital</td>
<td>16,169</td>
</tr>
<tr>
<td>Flanders</td>
<td>Vlaams-Brabant</td>
<td>7,140</td>
</tr>
<tr>
<td></td>
<td>Antwerpen</td>
<td>5,987</td>
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<tr>
<td></td>
<td>Oost-Vlaanderen</td>
<td>4,349</td>
</tr>
<tr>
<td></td>
<td>West-Vlaanderen</td>
<td>3,799</td>
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<tr>
<td></td>
<td>Limburg</td>
<td>2,252</td>
</tr>
<tr>
<td></td>
<td>Anvers</td>
<td>1,948</td>
</tr>
<tr>
<td>Wallonia</td>
<td>Liège</td>
<td>3,357</td>
</tr>
<tr>
<td></td>
<td>Hainaut</td>
<td>2,934</td>
</tr>
<tr>
<td></td>
<td>Brabant wallon</td>
<td>2,151</td>
</tr>
<tr>
<td></td>
<td>Namur</td>
<td>1,559</td>
</tr>
<tr>
<td></td>
<td>Luxembourg</td>
<td>353</td>
</tr>
</tbody>
</table>
BRUSSELS CREATES THE HIGHEST SHARE OF MEDIA VALUE IN BELGIUM

GEOGRAPHY

Brussels creates 39.0% of the total net added value of Belgium’s media industry (€4,353,90 million EUR) showing how strong media activities are concentrated in the city.
Schaerbeek (1030) produces with 32.6% (553.95 million EUR) most value added to Brussels’ media industry (1.699.57 million EUR). This is followed by Sint-Gillis (1060) with 13.2%, the City Centre (1000) with 12.8% and Elsene (1050) with 10.4%.
CONCLUSIONS

- Brussels already regroups an important part of Belgian media activities.

- Media institutions cluster in key neighborhoods, most notably at Reyers where Mediapark.brussels is planned.

- Hence, the Brussels’ government finds itself in a favorable position to invest in the development of the capital as a media city as important conditions are already met.

  Still, as the research also suggests, an economically successful media hub equally requires a variety of institutions, skillful professionals and creative connections, points that should not be overlooked by the Brussels Government.
PRESS MATERIAL AND INSIGHTS:

www.mediACLusters.brussels/press-desk

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Any questions?
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