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INDUSTRIAL ORGANIZATION OF FILM EXHIBITORS IN THE LOW COUNTRIES: COMPARING THE NETHERLANDS AND BELGIUM, 1945–1960

Thunnis van Oort

Belgium and the Netherlands developed surprisingly divergent cinema economies and movie-going cultures from the early twentieth century onwards. This article seeks explanations for this difference in the way the film exhibition industry was organized in both neighbouring countries. The Dutch exhibitors were united (together with distributors) in the business interest association Nederlandse Bioscoopbond that functioned as a powerful cartel with a tight control over the market. By keeping entry barriers to the industry high, the association restricted the number of cinema operations. In Belgium, the business associations for exhibitors never attained a similar degree of coordination nor influence; here, the market was much less restricted, arguably leading to a wider distribution of cinemas. For instance, in contrast to the Netherlands, where barely any Catholic or Socialist cinemas appeared, Belgium counted large secondary circuits of these 'pillarized' film theatres. Basis for this analysis are Dutch and Belgian trade press materials and yearbooks, and archival files of the Nederlandse Bioscoopbond. The article sweeps through most of the twentieth century, with a main focus on the post-war reconstruction era.

The Dutch never were a movie-going nation. Cinema attendance, the size and number of movie theatres and of cinema seats per capita has been among the lowest in European statistics throughout most of the previous century.¹ The earliest

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explanations have pointed to the unfavourable influence of Calvinism on visual culture and outdoors entertainment in general, and film viewing in particular.² Karel Dibbets has challenged this view by suggesting an interplay of political-economic and business-economic causes for the Dutch lag.³ Cinema failed to integrate into the dominant 'pillarized' system, consisting of Protestant, Catholic, Socialist and to a lesser extent Liberal pillars, that functioned as complex, distinct networks of political parties, unions, schools, housing corporations, health care institutions and media platforms such as radio and newspapers. But not cinema. Whereas in neighbouring Belgium, a sizeable network of Catholic and Socialist cinemas appeared, this never succeeded in the Netherlands.⁴ Dibbets argues that Dutch governments attempted to weaken demand for film through high taxes, strict censorship and a negative discourse discouraging cinema going. In response to this hostile environment, the film exhibition industry organized itself in a strong cartel, that could counter the restricted demand for film by regulating the supply side, keeping prices high. This cartel was institutionalized in the form of the *Nederlandse Bioscoopbond* (Netherlands Cinema Alliance, hereafter NBB), established in 1921.

Dibbets unfolds a broad panorama of the undersized Dutch film culture, but admits that his hypothesis needs empirical testing. John Sedgwick, Clara Pafort-Overduin and Jaap Boter have accepted this empirical challenge and have compared Dutch, English and to a lesser extent, Australian film markets in the 1930s.⁵ They confirmed Dibbets' prediction that, at least in their period of investigation, ticket prices were relatively high in the Netherlands: even though Dutch consumers spent a similar percentage of their budget to cinema going, they went much less frequently than the British. In their analysis of prices and programming data, they place less explanatory emphasis on institutional dynamics such as government intervention and the business cartel that Dibbets foregrounded, and instead point to informal factors that negatively influenced the Dutch underdeveloped market. In a way, they return to a more elaborate version of the classic notion of a Calvinist mentality pervasive throughout Dutch society celebrating austerity, and a heightened culture of domesticity, concluding that it was a 'general ambivalence on the part of the Dutch people toward the cinema' that caused the Dutch exceptionalism.

The influential role of the NBB is acknowledged by Dibbets and by Sedgwick et al., but this element of the argument remains underdeveloped. Dibbets sketches the NBB cartel in broad strokes without demonstrating how this cartel actually worked.⁶ Sedgwick et al. provide some more detail on the (minimum) price policy and how the NBB started limiting the number of (new) cinemas from 1935, in an attempt to diminish the effects of the economic crisis, but the focus is limited to the 1930s. During the late 1930s, the NBB had only just started to realize one of its most powerful tools for manipulating the market: that is, limiting the number of new cinemas that were opened. This article aims to further elaborate on this topic: describing the workings of the Dutch business interest association NBB during the post-war reconstruction era, when the cartel was at its pinnacle of power, by concentrating on its policy of limiting the growth of the cinema park. An additional motive to focus on the post-war period is the availability of the NBB archives, that only cover the period after 1945, as the older archives were destroyed during the war. This detailed documentation, that has as yet hardly been

put to use by scholars, allows for a look behind the scenes of the Dutch cinema cartel, that effectively kept competitors out of the market and slowed down the opening of new cinemas.

Belgium and the Netherlands provide a remarkable case for an international historical comparison of the culture and economics of movie going. Both neighbouring countries, and particularly, the Dutch speaking Flanders region in Belgium, share many similarities as relatively small, constitutional monarchies with open economies, situated on strategic positions in Western Europe. Since Belgium and the Netherlands became separate states in 1830, the histories of the both nations remained intertwined. Ernst Kossmann identified many parallels in the nineteenth and twentieth century development of modern political parties, ideologies and practices that transcended obvious religious differences: in contrast to Belgium, Protestant minorities were a dominant force in Dutch politics and social life.⁷ From European comparative perspective, both countries developed much alike towards a corporatist societal organization.⁸ During the last quarter of the nineteenth century, a process called 'pillarization' created an intermediate layer between state, society and religion, structured vertically in ideological groups of Catholics, Liberals, Socialists and, in the Netherlands, Protestants. Notwithstanding the similarities, of course there were significant variations in both pillarized systems. The coexistence of French-speaking Walloons and Dutch-speaking Flemish has complicated the notion of the Belgian nation state. To some extent, the Flemish-nationalists formed a pillar of their own. And according to Hans Blom and Emiel Lamberts, the Belgian state lost more autonomy to the pillars which made them more resistant to the changes that rapidly swept away the Dutch pillarization during the 1960s and 1970s.⁹ The most pointed contrast between both political economies might well be the early industrialization of Belgium compared to the late economic modernization of the Netherlands, although the sharpness of these tempo differences evened out in the course of the twentieth century.¹⁰

In spite of the many resemblances between both neighbours, their cinema cultures could hardly be more dissimilar. Throughout the most of the twentieth century, Belgium boasted around the highest number of cinema screens and seats per capita in Europe, as well as very high cinema attendance rates, whereas the Netherlands were in the lowest ranks of European countries. When Belgium reached its all-time highest number of 1585 cinemas in 1957, the Netherlands reached a maximum number of no more than 565 cinemas in 1961. In 1960, when the Netherlands counted 11.4 million inhabitants and Belgium 9.1 million, the average Dutch inhabitant visited the cinema less than 5 times a year, while the Belgian almost went twice as often.¹¹

In a joint essay in 2003, Guido Convents and Karel Dibbets have compared the cinema cultures of the two capitals, Brussels and Amsterdam.¹² To explain the two 'different worlds' that existed in both cities at the time of the emergence of the cinema, the authors point to various factors, such as the flourishing urban culture in late nineteenth-century Belgium where mass entertainment and modern forms of consumerism transformed the city into a spectacle, a notion that hardly existed in the reserved bookkeeper's mentality that dominated in Dutch city administrations, and that impeded the development of the cinema industry through regulation that was stricter than in Brussels. For instance, the sale of alcohol in

Amsterdam cinemas was restricted, not in Brussels. Another indication of the different levels of integration of cinema going within existing social structures is the fact that a rich variety of Catholic and Socialist cinemas emerged in Brussels (and Belgium as a whole), whereas a similar appropriation of the cinema by socio-political formations occurred on a very limited scale only in the Netherlands.

Although no extensive debate exists on why the Belgian film culture is so well developed compared to other countries on the European continent, several explanations have been suggested. From the point of view of the American majors, as Daniel Biltereyst et al. have noted, the Belgian market was considered as attractively free, without import restrictions that were common in other European countries. Although import restrictions were no obstacle either in the Netherlands during the interwar years, the strong organization of the industry in the Netherlands, that will be discussed below, made the market decidedly less free from the American point of view. Furthermore, Biltereyst et al. argue that Belgium offered a favourable fiscal climate, and lacked mandatory censorship for adult audiences. Besides, there was no local production to speak of that could compete with foreign import (but again the same would apply to the Netherlands).¹³ Focusing on the early period, Convents points to the pre-existing nineteenth century market for commercial entertainment that had been flourishing well before the arrival of cinema. The fruitful convergence of the nascent cinema to the brewery and café industries yielded the successful formula of the 'café-ciné'.¹⁴ Again, Convents also mentions the early adaptation of cinema by pillarized communities as a cause of the advanced cinema culture in Belgium. Biltereyst et al. show how the pillarized cinema circuit grew into a formidable factor in terms of the number of cinemas and seats per capita.¹⁵ In oral history testimonies by former audience members, Catholic cinemas, that formed the largest portion of pillarized circuit, were often remembered as inferior in quality to 'real' cinemas. Still, they meant a real competition for regular exhibitors.¹⁶

The analysis in this article does not pertain to 'hard' economic figures such as ticket prices or profit margins, but it is rather an historical analysis of the organizational and regulatory structure of the business associations, the negotiations that took place within and were formative to these structures, and the way they related to the business practices and strategies of cinema exhibitors. Besides the NBB archives, annual reports and trade press materials from the Low Countries are used as key sources.

Business associations and cartels in capitalist economies

With regard to cartel agreements and collusion, famous episodes of American film history are the patent wars of the early twentieth century, and most particularly the 'Paramount case' that forced the studio oligopoly to divest its exhibition branches in the 1940s.¹⁷ As opposed to Anglo-Saxon countries such as the USA and the UK, where cartels were being criminalized since the late nineteenth century, cartel agreements were a government-sanctioned practice in many European countries, such as Germany and in Scandinavia. These disparate views on cartels derive from deeper differences that exist within capitalist economies, that can be

schematized into the two ideal-typical concepts of the 'Liberal' Market Economy (LME) vs. 'Coordinated' Market Economy (CME), which were coined by Peter Hall and David Solkice in 2001.¹⁸ Typically, the USA and the UK are considered LMEs, where competitive relations between firms are principal. The Netherlands and Belgium, with Japan, Germany and the Scandinavian countries, represent typical CMEs, where corporatist collaboration and networks of businesses, government and other stakeholders are more dominant features of the business system.¹⁹ So Dibbets' characterization of the Netherlands as 'cartel paradise' pertains to many more states where cartels were considered useful and perfectly legal instruments to (self)regulate markets.²⁰ This is the case for Belgium as well; economic historian Harm Schröter even views Belgian industry as pioneering in the early development of modern cartels during the second half of the nineteenth century. He places both Belgium and the Netherlands in the most cartel-friendly end of the spectrum.²¹

Cooperation between entrepreneurs can take many forms, from loosely tied branch organizations to stringent cartel agreements. Business associations and cartels can be narrowly interrelated institutions, certainly in the case of the NBB. In their recent research into the twentieth century national 'business system' in the Netherlands, Joost Dankers and Bram Bouwens have shown how the role of Dutch business associations changed throughout the twentieth century, and how they related to cartel formation.²² During the early years of the century, most business associations functioned primarily as informal social network platforms, as 'societies', and also as a lobby organization towards government. With the increase of union membership since the 1910s, the function of negotiator with external parties grew in importance. The crisis in the 1930s stimulated the 'guild' function of business associations, introducing binding agreements among its members, for instance, with regard to quality control, but also concerning prices or production quotas. In this sense, business associations often became *de facto* cartel organizations, and this situation persisted well into the post-war period. Deregulation and liberalization in the 1980s foregrounded a fifth function of business associations as 'service providers', advising members, for example, about fiscal, legal or PR matters. Usually, business associations would combine several or all of these functions (society, lobbyist, negotiator, guild and service provider), while their specific mixture fluctuated through time.

Cartels are often (though not necessarily) related to business associations. A cartel can be defined as 'a voluntary, private contractual arrangement among independent enterprises to regulate the market', in order to consolidate or increase profits.²³ Business associations could lead to cartel agreements (fixing prices, dividing markets, determining production quotas, defining quality standards, etcetera), and, the other way around, cartel agreements could solidify into business associations. The case at hand, the Dutch NBB, was a clear example of a business association that functioned as a (legally) institutionalized cartel, and a very effective one, too.

The crisis of the 1930s instigated the heydays of the cartels, amounting to an estimated 60% of Dutch companies with employees that functioned within cartels. Even though after the Second World War, the USA endeavoured to eradicate cartels in Europe, the Dutch government remained very tolerant towards cartel agreements. In 1958, the Economic Competition Act was adopted, enabling the

break-up of cartel agreements that were deemed harmful for the public interest, only slowly moving towards a less permissive stance towards cartel agreements. After the late 1960s, the number of cartels decreased. Internationalization made them less effective and mergers and acquisitions became more widespread as a means to regulate competition, Bouwens and Dankers argue. Nonetheless, it took a long time before the Netherlands adjusted to European anti-cartel legislation, and only in 1999 were cartels criminalized.²⁴

Cartel success is often measured by the degree of profit maximization, or the extent to which a monopoly price level is attained. A problem with this criterion is that it is difficult to establish (counterfactually) what the price level would have been without a cartel.²⁵ In the case of the NBB, there are indications that the Dutch price level was significantly higher than abroad (as mentioned earlier), but it is difficult to substantiate a direct causal connection. Another less precise indication of cartel success that is used by economic historians is the duration of the agreements. The NBB might well have been one of the longest continuously surviving cartels in the Netherlands, lasting from the 1920s until 1993, when the NBB was dissolved under pressure from the European Community.²⁶ In this article, the NBB cartel's success is determined by its capability to diminish competition by limiting the amount of film exhibition operations. One of the crucial success factors for a cartel is its capability to maintain entry barriers to keep or drive out outsiders, and to suppress the 'fringe' of 'free rider' entrepreneurs that do not participate in the cartel, but still profit from cartel agreements. Cartels that lack an effective system for punishing cheaters are less likely to survive.²⁷ As will be demonstrated below, the NBB met those conditions through its exclusivity of trade among members and its elaborate system of conflict mediation and punishment.

The Dutch cinema cartel NBB

During the First World War, in which the Netherlands remained neutral, cinema exhibition was booming and also the number and scale of companies specialized in film distribution increased. In 1916, a weekly film exchange started in Amsterdam, that quickly grew into an informal platform that was later formalized into a business association. Film exhibitors formed the 'Bond van exploitanten van Nederlandse bioscooptheaters' (Association of Dutch cinema exhibitors) in 1918. A crucial change took place in 1921 when the NBB united exhibitors and distributors into a single business association, which is very uncommon in international perspective.²⁸ In the end, the mutual disagreements were subordinated to the shared advantages of (1) a strong and united representation towards government institutions, and international suppliers such as the American film exporters, and (2) a strict internal regulation.

André van der Velden et al. have described how the driving power behind the NBB were a small group of the larger entrepreneurs active in distribution and exhibition combined, and operating on a supra-local scale, as opposed to the majority of smaller businesses that consisted mostly of exhibitors operating often a single venue in a local market.²⁹ The opposing interests of those two groups caused tensions that were only barely resolved during the first half of the 1920s. The small entrepreneurs

were persuaded to join the NBB because the organization demonstrated a successful aggressive opposition against municipal governments that levied high entertainment taxes. The NBB also lobbied extensively at the national government in the process of cinema censorship legislation, that took the better part of the decade to finally go into effect in 1928. It was in 1926 that the NBB consolidated its power base by adopting its exclusivity decree: members agreed that in the Netherlands no films could be bought, sold or rented (out) by non-members, making NBB membership unavoidable for anyone in the business. This gave the NBB the potent instrument of the boycott, or even expulsion: members that did not comply to the regulations, could be cut off from film supply or customers. The fact that the NBB represented the complete industry laid the foundation for the cartel agreements that were effective for decades and covered various areas.

Applying Bouwens and Dankers' typology of business association functions shows that the NBB contained all the various features of a business association. It started out as and remained an essential informal network.³⁰ The lobbyist and negotiator were vital roles of the NBB, since it was standing up to hostile local and national authorities that had won the NBB its broad membership basis in the 1920s. Besides government, the organization also stood in contact with many other external parties, such as labour unions, newspapers' editorial boards, copyright organizations, etcetera. The NBB also functioned as 'service provider' in guiding members in legal matters, and in promotional strategies. Finally, the 'guild' purpose was where the business association formed a cartel. One of its purposes was protecting the reputation of the industry. Improving public relations, especially with the government, was particularly important. Other, commercial goals were setting prices, and controlling a wide variety of business practices. Gradually, most aspects of the cinema trade were regulated by the NBB. First of all, a standard rental contract was proscribed in 1924, through which all transactions regarding the renting and screening of films were subjected to NBB regulations. When the economic crisis reached its nadir in the mid-1930s, minimum ticket prices were set in order to prevent cut-throat competition.³¹ Later, rental fees were also controlled. Besides price agreements, many other regulations were introduced to set quality standards and control business practices, covering, for instance, double billing, 16 mm and non-commercial rental and exhibition, zoning the market for travelling cinema, regulating television rights, (technical) staff qualifications and labour relations, copyright issues, etcetera.

The most far-reaching restriction of competition started out with a moratorium on new cinemas. In 1935, the NBB board decided that no new cinemas were allowed to open, in order to spare the struggling existing operations. This temporary measure was soon transformed into a permanent procedure, judging all applications for opening new cinemas, a practice that remained in existence until the NBB was dissolved in 1993. Until 1947, it was the NBB board that judged each application for a new cinema. In that year, this time-consuming task was transferred to a separate 'Commissie Nieuwe Zaken' ('Committee New Businesses', hereafter CNZ), consisting of four NBB members (two exhibitors and two distributors) and a chairman from outside of the industry, appointed by the NBB board.³² Furthermore, an Appeals Committee was installed, again with an even number of exhibitors and distributors.

Already before the war, this measure had prevented the opening of scores of cinemas.³³ In the period 1945–1965, the NBB granted 379 permits for new businesses in the film industry, of which the majority were cinemas, and it denied 240 applications.³⁴ The number of withheld permits is significant, when recognizing that the total number of cinemas increased with 242 in this period (from 323 in 1945 to the peak of 565 in 1961). So in other words: for roughly every new cinema that opened in this period, another cinema operation had been denied access to the market. Of course, this is not to argue that, had there not been a limitation on the number of new cinemas, their total amount would have been double, but it does show the scale on which the NBB was controlling the industry. And these numbers do not take into account the general dissuasive effect of the permit system that would have prevented many would-be cinema exhibitors from even applying.

Two examples serve to illustrate how the NBB effectively restricted the number of cinema operations. First, a defining conflict between the NBB and the American majors testifies to the strength of the Dutch cartel. Secondly, the reconstruction of the war-ravaged Rotterdam cinemas demonstrates how the NBB was able to exclude outside competition through the limiting of licences for new cinemas.

A major conflict with the American studios that was to a large extent about the limitations on expanding the Dutch theatre park is illustrative of the NBB's strength in defending the exhibitors' interests against 'outsiders'. Directly after the war, the combined American studios were represented by the Motion Picture Export Association (MPEA) that formed in fact a legal cartel that made use of the exemptions to domestic US antitrust legislation for international trade. In the wake of Europe's liberation and the ensuing Marshall Plan and Cold War, the MPEA became a powerful agent in furthering the national interests of the USA.³⁵ In September 1945, the Dutch subsidiaries of the American majors withdrew their NBB membership and announced to operate outside of the NBB's regulations. Apart from the MPEA's wish for more room to determine rental tariffs and contract provisions, a substantial element of the dispute was about the NBB's limitation on the opening of new cinemas.³⁶ The Americans wanted to expand their exhibition branches abroad at a time when antitrust litigation threatened vertical integration at home. The MPEA pushed for a division of the NBB into an exhibitors' and a distributors' association.³⁷ The confrontation between MPEA and NBB led to a boycott of American films that lasted for a year. The quarrel ended in a victory for the NBB, driving the American renegades back to the flock.³⁸ In its annual report, the NBB framed the conflict in terms of dissimilarities in business cultures. The MPEA supposedly had constructed a 'complex of prejudices' against the NBB as a 'monopoly' that blocked opportunities for expansion. The NBB accused the Americans of a lack of comprehension of the Dutch concept of industrial organization ('*ordeningsgedachte*') that collided with the American ideas of a 'so-called free economy, that merely recognized the freedom of the strongest, with the intent to devour the independent suppliers and the exhibitors'.³⁹

While the NBB demonstrated it could stand up to these formidable American opponents, the case of post-war Rotterdam shows it also kept a firm grip on the industry internally. The centre of the second largest city of the country was destroyed by an air raid at the start of the war, demolishing 12 of its 19 cinemas, among which the largest first run theatres. Reconstruction was significantly and

purposefully slowed down by the NBB cartel.⁴⁰ It took over a decade before rebuilding of the Rotterdam cinema park gained momentum. In the early 1950s, the number of cinemas was very low, comparatively. In the two other major cities, the number of inhabitants per cinema seat was 40 (Amsterdam) and 32 (The Hague), while in Rotterdam, over 70 inhabitants shared a cinema seat.⁴¹ In part, the late reconstruction of Rotterdam cinemas can be explained by external factors such as delays in urban planning and shortages of materials and capital.⁴² Nonetheless, the specific NBB regulations protected the vested interests of Rotterdam's existing (victimized) exhibitors, allowing them to slow down rebuilding without the threat of other competitors interfering and forestalling them, plus keeping a very high seat occupancy ratio.⁴³ Both general NBB regulations were used for this, as well as a specific local decree that was sanctioned by the NBB board.⁴⁴

The Rotterdam exhibitors kept the entry barriers very high, for regular competitors as well as a fringe of entrepreneurs that were operating in the margins of the industry, such as youth clubs, art societies and church organizations, organizing so-called non-commercial film exhibitions. The high demand in Rotterdam even produced 'wild cinemas', clandestine operations in club houses and pub rooms, some of which were prosecuted by local police for violating safety regulations.⁴⁵ The NBB took efforts to control and to a certain extent neutralize these alternative circuits, especially where the boundaries between altruistic and commercial purposes became blurry. In fact, the NBB had been clamping down on any alternative form of film screening (read: any form not under NBB control) since its inception, by effectively blocking the emergence of a Catholic cinema circuit during the 1920s.⁴⁶ The NBB's post-war course can be seen as a logical continuation of these earlier policies. When the Reformed Christian youth club 't Slag' in southern Rotterdam applied for a permit to start a cinema, the CNZ and the appeal committee rejected it unequivocally. A cinema subsidized by a Church organization was considered to be unfair competition to regular exhibitors, 'endangering the healthy development of the existing companies, by disrupting normal [!] competitive relations'.⁴⁷ Permitting 't Slag to operate a cinema could act as a precedent for similar youth associations to start up 'subsidized' cinemas. The NBB systematically prevented this from happening in the Netherlands, whereas we will see how in Belgium 'pillarized' cinemas were responsible for a significant proportion of the cinema park.

The increased demand in the so-called 'non-commercial' circuit after 1945 led to the foundation of the Nederlands Filminstituut (Netherlands Film Institute, hereafter NFI), in cooperation with representatives of Dutch sociability, such as the Christian association Kerk en Wereld (Church and World). The institute's purpose was to stimulate the cultural and educational value of cinema, by facilitating 'cultural' films for rental. The NFI was de facto an instrument for the NBB to outsource the regulation of the non-commercial circuit. The institute was, after adjustment of the NBB regulations in the annual meeting of 1947, the sole supplier for non-commercial films in the Netherlands.⁴⁸ Conditions for film rental were composed to preclude competition to regular exhibitors: ticket prices were subject to strict conditions, advertising was prohibited (which makes it all the harder for the historian to trace these screenings), the organizing association was only permitted to admit members to the private screening, and a film was merely allowed if it was not booked that year by regular exhibitors operating in the same municipality.⁴⁹

The 1960s and 1970s saw an increasing concentration in the exhibition industry accelerated by the disappearance of smaller (family) businesses and fusions and take-overs that led to a devaluation of the NBB as a crucial instrument to control and regulate the market. In 1970, the minimum price agreements were abolished.⁵⁰ In 1968, the association was restructured, transforming the various regional and local chapters into sections organized by company size. During the 1970s, the dwindling number of companies even made it difficult to find enough members to fill the boards of the subsections.⁵¹ By that time, the market was controlled by a genuine oligopoly of large companies, that no longer required the NBB as an administrative framework for their game of ‘cautious Stratego’.⁵²

Besides, the attitudes towards cartel agreements were changing. The influence of the European Community and its less tolerant attitude towards collusion gradually was being felt. Already in 1962, the NBB’s president J.G.J. Bosman reported on his deliberations with officials of the Ministry of Economic Affairs how the NBB should modify its regulations in order to comply with new policies on competition (‘mededingingsbeleid’), but that the implications of European legislation were still unclear.⁵³ Gradually did European cartel legislation encroach on the NBB, until the organization was finally dissolved in 1993 and replaced by a federation of separate business associations for distributors and exhibitors.

Belgian cinema business associations up to 1940

In Belgium, the combination of an open market and an extensive circuit of Catholic, and also Socialist and Liberal cinemas occurred within an industrial organization that differed quite strongly from the Dutch situation. There was no industry-wide cartel that was able to control this open market, or that could restrain these pillarized circuits as occurred in the Netherlands. The following section will look at the differences between the Netherlands and Belgium with regard to attempts to limit the expansion of the exhibition industry, from the perspective of industrial organization. But before that, the initial question is: what did the Belgian landscape of business associations for the cinema industry look like? Hardly, any dedicated scholarly literature exists on this subject. Information on Belgian cinema business associations is more scattered than for its Dutch counterpart, for the evident reason that – other than the one dominant organization in the Netherlands – many cinema business associations existed in Belgium throughout the twentieth century. The availability of sources on these associations varies, but no systematic archive such as that of the NBB has been uncovered. Primary sources used for the present exploration are samples of the trade press.⁵⁴ The following section is a rough sketch, by no means suggesting comprehensiveness, first discussing the earlier history in order to concentrate subsequently on the period right after the Second World War. The uneven obtainability of data makes the comparison fairly asymmetrical. Nonetheless, it demonstrates beyond any doubt the remarkable distinctions between the industrial organizations of film exhibition in both countries.

Since cinema exhibition developed earlier and more intensely in Belgium than in the Netherlands, it is no surprise that professional organizations were established sooner as well. In 1909, the first professional association was founded. The

Syndicaat voor Belgische Filmverhuurders en Bioscoopexploitanten (Syndicate for Belgian Distributors and Exhibitors) united film traders and exhibitors with the main purpose of standing up against market leader Pathé.⁵⁵ In 1911, the Association Belge de Cinématographie (Belgian Cinematograph Association, hereafter ABC) was founded, also to promote the interests of all entrepreneurs that earned a livelihood with the cinema. The ABC was divided into four sections: distributors, exhibitors, cinema employees and a fourth for film producers and other related professions. The ABC acted as a lobbyist and negotiator between the industry and government in the matters of entertainment taxes and impending censorship legislation, that was postponed by the First World War.

The late 1910s and the 1920s saw a proliferation of business associations for cinema entrepreneurs. One rallying cause was the State's development of legislation, that led in 1920 to a law denying children under the age of 16 access to cinemas, unless the film being screened was approved by a board of censors.⁵⁶ During and after the war, cinema taxation was raised repeatedly, on municipal, province and State levels. Additional fiscal legislation in 1921 further mobilized the industry into several interest associations. Joint actions included strikes, such as the one in September 1922 when almost all Belgian cinemas were closed in protest to the high taxes. Conflicts over cinema taxation were alleviated in the early 1930s, when taxes were reduced.⁵⁷ The opposition to government as a common enemy did not result in a long-lasting industry-wide cooperation in Belgium, in the way the protection against hostile authorities has been suggested as a main cause for the success of the Dutch NBB.⁵⁸ The various yearbooks of the period that were preserved in the Royal Belgian Film Archives library and a sample of trade periodicals, yield a list of at least seven national trade organizations, and the probability of an even larger additional number of local associations.⁵⁹ How these various associations related to one another is yet to be established, and the same goes for questions such as those regarding the role in this assemblage of associations of the language barrier and the Flanders-Wallonia question. The division between Flemish and Walloon communities was without doubt a pertinent factor in the structuring of the industrial organization, but more research is required on this subject.

In the 1930s, this multitude of trade associations stabilized into a more clearly defined constellation of interest groups. During this decade, the *Chambre Syndicale de la Cinématographie* (Syndicated Chamber for Cinematography, hereafter *Chambre* or *Chambre Syndicale*) consolidated into the most influential business organization for distributors. When in 1936, the *Belgische Cinematografische Associatie* (Belgian Cinematographic Association) was founded, expecting 'before long' up to 300 members, the *Chambre* did not acknowledge the need for a federative umbrella organization uniting several business associations in the industry. According to the distributors, industry-wide cooperation could be organized on an ad hoc basis when circumstances demanded it.⁶⁰ Consequently, the *Belgische Cinematografische Associatie* never grew into anything substantial. The distributors' aversion to close organization with the exhibitors proved to be a constant during the rest of the century. Crucial were the powerful subsidiaries of the American studios, that were organized in a separate association. Of course, the American majors also competed among themselves, and not only as distributors, because they also owned theatres.⁶¹ But forming a bloc was effective in furthering common

interests, playing out shared adversaries against each other. At least in 1939, but probably earlier, the Americans were organized in the *l'Amicale des maisons Américaines* (Association of American enterprises).⁶² Exhibitors were organized in the *Vereniging der kinemabestuurders van België* (Association of Belgian cinema managers, hereafter VKBB), founded by 25 exhibitors in 1938, absorbing prior local and regional business associations into a single national body with regional chapters. At the end of 1938, the VKBB counted 480 members, in late 1939 that total had increased to 680 members. After the war membership grew to 1135 in 1946.⁶³ These numbers suggest that a majority of Belgian exhibitors was a member directly after the war.

Besides these professional associations, the pillarized circuits created their own organizations (the successors of) which remained in existence for decades. In 1928, the *Katholieke Filmcentrale* (Belgian Catholic Film Central) was operational, acting as a lobbyist and a cooperative for Catholic cinema exhibitors, in the early 1930s followed by a *Katholieke Filmliga* (Catholic Film League) and *Katholieke Filmactie* (Catholic Film Action).⁶⁴ Attempts to centralize Socialist cinemas into unified networks started in 1921 with the *Centrale voor Arbeidersopvoeringen* (Central for Workers' Performances), succeeded by the *Socialistische Cinema Centrale* (Socialist Cinema Central).⁶⁵ Strictly, these were no business interest organizations, but they did represent commercial interests that were organized separately from the regular commercial industry, thereby further complicating industry-wide cooperation.

The post-war period

Looking back in 1946, Jozef Toussaint, exhibitor from the Liege region, stated that the pre-war Belgian cinema industry had been characterized by a most unbridled freedom.⁶⁶ During and after the war, things started to change. The German occupiers forced distributors and exhibitors to become a member of either the *Chambre Syndicale*, or the VKBB. Under the regime's command, both associations were forced to cooperate closely and implement some fundamental changes, such as the introduction of a standard film rental contract that stipulated the film rental price as a percentage of the box office takings, abolishing the use of flat rates. Just as radical was the introduction of standard ticket prices. According to Roel Vandewinkel, even the number of cinemas was reduced in order to improve profitability. In short, the sort of market manipulations that had been accomplished by the Dutch NBB, and had been advocated by some Belgian exhibitors without success before the war, were suddenly realized, enforced by the Nazi rulers.⁶⁷

After the war, the American companies controlled a large share of the Belgian market.⁶⁸ As before the war, the American distributors complemented their membership of the *Chambre* with an affiliation to their own association, in the renamed *Belgo-Amerikaanse Syndicaat* (Belgian-American Syndicate).⁶⁹ In contrast to the Netherlands, where the NBB had managed to contain the might of the Americans, in Belgium they were omnipotent, and managed to obstruct the limitations to the opening of new cinemas that the exhibitors advocated.

After the war, the state-coerced cooperation between both main business associations VKBB and *Chambre Syndicale* was lifted, but the situation did not fully return to the pre-war *laissez-faire*, in part because of government intervention. First, we will look into forms of cooperation that were established with varying degrees of success, in the area of rental prices and conditions, and with regards to the foundation of a regulatory body within the industry for conflict resolution. Finally, the issue of exclusivity of trade among members, and the attempts to limit the number of new cinemas is discussed.

According to trade press reports, film rental rates paid by exhibitors in Belgium were very high in European perspective. In the percentage system implemented under German rule, rates varied per run, first run cinemas in Brussels and Antwerp paid higher percentages than theatres having consecutive runs. Directly after the war, the national government determined maximum prices not only for food but also for cinema tickets.⁷⁰ However, to the chagrin of exhibitors, film rental prices were not controlled. In 1947, the Minister of Finance addressed this issue and set the maximum film rental rate to 45% of box office takings, where before it could amount to 60%, according to the VKBB trade periodical.⁷¹ In the Netherlands, the maximum rental fee purportedly was 32.5%.⁷² It took government intervention to force both parties to an agreement: in August 1947, the VKBB and the *Belgo-Amerikaanse Syndicaat* came to a quite detailed arrangement, that was also ratified by the *Chambre Syndicale*.

In accordance with this covenant, rental percentage rates were progressively matched to box office takings: the higher the result, the higher the percentage. For instance, with a taking lower than 5.000 Fr, the distributor would get 30%. Only with a box office result exceeding 100.000 Fr would the maximum rate of 45% be applied. Furthermore, limitations were agreed on block booking and blind booking. The arrangement was valid for a year, and rates and conditions were extensively re-negotiated before annual renewals.⁷³ In 1953, the mutual agreements were dissolved. According to the VKBB, MGM had infringed on the treaty by charging much more than the agreed percentage by renting out *Gone with the Wind* for 60% of box office takings.⁷⁴

In order to monitor the compliance with the mutual agreements made in 1947, particularly to supervise the administration of box office results that determined the rental fee, the VKBB and the *Chambre Syndicale* jointly installed a 'Hogere Kinemaraad' (High Council for the Cinema) on 22 December 1947. This Council would settle disputes between exhibitors and distributors outside of the courts.⁷⁵ The Hogere Kinemaraad was composed of an even number of exhibitors and distributors, taken from the ranks of both participating business associations. From the trade press sample, it is not fully clear how the Hogere Kinemaraad operated exactly, but it seems that the most severe sanction was a fine.⁷⁶ Complaints in the exhibitors' trade paper suggested that the Hogere Kinemaraad's priority was only protecting the interests of the distributors, by punishing fraudulent exhibitors that were tampering with the box office results, or clandestinely screening film copies in more than one auditorium (a practice called 'navette'). Remarkably, only a small portion of exhibitors that were sanctioned by the Hogere Kinemaraad were actually VKBB members.⁷⁷ Apparently, non-VKBB members would also fall under the authority of the Hogere Kinemaraad, even though it

existed on the basis of agreements between VKBB, Chambre and the Belgo-Amerikaanse Syndicaat.

The fact that many ‘offenders’ were no member of the main exhibitors’ association underlined the lack of organizational coherence in the industry, that facilitated the existence of a ‘fringe’ of non-organized entrepreneurs that would undermine a cartel-like mechanism. Just like in the Dutch trade press, the Belgian exhibitors complained a lot about a fringe of irregular film exhibitors that did not meet the professional standards of customary cinema operations. For instance, in 1948, Antwerp exhibitors complained about ‘parasitic’ film screenings by private companies that were no regular cinemas, in fact quite similar to complaints in Rotterdam about ‘wild cinemas’ and youth club cinemas. The main difference was the absence of an exclusivity agreement in Belgium: there were always distributors that would supply these ‘parasitic’ cinemas in Belgium and they could not be disciplined effectively.⁷⁸

In vain, the VKBB leaders called for a merger with the distributor’s Chambre Syndicale to form a powerful umbrella organization following the example of the Dutch NBB.⁷⁹ The VKBB attempted to forge an exclusivity arrangement, suggesting that members of the Chambre Syndicale and the VKBB would only do business with members. However, the American distribution companies did not abide by the exclusivity agreement.⁸⁰ Moreover, in 1949, the VKBB trade magazine *Inlichtingsbulletijn* reported that the ‘Beroepsvereniging der Belgische Filmdistributeurs’ (Association of Belgian Film Distributors, hereafter BBF) did not acknowledge the agreements between VKBB, Chambre and Belgo-Amerikaanse Syndicaat either.⁸¹ The BBF united a group of distributors ‘large in numbers but completely a minority with regard to [market] value’, apparently a more marginal group of small-time distributors, at least in the view of the VKBB.⁸² So on the one hand, the dominant (American) industry leaders impeded closer industrial cooperation, and on the other end of the spectrum, the behaviour of small independent distributors, and the fringe of non-syndicated exhibitors created a comparable effect.

A major bone of contention was the exhibitors’ wish to restrain the fast expansion of the cinema park. This topic had been on the agenda since before the war. Between 1945 and 1950, the number of cinemas increased by a staggering 34% to 1415 theatres, whereas cinema attendance was starting to decline.⁸³ The Belgian exhibitors looked at the Dutch NBB with some envy, as their northern neighbours were able to control the growth of the cinema park. The VKBB and NBB regularly sent delegations back and forth.⁸⁴ In 1946, a so-called Gemengde kamer (Mixed Chamber), a council consisting of exhibitors and distributors, quite similar to the CNZ in the Netherlands, was to evaluate plans for new cinemas. But this Mixed Chamber did not function properly, since not a single application was denied. Indignantly, the VKBB trade journal described the example of how two requests were granted for new cinemas in two (unnamed) villages where already two large cinemas were in operation, and where the new theatres would bring the amount of seats to an astounding three inhabitants per cinema seat.⁸⁵ According to the trade journal, the American distributors simply would not want to stop a single new cinema from opening.⁸⁶

This situation remained until 1948, when the trade journal stated that the French, ‘independent’ and 16 mm distributors, all united in subsections of the

Chambre Syndicale, were willing to restrict the quantity of new cinemas, except for the Americans, who flatly refused to move in that direction, after consultation with the highest European executive of the combined majors, MPEA's European chief Frank McCarthy.⁸⁷ In a letter explaining the decision, McCarthy reasoned that unconstrained competition would be in the best interest of the audiences, forcing exhibitors to offer the best and newest facilities. The considerable investments that were needed to open a well-equipped cinema would automatically prevent just anybody from opening a new theatre.

At the local level, there had also been attempts to limit the number of new cinemas, but they appear to have been largely ineffective. In Antwerp, attempts had been made in 1937, but without success.⁸⁸ After the war, the VKBB's journal reports that for Antwerp province, 11 applications for new cinemas had received a recommendation, and 12 received a negative advice. It is not clear from the report to what extent these recommendations could be effectuated, apparently they were not backed by sanctions.⁸⁹ Tellingly, the president of the local VKBB chapter complained that despite these efforts to limit the number of new cinemas, a brand new cinema would soon open in the city centre nevertheless.⁹⁰

Unlike their Dutch counterpart that preferred to keep its distance from government intervention, the Belgian exhibitors' association turned to the state for support.⁹¹ After the failed cooperation with the *Chambre Syndicale*, the VKBB requested the Minister of Economic Affairs to regulate the unrestrained growth of cinemas.⁹² National government refused to get involved and left it to the market to regulate itself. But a few years later, the Belgian state still ran into a struggle with the distributors, siding with the exhibitors, not on the issue of the limitation of cinemas, but with regard to rental fees. The Belgian federal government framed its involvement essentially as a struggle between victimized Belgian retailers vs. Machiavellian foreign (i.e. American) wholesalers.⁹³ In 1957, the Minister of Economic Affairs made further efforts to set maximum tariffs for film rentals, but the ministerial decree was revoked after an appeal by the distributors at the Council of State. Legal clashes between the distributors and the state continued through the 1960s, and in 1976, the legal maximum was, at 57%, still significantly higher than in other European countries.⁹⁴

At present, the Belgian industry still is relatively weakly organized. In the Netherlands, the NBB was replaced in 1993 by two cooperating, centralized business associations, the NVB for the exhibitors and the NVF for the distributors.⁹⁵ In Belgium, there is an association for exhibitors (*Federatie van Cinema's van België*, the successor of the VKBB), but market leader *Kinopolis* ... is not a member. Two separate business association exists for arthouse cinemas. In 2011, many small players had not joined the *Vereniging van Filmdistributeurs van België*, that represented mainly the larger distributors.⁹⁶

The fact that the industry-wide organization in Belgium was weak, compared to the Netherlands, does not mean there were no cartels or a lack of attempts to monopolize the market in other ways than using a trade organization. The oligopolistic muscle of the American distributors has already been pointed out. The city of Antwerp provides a good example of an exhibitor that managed to virtually monopolize a local market without the use of a formal business association. Kathleen Lotze has shown in her study of the post-war Antwerp film exhibition

sector how the entrepreneur George Heylen built a formidable cinema empire by incorporating competitors, and forcing others into distribution collaborations. In the 1970s, Heylen took on the US distributors in a head-on conflict that led to a situation where the largest American films were only shown in a few marginal neighbourhood cinemas of Belgium's second largest city.⁹⁷

In terms of industrial organization, both countries' evidently differ. The Belgian organization of the exhibition sector was feeble compared to its northern neighbours. After the Second World War, the American distributors were able to dominate the Belgian market, but even before this American preponderance, exhibitors did not succeed in forming a strong association, let alone set up a cartel such as the NBB. Obstructing the opening of new cinemas did hardly occur, enabling among others the emergence of large 'pillarized' circuits, that continued to expand after the Second World War.⁹⁸ Dutch exhibitors operated in a business culture where free-market competition was tempered by a spirit of protectionism. To a certain extent, forms of cooperation were favoured over cut-throat competition, whereas in Belgium, the business culture evinced more characteristics of what Solkice and Hall termed a 'liberal' rather than a 'coordinated' market economy.

Conclusions

During the 1990s, several veterans from the Dutch cinema industry looked back at the NBB's history. Distributor Frans van den Berg stated that it was during the 1950s and 1960s that the NBB had managed to suppress genuine competition, leading to a lack of incentive among exhibitors for innovation and theatre renovation.⁹⁹ Van den Berg's critique of the NBB during the post-war era was followed by a comparison to the situation in Belgium, where no equivalent restrictions of the growth of cinema exhibition existed. My preceding comparison between Dutch and Belgian business associations for cinema exhibition supports Van den Berg's claim that the Dutch NBB effectively manipulated the market by limiting the opening of new cinemas and by keeping the thresholds to enter the industry high via rigorously restraining the fringe of unaffiliated entrepreneurs. In Belgium, no trade associations with a similar clout emerged, at least not for the exhibitors. In Belgium, the industry appears to have been more inclined towards a 'liberal' market model, whereas the Netherlands draws to a 'coordinated' market model.

One of the key dissimilarities between the situation in Belgium and the Netherlands that Van den Berg pointed out in his retrospective assessment of the cinema economies of both Low Countries, was a difference in the balance of power between distributors and exhibitors. Where rental conditions in Belgium were more favourable for the distributor, the exhibitor had to work harder to please his audiences in order to fill his auditorium, Van den Berg argued. This factor was only obliquely discussed in this essay and would deserve further exploration. As yet, the history of Dutch and Belgian film distribution has received very little scholarly attention, especially for the interwar period and after. For now, we can only indicate that more insight into this terrain would be vital to gain better understanding of the dynamics of the entire industries.

The exploration of cinema business associations in both countries allows for a deeper empirical foundation to Dibbets' hypothesis on the working of the Dutch

film cartel, and adds further substantiation to the claim that the existence or absence of pillarized cinemas was a substantial factor in the differences between both countries' cinema economies. The NBB was the incarnation of what appears to be an exceptional organizational structure of the film exhibition industry. Broader comparative research could verify that assumption, and would also elucidate to what extent the Belgians conformed more than the Dutch to forms of sectoral organization in other European countries.

This type of transnational comparison of business associations is a new terrain for European cinema historians. Concentrating on the industrial organization of cinema exhibition provides a comparative perspective that can combine local and national frameworks and can shift between particular, incidental and more general, long-term aspects of how cinema fitted into larger societal structures. A focus on business associations in the cinema industry, and by extension, national 'business systems', can offer a useful comparative framework in analysing how entrepreneurs in different places dealt with internal competition or potentially also how they behaved in other types of business relations, with suppliers, customers, government or religious authorities, and non-cinematic leisure competitors. Investigating these business organizational features of cultural infrastructures can lead to a fruitful terrain where the economics of culture and economic cultures intersect.

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Notes

1. For example: *Film Year Book* (New York: Wid's Films and Film Folk, 1927), 945; *The 1963 Film Daily Year Book of Motion Pictures* (New York: Wid's Films and Film Folk, 1963), 660–2; and Eurostat, *Cinema, TV and radio in the EU, Data 1980–2002* (Luxembourg: Office for Official Publications of the European Communities, 2003).
2. Jan Hes, *In de ban van het beeld. Een filmsociologisch-godsdiensociologische verkenning* [A film-sociological religion-sociological exploration] (Assen: Van Gorcum, 1972).

3. Karel Dibbets, 'Neutraal in een verzuild land: het taboe van de Nederlandse filmcultuur' [Neutral in a pillarized country], *Tijdschrift voor Mediageschiedenis* [Journal for media history] 9, no. 2 (2006): 46–64.
4. Daniël Biltereyst et al., 'Negotiating Cinema's Modernity: Strategies of Control and Audience Experiences of Cinema in Belgium, 1930s–1960s', in *Cinema, Audiences and Modernity: New Perspectives on European Cinema History*, ed. Daniël Biltereyst, Richard Maltby, and Philippe Meers (New York: Routledge, 2012), 186–201; Thunnis van Oort, "'Christ is Coming to the Elite Cinema": Film Exhibition in the Catholic South of the Netherlands, 1910s and 1920s', in *Cinema, Audiences and Modernity*, ed. Maltby, 50–63.
5. John Sedgwick, Clara Pafort-Overduin, and Jaap Boter, 'Explanations for the Restrained Development of the Dutch Cinema Market in the 1930s', *Enterprise & Society* 13, no. 3 (2012): 634–71.
6. In his earlier work, Dibbets shows the concentration taking place in the exhibition industry over the decade, and the role of the business association is discussed in some more detail, but in that period, Dibbets could not make use of the sources that are now available in the NBB archives. Karel Dibbets, 'Bioscoopketens in Nederland: economische concentratie en geografische spreiding van een bedrijfstak, 1928–1977' [Cinema chains in the Netherlands: Economic concentration and geographical distribution] (master's thesis, Universiteit van Amsterdam, 1980).
7. E.H. Kossmann, 'Eender en anders. De evenwijdigheid van de Belgische en Nederlandse geschiedenis na 1830' [Similar and different. The parallelism of Belgian and Dutch history after 1830], in *Politieke theorie en geschiedenis* [Political theory and history] (Amsterdam: Bert Bakker, 1987), 378, 385; Kossmann, *The Low Countries: 1780–1940* (Oxford: Oxford University Press, 1978).
8. Dermot McCann, *Small States, Open Markets and the Organization of Business Interests* (Aldershot: Dartmouth, 1995), 60–1; H.J. de Jong and P.M. Solar, 'The Benelux countries', in *European Economies since the Second World War*, ed. B.J. Foley (London: Macmillan, 1998), 107–8; and Hans Righart, *De katholieke zuil in Europa. Het ontstaan van verzuiling onder katholieken in Oostenrijk, Zwitserland, België en Nederland* (Amsterdam, 1986).
9. J.C.H. Blom and E. Lamberts, *Geschiedenis van de Nederlanden* [History of the Low Countries] (Baarn: HB Uitgevers, 2003), 379–81.
10. De Jong, 'The Benelux Countries'.
11. Daniël Biltereyst and P. Meers, ed., *De verlichte stad. Een geschiedenis van bioscopen, filmvertoningen en filmcultuur in Vlaanderen* [The enlightened city. A history of cinemas, film screenings and film culture in Flanders] (Leuven: Lannoo Campus, 2007), 279; Centraal bureau voor de statistiek, 'Bioscoop- en filmhuisbezoek', <http://statline.cbs.nl/Statweb/publication/?VW=T&DM=SLNL&PA=37650&D1=20-24&D2=a&HD=151009-1147&HDR=T&STB=G1> (accessed October 9, 2015); FOD Economie, 'Exploitatie van de bioscoopzalen', http://statbel.fgov.be/nl/binaries/Bioscopen%20-%202010%20-%20201%20-%20Evolutie_tcm325-218118.pdf (accessed October 9, 2015).
12. Guido Convents and Karel Dibbets, 'Verschiedene Welten: Kinokultur in Brüssel und Amsterdam' [Different worlds: Cinema culture in Brussels and Amsterdam], *Die alte Stadt* 28, no. 3 (2001): 240–6.
13. Biltereyst, 'Negotiating Cinema's Modernity', 187–9.

14. Guido Convents, *Van kinetoscoop tot café-ciné. De eerste jaren van de film in België 1894–1908* [From kinetoscope to café-ciné. The first years of film in Belgium 1894–1908] (Leuven: Universitaire pers Leuven, 2000).
15. Biltereyst, 'Negotiating Cinema's Modernity'; Daniël Biltereyst, and Philippe Meers, 'Mapping Film Exhibition in Flanders (1920–1990): A Diachronic Analysis of Cinema Culture Combined with Demographic and Geographic Data', in *Locating the Moving Image: New Approaches to Film and Place*, ed. Julia Hallam and Les Roberts (Bloomington: Indiana University Press, 2014), 86–7.
16. For example, Lies Van De Vijver describes how during the 1950s, the Socialist 'Vooruit' cinema in Ghent managed to win a price war with regular commercial cinemas in the city centre. Liesbeth Van de Vijver, 'Gent Kinemastad: Een Multimethodisch Onderzoek Naar De Ontwikkeling Van De Filmexploitatie, Filmprogrammering En Filmbeleving in De Stad Gent En Randgemeenten (1896–2010) Als Case Binnen New Cinema History Onderzoek' [Ghent cinema city: A multi-method research of the development of film exploitation, programming and experience in ghent and surrounding municipalities (1896–2010) as a case in new cinema history research] (dissertation, Universiteit Gent, 2011), 99, 230. Catholic cinemas ranged from non-commercial parish hall screenings to regular commercial theatres. Daniël Biltereyst, 'The Roman Catholic Church and Film Exhibition in Belgium, 1926–1940', *Historical Journal of Film Radio and Television* 27, no. 2 (2007): 201–2.
17. Ernest Borneman, 'United States Versus Hollywood: The Case Study of an Antitrust Suit', in *The American Film Industry*, ed. Tino Balio, revised edition (Madison: University of Wisconsin Press, 1985), 449–62.
18. Peter A. Hall and David Soskice, 'An Introduction to the Varieties of Capitalism', in *Varieties of Capitalism. The Institutional Foundations of Comparative Advantage*, ed. Keetie Sluyterman (Oxford: Oxford University Press, 2001), 1–68.
19. Keetie Sluyterman, 'Introduction: Varieties of Capitalism and Business History: The Dutch Case', in *Varieties of Capitalism and Business History: The Dutch Case*, ed. Keetie Sluyterman (New York: Routledge, 2015), 3.
20. Dibbets, 'Neutraal', 59.
21. Harm Schröter, 'Cartelization and Decartelization in Europe, 1870–1995: Rise and Decline of an Economic Institution', *The Journal of European Economic History* 25, no.1 (1996): 129–53.
22. A. Bouwens and J. Dankers, *Tussen concurrentie en concentratie; belangenorganisaties, kartels, fusies en overnames* [Between competition and concentration: Interest organizations, cartels, mergers and acquisitions] (Amsterdam: Boom, 2012).
23. Jeffrey Fear, 'Cartels', in *The Oxford Handbook of Business History*, ed. G. Jones (Oxford: Oxford University Press, 2008), 271; Bouwens, *Tussen concurrentie en concentratie*, 14.
24. Joost Dankers and Bram Bouwens, 'Competition and Varieties of Coordination', in *Varieties of Capitalism*, ed. Sluyterman, 111–15.
25. Espen Storli, 'Cartel Theory and Cartel Practice: The Case of the International Aluminum Cartels, 1901–1940', *Business History Review* 88 (2014): 445–67, doi:10.1017/S0007680514000385.

26. Bart Hofstede, *Nederlandse cinema wereldwijd. De internationale positie van de Nederlandse film* [Dutch cinema worldwide. The International position of Dutch film] (Amsterdam: Boekmanstudies, 2000); During the Second World War, the NBB was temporarily disbanded, but the board continued meeting clandestinely.
27. Sorli, 'Cartel Theory', 451–3.
28. Karel Dibbets, 'Het bioscoopbedrijf tussen twee wereldoorlogen', in *Geschiedenis van de Nederlandse film en bioscoop tot 1940* [History of Dutch film and cinema until 1940], ed. Karel Dibbets en Frank van der Maden (Weesp: Wereldvenster, 1986), 229–70.
29. André van der Velden, Thunnis van Oort, and Fransje de Jong, 'De bewogen beginjaren van de Nederlandsche Bioscoop Bond, 1918–1925' [The tumultuous first years of the Netherlands cinema alliance, 1918–1925], *Tijdschrift voor Mediageschiedenis* 16, no. 2 (2013): 23–42.
30. Fransje de Jong, 'Joodse ondernemers in het Nederlandse film- en bioscoopbedrijf tot 1940' [Jewish entrepreneurs in the Dutch cinema industry until 1940] (dissertation, Utrecht University, 2013), 67.
31. This regulation was abolished in 1971. *Film. Orgaan van de Nederlandse Bioscoopbond* [Film. Publication of the Netherlands cinema alliance] (hereafter *Film*), May 1, 1971, 10; See also *Film*, January 1, 1971, 37–8.
32. Daan Hertogs, 'Inleiding' [Introduction], 'Inventaris archief Nederlandse Bioscoopbond', Archief Nederlandse Bioscoopbond [Inventory of the Netherlands cinema alliance archives], EYE Film Institute, Amsterdam (hereafter NBB) ix. The installation of this new committee was instigated by the conflict between the NBB and the MPEA, that is discussed below. Jitze de Haan, 'Filmvoorziening in Nederland 1945–1950' [Film supply in the Netherlands 1945–1950], *Kunst en Beleid in Nederland* [Art and policy in the Netherlands] 4 (1990): 72.
33. Sedgwick, 'Explanations', 14.
34. These figures, based on the NBB's annual reports (1945–1965), give an indication, but they are complicated. First of all: not all granted permits were realized into actual cinema operations. In addition, there will be duplications in the numbers of applications, granted and denied, because sometimes multiple applications were made for one object. For the turbulent years 1945–1947, we only have an aggregated number of applications for cinemas, as well as distribution and production companies (although cinemas formed the vast majority), for the subsequent years, the numbers apply to cinemas only. Furthermore, the NBB introduced the 'B-type' cinema in 1950, that usually only operated in weekends, as a new administrative category. These permit applications were not included in the statistics, because they were handled by the NBB board, not by the CNZ.
35. Thomas Schatz, *Boom and Bust: American Cinema in the 1940s* (Berkeley: University of California Press, 1997), 289; Thomas H. Guback, 'Hollywood's International Market', in *The American Film Industry*, ed. Balio, 463–86.
36. De Haan, 'Filmvoorziening in Nederland', 67, 72–3.
37. Annual Report NBB, 1945, 46.
38. Hofstede, *Nederlandse cinema wereldwijd*, 64–6.
39. Annual Report NBB 1945, 43, 51.
40. NBB, File 2855 (272) 'Rotterdamse Mij. tot Expl. van filmtheaters Romef – Amsterdam' [in Dutch]. In the transcriptions of these 1960 case hearings, the

- Rotterdam chapter freely admitted to purposefully slowing down the rebuilding of Rotterdam cinemas during the preceding decade.
41. NBB, File 2840 (93) 'Van't Hoft, Rotterdam' [in Dutch].
 42. Barry Raymakers, 'Verstrooiing na noeste arbeid: bioscopen en bioscoopbezoek in Rotterdam, 1945–1970' [Amusement after hard labour. Cinemas and movie-going in Rotterdam, 1945–1970], (master's thesis, Erasmus Universiteit Rotterdam, 1989).
 43. NBB, File 2840 (93).
 44. In 1946, the local Rotterdam chapter of the NBB drafted a document called 'Richtlijnen herbouw Rotterdam' (Guidelines reconstruction Rotterdam), that stated priority rights of those entrepreneurs that had lost a cinema during the 1940 bombardment, stipulating that no new cinemas could be opened unless by the war damage victims. NBB, File 2840 (93).
 45. *Het Vrije Volk* [The Free people], March 23, 1954. *Film*, August 1, 1957; *De Tijd* [Time], March 12 and 23, and June 8, 1954; Raymakers, 'Verstrooiing', 19.
 46. Van Oort, 'Christ comes'.
 47. NBB, File 2856 (280) 'Jeugdhuis 't Slag – Rotterdam' [in Dutch].
 48. NBB, File 306, 'Bedrijfsreglement op de Lijst van geen bezwaar' [in Dutch]. *Officieel orgaan van den Nederlandschen bioscoop-bond* [Official publication of the Netherlands cinema alliance] (hereafter *Officieel orgaan*), August 18, 1948. Though, typically, exceptions were made for some companies that had specialized in this niche market.
 49. NBB, File 2856 (280); Archief Nederlands Filminstituut [Archive Dutch Film Institute], File 223.
 50. NBB Annual Report, 1970, 56.
 51. NBB Annual Report, 1978, 52.
 52. Dibbets, 'Bioscoopketens', 88; *Film*, August 1, 1987.
 53. *Film*, November 1, 1962; NBB, File 2856 (280). In the case of the 't Slag youth club cinema, applicants referred to an earlier interference of the Ministry of Economic Affairs in 1957.
 54. The trade press is a more complex source than its Dutch counterpart precisely because more business associations existed in Belgium, with their affiliations to the various trade magazines not always being clear. Not all trade periodicals are readily available, and in contrast to the Dutch case, they are not yet digitized, which necessitated the use of sample years, obviously without the possibility to use search terms.
 55. Guido Convents, 'Ontstaan en vroege ontwikkeling van het Vlaamse bioscoopwezen (1905/1908–1914)' [Emergence and early development of Flemish cinema exhibition (1905/1908–1914)], in *De verlichte stad*, ed. Biltereyst, 39–42.
 56. Daniël Biltereyst, 'Film Censorship in a Liberal Free Market Democracy: Strategies of Film Control and Audience's Experiences of Censorship in Belgium', in *Silencing Cinema: Film Censorship Around the World*, ed. Daniël Biltereyst and Roel Vande Winkel (New York: Palgrave Macmillan, 2013), 276.
 57. Daniël Biltereyst, 'De disciplineren van een medium. Filmvertoningen tijdens het interbellum' [Disciplining a medium. Film exhibition during the interwar period], in *De verlichte stad*, eds. Daniël Biltereyst and Philippe Meers, 55–6.
 58. Van der Velden, 'De bewogen beginjaren'.

59. A few months before the war, the ‘Chambre syndicale de la cinématographie et des industries qui s’y attachent’ was founded. The Chambre’s members consisted of exhibitors and distributors alike. Another important association was the ‘Fédération Belge Cinématographique’, an umbrella organization uniting various other trade associations, the Chambre Syndicale included. A 1920 trade yearbook lists hundreds of individual members of the Fédération. In 1925, the Fédération included a ‘Comité des Loueurs’ and a ‘Comité des exploitants’ [respectively distributors’ and exhibitors’ committees]. Besides associations operating more or less on a national scale, a variety of local and regional associations had emerged, often also member of the Fédération. For one, throughout most of the twentieth century, Brussels had its own exhibitors’ association, a local organization that remained significant because the largest first-run theatres were located in the capital. Most regions had their own exhibitors associations, such as the ‘Syndicat de Liège’; ‘l’Association Cinématographique du Centre’, and the ‘Syndikale Kamer der Kinema’s en Schouwspelzalen der Provincie Antwerpen’, the Antwerp exhibitor’s association that had been founded in 1916. Flanders was not represented in the Fédération: the ‘Syndicale vereeniging der cinematografisten’ van Oost-Vlaanderen, seated in Ghent, declined to join in 1919. Even more associations emerged in this period, such as the ‘Ligue Nationale Belge pour la défense des intérêts de la cinématographie’, and the ‘Syndicat des loueurs belges’. In 1921, yet another umbrella organization was founded: ‘Belgisch Kinematografisch Verbond/Union Cinématographique Belge’ (1921–1937). In 1925, several distributors were members (such as Pathé and Gaumont), a variety of regional associations was represented, and also film producers and the film press. A 1925 trade yearbook mentions two more organizations: ‘Association cinématographique de Belgique’ (founded 1924), and the ‘Comité de défense des intérêts du spectacle (theatres et cinémas de Belgique)’, that, again, counted many representatives of other associations such as the Chambre Syndicale, Ligue du Cinéma, the Fédération, and in addition, a number of distributors and exhibitors from the various parts of the country. Sources: *Revue Belge du Cinéma* [Belgian cinema review] (hereafter *RBC*), January 12, 1919, March 2, 1919, *Annuaire de la cinématographie Belge* [Belgian cinematography yearbook] (hereafter *ACB*) 1920–1921, *Annuaire général du spectacle de la musique et du cinéma* [General yearbook for musical and cinema spectacle] (hereafter *AGSMC*) 1925, *Cinégraph Belge* [Belgian cinegraph] (hereafter *CB*), May 15, 1934, Clement Wildiers, *De kinema verovert de Scheldestad* [Cinema conquers the schelde city] (Deurne: Veereman, 1956).
60. *Weekblad Cinema* [Cinema weekly], 16, no. 17, April 24, 1936.
61. Metro-Goldwyn supposedly controlled several cinemas since the late 1920s. And other major distributors opened theatres during the 1930s. But as yet, no clear overview exists of American theatre ownership in Belgium. Biltreyst, ‘Disciplineren van een medium’, 48, 54. See also: Van de Vijver, ‘Gent Kinemastad’, 88.
62. *RBC* 27, July 2, 1939. According to a retrospective report in 1946, only one business association representing exhibitors was not included, the exhibitor’s section of the Chambre Syndicale. Apparently, the Chambre also represented a group of exhibitors, but it is not clear how influential this group was – possibly exhibitor-members of the Chambre were more or less vertically integrated,

- active as exhibitor and distributor simultaneously? *Vereeniging van kinemabestuurders in België: Inlichtingsbulletijn* [Association of Belgian cinema managers: Information bulletin] (hereafter *Inlichtingsbulletijn*) 1, no. 1 (1946).
63. *Inlichtingsbulletijn* 1, no. 1, 1946. Biltreyst, *De verlichte stad*, 279. Belgium counted approximately 1100 cinemas in 1939, 967 in 1945, and 1415 in 1950.
 64. Biltreyst, 'The Roman Catholic Church', 197–8.
 65. Rik Stallaerts, *Rode glamour. Bioscoop, film en socialistische beweging* [Red glamour. Cinema, film and socialist movement] (Gent: Provinciebestuur Vlaanderen, 1989), 17–18.
 66. Jozef Toussaint, 'Zijn of niet zijn' [To be or not to be], *Inlichtingsbulletijn* 4, no. 2–3 (January 15/February 1 1949).
 67. Roel Vandewinkel, 'De bezette bioscoop. Filmvertoningen tijdens de Duitse bezetting (1940–1944)' [Occupied cinema. Film exhibition under German occupation (1940–1944)], Biltreyst, *De verlichte stad*, 63–80.
 68. For instance, in the city of Ghent, market share was estimated at over 70% in 1952. Van de Vijver, 'Gent Kinemastad', 159.
 69. *Inlichtingsbulletijn* 2, no. 19, September 1947.
 70. Vincent Dujardin and Mark Van den Wijngaert, 'Land zonder Koning 1939–1950' [Land without King], in *Nieuwe geschiedenis van België II 1905–1950* [New history of Belgium II 1905–1950], ed. Michel Dumoulin, Emmanuel Gerard, Vincent Dujardin and Mark van den Wijngaert (Tiel: Lannoo, 2006), 1277; Gert Willems, 'De bioscoopexploitatie tussen bloei en crisis (1945–1957)' [Cinema exhibition between prosperity and crisis (1945–1957)], in *De verlichte stad*, Biltreyst, 91–3.
 71. *Inlichtingsbulletijn* 2, no. 16, June, 1947.
 72. *Inlichtingsbulletijn* 4, no. 9, June 15, 1949.
 73. *Inlichtingsbulletijn* 2, no. 19, September 1947. See, for example, on the long negotiations in 1951: *Inlichtingsbulletijn* 6, no. 8–9, August/September 1951.
 74. *Inlichtingsbulletijn* 8, no. 1, January 16, 1953; no. 3, March 7, 1953. MGM denied the allegations, because the film was technically not rented out to cinema exhibitors but was screened by MGM itself in individually rented auditoria.
 75. *Inlichtingsbulletijn* 4, no. 2–3, January 15/February 1, 1949.
 76. *Inlichtingsbulletijn* 7, no. 1, January 1952.
 77. *Inlichtingsbulletijn* 7, no. 1, January 1952. For example: *Inlichtingsbulletijn* 8, no. 1–3, January/March 1953 reports that only 15% of verdicts of the HKR concerned VKBB members, and even a lower percentage of members was fined.
 78. *Inlichtingsbulletijn* 3, no. 23, January 1848; see also *Inlichtingsbulletijn* 4, no. 2–3, January 15/February 1, 1949.
 79. *Inlichtingsbulletijn* 4, no. 2–3, January 15/February 1, 1949.
 80. *Inlichtingsbulletijn* 1, no. 1, 1946.
 81. *Inlichtingsbulletijn* 4, no. 4, February 15, 1949.
 82. *Inlichtingsbulletijn* 4, no. 16, October 1, 1949.
 83. Willems, 'De bioscoopexploitatie', 83.
 84. For instance, *Officieel orgaan*, 12-9-46; *Inlichtingsbulletijn* 3, no. 27, July 8, 1948; 4, no. 2–3, January 15/February 1, 1949.
 85. *Inlichtingsbulletijn* 1, no. 1, 1946.
 86. *Inlichtingsbulletijn* 6, no. 5, May 1951.
 87. *Inlichtingsbulletijn* 3, no. 29, August 30, 1948.

88. Wildiers, *Kinema verover de Scheldestad*, 25.
89. *Inlichtingsbulletijn* 4, no. 2–3, January 15/February 1, 1949.
90. *Inlichtingsbulletijn* 7, no. 4–5, April/May, 1952.
91. Another example where the industry asks for state intervention: *Inlichtingsbulletijn* 3, no. 15, September 15, 1949, when the Minister is requested to regulate travelling cinemas as an alleged risk to public safety.
92. *Inlichtingsbulletijn* 4, no. 2–3, January 15/February 1, 1949.
93. ‘Le secteur cinématographique en Belgique (II)’ [The Film sector (II)], *Courrier hebdomadaire du CRISP* [Weekly CRISP newsletter] 24, no. 770 (1977): 18, doi:10.3917/cris.770.0001. For an earlier instance of this nationalist element in trade press discourse, see *Inlichtingsbulletijn* 2, no. 14, April 1947.
94. ‘Le secteur cinématographique en Belgique (II)’, 18–20.
95. The NVB claims that all Dutch cinemas are a member. <http://www.nvbinfoctrum.nl/?id=1465> (accessed September 28, 2015).
96. Ann Overbergh, *Voorbij de vertoning – Analyse van het Vlaams audiovisueel vertoning- en distributieveld* [Beyond the screening. Analysis of the Flemish audio-visual exhibition and distribution sector] (Gent: Instituut voor beeldende, audiovisuele en mediakunst, 2011), 109–13, <http://www.bamart.be/download.php?i=849>.
97. Kathleen Lotze and Philippe Meers, ‘Citizen Heylen. Opkomst en bloei van het Rex-concern binnen de Antwerpse bioscoopsector (1950–1975)’ [Citizen Heylen. Rise and success of the rex concern in the Antwerp cinema exhibition sector (1950–1975)], *Tijdschrift voor Mediageschiedenis* 13, no. 2 (2010): 80–107.
98. Willems, ‘De bioscoopexploitatie’, 82–5.
99. *Film*, September 1, 1991. Also, long-time NBB administrator Van Dommelen agreed that it was especially the CNZ permit system that had ‘severely restrained’ the development of the Dutch cinema market. ‘Op weg naar de 21ste eeuw met Jan van Dommelen’, *Film*, September 1, 1998. In addition, Wolff wrote more appreciating about the NBB’s ‘closed-shop’ practices, looking back. *Film*, May 1, 1993.

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