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I3 's, MediaRoad's and Vital Media's Policy Recommendations for the Next Multiannual Financial Framework

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Table of contents

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European Media Ecosystem: Challenges and Opportunities

Digitization and globalization are giving rise to considerable opportunities for the European media sectors but also bring with them some significant challenges. Coordination and Support Actions (CSAs) financed by DG CONNECT's Media Convergence and Social Media Unit, the projects I3, MediaRoad and Vital Media, through their analysis reported in the Annex, have identified the **most pressing trends and the related challenges and opportunities** faced by the industry.

1. *The development of platforms in the European media sector*

Platforms are having a growing impact on the aggregation, distribution of and access to media content, often acting as gatekeepers between media organizations and their users. Relevant opportunities for European media companies to reach their (potential) customers do exist, as platforms may have an incentive in providing diverse and local content as they seek to please their end-users. Finally, many traditional media companies have set up their own platforms, with a few successful European examples (e.g. BBC iPlayer).

Challenges are related to the necessity of guaranteeing diversity of content and competition in a platform-led digital future. Platforms also often lack transparency, for example in terms of their underlying algorithms. For all these reasons, the risks are loss of autonomy, technology fragmentation and economic dependency.

2. *Continuous development of new technologies*

New technologies allow media to come up with new products and services, which are likely to be valued by end-users, or to make the production and distribution processes more efficient. Such technologies include immersive technologies, augmented reality, virtual reality and mixed reality, 5G, blockchain, hybrid distribution models, artificial intelligence and automated recommendation systems, to name but a few.

However, the challenge is that each of these new technologies modifies the audiovisual media ecosystem, thus making this a thorny issue for traditional media stakeholders. Additionally, certain impacts on end-users may be negative, as exemplified by the current debates about how algorithms can influence end-users' choices.

3. *Adoption of new business models*

Media stakeholders have an opportunity to better capture the value derived from media content and services. New business models include the development of the long tail, even more user-generated content and widespread use of subscription-based revenue models.

The adoption of these new business models, however, comes at a price. Currently, media companies need to invest in rethinking traditional business models, and some may simply not have the required means to make such an investment.

4. Increasing accessibility of media content

This trend can benefit end-users just as more and more content is made accessible "on the move", through different formats and over multiple devices. This can also improve inclusiveness: digital technologies make it increasingly possible to improve accessibility, e.g. for people with impaired hearing or vision. Digital technologies can also allow minority languages to survive or even thrive, for example through the development of more sophisticated translation software.
The challenge is therefore to make even better use of current and nascent technologies. This requires that issues such as accessibility and inclusiveness remain priorities for stakeholders and policy-makers.

1. "The Future of Media Research and Innovation". Highlights from the Parliament event

Based on these identified challenges and trends, the CSAs have launched a discussion with high-level stakeholders in the media sectors, involving both the European Parliament and the European Commission, so that jointly they can deal with issues and find common solutions to support media ecosystems.

One highlight was the CSAs event "The Future of Media Research and Innovation", held at the European Parliament on the 24 May 2018, which discussed major issues relating to policy dialogues and analysis from projects in relation to the next Multi Financial Framework (MFF). During the event, all the invited speakers stressed the significant changes that national media sectors are facing. MEP Dr Ehler, co-chair of the European Parliament's Creative Industries Intergroup, pointed out that "Creativity is defining new patterns of innovation" that could contribute in boosting the creative potential for innovative services in this unique sector. Professor Morganti, senior researcher at IMEC-SMIT (VUB), further argued that the media sector is not like any other economic sector. He invited the institutions to reflect on the broader relevance of media for European societies and for the need to address the ongoing "changes that appear everywhere in the media sector, from production and distribution, to ownership and financing." However, as also stressed by Ms Lai, Secretary General of the European Coordination of Independent Producers (CEPI), "with the scale and pace of the current market changes, at both national and global level, the situation becomes increasingly complex and difficult for the sector, especially for SMEs". Accordingly, Andrea Nicolai, President of T6 Ecosystems, highlighted industry's need to see support for innovation, with the aim of overcoming the so-called "Valley of Death"[1] affecting media research and new media products and services. In line with this, the role of transnational and cross-sectoral collaboration, together with the

[1] The Valley of Death refers to the period of time spanning from when a startup firm or research outcome receives an initial capital contribution to when it begins generating revenues. During the Valley of Death curve, additional financing is usually scarce, leaving the firm vulnerable to cash-flow requirements.

adequate support for media innovation, are pivotal to ensuring the future development of the European media sector. Thus, as emphasized by Dr Cesarini, head of the Media Convergence and Social Media Unit at DG CNECT (European Commission), we need to address the gap between creativity and technological advances in order to avoid further fragmentation and leverage the potential of the crossover between the creative arts and technology in Europe.

The fragmentation and the lack of competitiveness among European players is clearly a major concern, argued Dr Cesarini, who focused on the detrimental role played by large non-European platforms, which are gaining dominance on basic access to the downstream market. Thus, notwithstanding the fact that Europe is a major player in term of content production, there are still barriers and difficulties in exporting products.

2. Policy recommendations for European Institutions

Based on the aforementioned debate and on the research carried out by the three CSAs (extensively reported in the Annex), the aim of this paragraph is to convey key recommendations and messages from the media sectors in order to ensure that media innovation can flourish in Europe through adequate funding support and a stronger coordinated effort.

We therefore call upon the European Institutions to consider our recommendations when drafting the respective opinions on the next Multiannual Financial Framework[2], on Horizon Europe[3] and on Creative Europe[4].

As indicated by I3's results and analysis and echoed by Vital Media, the industry is looking for additional support from the European Commission – not only in terms of budget allocation but also to provide for a better and more efficient allocation that bridges the needs of technological innovation and Creative and Cultural Industries (CCI). In addition, MediaRoad's analysis outlines the need for financial support of media ecosystems, as well as a more prominent presence of the media sector in all the relevant programmes, with a more horizontal approach that could foster cross-sectorial collaborations and yield positive spill-over effects. Thus, a reform of existing schemes and programmes, and the support for more flexibility for research and funding, are strongly requested.

In this context, the three projects I3, MediaRoad and Vital Media have identified three major areas of intervention:

[2] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2018%3A321%3AFIN
[3] https://ec.europa.eu/info/designing-next-research-and-innovation-framework-programme/what-shapes-next-framework-programme_en
[4] https://ec.europa.eu/digital-single-market/en/news/proposal-regulation-establishing-creative-europe-programme

1. More prominent presence of media sectors in Horizon Europe and stronger synergies between relevant programmes.

First of all, in the context of the next Multiannual Financial Framework, the European Commission's proposals of Horizon Europe, Creative Europe and the Digital Europe programmes should be better aligned to allow the integration of media actions and funding. Horizon Europe should include among its priorities the key role of media, especially with regard to its second and third Pillars.[5] As the creative sector contributes significantly to European growth, this should be better reflected in the Horizon Europe proposal, with a clear reference to the sector in the legal text. Indeed, at the current stage, Horizon Europe seems fragmented and mostly focused on sectorial trajectories, which do not see media as a relevant interest group despite its huge contribution to creating economic growth and jobs and to fostering inclusive and cohesive societies. To properly define media as a cross-sectoral subject, Horizon Europe should provide actions or sub-programmes that are able to promote and facilitate integration between the relevant programmes, namely Digital Europe and Creative Europe.

What the CSAs strongly recommend, then, is (i) a gateway between Horizon Europe, Digital Europe and Creative Europe and (ii) a more prominent focus on media innovation sectors, with explicit reference to this in the Regulation establishing Horizon Europe, especially in the second and third Pillars.

2. Support for European cooperation to ensure the competitiveness and development of the European media sectors

Secondly, CCIs play a pivotal role in fostering economic growth, job creation and innovation. Indeed, CCIs have been identified by the European Commission as a high-growth sector generating added value as well as a resilient industry in times of economic crises.[6] Industrial competitiveness is therefore a key determinant of growth and jobs in Europe, and it is particularly important for SMEs[7] as well as for all European stakeholders involved in the sector. Nowadays, however, investment in technological innovation and content creation is dwarfed by powerful global players that are impacting the whole media value chain, creating fierce global competition and elevating barriers to entry that are barring European players and newcomers. As it has been said, "the overall video industry has seen both rapid growth and intensified competition due to increased direct access to a wide range of content, the elimination of traditional distribution barriers and changing consumer preferences".[8] Global scale is becoming the key to success; and

[5] For more information on the current proposal of Horizon Europe and respectively the second Pillar on "Global Challenges and industrial competitiveness" and the third Pillar on "Open Innovation – European Innovation ecosystems," please also see: https://ec.europa.eu/commission/publications/research-and-innovation-including-horizon-europe-iter-and-euratom-legal-texts-and-factsheets_en

[6] EASME. 2016. Boosting the competitiveness of cultural and creative industries for growth and jobs.

[7] European Commission. 2014. Communication for a European Industrial Renaissance http://eurlex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0014&from=EN

[8] McKinsey & Company. 2016. Global Media Report

alongside the rise of global major competitors in the media industry, such as Netflix, media conglomerates are threatened by the horizontal and vertical integration of companies like Apple, Facebook and Amazon, whose core businesses reside elsewhere. Thus, their pricing strategies and the extent to which they are able to subsidize video consumption across business lines will have a massive impact on how consumer video is valued and how rapidly it grows.[9]

In this context, the CSAs call for dedicated support to European media players to overcome market fragmentation, boost their competitiveness and capacity of collaborating at international level, to level the playing field, and to encourage the adoption of innovative or alternative business models by the industry. Developing new business models is crucial for media organisations, but this transformation also consistently causes problems. Thus, specific actions should aim at helping European players to innovate and keep up with international competition, focusing ever increasingly on Over-the-Top (OTT) business models and digital advertising.[10] The importance of interdisciplinary partnerships, open innovation, and digital and creative hubs should also be underlined to ensure the creation of new partnerships and alliances and, in turn, to reinforce creativity and diversity when delivering new products and services.

3. Dedicated investments in the latest technological advances to bridge innovation and creativity in Europe

Finally, the convergence of digital technologies and the role of the creative economy are having – and will in the future have – disruptive effects on global society. This is what scholars define as "The Fourth Industrial Revolution"[11] based on the development of accessible technology that is more widely used and more seamlessly integrated. The technologies that will allow the Fourth Industrial revolution to fully spread include augmented reality, virtual reality, mixed reality, 5G, blockchain, hybrid distribution models, artificial intelligence, metadata and big data analytics, semantic technologies and IP.[12] At the top of that, the collection of personal data for personalized content will become increasingly relevant for conquering market positions, leading to new issues related to data privacy and protection. Moreover, the growing need for fighting online disinformation increases the central role of media for the protection of European democratic discourses.[13] It is worth noting that all these topics are of great relevance, including for the European media sector, which is already looking at potential applications for these technological advances.

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[9] McKinsey & Company. 2016. Global Media Report
[10] DLA Piper. 2018. Global Media Sector Trends 2018
[11]https://www.weforum.org/agenda/2016/01/the-fourth-industrial-revolution-what-it-means-and-how-to-respond/
[12] See also World Economic Forum.2018. World Economic Forum Report 2018
[13] European Commission. 2018., A multi-dimensional approach to disinformation.

To benefit from this and to capitalize on the innovative potential of the sector, **CSAs propose introducing policies and actions that clearly address the media sector. In particular, CSAs are requesting ad hoc initiatives to support infrastructures all along the value chain that are dedicated to media, with regard to the above-mentioned technologies**. We also suggest that the relation between technologies, data and the media sector be used as a transversal point for the finalization of the Digital Single Market (DSM) as it impacts all the three pillars on which the strategy has been built: "(i) better access for consumers and businesses to digital goods and services across Europe; (ii) creating the right conditions and a level playing field for digital networks and innovative services to flourish; and (iii) maximizing the growth potential of the digital economy".[14]

3. Conclusion

Due to the relevance of the media sector and, more generally, of Creative and Cultural Industries for Europe's economic growth, and considering the outstanding level of the players engaged in the sector, the high quality of content and the technologies that have been developed, European stakeholders are asking for and indeed require dedicated instruments that will support media research and innovation.

As key representatives of the media sector, I3, MediaRoad and Vital Media ask the European Institutions to take into account these recommendations and the related studies/research results when finalizing proposals for the next MFF, Horizon Europe and Creative Europe.

[14] https://ec.europa.eu/digital-single-market/en/policies/shaping-digital-single-market

Annex 1

The Coordination and Support Actions: description of policy dialogue process and results

The production of a joint policy recommendation for the next MFF has been part of a medium-term strategy pursued by each of the three projects since the beginning of their activity. Each CSA has established its own policy dialogue process and performed policy activities in order to collect data and produce knowledge. In a second stage, individual analysis and findings have been collated in order to draw common conclusions. The next paragraphs are dedicated to the description of the CSAs, to the process established and to the results collected individually, all of which has enabled us jointly to write this White Paper in which we have stated our policy recommendations.

I3- Impact, innovate, Invest

Impact Innovate Invest - I3 - is a Coordination and Support Action that addresses the topic of ICT19-"Technologies for creative industries on Convergence and Social Media". Following the European Council conclusion that stated "Europe needs an integrated approach from research and innovation to market deployment", I3 started to support research results from lab to market in January 2016 (scheduled to end in September 2018) with the aim of making innovation happen.

During the project lifetime, I3 has focused on forging a closer relation between researchers and entrepreneurs, on providing mentorship and tutorship and on ensuring access to business angels and investors.

I3 has also developed a systematic policy dialogue by applying methods to address policy issues in the Media Convergence domain. The aim has been to provide concrete inputs to European institutions for policy-making purposes.

I3 policy dialogue construction

Since its early stages, the I3 project has aimed at fostering a policy dialogue that supports and strengthens the link between researchers, innovators and policy-makers in the media sector. In other words, it has sought to be the connection point between stakeholders and policy-makers. Accordingly it has set out stakeholder analysis and aimed to enhance discussions on the media. The final aim of the process has been delivering recommendations that can credibly influence the policy-making process. I3 has structured a policy framework based on five different steps (the process is reported extensively in D5.2 Policy Dialogue Protocols, 2016).

The I3 Policy Dialogue Framework started in the first six months of the project by following five steps. In the first step, the project defined the protocol to be followed by the I3 team (D5.1, Policy Dialogue Concept Paper, 2016). In the second step, a stakeholder analysis was then implemented, by considering the diversity of the stakeholders involved as a core project value. In the third step, topics to be discussed in the policy dialogue were identified. The identification of topics was performed by adopting three different approaches. The first one consisted of a literature review; the second was a policy analysis. Both were performed to identify the most relevant topics faced by policy and regulations (details are reported in D5.1 Policy Dialogue Concept Paper). The third approach consisted of a consultation of selected experts from the I3 Advisory Board to validate the topics emerging from the previous analysis (in September 2016). After the topics on which policy dialogue was to be based were identified, data gathering began (results are available in the D5.3 Dialogue Intermediate Working Group Report, 2017). After the data gathering was completed, the policy dialogue was implemented by using dedicated methods. Methods to implement policy consultations have included: expert groups and panel discussions, online surveys/e-questionnaires and face-to-face consultations.

In line with the above, I3 has combined different methods to engage stakeholders. In particular, it organized three multi-stakeholder meetings and performed three structured surveys, shared within the I3 ecosystem. The final step of the policy dialogue has been focused on the production of policy recommendations, which are to be addressed to European institutions. Results from the policy dialogue meetings and surveys have been analysed and investigated using dedicated qualitative methodologies. Subsequently, the main outcomes from the analysis have been used to inform the White Paper. Extensive results will be reported in the D5.4- Policy Dialogue Final Report and Recommendation and published on the I3 website. Preliminary highlights are reported in the next paragraph.

Results from I3 policy dialogue

As mentioned in the previous paragraph, I3 administered three surveys. The first one was addressed only to selected high-level media experts active on the Advisory Board of the I3 project. This survey was finished in September 2017. The aim was to double-check the results of the literature review by making a first selection of topics to be discussed at large. The second survey was finished in November 2017 and was enlarged to include sector representatives. The aim was to identify the stakeholders for engaging in the policy dialogue, the topics to discuss and the kind of tools preferred by stakeholders for participating in the policy dialogue. Finally, the last survey, which ended in April 2018, addressed the widest possible range of stakeholders, taking into account results from the previous survey. The last survey by I3 collected 116 responses. According to the composition of the respondents, 50% represented a Company or SME in the media sector, 16% represented start-ups, 14% were researchers, 6% ICT 19 projects, 4% media interest groups and less than 1% innovation hubs. 10% of the respondents replied as “other”, which included H2020 projects, ONG, trade associations and government representatives, as well as students

The first question asked to the respondents aimed to understand the relevance of the challenges faced by the Convergence and Social Media sector selected by I3. The answers show that the most relevant challenge to be faced is that “Innovative business models have to be considered and discussed to enhance economic opportunities”. According to the respondents, 78% agreed that the topic is important or very important for the stakeholders. Next, 70% agreed that “Data

privacy and copyright has to be improved according to the emerging technologies". Slightly below 62% of respondents opined that "Research ideas in Media Convergence are not adequately supported in terms of economic resources to go on the market" while the 50% agreed that "Fake news and content verification have to be the priorities of EC". Less than 50% of the respondents agreed that "Market barriers reduce economic opportunities in the field of Media Convergence".
According to the replies collected, the challenges emerging from the sector are not necessarily related to the amount of money allocated to the sector but to the fact that traditional business models are still adopted. Therefore, major efforts are needed to develop and understand new business models, which then need to be integrated into European financing schemes and funding mechanisms.

Moreover, the respondents were asked which were the topics that should be supported by the European Commission (EC) under the Media programme in terms of research, innovation and technology development. The topic that received the highest number of positive values on the Likert scale (important and very important) was "Technology for quality content and content verification" (72% of the preferences). Next, "Big data for Media" received 66% of preferences. Another crucial topic emerging from the survey was "technology for accessibility". Finally, immersive technologies and blockchain were both less popular topics.

To understand better what stakeholders think about the support that the media sector received by the European Union, it was asked to assess the degree of support received. 99 out of 116 respondents replied to the question. Looking at the number of replies, at the current stage the degree of support received by the EC for both research and technological development in the Media Convergence and Social Media sector is defined as poor by 36% of the respondents and very poor by 6% respondents. On the other hand, only 24% of the respondents assigned a score of good or very good. 33% judged the support received as sufficient.

A further question was asked to investigate the kind of actions that are expected from the EC to foster research and technological development in the media sector. In this case, 63% of the respondents called for additional economic resources, while 53% asked more support for market access. On the other hand, 39% called for more opportunities for networking and only 25% for a more integrated discussion between projects and the EC. The question was also structured to collect open contributions. Based on the collected data, content analysis was performed. It is worth pointing out that, out of the 19 open questions collected under the "other" box, 10 respondents requested additional efforts in the implementation of an integrated strategy. To use the words of one respondent: "a holistic approach to the sector" is needed. Three respondents focused on media regulation at national and European levels.

I3 conclusions
The I3 survey confirms findings from the literature review, namely that the media sector is facing several challenges that need to be urgently addressed. First of all,

the surveys suggested that more innovative business models are needed to support the sector. It was revealed that it is not just a question of budget allocation to the sector, but also about its distribution into different programmes and pillars. Indeed, while on the one hand stakeholders required more economic support and were not satisfied by current provision, on the other support for market access is crucial and needs to be promoted. Such results reveal that the request for working on innovative business models is linked to the crucial need to overcome barriers for gaining market position, leading in turn to improved competitiveness. Regarding the technological topics that stakeholders ask to be supported, it was shown that technologies for content verification and big data for media are the most important ones to address. Technology for accessibility remains a crucial topic for the sector, while it seems the blockchain and immersive technologies are not priorities. It is possible that such results are related to the fact that a lot has been done to support both blockchain and immersive technologies in recent years, while the debate on content verification and the use of big data for media still need to be deepened, including from the perspective of technology development.

In conclusion, the combination of the results collected during the I3 policy dialogue (both from surveys and multi-stakeholder forums) led I3 to make efforts to launch a dedicated event gathering together European Parliament, EC and representatives from the media and CCI industry to discuss the necessary strategies to support the sector in the next financial framework. The event was held in Brussels on 24 May 2018. Results have been collected and analysed together with Media Road, co-organizers of the event, and Vital Media. The outcome is this White Paper, which contains the common reflections from the CSAs.

MediaRoad project

The MediaRoad project, which is coordinated by the European Broadcasting Union, aims to support the transformation of the European media sector by building an ecosystem for innovation. The project is based on collaboration between nine key partners including diverse media stakeholders, public service media organizations, commercial radio stations and broadcasters, media workers' organizations, academic research institutes, innovation centres, independent producers and SMEs. The objectives are:

- Boost innovation across the European media sector
- Reawaken a "start-up" mentality in the media sector
- Bring together a broad network of media stakeholders
- Bring innovative concepts to fruition and to market
- Shape future media policy and be part of the digital transformation

One of the key priorities of the project is to build a diverse network where European media organizations, researchers, creative and cultural industries, technology experts and entrepreneurs can join forces to create their vision for the future together. Over the course this project, MediaRoad is aiming to provide the European Commission with regular proposals and suggestions that can feed into key EU policies such as the future framework for research and media innovation, and help develop a long-term policy vision for the European media sector, focusing on audiovisual and radio.

Within MediaRoad, a **Policy Hub** is led by imec, a world-leading research and innovation centre specializing in ICT, nanoeletronics and digital technologies. The Policy Hub is responsible for developing a long-term policy vision for the European media sectors, with a focus on the audiovisual and radio sector. It will achieve this through a series of consultations, targeted workshops, reports and research updates, with input from the Sandbox Hub and Network Hub activities. The actions will address a stakeholder pool including broadcasters, technology companies, social media providers, production companies, journalists, policy experts and research institutes.
Since its launch, the Policy Hub has already developed short and mid-term input to policy-makers through: a series of publications, including quarterly newsletters; the first Vision Document on the role of media innovation in the European Research Agenda post-2020; responses to relevant Public Consultations (e.g. Fake News and EU funds in the area of investment, research & innovation) and dedicated blog posts.

MediaRoad Vision Paper
Within the Policy Hub, dissemination of output takes several forms. This includes two annual Vision Documents addressing the major topics identified by consortium and stakeholder members through consultations, identifying main challenges and opportunities, and providing policy recommendations. Following internal discussions within the consortium, it was decided to focus the first Vision Paper on the European Research Agenda Beyond 2020. Input was gathered mainly using an online survey and workshops.

The MediaRoad survey was released over the Qualtrics platform, from 26 March until 10 May 2018. The objective of the survey was to gather qualitative input, from a variety of stakeholders, on trends and challenges in the European media sector and what should be the specific policies and actions to respond to those challenges, with a view to promoting media innovation and research. More details are available in MediaRoad’s first Vision Paper.

Three workshops were held: the first workshop at the EBU (Brussels) under the title “A Common Vision for Media Research & Innovation”, on 27 February 2018, with 16 people in attendance. The second was held at the MediaRoad Post-Convergence Radio event. The third took place at imec-SMIT-Vrije Universiteit Brussel on 2 May 2018, with 18 people in attendance.

MediaRoad policy dialogue key findings (see the first Vision Paper for more details)

We are putting forward a vision and accompanying measures that will foster media research and innovation based on the fact that the media sector plays a crucial role to help resolve Europe-specific and global challenges and manage changes in societal and economic contexts.

This vision can only be implemented if the media sector is transparent, sustainable, values based (public and economic values), cohesive and accountable. Policies and actions should aim at keeping these fundamental values centre stage.

What are the policies and actions required to implement the vision?

Bridge technological research and content innovation
There is a need for a Media Innovation Scheme to bridge the gaps between technological innovation, creativity and R&D at the European level. Currently, everything is evaluated from a strict technological point of view. This undervalues the importance of innovation in content (new formats, new storytelling, etc.). There is no alignment between H2020 (technology) and Creative Europe (content, including content innovation). Therefore, we need more funds and programmes linking technology and creative actions, leading to the combination of different technologies and infrastructures.

Dedicated and specific investment in media innovation
Independently of the form taken by support for innovation and research, it is crucial that the funding specifically dedicated to media research and innovation is increased in order to ensure crucial challenges can be tackled. It is important to come up with clear, quantified objectives, including a definition of which actions should be promoted. The increased funding for media in Horizon Europe should not be at the expense of the funding within Creative Europe, and vice versa.

Foster co-operation and collaboration
Policies aimed at supporting media research and innovation should do this by fostering co-operation and collaboration. In this perspective, it is important to support networking systems, media hubs and the development of creative/media clusters. This also requires further investigating these new forms of partnerships and collaboration, assess their impact (also at local level) and devise the best policies to develop them.

Ensure a level playing field for the media sectors
This vision relies on a level playing field for the media sector on which all types of actors (big and small, European and international, new entrants and established players) face the same regulations. Specific support should be provided to certain categories of actors depending on the objectives of specific policies. Thus, new entrants and Public Service Media may require subsidies.
Platforms enjoy a privileged position in this respect. A framework is needed to ensure that they act transparently and with accountability, most notably in combating disinformation online. There is a need for a clear evaluation of their role.

Support accessibility and inclusion

In this vision, research and innovation should have as one core objective to ensure that media services are truly inclusive and accessible to all, regardless notably of age and disabilities. Inclusion of minorities should happen not only in terms of access, but also in production.

Enhance media literacy and strengthen skills

Supporting media research and innovation requires that end-users become more media literate, including with digital issues, and that professionals' skills are adapted to current and future challenges.

Vital Media project

Vital Media as a Support and Coordinator Action project that is part of the Horizon 2020 Programme, topic "ICT19-2015 Technologies for creative industries on Convergence and Social Media". It is aimed at enlarging the community in the social media arena at the European, national and regional clusters levels through collaboration between the NEM Initiative and the clusters. It also aims to link those communities with policy-makers and stakeholders (e.g. standardization bodies) to increase awareness about topics of interest from both sides, for the benefit of the European CCI and ICT economy. Consequently, an important goal of the Vital Media project has been to enable and facilitate discussions among large industry players, small organizations (e.g. SMEs) active in the area of Content, Media, and Creative industries and other relevant stakeholders (e.g. research and academic institutions and policy-makers.), in order to establish common views on needs and requirements from the entire sector in respect to the future research and innovation activities, covering the identified gaps between the technology providers, their users/adopters, and policy makers and regulators. This enlarged community has been guided by discussions at different levels focusing on workshops and cooperation, using an innovative online collaboration platform.

Inside the Vital Media project, specific activities for fostering dialogue between policy-makers and the Convergence and Social Media sector were carried out.

In order to address the impact of future technology developments and necessary policies and regulations in media domain, the Vital Media project committed: (I) to support and encourage this dialogue in order to identify the best way to do it; (II) to specifically identify the most relevant topics, the stakeholders to be involved and the most appropriate tools and communication channels to support this dialogue.

To this end, a survey in the NEM communities in the first year of the project lifecycle was launched, and focus meetings and events – within NEM – with policy makers at European and national level were arranged.

Vital Media policy dialogue results and conclusion

Vital Media launched a focused survey within the NEM community to collect opinions from media and creative communities about Media Convergence and Media Policy.

The main objectives of that survey were to identify:

- The relevant topics and related priorities to be addressed through dialogue
- The main stakeholders to be involved in the dialogue
- The preferred tools and channels to be used to foster dialogue among the stakeholders involved

The main results of this survey are presented in a specific white paper "Policy dialogue in Convergence and Social Media: requirements", available on the NEM Collaboration Platform.[15]

For a European Technology Platform like NEM, composed mainly of technology experts, the main conclusion from the survey results was the following: "*We need to understand the policy challenges relating to data protection, privacy and copyright as well as all the challenges that policy-makers have to deal with, in order to identify how technology can be used to overcome them, identify what could be the impact of a technology-neutral approach, investigate how technology can support/facilitate the Digital Single Market goals and, more generally, how current or future technology can provide answers to those challenges*".

The topics considered most relevant, based on the survey results, were: i) data protection and privacy issues for media sector; ii) Digital Single Market (DSM) strategy for Europe versus media domain; iii) Customer Protection Policy: new decisions and impact on media domain; and iv) relevance of policy framework, for supporting research and innovation in the media sector. Below are the brief considerations that have come to light from the survey and the policy dialogue:

Data protection, Customer Protection Policy and privacy issues for Media sector

Customer protection seems to be one of the most relevant topics strictly related to the policy on data protection and privacy issues. The protection of minors seems to be a highly relevant issue in a sector where the convergence between media, internet and telecom has brought many options for end users, including minors, for accessing audiovisual media. The tools available today for protecting minors from harmful content tend to vary, but this issue needs to be addressed in a structured way. The ways for addressing customer protection, according to the answers, are media literacy, data protection mechanisms and ownership rights of customers/citizens on the self-posted content/media on the web or on social media. Finally, the need for a healthy balance between customer protection and corporate spending, especially for SMEs, also came to light.

[15] http://vitalmedia-project.eng.it/group/guest

Digital Single Market (DSM) strategy and relevance of policy framework for supporting research and innovation in the media sector

The topic related the DSM is linked to the expectation for future support to the sector development and, consequently, to the need for a policy framework that will support research and innovation in the media sector. Currently, there are no dedicated incentives/funding programmes that support the media. One reason why may be because what constitutes a media organization is poorly defined. It can be said that the sector encompasses press and journalism, films, games, books, animation, broadcasting and more besides. It is therefore hard to address business and innovation development issues adequately and find the right way forward. Some answers suggested the need to set an EC framework that can then be replicated at national level. That would strengthen the support for innovation in the media industry, not only on a technological basis, but also on the basis of "soft" innovation (business models, skills and competences, financing etc.). Innovation support could provide impetus for relevant initiatives that markets might not cover, for a number of reasons (scale, externalities, information asymmetries, trust, etc.). Such support should not only aim at the development of new technology but also at innovative uses of existing technology, including scaling up and replicating best practices. Another point highlighted was that this support needs to be sustainable, meaning a long-term innovation support strategy to ensure that investment is not wasted. In addition, with regard to the DSM, according the answers received, it will be important to continue reducing differences among EU countries in the areas of copyright, content acceptability and so on, as well as to consider the impact of digital platforms as tools for the creation and distribution of media services.

Copyright is considered essential for sustainability in cultural and creative industries. Therefore, it should be adequately protected. This means providing for effective enforcement but also not undermining it with too many exceptions and limitations, which might then hinder the normal exploitation of creative works.