

POLICY BRIEFING ON MEDIA INNOVATION IN EU FUNDING (EMBEDDING FMI) FOR MEMBER STATES

1. POLICY FRAMEWORK

AgoraEU / MEDIA+

A sectoral programme that explicitly positions media (AV, games, news/information ecosystem, XR/immersive). It focuses on competitiveness, circulation, the adoption of innovative tools and business models, access to finance, and synergies with Horizon and the ECF. The text allows for delegation/indirect management; this makes it the natural home for an Industrial Media Innovation Module (FMI-type).

EUROPEAN COMPETITIVENESS FUND (ECF, 2028–2034)

The new European Competitiveness Fund (ECF, 2028–2034) will become the EU's umbrella fund, bringing together fourteen funding instruments such as Horizon, Digital Europe and InvestEU. It provides multiple policy windows (including AI & digital) and a toolbox of grants, equity, guarantees and blending instruments. A strong link to the R&I framework should ensure a seamless investment journey from idea to market.

HORIZON EUROPE (AND ITS SUCCESSOR POST-2027)

The flagship programme for research and cross-cutting innovation (2021–27: €95.5 bn; 2028–34: expected approx. €175 bn). For FMI, the relevant elements are the strengthening of digital/media calls, the coupling of high-TRL innovation with user validation, pilots and industrial adoption—and the synergy and progression towards MEDIA+/ECF.

MARKET CONTEXT (MEDIA INDUSTRY/OUTLOOK 2025)

European media excel in content quality but are losing ground in distribution and technology. Platform dominance (YouTube ≈ all SVoD viewing time), under-utilisation of EU content (≈20% in catalogues; ≈16% viewshare), XR/AI ecosystems dominated by non-EU players. What is needed is an industrial innovation module addressing distribution, discoverability, data/AI, monetisation and reliable information.

2. WHAT ALREADY WORKS WELL FOR FMI - AND WHERE IT NEEDS SHARPENING?

AgoraEU functions as the sectoral entry point for media innovation, where early-stage experimentation and user validation take place, while Horizon and the ECF serve as reinforcement instruments for technological development or large-scale industrial deployment that cannot be covered by AgoraEU budgets.

AgoraEU / MEDIA+ (LONG VERSION BELOW)

Keep: Retain the language on digital innovation, AI, the interplay between media formats, financing, and cross-fertilisation, and ensure that tasks can be delegated to intermediate bodies.

Sharpen: Establish a **delegable Industrial Media Innovation Module** as a **core structural pillar** of the programme. Ensure this mechanism is equipped with **substantial resources** commensurate with industrial scale-up needs. Key requirements include:

- Third-party funding via **cascade instruments**.
- Mandatory **private co-funding** for every sub-grant awarded.
- Governance managed by a **specialised implementing body with delegated authority**, ensuring agile and industrial-grade execution.

Reinforce: Support a global increase of the AgoraEU budget to fully operationalise the programme's comprehensive scope. This requires a **concerted reinforcement** of cultural creation and distribution alongside industrial media innovation. Commensurate financial scaling is essential to ensure these mutually reinforcing pillars deliver on their objectives effectively.

ECF

Keep: Maintain the structure with separate financing windows, the toolbox of financial instruments, the link with Horizon projects and the ability to outsource management to trusted entities.

Sharpen: Explicitly include media & information ecosystems within the Digital window (distribution, AI-driven discovery, privacy-preserving personalisation, trustworthy information, immersive environments) and create a bridge to MEDIA+.

HORIZON (SUCCESSOR)

Keep: High-TRL Innovation Actions, faster and more flexible allocation of funding, cascade funding, and cooperation commitments.

Sharpen: Focus on TRL 6-8 topics, include mandatory user-testing (UX milestones), link measurable targets to market introduction and international roll-out, and explore the possibility of establishing a joint European partnership.

3. CONCRETE TEXT PROPOSALS (COPY-PASTE READY)

A) ECF – RECITALS & PROGRAMME

Complement for Digital window (recital)

“The Union’s **media and information ecosystems** are key to competitiveness, cultural diversity and digital sovereignty. The Digital window shall explicitly cover strategic media technologies, such as AI-enabled content discovery, privacy-preserving personalisation, cross-border distribution, trustworthy information services, immersive environments.”

Work programme clause (link to MEDIA+/Horizon)

“Work programmes may establish **pipelines with the MEDIA+ Module**; projects reaching predefined milestones are eligible for ECF/InvestEU guarantees or equity via entrusted entities (EIB Group, ...), with advisory support so projects are ready and attractive for investors and external financing.”

B) AgoraEU / MEDIA+ – MODULE + DELEGATION

Recital (added)

“The programme will also support large-scale media innovation that is close to market, tested with users and deployed across borders. This includes audience-focused distribution, EU-compliant advertising technologies, privacy-friendly personalisation, shared media data spaces and new immersive formats.”

New article: Industrial Media Innovation Mechanism

“Within MEDIA+, the Commission may establish a delegated Industrial Media Innovation Mechanism operated under indirect management by a **specialised implementing body**. The Module shall provide financial support to third parties (cascade funding), require industry co-funding at subgrant level, and target EU-wide deployment of media technologies and business models (distribution, discoverability, AdTech, AI/data, accessibility, XR). **Budgetary resources allocated to this mechanism shall be sufficient to ensure a critical mass of investment for industrial impact and scale.**”

Implementation article

“Parts of MEDIA+ may be entrusted under **indirect management to specialised implementing bodies** (public-law, private-law with a public-service mission, or PPP entities) to operate calls with financial support to third parties, ensuring transparent governance, conflicts of interest firewalls, **agile execution**, and multi-Member State participation.”

C) HORIZON (SPECIFIC PROGRAMME) – FEEDING THE FUNNEL

Topic language

“Actions at **TRL 6-8** for media technologies with **mandatory UX milestones, market-replication KPIs** and a **cascade-funding component** operated by the beneficiary consortium; cumulative funding with MEDIA+ is encouraged to ensure immediate flow into deployment funnels.”

Mid-term

“**Explore a formal Partnership on Media Innovation (SRIA-based)** with a shared long-term plan, so direct funding can be given to this partnership without separate project calls when allowed.”

4. WHAT TO DELETE / AVOID

- Vague “digital leadership” formulations without explicitly addressing media/information ecosystems → supplement with a clear media clause.
- In MEDIA+: an overly narrow focus on production without industrial-scale adoption/distribution/data/monetisation → add the Module.

5. SHORT COMPARISON (OVERVIEW)

Instrument	Role	What we’re asking for FMI
ECF (2028–34)	Umbrella (windows), toolbox + InvestEU; link with Horizon	Explicitly include media in the Digital window + create a pipeline with the MEDIA+ Module → guarantees/equity at funnel exit.
AgoraEU/MEDIA+	Sectoral programme media/culture/democracy	Create a delegated Industrial Media Innovation Mechanism under indirect management, with resources ensuring a critical mass (target: €250M EU funding). Support a concerted reinforcement of the global AgoraEU budget to jointly strengthen the cultural and industrial pillars.
Horizon	R&D/pilots, high-TRL IA, cascade	TRL 6–8 topics with UX/replication; later Partnership/JU for call-free delegation.

6. KEY MESSAGES / TALKING POINTS

- **MEDIA+ is the logical “home”** for an investment mechanism with an innovation funnel and day-1 delegated implementation via indirect management.

From the outset, the European Commission can entrust the implementation (“delegation”) of an Industrial Media Innovation Mechanism to an external, certified entity, without requiring the Commission to operate every component itself.

- **Horizon feeds** the funnel with high-TRL innovation and cascade funding; call-free delegation could follow later via a **partnership/JU**.

Horizon supplies high-TRL research and innovation projects to the innovation funnel, with results flowing easily into it through the cascade model. In the longer term — if politically feasible — segments could be implemented without separate project calls through an institutionalised collaboration (a partnership or joint undertaking).

- **ECF is the downstream amplifier**

The European Competitiveness Fund (ECF) primarily acts as an accelerator for later-stage (“downstream”) financing, for example through guarantees or investments via InvestEU. The ECF is not intended for running small-scale subprojects (cascade funding), but rather for providing additional support to projects that are ready for scale-up.

- **Pay-as-you-select co-funding**

For every sub-grant awarded, direct co-funding by a private partner is required. You only pay for selected projects, not for the entire programme. This mirrors the approach used in MEDIA+ and Horizon.

- **A €250 million multi-annual module is defensible**

We propose a multi-annual module of €250 million for the Industrial Media Innovation Mechanism. This budget is well-justified and defensible. The Horizon programme provides the substantive upstream pipeline, while the ECF supplies additional “bridging finance” once projects are ready for scale-up toward market or industry deployment.

7. WHAT WE ARE CONCRETELY ASKING MEMBER STATES TO SUPPORT

ECF (Digital window): support recital/work programme amendments to **explicitly anchor media** and create a **pipeline** with the MEDIA+ Module and InvestEU.

AgoraEU / MEDIA+: support for strengthened recitals and a new article establishing the “Industrial Media Innovation Module,” ensuring a critical mass of investment (target: €250M, equivalent to ~7.8% of the initial Media+ Commission proposal). This entails delegated implementation (indirect management) and cascade funding mechanisms.

Horizon (Specific programme): support **TRL 6–8 topics** with UX/replication/cascade requirements and explore an **institutionalised partnership/JU**.