

POLICY NOTE FOR MEMBER STATES

FUTURE MEDIA HUBS AND THE FUTURE MEDIA INITIATIVE

MOTIVATION

Europe's media sector is undergoing a rapid and profound transformation driven by new technologies (generative AI, XR/VR, virtual production), the rise of global digital platforms, shifts toward personalised and immersive content, and a digital advertising market dominated by Google and Meta. While Europe excels in producing high-quality audiovisual content and this represents a significant economic sector, it struggles to compete with US-based platforms that capture most video-on-demand consumption, digital subscriptions, and online advertising revenue. This imbalance undermines the economic sustainability and digital sovereignty of European media. Younger generations increasingly consume information via global social platforms, deepening Europe's dependence on foreign technologies, algorithms, and business models to reach its citizens. Furthermore, the access to the audience risks to be governed by non-European players.

If Europe fails to invest in media innovation, it faces several risks: erosion of cultural and democratic sovereignty, marginalisation of European industry players, loss of younger audiences, and shrinking revenues across public and commercial media. These pressures risk locking European companies into strategies of cost-cutting and consolidation rather than innovation.

To address these challenges, Europe must complement its traditional support for content creation with strategic investments in media innovation. Priorities include strengthening the distribution, discoverability and interactivity of European content through sovereign digital infrastructures; enabling more resilient business models via AI-driven production tools and new monetisation systems; and equipping independent producers with modern digital capabilities. EU co-financing plays a crucial role in reducing innovation risks and ensuring long-term competitiveness.

Ultimately, investing in media innovation is essential for safeguarding Europe's:

- **cultural diversity,**
- **economic strength** and
- **democratic integrity**

in a landscape increasingly shaped by non-European technology giants.

INTRODUCTION TO FUTURE MEDIA HUBS

Future Media Hubs is a European network of public and commercial media organisations working together to accelerate innovation, strengthen strategic collaboration, and reduce unnecessary duplication of effort. Our mission is simple: to ensure that Europe's diverse media companies—many of them relatively small compared to global competitors—can innovate faster and more efficiently by sharing knowledge, expertise and tools. By doing so, we help safeguard Europe's democratic resilience, cultural richness and technological sovereignty.

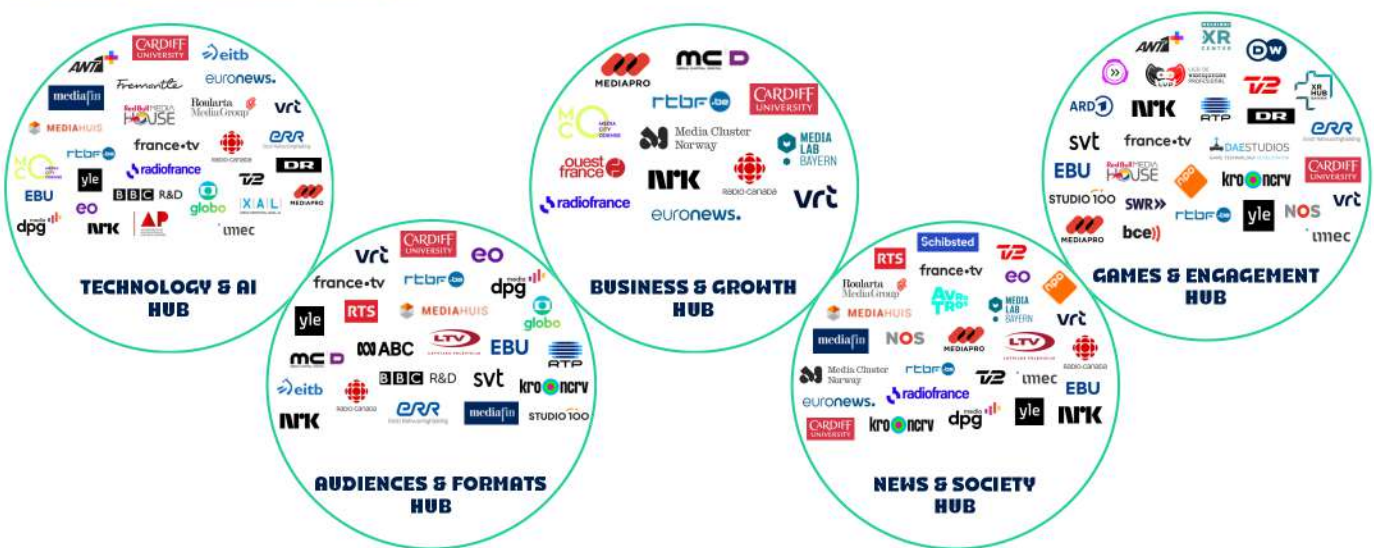
Created by VRT in close collaboration with RTBF, and supported by the Flemish Department of Culture, Youth and Media, Future Media Hubs brings together organisations that want to build a stronger, more competitive European media ecosystem. Our activities combine hands-on innovation support with strategic coordination, and we periodically receive modest European funding through competitive project grants.

Future Media Hubs operates across two core pillars:

1. Knowledge exchange and project collaboration

Our network includes 58 media companies — of which 29 public service media and 12 commercial media — and is strongly connected with clusters like EBU, NEM and WAN-IFRA. These companies are represented by 180 individuals across five thematic groups, which we call "our Hubs": Audiences & Formats, Technology & AI, News & Society, Business & Growth, and Gaming & Engagement. These Hubs convene monthly to exchange concrete use cases and address specific challenges. Annually, members meet at a designated location in Europe for more in-depth exchanges and workshops focused on launching tangible collaborative projects.

These insights, solutions and results are shared widely across our channels to ensure rapid knowledge transfer across Europe. Furthermore, we use our impact as a pan-European network to align with other European initiatives (eg. Virtual Worlds PPP, EDMO Hubs, BDVA) and to support startup-driven innovation in the media sector via our participation in EU-funded projects (eg. TEMS data spaces, STADIEM, Media Motor Europe).



2. Trend reporting with actionable recommendations

Each year, we publish an in-depth trend report that maps the latest developments in media innovation. Drawing on insights from our expert network, we translate these trends into actionable recommendations designed to shape and accelerate the strategic innovation roadmaps of media organisations. Our analysis spans five core Hub themes: Audiences & Formats, Technology & AI, News & Society, Business & Growth, and Gaming & Engagement.

THE FUTURE MEDIA INITIATIVE

Building on this solid foundation of Future Media Hubs, we are launching a new and ambitious European effort: the **Future Media Initiative (FMI)**.

This initiative proposes a long-term strategic partnership between the European Commission and industry leaders to mobilise up to 500 million euros for media innovation within the next Multiannual Financial Framework (2028–2034). The model combines up to 250 million euros in public funding with up to 250 million euros in private co-investment, creating a coordinated and strategic vision-driven mechanism designed to deliver far greater impact than fragmented, project-based instruments. FMI is designed to integrate with existing EU funds by anchoring media innovation within AgoraEU (MEDIA+), while providing pipelines to Horizon Europe (R&D) and the European Competitiveness Fund (ECF).

A public-private partnership proposal will be submitted to the European Commission early February 2026. At its core, the Future Media Initiative is an investment engine built around a disciplined innovation funnel, enabling Europe to turn strong ideas into market-ready solutions at scale.

STRATEGIC OBJECTIVES

The Future Media Initiative pursues three objectives essential for a competitive, democratic and sustainable European media landscape:

1. Accelerating media innovation and industry resilience

FMI strengthens Europe's capacity to innovate by fostering cross-border collaboration and supporting technologies that can be deployed across the sector. By reinforcing adaptability and preparedness, FMI enhances the sector's resilience — ensuring Europe's media can withstand future disruptions, from technological shifts to geopolitical and economic shocks. It develops practical and future-driven solutions — from AI and cloud technologies to new content experiences—that enhance the way Europe creates, distributes and monetises media.

2. Promoting diversity and safeguarding democracy

European media is a fundamental pillar of democratic life. FMI supports initiatives that strengthen trust, increase transparency, promote multilingual and culturally diverse content, and reinforce pluralism—ensuring media to remain close to Europe's societies.

3. Ensuring long-term financial sustainability

The initiative aligns public policy, European funding and industry realities. It reduces structural dependence on non-European platforms and strengthens Europe's technological sovereignty in critical media infrastructures, while accelerating the emergence of flexible, competitive business models that help small and large media organisations thrive.

Together, these objectives enable Europe to remain globally competitive while protecting its cultural and democratic richness and integrity.

The initiative directs investment in four domains where transformation is most critical for the future of Europe's media sector:

1. Creative content innovation

How media leverage technological innovation to create and distribute immersive and interactive content experiences across Europe's creative industries.

2. Data-driven personalisation and AI-enabled access

How data and AI enable content to become personal, relevant and accessible to diverse audiences.

3. Sustainable business models

How media generate sustainable revenue and anchor economic value in Europe.

4. Trust and democratic resilience

How media build trust and strengthen democratic resilience.

These pillars form the backbone of the innovation funnel. More details can be found in the [Future Media Hubs vision paper](#).

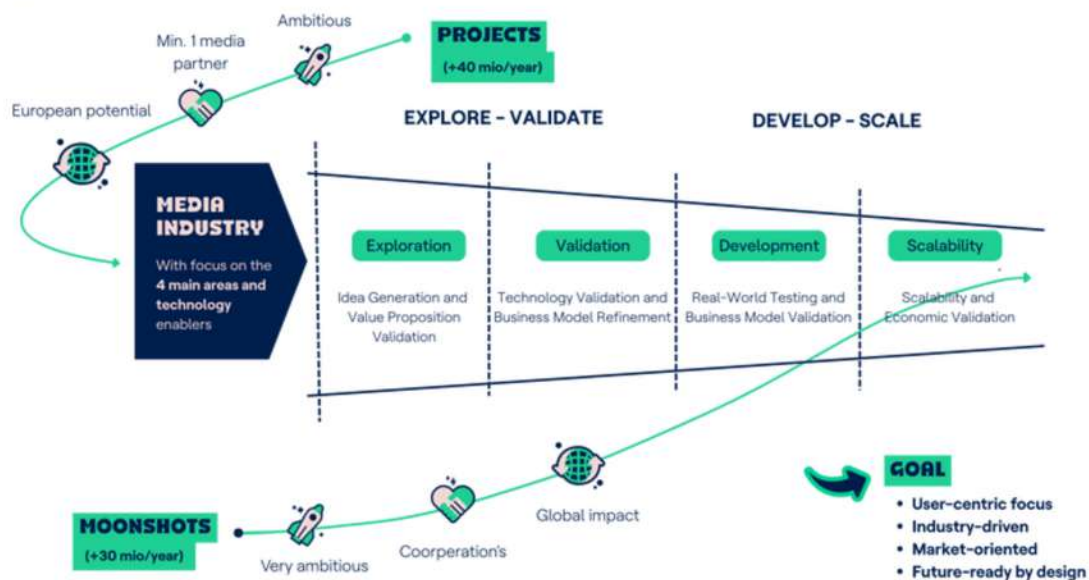
Across all four domains, access to shared, trusted and sovereign digital infrastructure is a critical precondition for meaningful innovation at scale.

CROSS-CUTTING STRATEGIC ENABLER: PARTNERSHIP FMI-AI FACTORIES FOR EUROPEAN AI COMPUTE ACCESS

The Future Media Initiative proposes a dedicated partnership with European AI Factories to tackle unequal access to large-scale AI compute infrastructure — the key bottlenecks for next-generation media innovation. Despite significant European investment in AI Factories and high-performance computing, many media organisations — particularly public service media, independent producers and SMEs — face structural barriers to access. This limits their ability to experiment with, validate and deploy AI-driven solutions, even where these are fully aligned with European objectives such as the European Media Freedom Act, the AI Act and digital sovereignty.

Through this proposed partnership the Future Media Initiative would act as a structured access gateway to European AI compute resources. FMI-selected projects, especially in the Validation, Development and Scalability phases, gain preferential, policy-aligned access to compute capacity under clear governance conditions that ensure compliance with European values, transparency and data protection.

By embedding compute access directly within the FMI funnel and moonshot envelope, Europe ensures that media innovation is not structurally excluded from its own AI infrastructure. Compute allocation is linked to independently evaluated, cross-border projects with demonstrated European added value and is granted as a strategic enabler within the innovation funnel, conditional upon cross-border collaboration, compliance with EU regulation, transparent governance and demonstrable sector-wide impact - transforming AI Factories from generic infrastructure into active enablers of trusted, pluralistic and sovereign European media innovation.



HOW DOES IT WORK?

The Future Media Initiative uses a disciplined innovation funnel to turn ideas into market-ready solutions. Each year, we conduct a comprehensive review and update of our innovation roadmap, which serves as the strategic framework for the funnel's focus areas and topics. The aim is not to create more long-running pilots, but to deliver validated, deployable solutions into the European media ecosystem. The model supports a balanced seven-year portfolio. To ensure fair distribution of the programme's resources and to prevent disproportionate concentration of funding in any single organisation or Member State, the initiative applies transparent, criteria-based selection carried out by an independent expert jury and uses proportional country-level participation thresholds. Allocations for approved projects are released gradually and strictly tied to independently verifiable milestones, guaranteeing controlled and accountable use of public resources.

Each year:

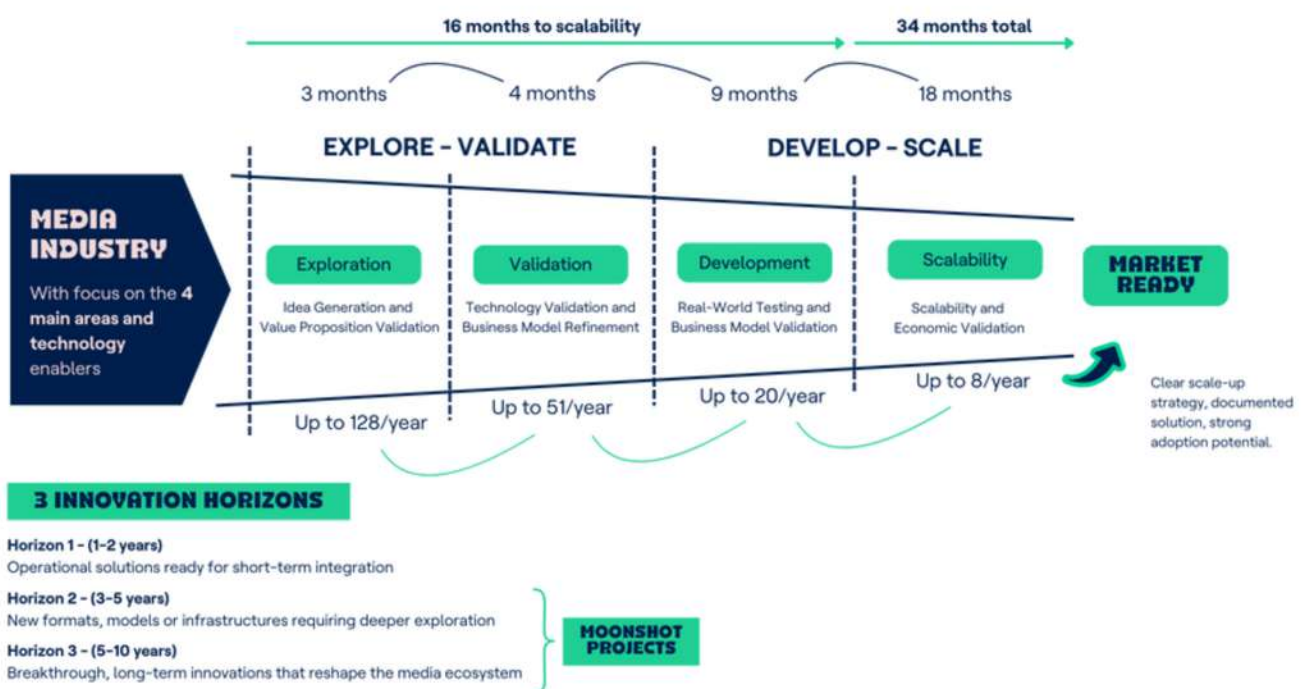
- Up to 128 ideas enter the funnel
- Around 50 progress to validation
- Around 20 advance to development
- Up to 8 reach full scalability

Across seven years, FMI builds a balanced portfolio covering three innovation horizons: Horizon 1 focuses on operational solutions ready for short-term integration, Horizon 2 focuses on new formats, models or infrastructures requiring deeper exploration, and Horizon 3 develops breakthrough long-term innovations that reshape the media ecosystem. More than 40 million euros per year supports the funnel, with approximately 2.8 million euros for every project that completes it, and an additional 30 million euros per year to scale breakthrough solutions.

The innovation funnel responds to a core tension in today's innovation environment: the need to foster experimentation and creativity in a high-risk context while ensuring that public and private investment results in concrete, scalable outcomes. To address this, the funnel is organised into 4 progressive stages, each tailored to project teams at different levels of maturity and ambition, while maintaining a consistent process of evaluation, learning and refinement:

- **Exploration** (around three months) validates the problem definition, assesses the strategic relevance and value proposition for the media sector and gathers early user insights to confirm that the proposed solution addresses a real and shared need. and the value proposition. In this phase, assumptions are tested at minimal cost and around 40% of projects advance to the next stage.
- **Validation** (around four months) tests a minimum viable product or prototype, generates actionable user feedback and shapes an emerging business model; again, about 40% of projects move forward.
- **Development** (around nine months) involves real-world testing with partners and audiences, further derisking both the technology and the business model, with roughly 40% of projects continuing.
- The final **scalability** phase (around eighteen months) prepares the solution for large-scale deployment, operational integration and strong economic validation, with only about 6% of initial ideas reaching full market scalability.

BALANCED PORTFOLIO (run over 7 years: 2028 - 2034)



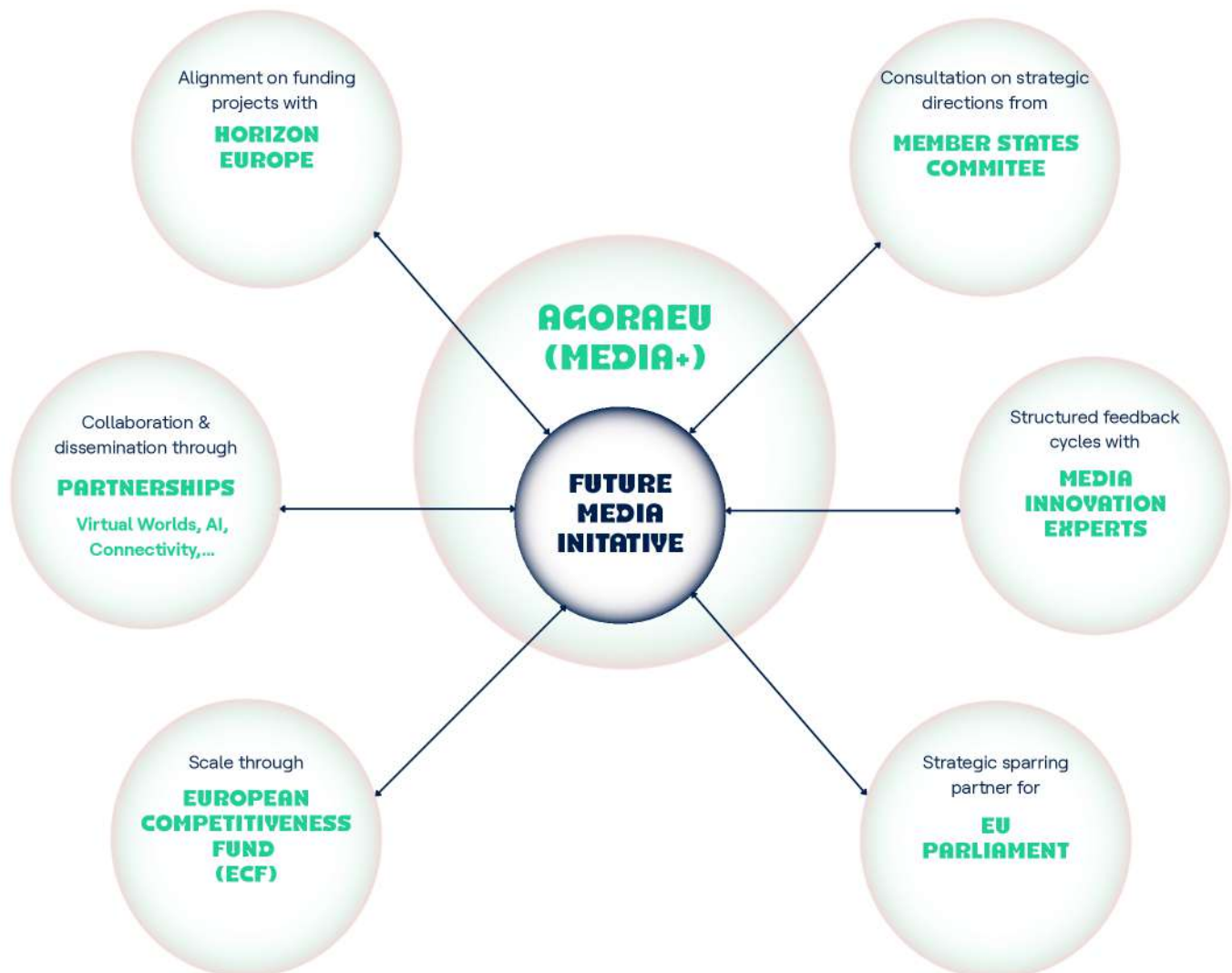
Projects may enter the funnel in the Exploration phase as single-organisation initiatives, on the condition that at least one additional partner is integrated by the Validation stage for prototype testing. Progression to the Development and Scalability phases, as well as participation in moonshot projects under Horizon 2 and Horizon 3, requires consortia comprising a minimum of three partners established in different Member States, ensuring cross-border applicability, scalability and clear European added value.

An independent expert jury – operating under internationally standardised terms of references – oversees each phase of the funnel. Its mandate is to apply clear, predefined criteria at every gate, ensuring a transparent, neutral and consistent evaluation process, guaranteeing fair access to funding and maintaining high standards across the portfolio. All European media companies are eligible to apply, either individually or as the lead partner of a consortium that can include technology providers, game studios and other relevant actors.

Participating media companies only commit their own co-investment once their projects have been selected to enter the funnel. For each selected project, they receive matching funding from Europe equivalent to their own investment (e.g. 1 euro invested = 1 additional euro from Europe). Projects that successfully move through the funnel gain access to greater funding and visibility, ensuring that their innovations are not only well-supported, but also more likely to succeed. To further amplify the impact of these validated projects, we have also allocated a moonshot budget to significantly boost funding for initiatives that prove their value in the validation phases. This top-up ensures that promising projects can scale effectively and achieve maximum impact.

YEAR	CYCLES	EXPLORATION PROJECTS	VALIDATION PROJECTS	DEVELOPMENT PROJECTS	SCALE PROJECTS	BUDGET EXPLORATION (€)/ CYCLE	BUDGET VALIDATION (€)/CYCLE	BUDGET DEVELOPMENT (€)/CYCLE	BUDGET SCALE (€)/CYCLE
2028	2	64	25,6	19,24	4,096	€ 1.280.000,00	€ 4.096.000,00	€ 6.144.000,00	€ 8.192.000,00
2029	2	100	40	16	6,4	€ 2.000.000,00	€ 6.400.000,00	€ 9.600.000,00	€ 12.800.000,00
2030	2	128	51,2	20,48	8,192	€ 2.560.000,00	€ 8.192.000,00	€ 12.288.000,00	€ 16.384.000,00
2031	2	128	51,2	20,48	8,192	€ 2.560.000,00	€ 8.192.000,00	€ 12.288.000,00	€ 16.384.000,00
2032	2	128	51,2	20,48	8,192	€ 2.560.000,00	€ 8.192.000,00	€ 12.288.000,00	€ 16.384.000,00
2033	2	128	51,2	20,48	8,192	€ 2.560.000,00	€ 8.192.000,00	€ 12.288.000,00	€ 16.384.000,00
2034	2	128	51,2	20,48	8,192	€ 2.560.000,00	€ 8.192.000,00	€ 12.288.000,00	€ 16.384.000,00
						€16.080.000,00	€ 51.456.000,00	€ 77.184.000,00	€ 102.912.000,00

	EU (M €)	INDUSTRY (M €)	TOTAL (M €)	EU SHARE (%)	INDUSTRY SHARE (%)
PROJECTS (Cascade funding, excl. coordination expenses)	213,82	213,82	427,63	50	50
PROJECT COORDINATION (7% of project budgets)	20,95	8,98	29,93	70	30
FMI BACK OFFICE (Operations, community, compliance, marketing)	0,00	21,00	21,00	0	100
PROGRAMME TOOLS (7 years)	234,77	243,80	478,57	49	51



STRUCTURAL INSTRUMENT: A EUROPEAN MEDIA LAB EMBEDDED IN FMI

To complement the project-driven innovation funnel, the Future Media Initiative establishes a European Media Lab as a lightweight, permanent instrument embedded as the strategic backbone within its structure. The Media Lab connects and strengthens existing national and regional media innovation initiatives (Ent.A, AI MediaLab Denmark, ...) across Europe, creating a coherent framework that reduces fragmentation and reinforces local capacity and investments. It focuses on a limited number of forward-looking challenges within the four domains identified in this initiative (creative content innovation, AI-driven personalisation and access, sustainable business models, trust & democratic resilience), while anticipating their technological, societal and market implications. The Media Lab does not operate as a standalone research entity, but feeds directly into the FMI funnel, generating strategic foresight, pre-competitive coordination, shared problem definitions, reference frameworks and early prototypes that transition into Horizon 2–3 moonshot projects. By anchoring long-term priorities within a European governance framework, the Media Lab reduces structural dependence on ad-hoc or non-European private funding sources and ensures that the FMI combines strategic coherence with deployment-focused execution and clear European added value.

WHY A FUNNEL?

For media organisations, the funnel provides three major benefits:

1. Efficient use of resources

Weak assumptions are identified early, preventing multi-year commitments to projects with limited evidence.

2. Higher technology and market readiness

User testing and industry collaboration at every gate significantly increase the likelihood that solutions reach audiences.

3. Greater innovation velocity across Europe

Teams spend less time on administrative processes and more time delivering high-impact solutions.

Europe produces excellent R&D, yet the transition from research to sector-wide deployment remains weak resulting in too few innovations reaching deployment at scale. The FMI funnel directly addresses this structural gap by providing a predictable, evidence-based pathway that transforms promising ideas into solutions used across Europe's media ecosystem.

IN SHORT

The Future Media Initiative funnel:

- channels **high idea volume** into **a number of validated market-ready solutions**;
- fosters creative experimentation and impactful innovation within a **controlled, evidence-based** process;
- evaluates up to **128 ideas** and scales up to **8 solutions per year**;
- ensures **transparent, fair and independent** funding decisions;
- validates assumptions at each stage (**40% progression** per gate);
- **prevents large-scale, long-term waste by stopping weaker projects early**;
- supports a **balanced seven-year portfolio** across three innovation horizons;
- concentrates funding where it has **greatest impact**;
- dedicates **over 40 million euros per year** to funnel activities; and
- adds a **30 million euros annual moonshot fund** for breakthrough innovations.

POSITIONING AND GOVERNANCE

The FMI is designed to integrate with existing EU funds by anchoring media innovation within AgoraEU (MEDIA+), while providing pipelines to Horizon Europe and its partnerships on Virtual Worlds, AI, Connectivity and others (R&D) and the European Competitiveness Fund (ECF).

As a programme under AgoraEU, FMI will ensure that the European media sector is closely involved within EU governance frameworks. Member States will be consulted on strategic directions and regularly updated through structured feedback cycles. Ownership of the initiative rests firmly with the European Union, ensuring alignment with overarching policy priorities and accountability mechanisms. FMI will act as the executive body of the programme and evolve into a legal entity under current European regulations, providing a stable and transparent structure for collaboration, resource allocation and long-term impact. In this role, FMI will also serve as a strategic sparring partner for the European institutions and the media sector, fostering dialogue, feedback and joint learning to ensure ongoing alignment between policy objectives and industry innovation.

MOVING BEYOND THE CURRENT EXISTING FRAMEWORKS

While current innovation calls generate valuable impulses, they often fall short of addressing the sector's operational and structural realities. The Future Media Initiative (FMI) is designed to close this gap by putting industry-driven innovation at the centre – combining expert guidance with a stronger focus on market readiness, scalability and the collective capacity of the European media ecosystem. Operating under indirect management to ensure the agile execution required for industrial scale-up, FMI acts as the engine to operationalise the European Democracy Shield. It moves beyond technical measures by deploying safeguards rooted in experience-based innovation, ensuring that the protection of our information and entertainment space is as intuitive and user-centric as it is robust. FMI introduces instruments and governance models that truly reflect the needs, dynamics and ambitions of Europe's media sector.

THE ADDED VALUE FOR EUROPE

THE CHALLENGE & THE VISION

The **European media sector** invests billions in high-quality content, but lacks control over distribution and audience data, leaving access to information primarily mediated by non-EU platforms. To rebuild trust and sovereignty, Europe must move beyond protection alone and proactively design the next generation of user experiences. The Future Media Initiative addresses this by establishing a reliable, European-governed media **innovation** ecosystem that reinforces **public trust**, strengthens **democratic resilience** and safeguards Europe's **technological independence**. This approach strengthens Europe's strategic autonomy in information and content accessibility, reduces systemic dependence on non-European platforms and builds shared technological capabilities under European governance.

STRATEGIC VALUE: OPERATIONALISING EUROPEAN POLICY

FMI acts as the industrial engine that turns high-level EU policy into deployable technologies, scalable solutions and real market uptake:

- **Operationalising the European Democracy Shield:** Protecting democracy requires rebuilding the infrastructure of trust and safeguarding the integrity of the European information space. The Future Media Initiative operationalises the European Democracy Shield by translating its objectives into concrete, deployable and trusted media technologies and services. FMI contributes to this effort by ensuring that access to high-quality information is governed within a European framework, reducing structural dependence on non-European platforms and opaque intermediaries. Through trusted, pluralistic and verifiable information flows, FMI strengthens citizens' ability to access reliable journalism, understand the origin and integrity of content, and navigate complex information environments with greater confidence. At the same time, FMI reinforces the economic and

technological resilience of Europe's media ecosystem, helping to secure sustainable, independent journalism and local media provision as essential democratic public goods. In doing so, the initiative strengthens the long-term resilience of European media systems – an indispensable condition for the effective implementation and success of the European Democracy Shield.

- **Implementing the European Media Freedom Act (EMFA):** The European Media Freedom Act requires that safeguards for media freedom, transparency and independence are reflected in concrete, user-facing media services. The Future Media Initiative supports the industry in operationalising EMFA by translating its core principles into deployable media technologies. Through FMI-driven innovation, ownership transparency becomes verifiable content provenance, editorial independence is reinforced through user-controlled recommender and discovery settings, and measurement obligations are implemented through open, auditable metrics. By embedding these features directly into media products, FMI ensures that EMFA protections enhance accountability, pluralism and user trust in everyday media consumption, fully in line with the objectives of the European Media Freedom Act.

OPERATIONAL VALUE: AN EFFICIENT INNOVATION MECHANISM

To deliver on this vision, FMI employs a structured, stage-gated funnel that ensures the most efficient use of public and private resources:

1. More efficient use of EU funds

By starting with small, predictable funding phases, the funnel drastically reduces administrative burden for both applicants and EU services. Organisations enter through light, low-risk steps, scaling funding only when evidence justifies it. This ensures investment follows validated potential and avoids the “pilot graveyard” of fragmented, one-off projects.

2. A coordinated approach that replaces fragmentation

Today, media organisations must navigate multiple disconnected EU programmes. FMI provides a unified innovation entry point within AgoraEU (MEDIA+) that channels substantial funding through one coordinated mechanism. It streamlines reporting and creates a clear pipeline towards Horizon Europe (for upstream R&D) and the European Competitiveness Fund (for downstream scaling), ensuring complementarity rather than duplication.

3. Stronger collaboration between public and commercial media sectors across the member states

The funnel acts as a shared innovation platform for Europe's entire media sector: public service media, commercial broadcasters, digital publishers, game studios and technology partners. Solutions are co-developed, co-tested and co-deployed across borders—enabling powerful forms of cooperation that no national scheme can deliver. A mechanism for broad participation across the member states ensures that small and large markets equally benefit from FMI-supported innovation, strengthening the competitiveness and technological sovereignty of the European media ecosystem.

4. Industry-led, impartial and close to market

The mechanism is coordinated by a dedicated, impartial legal entity derived from Future Media Hubs and directly connected to the needs and investment cycles of European media companies. Robust governance and conflict-of-interest safeguards ensure impartiality and transparency. Its proximity to the market enables faster decision-making, more agile iteration, and stronger alignment between public support and private risk-taking.

5. Better risk-sharing and higher success probability

Because the funnel is industry-anchored, financial and technological risks are evenly shared. Participating companies commit to a 1:1 co-investment model where private investment grows in parallel with project maturity. EU investment rewards validated progress, while weaker projects stop early, before substantial resources are spent.

6. Breakthrough innovation through a dedicated moonshot budget

FMI includes a yearly moonshot envelope to support high-impact, high-risk innovation with European strategic importance. Projects—particularly in AI, immersive media and cloud-based tools—receive the scale of support needed to reach deployment at scale.

7. A more impactful EU role as public funder

By funnelling resources through a unified, strategic mechanism, the EU avoids duplicated efforts and builds shared European technological capabilities. This approach ensures measurable results and impact for the entire sector rather than isolated beneficiaries.

8. A realistic and proportionate funding proposal

In the next Multiannual Financial Framework, FMI proposes a € 250 million / € 250 million co-investment model. The public contribution—€ 250 million—represents around 7.8% of the proposed Media+ strand of the AgoraEU programme. Directing this budget through a structured, industry-led funnel ensures maximum European added value by bridging the longstanding gap between research and adoption.

FMI's impact is measured through clear, predefined KPI's, including cross-border adoption rates, technological readiness improvements, audience reach, cost efficiencies and reductions in dependence on non-European platforms.



EXPECTED IMPACTS

The planned impacts of FMI span societal, economic, technological and scientific domains, addressing the needs of Europe's full media ecosystem, with particular attention to smaller regions and local media ecosystems, as well as SMEs and emerging players.

For **audiences**, FMI will broaden access to trustworthy, diverse and high-quality European media content through innovative, transparent, personalised, mobile-first distribution formats and user-centric services, particularly benefitting underserved communities. FMI strengthens trust and informed participation by embedding content provenance, recommender transparency and privacy-preserving personalisation into everyday media use. By giving citizens greater control over how content is discovered and contextualised, and by supporting user-driven verification tools alongside professional journalism, FMI enhances media literacy, critical thinking and resilience against disinformation.

Media content creators and producers will gain access to advanced and scalable production technologies (AI-assisted editing, 3D engines, virtual production and trusted shared infrastructure) that boost efficiency and creativity, while lowering barriers to entry for smaller actors. Innovation in content provenance and traceability will enable fair remuneration for creative work in an increasingly hybrid media environment combining professional, user-generated and AI-generated content, while simultaneously enhancing authenticity and trust. Training, data-driven insights and new monetisation models (subscriptions, micropayments, product placement, NFT-based ownership) will enable sustainable careers, greener and more resource-efficient production practices, and global reach, while fostering stronger cross-sector collaboration.

Distributors and platforms will benefit from state-of-the-art distribution tools, standardised and interoperable workflows and new AdTech-driven revenue models, strengthening their operational capacity and ability to scale across Europe. FMI will support European-owned media infrastructures, including sovereign cloud and advertising ecosystems to reduce dependency on non-EU platforms. Technology providers will gain insights through real-world testbeds to validate AI, XR, 5G and other emerging production and distribution tools, accelerating real value creation, market adoption and the growth of a competitive and sustainable European (media) technology ecosystem.

Regulators and policymakers will benefit from data-driven insights that improve policy alignment with industry needs, support ethical, transparent and accountable media governance, and promote digital sovereignty through European-centric regulation and standards.

Brands and agencies will co-develop advanced, privacy-preserving advertising solutions, validate emerging AdTech and retain more advertising spend within Europe.

Educational and research institutions will play a central role in applied research on AI and emerging technologies, piloting real-world use cases and shaping industry-aligned training programmes for a digitally skilled and AI-literate workforce.

Financial stakeholders will see reduced investment risk through structured validation environments and blended funding models, accelerating market uptake of innovative solutions. Industry associations will support standard-setting, advocacy and global competitiveness through coordinated cross-industry collaboration.

Overall, FMI is expected to deliver broad societal impact by enhancing media accessibility, trust and cultural diversity; technological impact through next-generation, interoperable, secure and ethically compliant infrastructures and ecosystems; economic impact via new business models, strengthened European media sovereignty and competitiveness secured through a coordinated public-private investment model and a disciplined innovation funnel that ensures market-ready scalability; and scientific impact through strong industry-academia R&D pipelines and evidence-based policy development.

SOME EXAMPLES

STRENGTHENING TRUST AND RESILIENCE AMONG EUROPEAN MEDIA AUDIENCES:

FMI empowers media users by providing access to trusted European media sources alongside shared knowledge tools that help citizens navigate and assess disputed content. First, a European-governed media discovery service enables citizens to access news and cultural content from trusted European media outlets through a single interface, while retaining full control over how content is recommended and personalised. Transparent recommender settings, content provenance and clear labelling help users understand what they see, why they see it and where it comes from. Second, a complementary knowledge platform brings together verified information and contextual insights to address questions citizens may have about the quality, accuracy, or reliability of content. This includes dedicated verification tools that allow users to assess whether images or videos circulating around major news events are authentic or manipulated. User-driven fact-checking features allow citizens to flag disputed content, consult trusted verification sources and share contextual information, strengthening media literacy, trust and informed participation - without replacing professional editorial responsibility.

- Explore: analysis of audience trust needs and expectations regarding transparency, recommender control and access to verified European news
- Validate: testing of prototype discovery and knowledge service with users
- Develop: deployment with multiple media partners to evaluate audience engagement and participation
- Scale: preparation for large-scale European adoption, validating resilience to disinformation, informed participation and impact on audience trust in the European information ecosystem

AN AI-ASSISTED PAN-EUROPEAN AUDIO PLATFORM ENABLING CONTINUOUS, TRUSTED NEWS DISTRIBUTION:

A radio platform owned by Europeans and powered by AI broadcasting a 24/7 news stream pulling stories from a network of trusted high-quality journalism sources. The AI-driven news service supports selection, curation, personalisation and automated translation of controlled European news content. This always-on verifiable audio service—providing new revenue opportunities for publishers--- offers audiences a reliable, continuous source of information. In an age of large-scale disinformation and growing platform dependence, such a European-controlled news infrastructure could become a genuine game changer.

- Explore: validation of audience demand and public value including trust, editorial control and alignment with EMFA and AI Act requirements
- Validate: testing of minimum viable service focusing on AI-supported selection, curation, personalisation and translation
- Develop: real-world deployment in multiple member states to assess editorial workflows, audience engagement and trust indicators
- Scale: preparation for large-scale European rollout including long-term sustainability, platform interoperability and independence, and partnership models

AI-DRIVEN CONTENT CREATION FOR A DIVERSE AND MULTILINGUAL EUROPE:

Generative AI tools that can create new forms of content and produce multilingual video and audio formats built on European data sets, cultural archives and trusted journalistic sources. Instead of relying on non-European GenAI platforms, these tools integrate provenance and rights protection—alongside automated verification support to help identify factual inconsistencies—and ensure alignment with the European Media Freedom Act (EMFA) and the AI Act. This enables smaller markets to produce culturally relevant, multilingual media far more efficiently, strengthens editorial capacity and connects audiences across Europe’s linguistic and cultural diversity while building Europe’s own strategic technological capabilities.

- Exploration: assessment of IP-related challenges, editorial needs and suitability for smaller language markets
- Validation: testing of generative AI prototype using European datasets and archives focusing on content quality, trust and audience engagement
- Development: deployment in real editorial environments across multiple languages and regions to evaluate cultural relevance and editorial control
- Scalability: preparation of large-scale adoption across European media organisations, validating sustainability, interoperability and cost efficiency

LARGE-SCALE SHARED IMMERSIVE EXPERIENCES, INDEPENDENT ON NON-EUROPEAN HARDWARE ECOSYSTEMS:

A shared 3D experience inside mobile domes—without the need for headsets—bringing media out of individual personal screens and into a shared public space that can travel across Europe. The goal is to develop entirely new business models for immersive storytelling without relying on the VR/AR hardware ecosystems built and controlled by dominant non-European technology platforms.

- Explore: assessment of audience interest, public value and feasibility of shared immersive experiences in physical public spaces
- Validate: testing of pilot immersive installations using mobile domes focusing on content format and technical reliability
- Develop: deployment across multiple locations and member states to evaluate operational scalability
- Scale: preparation for European-wide rollout as a reusable immersive media infrastructure with reduced reliance on non-European VR/AR platforms

FAIR AND TRACEABLE USE OF EUROPEAN MEDIA ASSETS IN GENERATIVE AI:

A pan-European generative AI framework that enables transparent attribution and fair remuneration of media assets used in AI-generated content. Building on research into data attribution mechanisms for generative models – across text, audio, video and 3D assets – this solution allows AI systems to identify, track and value the contribution of individual source assets to generated outputs. Through integration with the Trusted European Media Data Space (TEMS), media organisations, creators and rights holders can securely make assets available under clearly defined usage conditions, while retaining control over intellectual property and monetisation. Smart contracts and metadata-driven attribution ensure that revenues generated by AI-driven content creation are automatically and fairly distributed to asset owners, including journalists, composers, voice artists and producers.

- Explore: identification of priority use cases for attribution and remuneration in generative AI
- Validate: testing of attribution mechanisms within limited GenAI workflows, integrated with TEMS, to verify traceability and fair revenue distribution
- Develop: deployment with multiple media organisations and right holders to assess governance, smart contract execution and operational integration into real AI production pipelines
- Scale: preparation for EU-wide adoption as a reusable framework

Projects that do not progress through the FMI funnel do not represent lost investment. Early-stage funding is intentionally limited and focused on validation and learning. Even when projects stop, they generate reusable insights and evidence that inform other initiatives across the portfolio as well as the innovation agenda. By structuring support around phased funding and independently verified milestones, projects that show insufficient traction can be discontinued early, while their outputs (including methodologies, user insights, technical components and business learnings) remain available as reusable building blocks for subsequent initiatives. This enables new projects to build on existing knowledge rather than starting from scratch, strengthening the overall innovation pipeline. Moreover, projects remain eligible for continuation through other European, national or private funding instruments, allowing teams, prototypes and partnerships developed within the funnel to mature further, attract additional partners and find new applications beyond FMI. By linking funding strictly to independently validated progress and ensuring that knowledge and assets circulate beyond individual pilots, FMI ensures that public and private resources are spent efficiently, risks are contained early and value is retained at ecosystem level rather than locked into individual projects.

INSTITUTIONAL & INDUSTRIAL TRACTION

The Future Media Initiative has already gathered significant traction across the European media sector and within EU institutions:

- **Strong Industry Backing:** More than 40 leading European media companies have formally endorsed the initiative, demonstrating a clear market demand for a coordinated innovation instrument.
- **Institutional Alignment:** We have engaged in constructive dialogues with DG Connect and the Cabinets of Executive VP Virkkunen and Commissioner McGrath over the past two years. These exchanges confirm that FMI aligns closely with the new Commission's priorities on technological sovereignty and democratic resilience.

- **Immediate Implementation (2026):** At the specific request of the European Commission services, we are currently preparing a derivative "fast-track" project plan for 2026 under the Media Resilience programme. This serves as a concrete pilot step towards the full FMI implementation in the next MFF.

