

VISION PAPER TOWARDS A EUROPEAN MEDIA INNOVATION AGENDA

EXECUTIVE SUMMARY

Media innovation in Europe needs a more unified approach, to cope with rapidly evolving technological and consumer behavioural trends and changing market conditions. This initiative aims to bring together public and private stakeholders to collaborate on a shared vision for media innovation in Europe to strengthen the sector against non-European competition, mainly from large platforms, and to foster growth and innovation.

The vision paper outlines an updated innovation agenda for the media sector, addressing common creative, technological and regulatory challenges and opportunities. It encourages collaboration among media actors who share the vision of a vibrant and responsible European media industry.

The vision paper recommends three core strategic areas for European media innovation:

- 1. Data / AI:** Leveraging advanced (real-time) data analytics and the next wave of AI technologies to enhance audience understanding, content monetization, content generation, personalised experiences and recommendations, and data ethics compliance.
- 2. Trust:** Building trust with the audience through new fact-checking solutions, transparency, community engagement, media literacy programs and ethical journalism practices.
- 3. New Experiences & Formats:** Exploring interactive and immersive (local) content, forming partnerships with emerging tech companies, and virtualising media production infrastructure leveraging gaming-based platforms.

Additionally, it advocates for business model innovation, emphasising dynamic partnerships, data-driven monetisation, and community-based models to build deeper connections with audiences.

In order to achieve these innovations, the industry advocates for new funding models allowing to be more agile during the implementation of innovations. A Pan-European accelerator operation framework and methodology is needed, to underscore the importance of structured collaboration between scale-ups and European media companies, thereby enabling accelerated digitalization. Furthermore, standards initiatives need the support to bring the standards to industry.

To succeed in these strategic areas, collaboration between media organisations, technology firms, startups & scale-ups, policymakers, and academia is crucial. Adapting to new market conditions, emerging technologies and audience preferences is essential for maintaining competitiveness in the ever-evolving media landscape.

Future Media Hubs is an international network of about 60 public and commercial media organisations that accelerates the development of the media industry and their local ecosystems by facilitating partnerships between media organisations. The intention of Future Media Hubs is to put focus on European innovation and regulation initiatives, and to be a partner for dialogue on this innovation agenda with policy makers.

INTRODUCTION

Media innovation in Europe all too often happens in silos. However, the past explosion of new forms of media, from social media to streaming services, and the next wave of AI generated and immersive media user experiences have and will revolutionise the way we consume and interact with media content. The boundaries between media and gaming industry are blurring creating ample opportunities for innovation in many domains. From the Future Media Hubs 2026 Trend Report:

- Media consumption is now mobile-first, video-first, and increasingly short-form, with formats often under 60 seconds.
- Younger audiences no longer “consume” media, they participate, remix, and co-create within platforms and virtual worlds.
- The boundary between media, gaming, and social environments has dissolved, creating new hybrid ecosystems.

The European media sector is a rich and diverse ecosystem with a high innovation potential. This initiative unites the sector, public and private, to collaborate on a common vision for media innovation in Europe, both inside and beyond the industry, to drive innovation, skills and growth. The initiative creates an ecosystem connecting media organisations with technology providers, startups and scaleups, and policy makers and academia. We feel Europe needs a more coherent vision on media innovation to reunite the sector and strengthen it in building the innovation ecosystem together.

To remain competitive, Europe needs an innovation network and framework that has a long-term horizon and with a primary focus to ensure that the many ambitions, ideas, funding, knowledge gathering and innovations are connected. As such it will stimulate economic growth, skills and jobs, attract new investments and enhance Europe's competitiveness in the global media market.

For the scope of this vision paper, media encompasses entities that create, distribute, curate and monetise content. This includes both traditional forms like newspapers, magazines, radio and television, as well as digital platforms such as websites, podcasts, streaming services and interactions through different platforms.

PURPOSE OF THE VISION PAPER

European innovation initiatives are currently too scattered across different European policy initiatives without the necessary coordination and alignment between them. The European action plan for media and audiovisual contains many relevant topics and resonates with various needs of the sector, however its implementation is mostly fragmented. This hampers the necessary development of shared European knowledge and skills to address the many future challenges in the global media market and potentially slows down growth in the sector.

This vision paper seeks to address these challenges by outlining an updated innovation agenda for the European media sector, the potential benefits and the challenges that need to be addressed to make it a reality. We also propose a roadmap for its development and discuss the role of different stakeholders in achieving this vision. Our goal is to inspire a fruitful discussion and collaboration among all those media actors who share our vision of a vibrant, connected, sustainable, and responsible media industry in Europe. Together, we will fundamentally redefine the shape, the purpose and the vision of the media sector in Europe and how we collaborate. The intention is to put focus on European innovation and regulation initiatives, and to be a partner for dialogue on this innovation agenda.

To be clear, this vision paper outlines an opportunity for European policy makers to achieve more in terms of their ambitions and funding, and to create a two-way dialogue to ensure that the many efforts made at all levels have an increased potential for success.

Concretely, this vision paper proposes

- a common media innovation agenda for Europe, defining key themes (data/AI, trust and new experiences & formats), business model innovations and improved media innovation processes/mechanisms;
- a set of vision driving ideas, which serve as main drivers for a reinforced media sector in Europe in the coming decade
- a continuous conversation between regulators and the media sector in Europe (clear point of access for dialogue around media innovation); and
- a broad alignment across different media companies for generating larger impact (cf. collaboration creates the bigger effect).

CHALLENGES AND OPPORTUNITIES FOR BOOSTING EUROPEAN MEDIA

The European media sector is a diverse and complex ecosystem that includes a wide range of businesses, from traditional media companies such as television and radio broadcasters to digital media platforms and social media networks. Despite its diversity, the media sector faces common challenges and opportunities in the current digital age:

- Increasing dominance from US/Asia-based digital media platforms and GenAI platforms, which disrupt traditional business models and have forced media companies to adapt to new market conditions. These have increasing dominance in the distribution and monetisation of content, while the traditional role of media as (regulated) gatekeepers of information has been substantially weakened. This is even reinforced by the launch of AI-generated summaries in search results reducing the need for users to access original content.
- Audience behaviour is changing rapidly. The rise of short-form, visually driven content formats has created new expectations around speed, accessibility, and engagement. At the same time, younger audiences increasingly inhabit so-called “third spaces” or virtual environments, where media consumption is embedded within broader social and interactive experiences. These shifts challenge traditional media organisations, which remain largely structured around legacy formats and workflows.
- Trust in media is another critical issue. Across many countries and cultures, trust in traditional media continues to decline, while alternative sources of information, including influencers and user-generated content, gain prominence. The proliferation of AI-generated content, including deepfakes and low-quality synthetic media, further complicates the information environment, making it increasingly difficult for users to distinguish between reliable and unreliable sources. There are also challenges of geopolitical nature, with foreign influences trying to reduce trust of EU citizens in the European media sector.
- Future challenges and opportunities related to the next wave of AI generated user experiences and the rise of immersive social platforms and other gaming-based platforms.
- Challenges related to regulatory frameworks and funding models of joint media initiatives including public service media, catering for both freedom of expression as well as media diversity.

Despite these challenges, there still are significant opportunities for growth and innovation, fostered by high-quality content, and an increasing demand for locally relevant quality content.

OUR VISION

Our vision is to drive European media forward in three sector-wide strategic areas, enabling European media to preserve its rich ecosystem while empowering it to compete with external players. We list the proposed areas of intervention with concrete innovation topics and include a vision topic for the sector for each intervention area where we feel the current large R&D programmes leave gaps to make the bridge to the production floor in the media sector.

We believe European media should take the lead in the following areas:

1. DATA / AI

Artificial intelligence has evolved from an experimental technology into a core component of media infrastructure. It is increasingly integrated into all stages of the media value chain, from content creation and editing to distribution and audience engagement. Europe is in a unique position in providing protection to its citizens with (among others) the GDPR, the data governance act and the AI act. Whereas we believe some of the current technologies are overhyped, the technological advances are nevertheless impressive and could certainly create innovation in the following areas:

- **Data utilisation:** Develop advanced data analytics capabilities to better understand audience preferences, content consumption patterns, and advertising effectiveness. Bring real-time actionable insights.
- **Monetisation:** Leverage AI to optimise advertising placement and targeting, maximising revenue while minimising intrusiveness.
- **Content generation:** Explore AI-driven content generation tools to augment journalism and creative production.
- **AI as a gatekeeper to information:** A key challenge lies into the hybrid human-AI collaboration to mediate access to information.
- **Personalisation:** Use AI to create personalised content recommendations, increasing user engagement and satisfaction, with new UX paradigms and personalised story experiences, targeting different users, platforms and context and offering new forms of user control.
- **Accessibility:** Ensure access to content for every European citizen, independent of background or disabilities.
- **Data ethics:** Ensure responsible data practices, respecting user privacy, and complying with data protection regulations like GDPR and the Data Governance Act.

Vision driver: Generative AI opens new opportunities for real-time content production, hyper-personalised storytelling, and intelligent curation at scale. But media organisations need transparent, controllable and explainable solutions – and above all, evidence of real business value. We will co-finance industrial testbeds to experiment with generative AI directly in media environments, focusing on **validating both technical feasibility and economic impact**. Use cases may include real-time adaptation of content to audience segments, AI-driven highlights or summaries, and editorial co-pilots. European R&D ecosystems (e.g. GenAI4EU, ADR) may be leveraged, but the focus is on delivering measurable value to the media sector. The vision is therefore to develop a sovereign European AI layer for media, including proprietary models trained on local data, robust governance frameworks, and mechanisms for ensuring transparency and accountability. Industrial-scale testbeds should be established to validate AI applications in real-world media environments, focusing on both technical feasibility and economic impact.

2. TRUST (Relationship with the audience, focus on disinformation / fake news)

Trust remains a fundamental pillar of the media sector, but its nature is changing. In an environment characterised by information overload, synthetic content, and fragmented audiences, trust can no longer be addressed solely through traditional editorial practices. Instead, it must be embedded within the technological and organisational infrastructure of media systems. This needs advances in the following areas:

- **Factchecking:** Invest in robust and user-friendly fact-checking tools and teams to combat disinformation and fake news, including AI-created disinformation.
- **Transparency:** Be transparent about editorial decisions, sources, and affiliations to build trust with the audience.
- **Community engagement:** Foster a sense of community and engagement with your audience through feedback mechanisms, Q&A sessions, and forums.
- **Media literacy:** Promote media literacy programs to educate the public about identifying credible sources and distinguishing between reliable and unreliable information.
- **Ethical journalism:** Commit to ethical journalism practices, including ethical content creation, unbiased reporting and disclosing conflicts of interest.

Vision driver: Develop a European trust architecture that combines technological solutions with social and institutional innovation. This includes fostering media literacy, critical thinking skills, promoting diversity and representativeness, and building stronger relationships between media organisations and their audiences.

3. NEW EXPERIENCES & FORMATS (New creative industries)

With the rise of digital technologies, we also see new experiences and media formats arising. The evolution of media formats is one of the most visible aspects of the current transformation. Short-form video, mobile-first design and visual storytelling have become dominant, while long-form formats such as podcasts continue to grow in popularity. At the same time, new forms of content are emerging that blur the boundaries between media, gaming and social interaction. We believe technology innovation could be achieved through the following elements:

- **Interactive content:** Create interactive and immersive content experiences that engage and captivate audiences, including local content interactions with the end-user. Content is increasingly designed as part of transmedia ecosystems, where narratives unfold across multiple platforms and formats. Younger audiences expect content to be interactive, participatory, and adaptable, allowing them to engage not only as consumers but also as creators and contributors.
- **Innovation partnerships:** Collaborate with emerging tech companies and startups to explore new storytelling formats like virtual reality, augmented reality and interactive narratives.
- **XR production:** Virtualizing the media production infrastructure by highly leveraging on 3D gaming technologies used in the gaming industry. Cutting cost of (real-time) 3D design through intelligent use of technologies. For media organisations, engaging with these environments is becoming essential for reaching new audiences.
- Real-time streaming of 3D assets and interaction around them.

Vision driver: Support the development of European capabilities in immersive and interactive media, including shared production infrastructures, open standards, and collaborative platforms. By doing so, Europe can reduce its dependence on non-European technologies and establish a strong position in the emerging landscape of virtual and transmedia content.

4. BUSINESS MODEL INNOVATION

In the continuously evolving media landscape, it is imperative to reconsider traditional business models and foster innovation in monetization strategies. The flux in consumer behaviours, alongside the surge in digital platforms, demands a multi-faceted approach that leverages new opportunities for revenue generation and partnerships. Key areas of focus include:

- **Dynamic partnerships:** Collaborations via content syndication and co-branding, reaching broader audiences and offering unique content for mutual growth.
- **Data-driven monetisation:** Responsibly using data for enhanced strategies like targeted advertising and content suggestions, aiming to boost user engagement and revenues.
- **Development of hybrid models** that combine advertising, subscriptions, micro-payments and commerce. However, these efforts will only be sustainable if they are supported by broader structural changes that address the concentration of power in global technology platforms.
- **Building direct relationships with audiences,** reducing dependence on external platforms for distribution and monetisation.

Vision driver: Taking back the business value in European hands, through e.g. the realisation of a federated European platform through which partnerships can easily be built, building further on current work being done on the EU level, such as core assets created in the Media Data Space (TEMS) project. The challenge is to create a European media ecosystem in which value is generated and retained within Europe, supported by shared infrastructures and collaborative business models.

To successfully drive European media forward in these strategic areas, it is essential to foster collaboration between media organisations, technology companies, startups & scale-ups, policymakers and academia. Additionally, staying adaptable and responsive to emerging technologies and audience preferences will be key to maintain a competitive edge in the ever-evolving media landscape.

FUTURE CONDITIONS FOR A COLLECTIVE EUROPEAN MEDIA AND TECH LANDSCAPE

- In a fast-moving media landscape, it is essential that funding mechanisms and strategies are agile and can meet the opportunities and challenges as and when they are identified.
- The necessity of a Pan-European accelerator operation framework and methodology underscore the importance of structured collaboration between scale-ups and European media companies, thereby enabling an immediate and profound impact on the digitalization of media houses (as opposed to other markets where scaling may be perceived as easier).
- Europe must invest in building its own media technology infrastructure, including AI systems, data spaces, and distribution platforms. This is essential not only for economic competitiveness but also for safeguarding democratic values.
- A close collaboration with investors and investor networks can help accelerate the development and scaling of the most promising services. We believe that a combined approach of an accelerator and a dedicated media investment fund offers a more robust proposition for the media sector.
- Skills need to follow the needs of the sector. A better coordination with institutions of education and training and mechanisms that can help retain and attract talent to Europe are essential.

- Media companies need to take an active role in nurturing the talent and offering opportunities and strategies for talent development across technologies and content production. Opportunities for collaborations between media organisations and across borders to help drive the scale of the projects are important.
- A close collaboration on emerging standards would help ensure that new products and services developed in Europe are interoperable and would reduce the needs of adaptation or limit the problems of incompatibility.
- In media innovation programmes, media organisations themselves need to be in the driving seat. Now all too often academia and innovation programmes are in the lead. Whereas we strongly acknowledge their relevance, innovation needs to put the industry in lead, supported by academics. Public funding in a vibrant European media ecosystem is essential in order to secure sustainable democracies.
- Innovation hubs or incubators need to be established to nurture creative talent and new content formats.

The proactive contributions from the media sector may also help fuel the visions of policy makers.



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