MEDIAROAD
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MEDIAROAD – VISION PAPER

THE FUTURE OF MEDIA INNOVATION

EUROPEAN RESEARCH AGENDA BEYOND 2020

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DISCLAIMER

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MEDIAROAD

MediaRoad – European Media Ecosystem for Innovation

Horizon 2020, H2020-EU 2.1.1. – Industrial Leadership – Leadership in enabling industrial technologies – Information and Communication Technologies (ICT) - Coordination and support action

Duration: 1 September 2017 – 31 August 2019 Project number: 761412

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Coordinated by the European Broadcasting Union, the MediaRoad project aims to support the transformation of the European media sector by building an ecosystem for innovation involving diverse media associations, public service media organisations, commercial radios and broadcasters, media workers' organisations, academic research institutes and innovation centers, independent producers and SMEs.

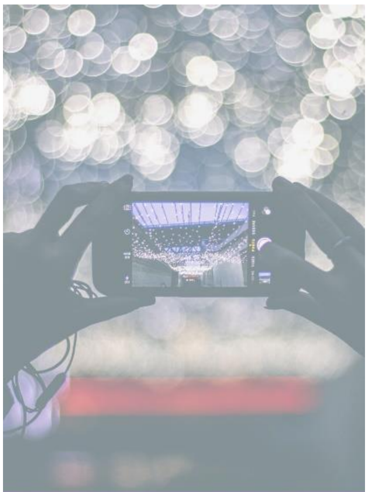
OBJECTIVES:

- 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 market deployment
- Shape future media policy and be part of the digital transformation

Data policy, cloud, privacy and security, 5G, investment in training and research, innovation, methodology, AR/ VR, digital platforms and European Research Agenda are just some of the "tomorrow's world" topics this Horizon 2020-funded project touches upon.

SANDBOX
Hub

Creating a series of interlinked incubators for innovation



POLICY
Hub

Developing a long-term policy and research agenda for audiovisual and radio media

NETWORK
Hub

Bringing together broadcasters, researchers, content creators, technologists and entrepreneurs

TABLE OF CONTENTS

EXECUTIVE SUMMARY 5

CONTEXT 5

1. BACKGROUND AND RATIONALE 7

2. TRENDS AND CHALLENGES FOR THE EUROPEAN MEDIA SECTOR IN TRANSITION 9

- **Platformization of the European media sectors** 9
- **New technologies in the media sector** 10
- **New business models for established and new media** 12
- **Media access, accessibility and inclusiveness** 13
- **CHALLENGES** 13
- **Guaranteeing diversity of content and competition in a platforms-led digital future** 13
- **Rethinking traditional business models and addressing emerging/disruptive technologies** 14
- **Ensuring media accessibility and improving skills** 15

3. VISION FOR THE FUTURE OF THE EUROPEAN MEDIA ECOSYSTEM 16

- **Dedicated and specific investment in media innovation** 19
- **Foster cooperation and collaboration** 20
- **Ensure a level-playing field for the media sectors** 20
- **Support accessibility and inclusion** 21
- **Enhance media literacy and strengthen skills** 22

EXECUTIVE SUMMARY

CONTEXT

This Vision Paper has been developed by the Policy Hub of MediaRoad, a project coordinated by the European Broadcasting Union to support the transformation of the European media sectors and to help Europe's media sector revamp the way it approaches innovation by shaping future research and policy priorities.

The culmination of the Horizon 2020 period and current efforts to prepare its successor, Horizon Europe, provide a good opportunity to develop MediaRoad's vision for the future of research and innovation in the European radio and audiovisual sectors. Indeed, these sectors play a crucial role in helping to answer European and global challenges as well as societal and economic changes. Thus, in this context, the Vision Paper provides policy recommendations to support the digital transition of European media sectors, and particularly radio and audiovisual, in order to foster media innovation in the future.

VISION FOR THE EUROPEAN MEDIA SECTOR IN TRANSITION

The European Media Sector is characterized by a number of interconnected trends and challenges.

TRENDS

The platformization of the European media sector: Platforms are having a growing impact on the aggregation, distribution of and access to audiovisual and radio content by acting as key intermediaries but also as gatekeepers between media organizations and their users.

New technologies adopted in the media sector, all along the value chain (production, distribution, consumption): immersiveness, 5G, Blockchain, hybrid distribution models and AI-driven recommendation systems, to cite just a few.

New business models for established and new media: The development of 'long tail' content, more and more user-generated content, and generalization of subscription-based revenue models.

Media access and inclusiveness: More and more content is accessible and accessed on the move on various devices.

CHALLENGES

Guaranteeing diversity of content and competition in a platform-led digital future

Rethinking traditional business models and addressing emerging and disruptive technologies

Ensuring media accessibility and improving skills

RECOMMENDATIONS FOR THE FUTURE OF INNOVATION IN THE MEDIA SECTORS

The media and creative sectors play a special role in the development of our European societies. In order to ensure a sustainable and innovative European Media sector we need:

A cohesive ecosystem in which media can contribute to help solving global challenges by assisting in the transition to a digital society and economy by promoting EU integration, economic growth, democracy and education, by combating disinformation and by helping mitigate the effects of natural or man-made disasters.

An EU-specific integration of policies and action steps for the media sector through the combination of financial support, policy and legal framework, and co- and self-regulation.

Specific policies and action steps for implementing the vision: to bridge technological research and content innovation; to foster cooperation and collaboration; to ensure a level playing field for the media sector; to support accessibility and inclusion; to enhance media literacy and strengthen skills; and to mobilise more dedicated and specific investment in media innovation.

1. BACKGROUND AND RATIONALE

CONTEXT

Digitization and globalization represent a huge opportunity for the European media sectors but also raise challenges. Following the push towards accelerating convergence, the radio and audiovisual sectors are steadily becoming an innovation-driven industry. Change is happening everywhere, from products and services, distribution and production processes to ownership and financing, the role of users and in the very way we imagine the role of media in our societies.

The European Union has a strong tradition of multifaceted investment in media research and innovation. Supporting technological and content innovations will play a key role if the radio and audiovisual sectors are to maintain their key role and future sustainability.

The culmination of the Horizon 2020 period and current efforts to prepare its successor, Horizon Europe, provide a good opportunity to develop MediaRoad's vision for the future of research and innovation in the European radio and audiovisual sectors.

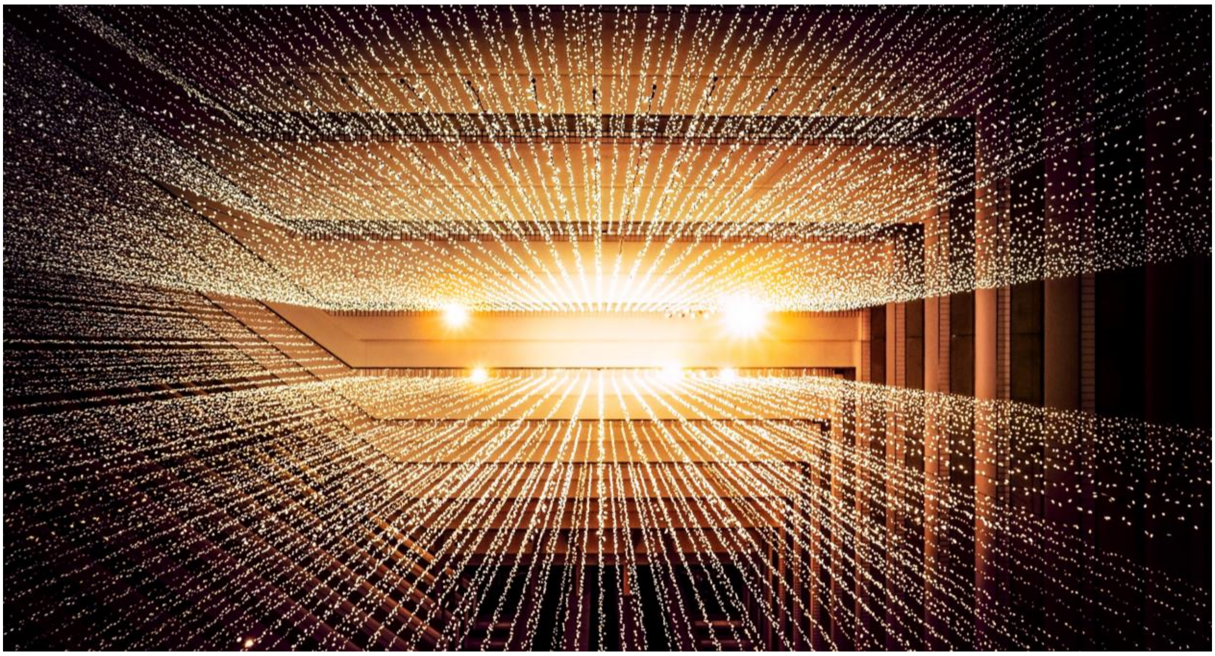
Coordinated by the European Broadcasting Union, the MediaRoad project aims to support the transformation of the European media sectors by building an ecosystem for innovation that brings together diverse media associations, public service media organizations, commercial radio stations, media workers' organizations; academic research institutes and innovation centres, independent producers and SMEs.

The survey relies on various information sources. In addition to monitoring information related to media innovation, it is notably based on:

- A specific survey (151 responses of which 38 usable)
- Three workshops
- The round-table discussion on "The Future of Media Innovation for the EU Research Agenda post-2020, hosted by MEP Dr Christian Ehler, co-chair of the Intergroup of Cultural and Creative Industries (CCIs) at the European Parliament

This Vision Paper will be supplemented by a White Paper on the Future of Media Innovation, which will be released in September by MediaRoad, I3 and Vital Media, and a Position Paper developed in the context of the Commission's proposal regarding the next Framework Programme 9 Horizon Europe.

2. TRENDS AND CHALLENGES FOR THE EUROPEAN MEDIA SECTOR IN TRANSITION



TRENDS

Platformization of the European media sectors

Nowadays, we are confronted with the emergence and dominance of online platforms in the media domain, even more so than in most other sectors of the economy. To reach their target audiences, media organizations provide and distribute their content across many different platforms, both online and offline. This is increasingly exposing them to a loss of autonomy, technology fragmentation and economic dependency. This trend is also leading to increased competition arising from the horizontal and vertical integration of online platforms and other media-market players. Consequently, media organizations are having to adapt their strategies and diversify their offerings in order to stay relevant and competitive, e.g. newspaper online platforms that also offer podcasts and videos.

Platforms are often characterized by 'winner-takes-all' and network effects, leading to increasing concentration and, in turn, unfair competition. Furthermore, the companies behind some online platforms do not face the same constraints as other stakeholders in terms of taxation or media regulation, for example.

The rise of Over-The-Top players and online distribution is starting to threaten the place of traditional radio and audiovisual stakeholders. While television and radio broadcasting are still relevant, online platforms have a growing impact on the aggregation of, distribution of and access to audiovisual and radio content by acting as key intermediaries and online gatekeepers between media organizations and their users.

In particular, among online platforms, search engines (Google, Bing, etc.) and social media (Facebook, Twitter, Instagram, etc.) have become important gateways for users to access media. Rather than disintermediation, we are seeing new forms of intermediation.

New technologies in the media sector

Digitisation has led to several technological innovations being adopted by the media sector, all along the value chain, from production and distribution to consumption. This is the so-called fourth Industrial Revolution, which relies heavily on big data and data-driven systems.

A massive leap in flexibility and versatility can be achieved through a shift away from dedicated and locally deployed media production facilities to IP-based and (often) virtualized solutions. Individual functionalities or entire parts of a media production workflow can be moved to the cloud. At the same time, mobile production equipment of the size to fit into a backpack can deliver a higher throughput and better quality at a far lower cost when using an outside broadcasting van, for example. All types of infrastructure are being migrated to end-to-end IP-based solutions (camera, studio, editing etc.), which is giving rise to new and efficient workflows. However, this also requires a fundamental rethinking of how media can be produced in a reliable, sustainable and interoperable manner at a time when vendors are pushing for dedicated solutions.

Immersiveness (virtual reality, augmented reality and mixed reality) is becoming more and more important (especially for audiovisual content). It impacts consumption (notably with the use of head-mounted devices) and production (of technology, notably with new types of rigs and cameras, and of content, with 360° videos, allowing users to turn their heads to see everything happening around them). Overall these technological developments are having a major impact on storytelling and the related production of media content.

Immersive and higher-quality content requires ever-growing bandwidth. Concurrently, more and more content is accessed through Internet Protocol (IP). Thus, data-driven distribution is becoming increasingly important for delivering audiovisual media content in a multi-platform environment and for lowering distribution costs whilst guaranteeing a reliable service.

5G is on course to become the next-generation ubiquitous communication infrastructure. It is expected to deliver better mobile broadband than any of the existing technologies and to enable a variety of innovative use cases, e.g. through low-latency edge-cloud approaches. For a long time, media content has accounted for the majority of network traffic, so 5G promises to provide a capable technology foundation for the sector. In the coming years, 5G standards will be ready for rollout, to be followed by commercial deployment of 5G networks. Thus, the developments of standards and the appropriate adoption of 5G will be key in business-to-business environments, both for the future development of media distribution (including 5G broadcast) and deploying new effective workflows in production environments.

Blockchain technologies are being increasingly used in various sectors of the economy. Their further development could change the conditions for distribution, regarding uses such as peer-to-peer distribution or the tracking of intellectual property.

Market trends show that online distribution is growing while coexisting with current distribution channels (cable, satellite and antenna). Thus, for radio, traditional distribution remains important, with the current development of hybrid models.

Personalization is also becoming increasingly important. Faced with content overload, consumers are supplied with recommendation systems designed to help them select what they are going to watch or listen to. Automated processing based on artificial intelligence, algorithms and big data analytics is used to create tailored services, which are then pushed to mobile or web applications. Artificial intelligence's development is pervasive, including in the media arena, where it is already used to create news reports (notably on sport or stock exchange) and other media content.

New business models for established and new media

Scarcity and physical limitations (in terms of storage and time) are replaced by abundance. A greater diversity of content is available, and more and more will be available. A predicted trend is the further development of the long tail, i.e. niche or obscure content becoming relatively more important as a proportion of overall consumption and revenues.

It has become cheaper and cheaper to produce media content, especially sound and audiovisual content, and make it available to a potentially global audience. Hence the development of self-made products (user-generated content) such as videos on YouTube or podcasts that can be downloaded or streamed on a computer or mobile device. It has also become easier to produce content using mobile technologies, e.g. by using a smartphone in a demonstration to film an event or to interview people.

Revenue models are under pressure, be it advertising revenues (in particular for newspapers, where they are decreasing) or the licence fee for public broadcasters. It is said that users no longer want to pay to access audiovisual content, notably news, since there is so much available for free. Where they are willing to pay for audiovisual content, traditional pay-per-view might be replaced by subscription. At the same time, technology provides solutions for personalizing advertising across all platforms including linear TV and online radio services, which has a clear potential impact on the marketing domain.

The changing environment in which work is being carried out is also driving (radical) change in organizational structures. In recent years, the sector has seen the rocketing growth in the number of enterprises that simply come and go. These companies are characterized by a high degree of flexibility. They are mainly micro-enterprises with less than five employees, consisting mostly of selfmanaging teams with rapidly changing compositions, depending on the project which is worked on, often in an online environment.

Media access, accessibility and inclusiveness

Digital technologies are helping improve accessibility, e.g. for visually or otherwise impaired people. They can also allow minority languages to survive and, in some cases, even thrive, by making online distribution easier, or through the development of more sophisticated translation software.

While internet delivery is gaining ground, mobile has become the primary means to go online, especially for younger audiences. Content has for a long time been on the move (e.g. with cars) and this trend is being reinforced (mobile devices, wearables, etc.). In the end, access to media content is being spread over more and more devices.

Voice and music are becoming more prominent, for instance through the use of voice commands to activate devices (such as smart speakers and mobile devices). These technological advances also influence the production side, dovetailing with the development of the Internet of Things (e.g. wearables).

Furthermore, new formats are being developed, such as podcasts. This opens up opportunities for consumers in the same vein as new widespread types of behaviour, for example binge watching, when full seasons are consumed in one go (e.g. on Netflix).

CHALLENGES

Guaranteeing diversity of content and competition in a platforms-led digital future

The platformization of the digital European market raises various challenges as market power becomes more concentrated and a handful of stakeholders become the gatekeepers. Investment in technological innovation today in Europe is dwarfed by powerful global players. The European media research-and-innovation landscape is fragmented and lacks coordination.

Beyond the problems that usually go hand in hand with a lack of competition in some activities, induced by oligopolies or quasi-monopolies, there is a more general problem, which is a lack of transparency. Platforms use algorithms, e.g. to rank content, and this influences the way in which content is displayed for each user. As the recent cases of Facebook and Cambridge Analytica have shown, however, such algorithms lack transparency, for users as well as other stakeholders (e.g. the providers of the content that are then ranked). Furthermore, there is a lack of access to data (e.g. to monitor the consumption of online video-on-demand services).

The development of global online platforms providing audiovisual or music content is an opportunity as well as a challenge in terms of content diversity. Such platforms claim that they provide a diverse offer, sometimes insisting on their contribution to local content production. For the moment, however, European broadcasting and productions companies remain leaders in the creation of and investment in diverse European content. Additionally, each of these global platforms has the kind of influence that would make local ecosystems too dependent on one or a few of them. In any case, it is difficult to assess whether they will improve the circulation of EU works in the EU, the representation of productions from the rest of the world (outside Europe and the USA) in Europe, or the development of co-productions, due to the lack of data available.

Rethinking traditional business models and addressing emerging/disruptive technologies

Media organizations have the opportunity to experiment with new business models, in particular new revenue models, from crowdfunding to freemium, metered models, native advertising and so forth. Not all of them are specific to digital technologies and online environments, but the latter have led to their rapid expansion. The case of online advertising, however, raises some important challenges. First, the advertising market has boundaries, and the expansion of online advertising at some point takes place at the expense of offline advertising; and online advertising is currently captured by newcomers to the media sectors such as search engines and social media. Secondly, online advertising may come to suffer from a bad image, with content producers as well as advertisers losing control over their content. Thus, content producers do not necessarily know which advertising will be displayed before or next to their content, and conversely advertisers may find themselves paying for advertising on websites that may tarnish their reputation.

Innovation in the online environment requires collaboration between different types of stakeholder, hence the success of notions such as open innovation. Beyond interdisciplinary research, this means that online platforms providers are incited to give access to third parties in order to attract users, or that stakeholders will cooperate in order to ensure the success of a service or a platform.

Regarding the impact of personalization, there is a risk of filter bubbles developing, that is to say situations where users do not obtain access to and, hence, remain unaware about some types of content. Data-driven and fully automated personalization models are not sufficiently looking into how to include diversity and serendipity in algorithmic functions to broaden the consumer's experience. Personalization is specifically difficult for broadcasters that offer vast amounts of new content every day, compared to the more stable catalogues of streaming service providers.

Disruptive technologies are entering the TV and radio domain (e.g. TuneIn, and smart and personal assistance devices such as Alexa, Google Home, etc.), prompting a need to implement new strategies and deliver competitive or complementary offers (such as Radioplayer). For traditional stakeholders, this is giving rise to certain difficulties as well as incurring transition costs.

Standards and interoperability are key challenges for the sector as media organizations need to keep on constantly researching and investing (e.g. the development of 5G requires research to ensure that standards are interoperable). All in all, multi-technology transitions and hyper-connectivity (UHDTV, IP based live production, Cloud, Data and AI) offer many opportunities for automating workflows but also present challenges (e.g. new skills, costly and complex technology transitions, utilising open standards and compatible devices, and defining the right investment strategies).

Ensuring media accessibility and improving skills

As barriers remain in terms of language and accessibility, the focus must be kept on the issue of media access, especially from a political standpoint.

Whereas regulations request media providers to provide accessibility services (e.g. subtitling, audio description, sign language) together with the content they provide, the heterogeneity of platforms and content formats do not allow for a one-size-fits-all solution. At the same time, it costs money to produce accessibility services, at a time when only limited resources are available. Thus, cost-efficient production and distribution are priorities. Standardization of solutions for accessibility services is also of the utmost importance as well as the application of new production methods. Artificial intelligence has enormous potential in this respect, e.g. for semi-automatic generation of subtitles.

Media organizations are also faced by a shortage of trained personnel. It is imperative to develop skills within the audiovisual community in order to benefit fully from the opportunities offered by fast-developing technology and innovation. In addition, these rapid changes entail that media professionals should be willing to undertake lifelong training.

3. VISION FOR THE FUTURE OF THE EUROPEAN MEDIA ECOSYSTEM

The vision presented here makes reference to documentation including: Digital Single Market Strategy, and its mid-term review, the ongoing debate on the next Multiannual Financial Framework (MFF) post-2020 and the related relevant European Commission proposals relating to the next MFF (May 2nd), the Framework Programme 9 Horizon Europe (June 7th) and the Creative Europe Programme (May 30th). In this framework, we have been working and collaborating with different stakeholders in order to position the media and creative sector advantageously within R&I strategies and frameworks at EU level.

IMPORTANCE OF MEDIA IN HELPING TO SOLVE GLOBAL CHALLENGES

We are putting forward a vision and accompanying measures to foster media research and innovation because the media sector plays a crucial role to help meet European and global challenges as well as changes in the societal and economic contexts. In particular, the following pivotal role/functions are fulfilled:

- The media can contribute to the transition to a fully-fledged digital society and economy

- The media has an important role to keep on playing in the EU integration and cohesion process

- The media industry has a large economic contribution (GDP, employment, etc.)

- The media can contribute to education, media literacy, awareness of global challenges, community cohesion and civic engagement, thus highlighting the importance for an integrated vision for culture, education, communication and media.

- Media actively contributes to fostering, supporting and promoting European values and to tackling current transnational challenges, from inclusiveness and diversity, to citizens' engagement and democracy, quality information and education, common European cultures and shared cultural heritage.

- Audiovisual and radio are part of the toolbox for fighting disinformation and fake news

- Broadcast reception (especially for radio) is a secure, reliable and free-to-air platform. It is resilient during natural disasters and can issue reliable emergence warnings when needed.

EU-SPECIFIC INTEGRATION OF POLICIES AND ACTION STEPS FOR THE MEDIA SECTOR

This vision can only be implemented if the media sector is transparent, sustainable, values based (public and economic values), as well as being cohesive and accountable. Policies and action steps should keep such fundamental values in their scope.

This ecosystem should promote high-quality media and journalism. This will require policies for dealing with information disorder and a clear framework that guarantees transparency and accountability for platforms. This also requires stable, sustainable jobs in the European media sector, which must be seen as an attractive destination from a career perspective.

In terms of policies and actions, we endorse a combination of financial support, policy and legal framework, and co- and self-regulation (e.g. codes of conduct), which can then be adapted to specific challenges. Policy can also take place at various levels (from local to regional to national to European to global) depending on challenges In the same way, the role of the EU should be adapted to the aim of the actions: main player, legislator, catalyst, etc.

Moreover, there is a need to assess and keep monitoring the implementation and effectiveness of existing funding schemes and programmes in order to improve them. One idea would for example be to reinstate the service in charge of evaluating the impact of regulations on the media sector within the European Commission DG CNECT department. Another would be to conduct real impact assessments that can then be considered when drafting regulatory measures (i.e. making sure the proposal does not state the exact opposite of what the impact assessment has suggested).

Diversity of funding sources can be beneficial to researchers and innovators, but they can also correspond to a situation where there is a lack of interconnections between these sources. It is therefore important to consider and reassess how they can be complementary to each other. The objective could be to develop a sector strategy/industrial policy for media by coordinating existing policy and funding tools.

Finally, more flexibility is needed for research and innovation funding. To fulfil the potential of European media sector, future programmes must address the complexity of procedures, poor flexibility in reacting to unforeseen circumstances and must be able to adapt if adjustments in objectives are needed. The possibility of re-aligning goals more easily in the light of intermediary results is key to the success of R&D projects.

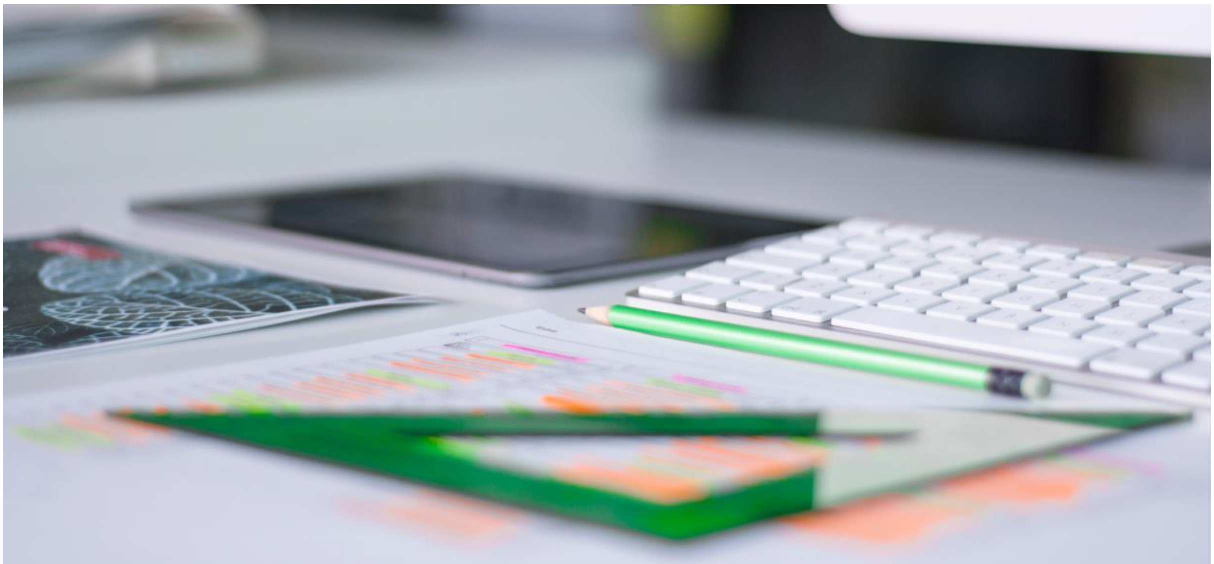
POLICIES AND ACTION STEPS TO IMPLEMENT THE VISION

Bridge technological research and content innovation

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, news, new storytelling, etc.). Furthermore, there is no alignment between Horizon 2020 (technology) and Creative Europe (content and innovation in content).

Instead, we need more funds and programmes to bring together technology and creation.



This should allow for the combination of different technologies and infrastructures.

In this context, we want to put forward the following ideas for future actions and concrete funding calls:

- Create an R&I European pole, a European MediaLAB, to attract creative talents and technological experts, foster transnational collaborations and ensure European leadership in media innovation

- Place a stronger focus on serial storytelling from multiple perspectives, including new mixes of media channels and object-based media

- Draw attention to the entire media and cultural value chain

- Combine investigative journalism and data journalism to ensure quality and trusted news in today's multimedia environment

Dedicated and specific investment in media innovation

Regardless of the form (topics, implementation, etc.) taken by the measures to support innovation and research, it is crucial that the funding specifically dedicated to media research and innovation is increased in order to ensure the crucial challenges ahead can be tackled.

However, the increase in funding for media in Horizon 2020's successor, Horizon Europe, should not be awarded at the expense of funding within Creative Europe, and vice versa. European policymakers have paid greater attention to the need to support collaboration and innovation in the MEDIA programme (still limited to audiovisual) through its increased budget and via the cross-sectoral strands of Creative Europe. Despite this, however, the media and creative sectors are still not present in the broader Horizon Europe scheme, and synergies between the different funding schemes still need to be unlocked in order to adequately support research and innovation in this field.

The role of media should be reflected in dedicated, media-specific funding calls in each strands of the Multiannual Financial Framework. To facilitate the search and application to these funding calls, there should be a dedicated web portal/page that aggregates the media-specific funding calls and actions present in the different schemes.

This is in a context where recent and/or ongoing technological breakthroughs need to be adopted by the media sector to make it more efficient and deliver more public values. Such relevant technological advances include:

- Artificial intelligence (for example for fact checking)

- Semantic technologies

- Content metadata acquisition

- Blockchain (for example for transparent end-to-end revenue models)

- Media services and efficient distribution across all platforms including 5G
- Brain interfaces
- Haptic devices
- Holography

Foster cooperation and collaboration

Horizon 2020 has started emphasizing the importance of cooperation by allowing collaboration between European stakeholders of various sizes and with diverse profiles (technology, media, end-users, etc.). Following these first steps, additional policies – including the newly proposed Horizon Europe – should be aimed at supporting media research and innovation by fostering co-operation and collaboration.

Supporting networking systems, media hubs and the development of creative or media clusters is extremely relevant for the future of the sector. That also requires further to investigate these new forms of partnerships and collaborations, assess their impact (including at local level) and devise the best policies to develop them. In this respect, media should be clearly referenced in clusters like the Open Innovation of Horizon Europe, or the Digital Innovation Hubs of the Digital Europe Programme.

Thus, it is key that national and EU policy and regulatory frameworks enable and support public- private partnerships in providing content and platforms (cf. RadioPlayer) or developing new policies (cf. MediaRoad, NEM, etc.), allowing EU companies to compete on a level playing field with competitors from outside the EU.

<u>Ideas for future actions and concrete funding calls:</u>

- Generation of more language resources to avoid an even more fractured market in Europe
- Continuous support for co-productions, which are important also in relation to the Creative Europe programme

Ensure a level-playing field for the media sectors

This vision relies on a level playing field for the media sector where all types of actors (small and big, European and international, new entrants and established players) are subject to the same regulations.

Specific support should be provided to categories of actors depending on the specific policy objectives. Access to the market needs to be enhanced for European SMEs and start-ups. Entrepreneurship must be supported.

Implementation can also be differentiated, e.g. with more time to comply for small and new players, and supporting environments and for national and European players.

Platforms occupy a special position here. A framework is needed to ensure their transparency and their accountability, notably in the fight against online disinformation.

The role of platforms must doubtless be assessed. While most platforms do not have editorial responsibility over their content, some platforms (e.g. social media) play a key role by influencing the display of content, or more broadly, the way content is presented to the public. For search engines, search results should objectively reflect the search request, without undue commercial influence on these results. Search results should equally not privilege those services owned, administered or controlled – in whole or in part – by search engines.

<u>Ideas for future actions and concrete funding calls:</u>

Avoid an increasingly fragmented and fractured market by developing European standards

- Support/extend standards like the Web to ensure an open ecosystem

- Possibility of a flexible and open all-IP end-to-end media value chain exploiting intelligent network infrastructures, eventually co-existing with broadcast transmissions

Support accessibility and inclusion

Under the terms of this vision, research and innovation should have one core objective: ensuring that media services are truly inclusive and accessible to all, regardless notably of age and disability.

Minorities should be considered and included not only in terms of access, but also of production.

<u>Ideas for future actions and concrete funding calls:</u>

- Further development of audio description

- Sustainable concepts for serving older/legacy equipment and areas with lower connection bandwidths

- Protection of minority languages; promotion of niche products

Enhance media literacy and strengthen skills

The support towards media research and innovation requires that end-users become more media literate, including regarding digital issues, and that professional skills are adapted to current and future challenges.

New working conditions, including more flexible working arrangements, affect people's wellbeing, how they plan their careers and which skills they learn. Attracting new media professionals with the right expectations is important. Educating and training talent requires a long-term vision and, consequently, business models that invest over lengthier timeframes.

Through innovation and transformation in the sector, media professionals can help formulate new responses. Therefore, new and existing forms of dialogue and cooperation between all players are necessary. This also implies the need for different forms of structured consultation between the different stakeholders in the future.

<u>Ideas for future actions and concrete funding calls:</u>

Specific media literacy policies for both young generations and the elderly

- Financial support to local content production, notably cross-disciplinary education

- Development of connected communities as a way of sharing knowledge; allowing expertise to cross-fertilize within the audiovisual industry.

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