

Towards an integrated vision for the European Digital Media Sector

Mapping of other existing EU programmes targeting Creative and Cultural Sectors in the Audiovisual field

31 October 2018

This document was requested by the European Commission's Directorate-General for Communications Networks, Content and Technology

AUTHORS

Philippe Kern, MD and Founder, KEA
Arthur Le Gall, Director, KEA
Elisabetta Airaghi, Senior Consultant, KEA
Teodora Pletosu, Consultant, KEA

DISCLAIMER

The opinions expressed in this document are the sole responsibility of the author and do not necessarily represent the official position of the European Commission. Reproduction and translation for non-commercial purposes are authorized, provided the source is acknowledged and the publisher is given prior notice and sent a copy.

EUROPEAN COMMISSION

Directorate-General for Communications Networks, Content and Technology
Directorate I – Media Policy
I.3 Unit – Audiovisual Industry & MEDIA programme

Contact: DG CONNECT Unit I.3
E-mail: cnect-i3@ec.europa.eu

European Commission
B-1049 Brussels



Table of Content

EXECUTIVE SUMMARY	4
1. Objective and scope of the research	7
2. Methodology	7
3. Evolution of the AV sector as a strategic economic and societal sector	8
4. Mapping of funding programmes other than Creative Europe	11
4.1. Introduction	11
4.2. Current programmes.....	11
4.2.1 Horizon 2020.....	11
4.2.2 COSME	16
4.2.3 ERASMUS+	19
4.2.4 European Structural and Investment Funds (ESIF).....	21
4.2.5 External and Development Cooperation programmes	23
4.2.6 Other actions and initiatives	26
4.3. Analysis and conclusions on this initial mapping	27
4.3.1 Stakeholders' accessibility to funding opportunities	27
4.3.2 Synergies with CE and across programmes	28
5. Overview of future funding in the MFF 2021-2027	32
5.1. Introduction	32
5.2. Future programmes	32
5.2.1 Horizon Europe	32
5.2.2 Digital Europe.....	32
5.2.3 InvestEU	32
5.2.4 Single Market programme.....	33
5.2.5 ERASMUS+	33
5.2.6 European Structural and Investment Funds (ESIF).....	34
5.2.7 External and Development Cooperation programmes	34
5.3. Analysis and conclusions.....	35
6. Operational recommendations	39
6.1. Basis and justifications	39
6.2. Operational recommendations.....	42
6.3. Concrete examples of future support to the DM sector across different programmes	43
Annex - Bibliography	46

Executive Summary

Over the last decades, ICT convergence has radically transformed the industrial structure of the audiovisual (AV) sector. As a result, IT and media services have become more closely integrated in order to feed the world's growing need for communication and immediate visual content in every aspect of life. This has led to significant growth of the AV sector which is not only integrating a wider palette of services, but has started permeating other sectors, such as tourism, healthcare, architecture, marketing or education. To better reflect the digitalisation which is transforming the sector and creates new patterns of content consumption, the current paper proposes to consider the audiovisual sector as part of the wider digital media (DM) sector which includes all activities linked to cinema, television, news and information, production, distribution and storage of content and video games.

The DM sector is rapidly expanding, driving innovation in other economic sectors, exploring cultural diversity and reflecting a high degree of creativity. It is estimated that the overall global media spending will rise from \$1.6 trillion in 2015 to \$2.1 trillion in 2020. Digital spending is expected to account for more than 50% of overall media spending by 2019, fuelled by the expansion of mobile telephony and the improved ICT infrastructures.

While the EU has a long-established policy supporting the development of the AV sector through the MEDIA programme, this support has been chiefly dedicated to increase the theatrical distribution of EU non-national films and, to a much lower extent, to the online distribution of wider EU audiovisual works or to the development of EU video games.

The current research shows that while other EU programmes offer opportunities for the AV sector and the wider DM sector, these opportunities do not explicitly target the above-mentioned sectors, but reflect larger EU policy objectives in a bottom-up approach, to which the DM sector could contribute. As a result, the number of funded projects linked with DM is low (and so is the number of DM beneficiaries). This situation translates into a general lack of awareness of funding opportunities outside Creative Europe amongst the DM stakeholders, which limits the overall accessibility to these opportunities. Moreover, the analysed EU programmes do not share a common vision on the DM sector and its potential to contribute to different policy objectives and thus, the limited support to the sector does not benefit from a clear strategy at EU level.

At regional level, there is equally limited consideration for the potential of the DM sector to contribute to regional development, despite the fact that EU cities and regions are increasingly driving investment in the creative industries (CI) for territorial development.

The EU international cooperation policies channel support only to the traditional branches of the digital media sector, namely film, focusing on the development of non-European (local) films and the distribution of EU featured films.

An analysis of the proposed Regulations for future EU programmes in the 2021-2027 Multi-annual Financial Framework (MFF) shows that there are opportunities to better streamline support to the DM sector across different policy areas, such as research and innovation, competitiveness of SMEs, education, regional development or international cooperation policies, provided that synergies between Creative Europe and other EU funding streams are developed and that the DM stakeholders are informed and guided along the reinforced opportunities for the sector. A clear and robust strategy to streamline support for the DM sector would serve the following policy objectives:

- Reinforce the competitiveness and internationalisation of the DM sector in an evolving global digital market place;
- Streamline creativity and content production in the above-mentioned policy areas, as part of a strategy to brand Europe as a place of innovation and creation capable of promoting cultural diversity internationally;

- Help the creative work force to adapt to a new ecosystem driven by digital technology.

Therefore, the paper puts forward 3 sets of policy recommendations for the development of such strategy and achievement of the above policy objectives.

Table 1 – Overview of policy recommendations

Objective	Policy recommendations
Provide information and guidance, raise awareness amongst DM stakeholders	Create a ‘one-stop-shop’ type of platform where all funding opportunities for DM will be displayed and constantly updated to complement the work of Creative Europe desks which have a more regional approach and outreach.
	Improve the collaboration between Creative Europe desks and other supporting desks such as Horizon Europe’s national contact points (NCP) or the Erasmus National Agencies in order to stretch out possibilities of synergies
	Organise discussion forums or information seminars with stakeholders to present funding opportunities during major tech events and festivals.
	Identify and disseminate good practice examples for synergies and cross-sectorial collaboration (e.g. tourism, healthcare, education), for instance through international competition or prizes to showcase the best innovative solutions developed for the DM sector.
Improve consultations with DM stakeholders	Involve representatives of the DM sector in the development of the annual work programmes as well as in mid-term programmes’ evaluations.
	Channel the voice of DM SMEs across Europe through networks and collaborative platforms.
	Dedicate funding to enlarge the representativity of DM stakeholders across traditional subsectors (e.g. via creative hubs, AV/media clusters)
Plan synergies between CE and other programmes at strategic and programme level <i>Strategic level</i>	Establish a common vision and definition of the DM sector amongst concerned Directorate Generals of the European Commission (including DG CONNECT, DG EAC, DG RTD, DG REGIO, DG GROW, DG DEVCO, DG NEAR, EEAS) and the European Parliament.
	Streamline the common vision and definition of the DM sector not only in future legislations and policy documents but also in outreach communication activities to raise awareness across Europe.
	Ensure that the national Managing Authorities that implement cohesion policy are aligned on the vision and definition of the DM sector and recognise its multi-dimensional impact in the Smart Specialisation Strategies.
	Make explicit reference to the DM sector in the text of the Regulations establishing the future programmes (notably Horizon Europe, Digital Europe, the Single Market programme, InvestEU, ESIF) to ensure funding for the DM sector
	Ensure that high-ranked but unfunded Creative Europe projects due to budget limitation are funded through other appropriate EU programmes through the “Seal of Excellence Certificate”
	Foresee in other programme Regulations the possibility to contribute to finance actions under the Creative Europe programme (for instance, funding under the Neighbourhood, Development and International Cooperation Instrument



	Regulation could be used to finance actions under the international dimension of the Creative Europe Programme).
<i>Programming level</i>	Explicitly include <i>ad hoc</i> action lines and initiatives to support the DM sector in the annual work programmes (for instance in the “Digital and Industry” cluster of Horizon Europe) as well as in Partnership Agreements in the ESIF framework in alignment with DM policy priorities.
	Where appropriate, explicitly foresee the participation of DM stakeholders including artists and creative industries to R&I calls to better integrate the development of new digital technologies and tools relevant for the DM sector with the “creative” component.
	In line with the strategic vision developed, streamline support to DM clusters and hubs via coordinated actions amongst Creative Europe, Horizon Europe, the Single Market programme and ESIF.
	Seize the opportunity to build a strong repository of DM content (whether heritage or newly produced) that are feeding digital networks and social media to ensure visibility of such content on various digital platforms.
	Explore the possibility to create a specific Knowledge and Innovation Community (KIC) dedicated to CCI and notably the DM sector through the European Institute of Technology (EIT).
	Foresee a specific Public Private Partnership (PPP) dedicated to DM content under the new Horizon Europe programme.
	Make sure that experts in DM are included in the panel of experts in the evaluation of relevant project proposals.



1. Objective and scope of the research

The present paper aims to provide a mapping and analysis of the current and future actions and programmes at European level, other than Creative Europe, targeting the cultural sector and the audiovisual (AV) sector in particular, including concrete examples of funded projects. The analysis is put into context considering the ongoing evolution of the AV sector driven by the digital shift and technological convergence. It considers policy trends as well as the EU's industries' competitiveness in AV and media.

The overall goal is to provide policy recommendations and concrete proposals to DG CONNECT on how more synergies can be achieved in practice amongst the different funding instruments in the future Multi-annual Financial Framework (MFF) 2021-2027 to strategically address the development of the AV sector. The paper proposes concrete examples of future support cutting across different programmes.

2. Methodology

The research is chiefly based on desk research, since the information on existing and future programmes is abundant.

Background research has been carried out to briefly describe the evolution of the AV sector and the wider Digital Media (DM) and upcoming trends, as well as the current European Union (EU) support mainly channelled through the Creative Europe programme. This research identified the main opportunities and policy challenges as basis for the operational recommendations as well as concrete funding examples. Desk research considered recent studies carried out at international and EU level, recent EU legislations and policy documents.

The mapping of the current actions and programmes includes Horizon 2020, COSME, Erasmus+, European Structural and Investment Funds (ESIF), external and development cooperation programmes (namely IPA II, ENP, ACPCulture+, MedFilm) and other actions and activities particularly focused on media freedom, pluralism and journalism. The selection of the programmes is based on the following criteria:

- programmes where the cultural and/or DM sector is explicitly mentioned;
- programmes where the cultural and/or DM sector is not mentioned but funding is open to DM stakeholders through calls for proposals or other type of support.

Due to resource and time limitation, the research did not include the mapping and analysis of all funded projects for the period 2014-2020 but rather a selection of relevant examples to illustrate the funding opportunities across the different programmes and identify potential synergies. Desk research is chiefly based on programme Regulations, annual work programmes, databases of funded projects (including Cordis, COSME and Erasmus+ databases, EYE@RIS3) and existing studies on funding opportunities for the cultural sector in Europe. The mapping is complemented by other information relevant for the identification of synergies such as the visibility of funding opportunities for relevant stakeholders.

The overview of future programmes in the upcoming MFF 2021-2027 and potential sources of funding opportunities for the DM sector is based on currently available documentation, namely the proposals for the Regulations of future programmes and annexes. The research focused on the successors of current programmes included in the mapping (Horizon Europe, COSME, Erasmus+, ESIF and external and development cooperation programmes) as well as newly introduced instruments relevant for the scope of the paper (notably Digital Europe, InvestEU and the Single Market programme).

The analysis of the collected information identified complementarities between Creative Europe and other programmes and opportunities to improve synergies at strategic, programming and project level to shape operational recommendations and concrete proposals for the next MFF 2021-2027.

3. Evolution of the AV sector as a strategic economic and societal sector

The EU has a long-established policy to support the development of the AV sector. The MEDIA programme, the EU programme devoted to strengthen the competitiveness of the European audiovisual industry and promote cultural diversity via cinema, started in 1991 essentially as an EU response to Hollywood's market dominance. EU support is aimed at promoting the circulation of European AV works (mainly films and TV programming) across EU countries.

Over the last two decades, the scope of the MEDIA programme (now embedded in the Creative Europe programme) enlarged to better reflect the evolution of the audiovisual industry. Newly introduced actions included support for online distribution of digital content and Video-On-Demand (VoD) and the development of video games. However, the bulk of the funding focuses on the theatrical distribution of featured films. The MEDIA programme dedicates almost half of its overall budget to actions supporting the distribution of non-national films in cinemas across Europe. The support to the development of European video games represents around 3% of its budget.¹

Today, media content is at the heart of the digital and creative economy. Driven by technological convergence, the AV sector is growing fast and is increasingly considered as part of a wider DM sector. According to a recent McKinsey report, the global media spending will rise from \$1.6 trillion in 2015 to a projected \$2.1 trillion in 2020, a 5.2% CAGR (compound annual growth rate).² The video games sub-sector is predicted to be the fastest growing segment, rising from \$85,154 million in 2015 to \$132,425 million in 2020 (9.2% CAGR). The cinema sub-sector will rise from \$40,239 million to a projected \$51,732 million (5.2% CAGR), TV advertising from \$180,446 million to \$228,750 million (4.9% CAGR) and in-home video entertainment from \$308,864 million to \$359,760 million (3.1% CAGR). On the other hand, newspapers³ will decrease from \$119,553 million in 2015 to a projected \$107,508 million in 2020 (-2.1% CAGR). By 2019, it is estimated that digital spending will account for more than 50% of overall media spend, fuelled by the expansion of mobile telephony and the improvement of current ICT infrastructures (both broadband and wireless) also in emerging markets.⁴

Digital will continue to be the driving force for media industry growth in the foreseeable future, influenced by ongoing key developments:

- New tools for production of new immersive and interactive DM content, such as 3D, Virtual Reality (VR)⁵ and Augmented Reality (AR), especially in the entertainment sector;
- Artificial intelligence (AI) in content discovery and content creation: as Artificial intelligence technologies develop, new AI-powered content services will emerge;

¹ Source: Creative Europe annual work programmes 2014-2018

² Global media include digital advertising, broadband, TV advertising, in-home video entertainment, audio entertainment, cinema, out-of-home, consumer magazine publishing, newspaper publishing, consumer books, educational publishing, video games. Source: McKinsey&Co (2016) Global Media Report 2016.

³ Newspapers include Daily Newspaper Print Advertising, Daily Newspaper Digital Advertising, Daily Newspaper Print Unit Circulation, Daily Newspaper Print Circulation Spending, Daily Newspaper Paid Digital Unit Circulation, Daily Newspaper Digital Circulation Spending (source: McKinsey, Global Media Report 2016)

⁴ In addition, it is worth mentioning that the professional AV market, which aggregates traditional media and a wide palette of services (ranging from video display and projection to media storage, distribution and production equipment, AV services to new markets, such as hospitality, healthcare, retail or constructions) reached a global market value of \$178 billion in 2016. Through 2022, it is expected that the global pro-AV revenues will increase 4,7% annually. Source: AVIXA, IHS Markit (2017) Global AV Industry Outlook and Trends Analysis (IOTA) 2017

⁵ The global market for virtual reality technologies totalled \$3.7 billion in 2017 and is expected to reach \$39.4 billion by 2022, growing at a CAGR of 60.5% during 2017-2022. Source: BCC Research (2018), Virtual Reality Technologies: Global Market to 2022

- Increasing role of video and mobile content. 91% of consumers now prefer interactive and visual content over traditional, text-based or static media.⁶ Video is being increasingly consumed on mobile devices especially within the youngest demographics;
- Rise of global on-demand services: the VoD global market is expected to reach \$94 billion by 2023 at a CAGR of 8,93% (in 2017 the market was valued at \$56,26 billion)⁷;
- Upsurge of digital advertising (both internet and mobile), expected to become the largest advertising category in the near future⁸;
- New consumption habits will emerge (e.g. wearables, new “screens” in self-driving cars or smart homes), powered by the uptake of disruptive ICT technologies such as the Internet of Things (IoT), High Performance Computing (HPC), Big Data, 5G which will further increase the technological and media convergence.

As a result of convergence, a growing number of media creators and professionals are combining digital expertise (e.g. transmedia storytellers, app developers or virtual reality specialists). The creation and production of DM content are increasingly taking place in collaborative and cross-sectorial environments (e.g. media parks, creative hubs, fab labs or media clusters).

We propose to use the terminology “Digital Media” (DM) to cover all activities linked with cinema, television, news and information, distribution and storage of content and video games.

The high demand of digital content opens up possibilities for novel applications of interactive and immersive DM content to the benefit of a wide array of sectors, such as healthcare, tourism, architecture, marketing or education. This will create massive opportunities for companies that are able to take advantage of the benefit from the digital transition.

At the same time, the ongoing digital transition is shifting the power balance from legacy media companies to new entrants. New powerful distributors (e.g. telecommunication companies, Internet Service Providers, Internet and mobile platforms) challenge existing infrastructures and business practices. Large international DM distributors established outside the EU such as Apple, Google, Amazon, Facebook or Netflix are taking a leading role at production and distribution level.

Notwithstanding the emphasis on the shift to digital, the traditional cinema sector still plays a considerable role in the EU media sector. Over the last decade, film production boomed by 47%.⁹ Cinema theatres remain the main vehicle for the exploitation of feature films. The 2017 European box office topped the €7 billion benchmark for the third time consecutively.¹⁰

With technology and business development as well as new consumption patterns the competitiveness of the European DM and media sector hinges on the industry’s ability to influence the digital transformation and remain present across media platforms globally.

The challenge of keeping pace with the growth of the DM industry has strategic importance to sustain innovation in the EU as it relates to:

- Supporting creative entrepreneurship and the development of digital skills in Europe;
- Preventing talent drain in storytelling and DM expression for future business applications;
- Fostering collaborations between DM industry and technology sector to drive R&I and make the most of new ICT-driven technologies (e.g. AI or blockchain technology);
- Supporting regions and cities to invest in DM and cultural and creative industries to boost territorial development by attracting investment and social capital;

⁶ Zohar Dayan, ‘Visual Content: The Future of Storytelling’ in Forbes, 2018

⁷ Market Research (2018) Future Over the top Content Market Research Report Global Forecast, 2018

⁸ Source: McKinsey&Co (2016) Global Media Report 2016

⁹ European Audiovisual Observatory, Yearbook 2017

¹⁰ European Audiovisual Observatory, ‘EU gross box office topped EUR 7 billion in 2017 for third year running’, press release, 2018 https://www.obs.coe.int/en/web/observatoire/home/-/asset_publisher/9iKCxBYqiO6S/content/eu-gross-box-office-topped-eur-7-billion-in-2017-for-third-year-running

- Politically and socially the goal of promoting cultural exchanges and language and cultural diversity¹¹ needs to be achieved beyond the presence of films in cinema theatres.

Some of these objectives have been addressed in the recently amended Audiovisual Media Services (AVMS) Directive, which constitutes the regulatory leg of the AVMS policy, with particular reference to the obligations on media service providers to ensure a certain share of European works, as set out in articles 16 and 17 of Directive 2010/13, applicable to linear services, and in Art 13 applicable to non-linear services.¹²

The ongoing negotiation on the future MFF 2021-2027 represents the opportunity to reconsider EU programmes for the Cultural and Creative sectors and notably the DM or DM industries.

Considering its strategic importance, it is natural to apprehend support policies across the various policy instruments that relate to:

- Research and Innovation (R&I)
- Competitiveness of SMEs
- Cluster policy
- Education and skills development
- Cohesion policy
- External and development cooperation policy.

This review is the opportunity to promote a more holistic approach enabling the DM sector to be in a better position to benefit from various funding streams.

Before making concrete proposals to this effect, this document will first map the way current programmes are or may be supporting the DM sector in the MFF 2014-2020. This initial mapping will be followed by an analysis on the findings.

Next, the document presents an overview of possible funding opportunities for the DM sector in the future MFF 2021-2027 and assesses potential complementarities and synergies with Creative Europe and across programmes.

Finally, the document proposes operational recommendations to enable a better access of the DM sector to EU funding programmes and it suggests ways to improve synergies across programmes.

¹¹ Cultural diversity is explicitly referred to in Art 167.4 TFUE

¹² The latest review of AVMSD has been completed on 6 November 2018 with the adoption by the Council.

4. Mapping of funding programmes other than Creative Europe

4.1. Introduction

The following sections describe how several EU programmes, other than Creative Europe, are supporting the cultural sector and more particularly the DM sector in the current MFF 2014-2020.

Each programme will be presented separately to facilitate the reading. The mapping includes examples of funded projects to better illustrate the scope and nature of available opportunities for the DM sector.

4.2. Current programmes

4.2.1 Horizon 2020

Horizon 2020 is the largest EU programme dedicated to Research and Innovation (R&I) from concept to market uptake, benefiting from a dedicated budget of nearly €80 billion.

The Programme Regulation makes specific reference to the cultural and creative sector under Pillar II Industrial Leadership and Pillar III Societal Challenges.¹³ Funding that is non-earmarked but available for the cultural sector and DM is included in actions dedicated to SMEs as well as in other sections of the Programme as described below.

Pillar II – Industrial Leadership

In line with the Programme Regulation, funding to support R&I projects is available under the ICT Work Programme for the development and management of digital content.

The Annual Work Programmes 2014-2015 and 2016-2017 included a specific “Content” action line under the call “ICT” aimed at developing new technologies and tools for creative and knowledge industries, amongst which DM industries. Topics covered digital content creation and management, convergence of media¹⁴, advanced digital gaming and gamification technologies, social media content as well as accessibility to digital content by improving management of multilingual AV data. Support to the DM sector was also potentially available in other action lines related to the Future Internet, notably “Big Data”, “5G”, “cloud” and “IoT”.

The current ICT Work Programme 2018-2020 streamlines support for content convergence, social media and other relevant topics for DM under the “Next Generation Internet” action line. Topics include the development of interactive technologies and tools for future hyper-connected social media or multilingual Next Generation Internet. Support is also available in other action lines such as “European Data Infrastructure: HPC, Big Data and Cloud technologies” and “5G”.

Examples of relevant research projects funded under the ICT Work Programme¹⁵

- **Topic: ICT-19-2017 - Media and content convergence**

Title: Audiovisual Technologies for Next Generation Immersive Media (IMMERSIFY)

Budget: 2 488 275 euro

Short description: the scope of Immersify is to develop key tools for allowing the next generation of immersive media applications to widespread immersive content and facilitate its distribution and exhibition by supporting multiple devices and environments (such as PC-

¹³ Regulation (EU) No 1291/2013 establishing Horizon 2020 - the Framework Programme for Research and Innovation (2014-2020)

¹⁴ According to a research carried out by the DM project, 30 projects on convergence of media were financed under Horizon 2020. Source: <https://nem-initiative.org/wp-content/uploads/2018/07/vitalmedia-d1-2-v1-0-final.pdf>

¹⁵ Source: https://cordis.europa.eu/home_en.html

and mobile-based head mounted displays, multi-display systems, and dome, immersive cinemas and deep spaces). The project also allows content creators to produce highly personalized content. Demonstrations are foreseen in the world's most important art and film festivals through project partners (Ars Electronica and Cannes Film Festival).

- **Topic: ICT-20-2017 - Tools for smart digital content in the creative industries**
Title: Visual and textual content re-purposing FOR(4) architecture, design and video virtual reality games
Budget: 3 937 850 euro
Short description: V4Design will develop a platform that provides architects, video game creators and designers of any expertise with the innovative tools necessary to enhance and simplify the creative phase of the design process.
- **Topic: ICT-20-2017 - Tools for smart digital content in the creative industries**
Title: Methods for Managing Audiovisual Data: Combining Automatic Efficiency with Human Accuracy (MeMAD)
Budget: 3 431 593,75 euro
Short description: MeMAD will provide novel methods for an efficient re-use and re-purposing of multilingual audiovisual content which revolutionise video management and digital storytelling in broadcasting and media production.
- **Topic: ICT-08-2017 - 5G PPP Convergent Technologies**
Title: Programmable edge-to-cloud virtualisation fabric for the 5G Media industry (5G Media)
Budget: 7 820 383,75 euro
Short description: 5G-MEDIA aims at innovating media-related applications by investigating how these applications and the underlying 5G network should be coupled and interwork to the benefit of both.
- **Topic: ICT-14-2016-2017 - Big Data PPP: cross-sectorial and cross-lingual data integration and experimentation**
Title: FAke News discovery and propagation from big Data ANalysis and artificial intelliGence Operations (FANDANGO)
Budget: 3 583 125 euro
Short description: The aim of FANDANGO is to aggregate and verify different typologies of news data, media sources, social media, open data, so as to detect fake news and provide a more efficient and verified communication for all European citizens. The project aims to break data interoperability barriers providing unified techniques and an integrated big data platform to support traditional media industries to face the new "data" news economy with a better transparency to the citizens under a Responsible, Research and Innovation prism. Partners include the Vlaamse Radio- en Televisieomroeporganisatie (Belgium) and ANSA (Italy).
- **Topic: ICT-21-2016 - Support technology transfer to the creative industries**
Title: High-Quality VR for Film & TV industry professionals (DDD60)
Budget: 1 226 500 euro
Short description: DDD60 introduced cutting edge video compression and delivery technology to deliver high-quality VR content to Film and TV professionals and showed immersive content in some of the leading Film and TV markets worldwide. Several stakeholders in the DM industry (*Société de Gestion d'opérations commerciales pour le Festival International du Film*; International Documentary Festival Sheffield Ltd; Tampere Film Festival Ry) were members of the consortium to enhance market uptake.
- **Topic: ICT-19-2015 - Technologies for creative industries, social media and convergence**
Title: Object-based broadcasting for European leadership in next generation audio experiences (ORPHEUS)
Budget: 3 998 730 euro

Short description: ORPHEUS developed, implemented and validated a completely new end-to-end object-based media chain for audio content. Object-based media is a revolutionary approach for creating and deploying interactive, personalised, scalable and immersive content. Several media companies, including partners of this project (e.g. British Broadcasting Corporation) are ready to adopt this next-generation media representation.

- **Topic: ICT-19-2015 - Technologies for creative industries, social media and convergence**

Title: In Video Veritas – Verification of Social Media Video Content for the News Industry

Budget: 3 765 706,25 euro

Short description: InVID will build a platform providing services to detect, authenticate and check the reliability and accuracy of newsworthy video files and video content spread via social media. This platform will enable novel newsroom applications for broadcasters, news agencies, web pure-players, newspapers and publishers to integrate social media content into their news output without struggling to know if they can trust the material or how they can reach the user to ask permission for re-use. The InVID platform and applications will be pilot-tested by three leading institutions in the European news industry ecosystem: AFP (the French News Agency), DW (Deutsche Welle), and APA (the Austria Press Agency), and will create new exploitation possibilities for all consortium members.

In addition to R&I projects, the ICT Work Programmes also dedicated funding to foster networking, awareness raising and cross-sectorial collaboration activities and mutual understanding amongst stakeholders within and outside the DM sector (e.g. broadcasters, telecoms, IT companies) through Coordination and Supporting Actions (CSA). These projects can also provide support to clusters, such as the New Media Initiative.¹⁶

Examples of relevant CSA projects funded under the ICT Work Programme

- **Compact: from research to policy through raising awareness of the state of the art on social media and convergence**

Topic: ICT-19-2017 - Media and content convergence

Budget: 999 562,50 euro

Short description: The objective of the project is to increase awareness of the latest technological discoveries among key stakeholders in the context of social media and convergence. The dissemination will be based on key areas that impact the convergence of social media. This includes scientific, political, cultural, legal, economic and technical areas, to name but a few.

- **MediaRoad – European Media Ecosystem for Innovation**

Call: ICT-19-2017 - Media and content convergence

Budget: 994 187,50 euro

Short description: led by EBU (European Broadcasting Union), the consortium composed by public and commercial broadcasters, creative producers and research bodies proposes a highly innovative coordination project with three interconnected Hubs: the Sandbox Hub will enable media organisations to create a series of interlinked incubators, or Sandboxes, where SMEs can test and scale innovative concepts in operational environments; the Policy Hub will develop a policy vision for the whole radio and AV sector on topics such as the EU research agenda, data, 5G, security, immersive media, investment, training and regulatory issues; the Network Hub will create a series of events to bring together broadcasters, researchers, content creators, technologists and entrepreneurs to inspire collaborations and share knowledge.

¹⁶ The NEM Initiative (New European Media Initiative) was established as one of the European Technology Platform under the Seventh Framework Programme, aiming at fostering the convergence between consumer electronics, broadcasting and telecoms. Recently the NEM initiative enlarged its focus towards creative industries, dealing with Connected, Converging and Interactive Media & Creative Industries. Source: <https://nem-initiative.org/>

- **Vital Media**

Topic: ICT-19-2015 - Technologies for creative industries, social media and convergence

Budget: 979 780 euro

Short description: one of the main goals of the VITAL MEDIA project is to enlarge the community in the social media area at the European level, at level of the national and regional clusters, through collaboration amongst the New Media Initiative – NEM and the clusters.

- **I3 – Impact Innovate Invest**

Topic: ICT-19-2015 - Technologies for creative industries, social media and convergence

Budget: 986 750 euro

Short description: I3 will promote a closer relation between researchers and entrepreneurs providing mentorship and tutorship support to researchers and providing access to business angels and investors. The objective is to identify the emerging promising solutions and their feasibility in the convergence and social media sector within the European research ecosystem. I3 aims to connect them with investors, corporates, institutions and media and with Startup Europe Initiative, in order to help them in accessing the market through selected events and exploitation activities.

Within the ICT Work Programme 2018-2020 it is worth mentioning two other potential funding opportunities open to SMEs and other stakeholders in the DM industry:

- The call “Digitising and Transforming European Industry and Services: Digital Innovation Hubs and Platforms”¹⁷, especially to reach out to new or key actors in the DM innovation chain (such as SMEs and mid-caps). Several NEM members constitute or are part of initiated DIHs in the media and creative industries sector declared in the Digital Innovation Hubs Catalogue¹⁸;
- The S+T+ARTS (the Arts stimulating innovation) initiative and prize: in 2018-2020, S+T+ARTS will fund starts light house pilots that will involve artists directly in addressing industrial and societal challenges, open to DM creators.¹⁹

Pillar III – Societal Challenges

Within Societal Challenge 6 "Europe in a changing world: Inclusive, Innovative and Reflective Societies", a number of call topics can be suitable to apply DM content to other sectors for a wider societal use such as learning, promoting social inclusion and cohesion, enhancing users' experience (e.g. in museums, tourism...). Specific call topics focused on the digitisation and curation of cultural assets (AV content is itself part of immaterial and digital cultural heritage) or improving the management and discoverability of AV archives.

The current annual Work Programme 2018-2020 also offers opportunities for research in relation to intellectual property rights and copyright.²⁰

¹⁷ Digital Innovation Hubs (DIH) are one-stop-shops that help companies to become more competitive with regard to their business/production processes, products or services using digital technologies. They are based upon technology infrastructures (competence centres) and provide access to the latest knowledge, expertise and technology. DIHs also provide business and financing support to implement these innovations. In 2016-2017, the EU launched DIH projects to support 600 innovation experiments where about 150 Digital Innovation Hubs and more than 1.200 startups, SMEs and mid-caps take part. Source: <https://ec.europa.eu/digital-single-market/en/digital-innovation-hubs>

¹⁸ Source: https://nem-initiative.org/wp-content/uploads/2018/03/nem-dei_dih-wg-december-2017.pdf

¹⁹ The main goal of the S+T+ARTS initiative is the inclusion of artists in innovation projects funded through residencies of artists in technology institutions and of scientists and technologists in artists' studios. Source: <https://ec.europa.eu/digital-single-market/en/ict-art-starts-platform>

²⁰ DT-GOVERNANCE-13-2019: Digitisation, Digital Single Market and European culture: new challenges for creativity, intellectual property rights and copyright

Examples of relevant research projects funded under Societal Challenge 6 Work Programme

- **Topic: CULT-COOP-08-2016 - Virtual museums and social platform on European digital heritage, memory, identity and cultural interaction**

Title: Emotive - Virtual cultural Experiences through personalised storytelling

Budget: 2 646 447,50 euro

Short description: The principal objective of the EMOTIVE project is to research, design, develop and evaluate methods and tools that can support the cultural and creative industries in creating Virtual Museums which draw on the power of 'emotive storytelling'. This means storytelling that can engage visitors, trigger their emotions, connect them to other people around the world, and enhance their understanding, imagination and, ultimately, their experience of cultural sites and content. EMOTIVE will do this by providing the means to authors of cultural products to create high-quality, interactive, personalised digital stories.

- **Topic: REFLECTIVE-6-2015 - Innovation ecosystems of digital cultural assets**

Title: Innovative e-environment for Research on Cities and the Media

Budget: 3 349 787,50 euro

Short Description: I-Media-Cities is the initiative of 9 European Film Libraries, 5 research institutions, 2 technological providers and a specialist of digital business models to share access to and valorise DM content from their collections for research purposes in a wide range of social sciences (sociology, anthropology, urban planning, etc). The project revolves around cities in European history and identity.

- **Topic: YOUNG-5b-2014 - Societal and political engagement of young people and their perspectives on Europe**

Title: STEP - Societal and political engagement of young people in environmental issues

Budget: 3 157 941,07 euro

Short Description: the overall objective of the project is to develop and pilot test a cloud eParticipation SaaS platform, (available as a mobile application and through a web platform) enhanced with web / social media mining, gamification, machine translation, and visualisation features, which will promote the societal and political participation of young people in the decision-making process on environmental issues.

Support to SMEs

Even if not dedicated to SMEs in the CCI or the DM sector, funding is available through the SME instrument, now part of the European Innovation Council pilot (EIC pilot).²¹

Examples of relevant projects funded under the SME Instrument

- **Call: ICT-37-2015-1 - Open Disruptive Innovation Scheme (implemented through the SME instrument)**

Title: Advanced Lighting Management System for film production, smart lighting and creative industry

Short description: During the project, company will develop Advanced Lighting Management Solution (ALMS) for amateur film production market that offers professional-grade lighting functionality for 80% lower cost. Plus, feature rich ALMS will provide drastically improved creative freedom for creative industry.

- **SMEInst-12-2016-2017 - New business models for inclusive, innovative and reflective societies**

Title: FAST (Film Archive Superior Transfer) – A new paradigm for digital preservation of DM heritage through fast and cost-efficient film digitisation

²¹ Source : <https://ec.europa.eu/programmes/horizon2020/en/h2020-section/sme-instrument>

Short description: The project will develop solutions to prevent deterioration and loss of TV records. Existing solutions for film digitisation are complex and extremely expensive, especially for processing very large collections, such as television materials kept by the major broadcasters. Nevertheless, there is a high commercial as well as public/societal interest in preserving those media contents. FASTFORWARD wants to seize this market opportunity by offering an integrated solution consisting of proprietary hardware, cloud-based software and support in one, easy-to-scale service.

Another interesting initiative for DM SMEs supported by H2020²² and more recently by the Connecting Europe Facility (CEF) is the **FIWARE Accelerator Programme**, promoted by the European Commission as part of the Digital Agenda 2020.²³ Flagged topics include Media and Content. In particular, the IMPACT Growth Smart Content programme addresses the content needs presented by electronic media, telecommunication, gaming, leisure, tourism, culture, education, entertainment, advertising, video and social networks, and others.²⁴

SMEs and other business can also benefit from **financial instruments** supported by H2020. Examples are the **InnovFin** products managed by the EIB Group and funded by H2020 available for start-ups and SMEs but also for mid-caps, larger private companies, research institutes/organisations, universities or an R&I-driven entities.²⁵ However, data on financed companies is not publicly available.

Other support

H2020 also offers support to clusters, notably through the INNOSUP calls in the Work Program “Innovation in SMEs” under Pillar II “Industrial Leadership”, managed by EASME.²⁶ Some DM clusters received funding through this call, including Screen Brussels, Cap Digital, Creative Industry Cluster Hungary.²⁷

Lastly, it is worth mentioning that Pillar I “Excellent Science” can also contribute to research for the CCI and DM sector, since it supports breakthrough research in all scientific fields (including DM). While the main direct beneficiaries of this type of funding are researchers and associated institutions, research outcomes and potential applications could be valuable for the DM industry²⁸ and society at large.²⁹

4.2.2 COSME

COSME, the dedicated EU programme to strengthening the competitiveness and sustainability of SMEs, with an earmarked budget of €2.3 billion (2014-2020) displays a number of support actions to improve access to finance, to markets and framework conditions for European SMEs and to

²² Through the ICT-12-2016 - Net Innovation Initiative.

²³ The FIWARE network of 16 accelerators, operating within the programme, has attracted over 8,000 submissions to their open calls, of which more than 1000 SMEs and startups have been part of the FIWARE business acceleration programme. Source: <https://ec.europa.eu/digital-single-market/en/news/fiware-european-success-story>

²⁴ The IMPACT Growth Smart Content programme is the new project from IMPACT Accelerator, one of the top ten accelerator programs in the world, built in partnership with DOCOMO Digital. Source: <http://www.impact-accelerator.com/smart-content/>

²⁵ More information is available here: <http://www.eib.org/en/products/blending/innovfin/products/index.htm>

²⁶ Notably, the H2020-INNOSUP call “Cluster facilitated projects for new industrial value chains”

²⁷ Source: and the European Cluster Collaboration Platform <https://www.clustercollaboration.eu/>

²⁸ For example, one of the expected results of the ERC-2016-PoC (Proof of Concept Grant) *Emulating visual perception of contrast for image capture, post-production and synthesis* is a commercial software for professionals in three media industries (cinema post-production, photography and videogame development). More information is available at: https://cordis.europa.eu/project/rcn/205770_en.html

²⁹ An interesting example is the ERC-2015-COG (Consolidator Grant) *Video games for the prevention of depression and anxiety: A 21st century approach to emotional and mental health in adolescents*. More information is available at: https://cordis.europa.eu/project/rcn/204759_en.html

promote entrepreneurship and entrepreneurial culture. There is no specific mention of the DM sector in COSME Regulation, nor in the annual work programmes, however the sector is clearly included in the broad scope of supporting SMEs and entrepreneurial culture.

As such, even though the DM sector is not specifically targeted in COSME's support actions, it has received certain support across several topics, primarily geared towards cross-collaborations in which the DM practices or content helped increase the competitiveness of another sector. An example is provided by a COSME-funded project in the tourism sector:

- **COSME action 'Enhancing the competitiveness of the EU tourism sector'** (call 2017) aimed at:
 - Improving the business environment for tourism enterprises, through enhanced socio-economic and market intelligence and exchange of best practices
 - Diversifying and increasing the visibility of Europe's transnational tourism offer
 - Exploiting synergies between tourism and CCIIs
- **Project:** FAMOUS – Film Festivals and Movie Tourism across UNESCO sites (2018-2019)³⁰
- **EU Budget:** 286 632 euro
- **Leader:** Regione Liguria (IT)
- **Participants:** Italian Chamber of Commerce Lyon (FR), Destination Makers SRLS (IT), Ellenikiethniki Etnikiepitropi Giatin UNESCO (GR), Inmedia Solutions SL (ES), Palazzo Ducale Fondazione per la Cultura (IT), Top Kinisis TrDMel Public Limited (CY), Universita Malta (MT)
- **Description:** The project develops a thematic product of Smart Movie Tourism that links European destinations with UNESCO cultural sites that have been the subject of well-renowned movies and film festivals. The product creates a two-fold synergy between tourism and CCIIs, in particular the DM sector, as the thematic qualification of the product is enabled by a creative industry (DM industry) and exploits the intrinsic cultural value of European film heritage. The product builds a storytelling that is unfolded across different platforms and formats, arranging a creative cumulative story experience that starts from a movie and, through AR/VR, continues with a game play. The product is thought to offer, by the means of digital and audiovisual content and technology, a new exploitation window for the European film heritage.

COSME also supports research and innovation endeavours, by encouraging the market uptake of prototypes, emerging technological solutions or other innovation-based activities. Important support is therefore channelled with a view to bridge the gap between R&I on one hand and on market on the other hand, by supporting scale-up, market replication or first application of projects related to new products or services.

SMEs aiming to change production and distribution patterns of their products by using emerging technologies related to the DM field (i.e. 3D technology, motion design or other visualisation techniques) were supported with COSME funding in order to push their innovative solutions to the market and minimise residual risks linked to scaling-up. One example of such business model is presented below.

- **COSME action 'Design-based consumer goods'** (call 2015) aimed at:
 - Encouraging the market uptake of new and creative solutions in design-based consumer goods area
 - Bridging the gap between R&I on one hand and on the other by supporting scale-up, market replication of projects related to novel products, services, techniques, processes.
- **Project:** VISAGE – Virtual Sample Generator for 3D textile design (2016-2018)³¹
- **EU budget:** 953 383 euro
- **Leader:** Domina SRL (IT)

³⁰ Source: COSME data hub

³¹ Source: COSME data hub

- **Participants:** Agenzia Nazionale per le Nuove Tecnologie, L'Energia e lo Sviluppo (IT), European Apparel and Textile Confederation (BE), Filatura Lana Pettinata Tralbaldo SRL (IT), Fratelli Piacenza SPA (IT), Scotcad Textiles Limited (UK)
- **Description:** The project implements the full deployment of 3D virtual textile design technology into a new solution, for EU fashion textile SMEs to create a single and integrated ecosystem at commercial level. VISAGE will be implemented via the following technologies: 3D effects for realistic advanced fabric surface visualisation, content generation on the basis of production cycle and a. software integration platform and interoperability set up.

COSME also offered specific support to CCIIs (which include the DM sector) through a single action launched in 2017 'European Incubation Networks for Creativity-Driven Innovation', with an earmarked budget of €2.6 million. The action aimed at supporting business development and scaling-up of companies in the creative industries through a cross-national incubators-driven approach integrating art and design skills with technology and science.

COSME provides important support to clusters' collaboration in order to enhance SMEs internationalisation and cooperation in new areas by contributing to the emergence of new value chains and business models. The programme does that via several initiatives, such as Support to Cluster Excellence which promotes benchmarking and training tools for cluster organisations, or Support to Cluster Internationalisation, which enables EU clusters to profile themselves, exchange experience and search for cooperation partners inside and outside the EU. These actions are part of the wider cluster policy support at EU level, which foresees complementarities with Horizon 2020 and with Structural Funds, via the Smart Specialisation Platform which assists regional and national policy makers to develop and implement their research and innovation strategies for regions.³²

Clusters are very important for the development of the DM sector as they:

- Increase productivity through specialised inputs, access to information, synergies and access to public goods
- Foster innovation through cooperative research and competitive striving, also by involving research institutes and universities
- Raise the attractiveness of regions by stimulating competence development in the region and motivating people not to migrate
- Protect employment and promote entrepreneurship, as they are large providers of jobs by attracting inward investment and largely contributing to GDP. Much of the added-value typically comes from SMEs supplying the large end producers.

However, out of more than 250 clusters that benefited from COSME funding between 2014-2018, we identified less than 10 which are operating within the wider audiovisual sector (i.e. including ICT technologies).³³ One COSME-funded project supporting clusters' collaboration in the DM sector and digital industries is presented below.

- **COSME action 'Clusters Excellence'** (call 2014) aimed at assisting cluster organisations and business networks to provide high quality services to SMEs in different areas:
 - Improve their management practices, competitive advantages and value chain analysis capacities
 - Services on partnering, creativity integration, internationalisation, exploitation of key enabling technologies, IPR protection
- **Project:** CECIL – Cluster Excellence for Creative Industry Leadership³⁴
- **EU budget:** 299 450 euro
- **Leader:** Madrid Plataforma ICT DM (ES)

³² See more info at the EU Cluster Portal http://ec.europa.eu/growth/industry/policy/cluster_en

³³ Source: COSME data hub and the EU Cluster Collaboration Platform <https://www.clustercollaboration.eu/>

³⁴ Source: COSME data hub

- **Participants:** Cap Digital (FR), Danmarks Tekniske Universitet (DK), IBEC Limited Irish Business and Employers Confederation (IE), Momentum ICT Federation LTD (UK), RCD Romagna Creative District (IT), Stowarzyszenie Rozwoju Społeczno-Gospodarczego Wiedza (PL)
- **Description:** CECIL unites European clusters to drive cluster excellence and provide top professional support services in the digital cultural and creative industries. All participants take part in the benchmarking activity, increase their level of expertise in theoretical and practical training activities and integrate the lessons learnt into their clusters' strategies. CECIL analyses the currently provided services to design new ones that better adjust to the committed participants' needs and/or upgrade current services. Additional dissemination activities are conducted to raise awareness of the benefits of investing in cluster excellence activities among the clusters' committed participants, to other clusters and regional/national and European policy makers.

COSME also funds skills development as a way to increase capacity for SMEs to access to markets and encourage entrepreneurship. In particular, the action Erasmus for young entrepreneurs aims to support future entrepreneurs in building management and business skills. One awarded consortium focused on developing these types of skills for operators in the creative industries (including the DM sector).

- **COSME action 'Erasmus for Young Entrepreneurs'** (calls 2014 and 2017) aiming at helping new entrepreneurs acquire and build managerial skills and further develop their business plan by learning from experienced entrepreneurs.
- **Project:** EXCITE (2015-2016)³⁵
- **EU budget:** 363 874 euro
- **Leader:** Creative Industries Kosice (SK)
- **Participants:** Ale Kommun (SWE), Creative Region Linz & Upper Austria GMBH (AT), Kosice IT Valley zpo (SK), Peopleing Estudio Bilbao SLL (ES), Stadt Gelsenkirchen (DE), European Creative Business Network (NL)
- **Description:** The project is dedicated to the support and growth of CCIs, from advertising and crafts to performing arts and video games. It focuses on improving entrepreneurial skills in the CCIs (including DM), a need strongly felt by the sector. To meet this need, the consortium planned to create 59 matchmakings between new entrepreneurs and experienced hosts (companies) to provide the former with business knowledge and market access, supplied by the experienced companies. Knowledge is backed with support by projects' partners according to their existing business support activities and facilities.
- **Follow-up:** EXCITE 2.0 (2018-2019)
 - **same objectives** – wider purpose to create 72 matchmakings between new entrepreneurs and experienced hosts.
 - **EU budget:** 427 393 euro
 - **Additional partners:** C2MASI SL (ES), Kulturni Kod (SRB), Poligon (SI)

4.2.3 ERASMUS+

Erasmus+ offers opportunities to CCI and the DM sector the fields of education, training and youth in line with the Agenda for new skills and jobs.³⁶ The Programme has an overall indicative financial envelope of 14.774 billion EUR under Heading 1 and of 1.680 billion EUR under Heading 4 of the EU Budget for 2014-2020.

The Programme offers support to establish international partnerships to foster cross-borders cooperation amongst education institutions, industry or other organisations to better address possible skills gap (e.g. new storytelling techniques or digital skills for new technologies and tools). The programme also favours the use of DM content and tools (e.g. VR, gaming) to improve

³⁵ Source: COSME data hub

³⁶ Available at: <http://ec.europa.eu/social/main.jsp?catId=958>

teaching techniques or learning experience. The programme targets particularly students and young professionals, but it can also support adult education, vocational training and lifelong learning projects. These actions are notably supported by the Programme's Key Action 2 "Cooperation for Innovation and the Exchange of Good Practices". In particular, the "ICT, new technology and digital competences" priority axis offers opportunities to fund activities relevant to digital skills development for the future job market.

In relation to media and journalism, the Erasmus+ Programme continues to support the Mundus Journalism Consortium which has been offering a 2-year Master's programme in Journalism, Media and Globalisation since 2005.³⁷

Examples of relevant funded projects

- **ICSS (International Creative Soundtrack Studies)**
Call: Strategic Partnerships for higher education
Budget: 446 850,4 euro
Short description: is a strategic partnership with the aim to develop an international programme in music composition for the audiovisual named InMICS (International Master in Composition for Screen). The partnership is composed of 4 higher artistic education institutions with a great expertise in teaching music composition for the audiovisual and of 4 professional partners active in the fields of cinema and audiovisual arts and showing a particular interest in musical creation: Lyon CNSMD, coordinator, and Aubagne International Film Festival (France), KASK & Conservatorium/School of Arts Gent and Film Fest Gent (Belgium), Conservatorio di Musica G.B. Martini and Fondazione Cineteca di Bologna (Italy), Faculty of Music/University of Montreal and Permission Inc specialised in copyright clearance. (Canada).
- **DIG IT: Digital Storytelling meets the world of work**
Call: Strategic Partnerships for vocational education and training
Budget: 153 147 euro
The DIG IT project focused on cooperation for innovation and exchange of good practices between educators, schools and organisations. The key element of the project was the method of Digital Storytelling which combines the art of telling stories with a variety of digital multimedia, such as images, audio and video. Students gained knowledge about the labour market skills and entrepreneurship through interviews and discussions with professionals and high-profile decision makers in Europe.
- **Educational cinema: from non-formal learning to a curriculum adaptation**
Call: Strategic Partnerships addressing more than one field
Budget: 51 310 euro
Short description: This project is a Strategic Partnerships aimed at creating a network at European level where youth organisations with major European recognition in the field of educational film, develop curricular proposals adapted to various EU countries to introduce this type of film in the school environment as a useful tool to develop skills of children. And enhance the Spanish language in the EU.
- **Internationalisation serious Game for Start-ups and entrepreneurs**
Call: Strategic Partnerships for vocational education and training
Budget: 214 673 euro
The specific project aim is to embed strategic management Virtual Games (VG) within business education by enhancing trainers' competencies to create virtual reality contents and use it on strategic management training.
- **YOUNGSTERS I.DOC MAKERS (YIDOCM).**
Call: Strategic Partnerships for vocational education and training

³⁷ More information is available here: <http://mundusjournalism.com/>

Budget: 165 300 euro

The project is an applied audiovisual innovation project developed by young students from professional education centres of Image and Sound, Graphic Arts and Informatics in Europe. YIDOCM culminates the evolution of the project "Youth seen by young people" towards interactive digital environments within the current communicative context. This project promotes the adaptation of schools and future professionals to changes in the online audiovisual context. Given the convergence of conventional media in the internet, in close symbiosis with social networks thanks to the development of new communication technologies, documentary genre has undergone important changes that result in a transmedia treatment of projects, providing interactivity to the documentary genre and expanding the story thanks to the development of the webdoc.

Other opportunities are included in the Key Action 1 "Supports mobility in the education, training and youth", which can be instrumental to enhance employability in the DM market and support youth employment. Relevant topics are "creativity and culture", "entrepreneurial education", "ICT and digital skills".

Examples of relevant funded projects

- **Newsroom In the Palace - NIP**

Call: Learning Mobility of Individuals - Large Scale European Voluntary Service Events

Budget: 124 228 euro

Short description: 75 young people from 15 Programme and/or Partner countries have had the opportunity to get an inside touch of the organisation and working process of a festival in Sofia, Bulgaria and 3 main related events – the International Short Film Festival, Film Training (Filmer Forge) and Industry Gathering (Industry Market). As volunteers they developed knowledge, skills and competences improving their employment prospects on the European labour market of audiovisual services and empowering their active role as citizens.

- **FILMAKER**

Call: Learning Mobility of Individuals - Youth mobility

Budget: 32 880 euro

Short description: FILMAKER project brought together 56 participants from Romania, Iceland, Italy, Turkey, Spain, Estonia for 12 days in Busteni, Romania, in the period of 17-28th October, 2014, to address the topic of entrepreneurship and youth employment by creative methods of non-formal education, as: Public Café, Living Library, creating screenplays, making short films and animated films.

4.2.4 European Structural and Investment Funds (ESIF)

With an earmarked budget of €352 billion (almost a third of the total EU budget), the Cohesion Policy aims to reduce differences between regions and to ensure growth across Europe. European Structural and Investment Funds (ESIF) are among its main tools. A prerequisite for regions to receive funding from the European Regional Development Fund is to develop a Research and Innovation strategy for Smart Specialisation.

Smart Specialisation strategies

Smart Specialisation is a place-based approach characterised by the identification of strategic areas for intervention based on the analysis of the strengths and potential of the economy with wide stakeholder involvement. The approach embraces a technological-driven approach supported by robust monitoring and evaluation tools.

The Smart Specialisation Strategy represents a key element to achieve the three thematic priorities of Europe 2020 – smart, sustainable and inclusive growth, as it is in position to leverage important EU budget. Over the past five years, more than 120 Smart Specialisation Strategies have been developed across Europe, with more than €67 billion available to support these

strategies. Expected achievements by 2020 include bringing 15000 new products to market and creating 140000 new start-ups and 350000 new jobs.³⁸

Over the current multiannual financial period, the CCIs have increasingly benefited from regional investment under the Smart Specialisation Strategies in order to drive local social cohesion, to strengthen the competitiveness of SMEs, to improve access to culture and digitisation of services, to develop sustainable tourism infrastructure and ICT, or to transform the declining industrial regions.³⁹ According to the RIS3 database, there are currently 118 Smart Specialisation Strategies developed by regions across Europe which explore the creative industries for regional development.⁴⁰ However, it is difficult to know the overall EU budget invested within these strategies in relation to CCIs, as there is currently no harmonised such data collection at EU level.

However, despite the strategic importance of the AV sector to drive innovation and social cohesion and economic growth, the sector is currently specifically embedded in less than a half of the identified smart specialisation strategies leveraging CCIs. The RIS3 database has returned 48 results when queried according to the 'Motion picture, video and television programme production, sound recording and music publishing activities' – classified as an economic sub-sector under the general thematic of ICT.

Below we show three ways in which the AV sector can be included in strategies for regional development and benefit from Structural Funds, as returned by the research.

AV for education

New technologies have dramatically influenced the education (particularly the way of teaching, of presenting information). 3D modelling and virtual reality open a new level of understanding and conceptualising information. Coupled with a strong narrative (innovative content), these technologies will contribute in making education more efficient. Ex: Nord-Pas de Calais region aims to reinforce the Training sector (especially Vocational training) with the integration of immersive technologies.

AV for tourism

Emerging technologies for the tourism sector and valorisation of cultural heritage, co-creation for immersive experiences for the discovering of heritage and touristic places. Ex: Sicily aims for cross-sectorial innovation (virtual reality and 3D videos to enhance the tourist experience)

AV for healthcare

The integration of health sciences with new media to improve healthcare services, give patients increased autonomy in accessing and manipulating healthcare services, also innovate protocols in treating patient with certain impairments such as locomotory disabilities. (ex. Malta's healthcare sector is capitalising on the country's significant component of R&D investment to develop e-health solutions or advanced engineering prototypes using new technologies to treat different medical conditions).

INTERREG EUROPE

Opportunities are also offered by the INTERREG Europe programme funded by the ERDF (€ 359 million for 2014-2020). INTERREG Europe supports interregional cooperation between managing authorities of structural funds in Europe. A growing number of regions promote projects on culture and creativity including DM, since CCI are increasingly included in regional smart specialisation strategy.

Projects can be fully focused on DM or include the sector within a broader CCI support.

³⁸ Source : http://ec.europa.eu/regional_policy/en/newsroom/news/2018/09/26-09-2018-made-in-the-eu-smart-specialisation-inspires-the-world

³⁹ Source: project Culture for Cities and Regions <http://www.cultureforcitiesandregions.eu/culture/home>

⁴⁰ The RIS3 database was queried based on the 'Arts, creative and entertainment industries' economic sector

Examples of relevant funded projects under INTERREG Europe

- **Greening the creative industries: improving policy practices for the European Audiovisual industry**

Total Budget: 2 004 082,00 euro

Short description: Green Screen aims to reduce the carbon footprint of European film and TV production. The film and TV industries are a successful driver for growth across Europe, but they are also a major source of carbon emissions. Productions move between locations and affect the environment through their use of transport, construction, lighting, catering and water. Some companies have recognised the environmental impact of their activities and are changing working practices to make their operations more sustainable.

- **CRE:HUB**

Total Budget: 1 484 484,00 euro

Short description: CRE:HUB brings together eight regions that consider Cultural and Creative Industries (CCI) a strategic sector of development and want to create new enterprises and to support the existing ones working in this field, including DM.

European Social Fund

The European Social Fund (ESF) is Europe's main instrument for ensuring fairer job opportunities for EU citizens and investing in EU's human capital, with an earmarked budget of more than €80 billion in the current MFF. The ESF priorities focus on boosting the adaptability of workers with new skills, on improving access to employment by helping young people make the transition from school to work, or training less-skilled job-seekers to improve their job prospects. Acquiring and developing digital skills has been increasingly streamlined in the ESF priorities, also in line with the new Skills Agenda for Europe which recognises the need for new multidisciplinary digital skills, as vital for innovation, growth, jobs and EU competitiveness.⁴¹

Examples of relevant funded projects

Title: Skills for Digital Economy

ESF budget: £2.6 million

Leader: Creative Skillset

Duration: 2012-2015

Description: The project focused on helping people in the CIs upgrade their digital skills and enhance their career prospects in the region of West Wales and The Valleys. It offered a variety of short and part-time courses to almost 1 000 people. The training options were selected and funded after the project team and key local employers collaborated to assess needs. The project can boast many individual successes. For example, an award-winning film-maker took part in a seven-month training programme on multi-platform production management, which boosted her career. Meanwhile, a visual effects producer who was facing redundancy acquired new management skills that have helped her find a job.

4.2.5 External and Development Cooperation programmes

Support to the circulation of EU films and cinema is been made available as part of EU's cultural cooperation with third countries. More than half of the 139 EUDs (i.e. 76 EUDs) around the world are involved in the organisation of film festivals (EUFFs) and other film events with a view to promote the EU, showcase European culture and use film as a cultural diplomacy tool.⁴² 71% of

⁴¹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions – A New Skills Agenda for Europe SWD(2016) 195 final, Brussels 10.6.2016

⁴² KEA (2015) Feasibility study exploring different possible modus operandi for making available a package of European films – for the European Commission, DG CONNECT

EUFFs are organised on a budget under €20,000 mainly coming from the Press and Information Section of the EUD.⁴³

Other funding for the cultural and DM sector is available from different financial instruments under the EU international development and cooperation policy. These instruments have different policy objectives according to their geographical or thematic scope as well as specific implementation modalities managed by different Directorate Generals (namely DG NEAR, DG DEVCO and EEAS), as briefly presented below.

Enlargement Policy (DG NEAR)

For the Enlargement countries (candidates and potential candidates)⁴⁴, support to cultural organisations is potentially available under the Instrument for Pre-Accession Assistance (IPA) II.⁴⁵ IPA II has a dedicated budget of € 11.7 billion for the period 2014-2020. IPA II targets reforms within the framework of pre-defined sectors according to the Country Strategy Papers made for each beneficiary for the 7-year period. These sectors cover areas closely linked to the enlargement strategy, such as democracy and governance, rule of law or innovation and competitiveness. Culture and CCI, however, are not explicitly mentioned amongst the key sectors to support.⁴⁶

Neighbourhood Policy (DG NEAR)

DG NEAR is currently supporting several initiatives to develop the potential of the CCI including DM sector for neighbouring countries. Specific support to CCI is provided under the European Neighbourhood Instrument (ENI) within the framework of the revised European Neighbourhood Policy (ENP). ENI has an allocated budget of €15.4 billion for the period 2014-2020 and finances several initiatives both for Eastern and Southern neighbourhood partner countries.

In Eastern Europe, the Eastern Partnership (EaP) Culture and Creativity Programme II has an allocated budget of €4,2 million for 2015-2018.⁴⁷ While the programme does not foresee any specific actions targeting the DM sector, the programme provides important support to capacity building for the development and professionalisation of the CCS as well as to increase the participation of public and private actors in international cultural cooperation initiatives in the EaP countries. The programme also supports studies and research in the field of culture and AV.⁴⁸

In the field of media freedom and pluralism, for the period 2014-2020 the EU has developed a long-term strategic approach in the Western Balkans with a focus on media accountability, funding, capacity building, regional cooperation and young journalists.⁴⁹

In Southern Europe, the Med Culture programme had an allocated budget of €9 million for the period 2014-2017.⁵⁰ The programme accompanies partner countries in developing and improving cultural policies and practices, reinforcing the capacity of cultural policy makers and promoting

⁴³ *Ibid*

⁴⁴ Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Kosovo, Montenegro, Serbia, and Turkey.

⁴⁵ EU policies in the field of culture are part of the 'EU acquis' that need to be implemented under negotiating Chapter 26 on Education and Culture

⁴⁶ It should be mentioned, however, that IPA II supports the co-financing of the entry tickets for the Creative Europe programme.

⁴⁷ Targeted countries are Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine. More information is available at <https://www.culturepartnership.eu/en>

⁴⁸ Examples include the report on *Developing the Film Sector in Azerbaijan*. More information is available at <https://www.culturepartnership.eu/en/article/sub-sector-report-az>

⁴⁹ More information is available here: https://ec.europa.eu/neighbourhood-enlargement/news_corner/news/european-union-strengthens-its-support-media-freedom-and-young-journalists-western_en

⁵⁰ Targeted partner countries are Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia. More information is available at <https://www.medculture.eu/about/overview>

investment and the development of cultural operators' business capabilities. While not directly targeting DM, the programme supports the development of an enabling ecosystem for the sector.

More specifically for the DM sector, the new **MedFilm programme** has an allocated budget of €4.5 million for the period 2017-2020. The programme builds on the experience of past programs notably the EuroMed DM III, which run from 2011 to 2013. The specific objectives of the MedFilm programme are to promote the role of women in the film industry on screen, to promote freedom of expression by encouraging filmmakers from the region to tackle sensitive issues and to facilitate the access to market and exchanges of films throughout the Mediterranean. A call for grant applicants was launched in July 2016 and three grants have been awarded respectively to Fundacio Interarts per a la cooperacio cultural; Gruppo di Volontariado Civile (GVC) and UNESCO.⁵¹

Another initiative funded by the ENI in Southern Europe is the project CCI Clusters: Development of Clusters in Cultural and Creative Industries in the Southern Mediterranean with an allocated budget of €5.6 million for 2013-2017, implemented by United Nations Industrial Development Organisation (UNIDO). However, no cluster in the DM sector has been selected.⁵² Other opportunities are available based on bilateral agreements with partner countries or specific calls for proposals, for instance in support to the modernisation of the media sector.⁵³

In the field of media freedom and pluralism, the European Union Programme "OPEN Neighbourhood: opportunities, participation, engagement and networking"⁵⁴ supports the project "OPEN Media Hub: networking, on-the-job training and support to media professionals across the EU Neighbourhood area".⁵⁵

International development policy (DG DEVCO)

One of the most relevant opportunity for the DM sector was the ACPCultures+ program financed under the 10th European Development Fund (EDF) from 2012 to 2017 with an allocated budget of €30 million.⁵⁶ The programme provided support to cinema/DM and other cultural industries. The support to the DM sector is mostly concentrated on creation ("Maisha Film Lab – regional screenwriting Labs"), production (e.g. "AFRICADOC production") distribution and circulation, including digital distribution through VOD platforms ("AfricaFilm. TV-mobicine", Sénégal; "Afrique en doc TV") as well as film festivals (e.g. the ACP-Culture Prize at the FESPACO 2017). The programme also funds training especially for young professionals. Very few projects focus on innovative aspects of the DM sector such as skills development for 3D animation ("ACP 3D").⁵⁷

Several sections of the Regulation of the Development Cooperation Instrument (DCI) also acknowledge the role of culture including the DM sector.⁵⁸ The budget allocated under the DCI for the period 2014-2020 is €19.6 billion. In particular, the €10 million programme for Intercultural Dialogue and Culture (under the Global Public Good and Challenges programme) represents an opportunity for cultural operators in many third countries. However, the main objectives of the

⁵¹ Source: <https://www.medculture.eu/information/news/europe-aid-call-proposals-med-film>

⁵² <https://www.medcreative.org/success-stories>

⁵³ A call for proposals for the reinforcement of the civil society in the media sector was launched in Tunisia in 2016 with an overall budget of €1.1 million (EuropeAid/151550/DD/ACT/TN)

⁵⁴ More information is available here: <https://www.euneighbours.eu/en/policy/about-project>

⁵⁵ More information is available here: <https://openmediahub.com/>

⁵⁶ The EDF finances cultural programmes that are managed and implemented by the Secretariat of the ACP Group of States. In particular, since 2007, 3 programs have been financed by the 9th and 10th EDF: ACPFilm, ACPCultures, and ACPCultures+

⁵⁷ Source: ACPCulture+ (2018) 5 years Results Impact Data, ACP Secretariat

⁵⁸ DCI aims to reduce poverty and foster sustainable economic, social and environmental development as well as promoting democracy, the rule of law, good governance and respect for human rights.

programme were mostly related to foster intercultural dialogue rather than the professionalisation of the CCI and support to entrepreneurship, thus the actual opportunities for operators in the DM sector are low.

Other opportunities are available under other thematic programs managed by DG DEVCO, such as the European Instrument for Democracy and Human Rights (EIDHR)⁵⁹ or following specific calls for proposals managed by the EU Delegations. Furthermore, many of the EU's strategic partners have strong cultural diplomacy strategies (e.g. US, South Africa, China to name a few) which can lead to opportunities for the AV sector, for instance support to AV producers. These actions, however, are often dedicated to cultural operators and artists and lack a specific focus on the industrial dimension of the CCI.

Foreign Policy Instrument (EEAS)

Funding is available through activities managed by national cultural institutes and EUNIC (e.g. support to clusters in the DM sector) and also through the EU Cultural Diplomacy Platform.⁶⁰

A new two-year scheme with a budget of € 1.5 million to organise EU film festivals in a more coherent and strategic way was launched in 2017 (following a study carried out in 2015⁶¹) under the new PI action for Global Public Diplomacy.

4.2.6 Other actions and initiatives

The EU Programme for Employment and Social Innovation (EaSI) supports the Creative Skills Europe project, a platform to facilitate dialogue between a wide range of stakeholders from the European AV and live performance sectors including trade unions, employers' organisations, national skills bodies, education & training providers, professional associations. The objective is to better adjust the sector training offer to the needs on the ground, to facilitate access to training for all types of workers at different moments of their careers, to contribute to the development of the sector and to secure professionals' career paths.⁶²

In the field of media and journalism, the **EU's Multimedia Actions** - promoted by the EC within the Digital Single Market Strategy - aim to engage citizens in EU policy-making process by providing them with information about European issues, thus reinforcing Europe's democratic pillars.⁶³ Three actions receive funding under this line:

- the TV channel Euronews NBC⁶⁴
- the radio network Euranet Plus⁶⁵
- data-driven news production.⁶⁶

Further to the initiative of the European Parliament (EP), the EC is also co-funding preparatory actions and pilot projects in the fields of media freedom, media pluralism, quality journalism and media literacy.

⁵⁹ Source: https://ec.europa.eu/europeaid/projects/strengthening-film-means-promoting-diversity-and-democratisation_en

⁶⁰ <https://www.eunicglobal.eu/clusters>

⁶¹ KEA (2015) Feasibility study exploring different possible modus operandi for making available a package of European films – for the European Commission, DG CONNECT

⁶² More information available at <http://www.creativeskillseurope.eu/about-us/>

⁶³ More information available at: <https://ec.europa.eu/digital-single-market/en/multimedia-actions>

⁶⁴ <https://www.euronews.com/>

⁶⁵ <https://euranetplus-inside.eu/>

⁶⁶ More information available at: <https://ec.europa.eu/digital-single-market/en/news/call-proposals-field-data-driven-news-production-0>

One such action is run by the **European Centre for Press and Media Freedom (ECPMF)** based in Leipzig (Germany) and its partners.⁶⁷ An example of co-funded project managed by Index on Censorship as part of the ECPMF is the **Mapping Media Freedom** project, which aims to identify threats, violations and limitations faced by media workers throughout European Union member states, candidates for entry and neighbouring countries.⁶⁸ In 2018, the budget earmarked for the co-financing of the projects is EUR 1 000 000. In particular, the IJ4EU grant is a new fund launched in 2018 by the ECPMF and the International Press Institute (IPI) to support cross-border investigative reporting in the EU. The fund is managed by IPI.⁶⁹

In 2017, a budget of EUR 350,000 has been awarded for a preparatory action to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute in Florence (Italy) to implement the **Media Pluralism Monitor (MPM)** across all EU Member states, as well as in Serbia, Turkey and FYROM (Former Yugoslav Republic of Macedonia).⁷⁰

In 2016, the EC launched a Call for Proposals for **pilot projects on “Media Literacy for All”**. The objective is to develop actions aimed at increasing the critical thinking towards the media among citizens of all ages and to test the feasibility and usefulness of such actions. Two pilot projects have been selected for funding⁷¹:

- Mind over Media in the European Union (€ 125,000)
- Media in Action (€ 120,106)

The Work programme for 2018 for Pilot Projects and Preparatory Actions in the field of Communications Networks, Content and Technology adopted by the European Commission on 22 October 2018 ((C(2018) 6834 final) foresees a number of new actions in the field of media pluralism, quality journalism and media literacy.

4.3. Analysis and conclusions on this initial mapping

The analysis of the mapped programmes focuses on two main aspects:

- 1) accessibility of funding opportunities to DM stakeholders and
- 2) synergies between Creative Europe and other programmes.

The only programme that addresses to a certain extent the ongoing digital transformation of the media industry with dedicated call topics is Horizon 2020, especially the ICT work programme. The programmes dedicated to international cooperation also considers DM but in its more limited scope focusing generally focusing on films (e.g. ACPCulture+, MedFilm).

4.3.1 Stakeholders’ accessibility to funding opportunities

The mapping shows that funding opportunities for the CCI and the DM sector are available in all mapped programmes. However, overall the support does not specifically target the DM sector, besides targeted actions and initiatives in the field of media and journalism. Few calls explicitly target CCI, of which the DM is an implicit part. As a result, this seems to act as a disincentive to apply for funding.

The majority of opportunities follow a bottom-up approach, being open to CCI (and thus for the DM sector) but not specifically flagged for them (e.g. COSME, SME Instruments, InnovFin, or Erasmus+). The research revealed that the DM operators do not make much use of these opportunities, as a small number of funded projects across the mapped programmes involved beneficiaries from the sector. COSME’s beneficiaries are most often regional and national economic and business associations or SMEs active in manufacturing and overall light industries.

⁶⁷ More information available at: <https://ec.europa.eu/digital-single-market/en/media-freedom-projects>

⁶⁸ More information available at: <https://mappingmediafreedom.org/>

⁶⁹ More information available at: <https://www.investigativejournalismforeu.net/guidelines/>

⁷⁰ More information available at: <https://ec.europa.eu/digital-single-market/en/news/media-pluralism-monitor-report-2017>

⁷¹ More information available at: <https://ec.europa.eu/digital-single-market/en/news/results-2016-call-proposals-media-literacy-all>

In relation to Erasmus+, the research revealed that most of the beneficiaries are education institutions with little participation from the industry. Furthermore, no project related to the DM sector has been found in actions aimed to strengthen the cooperation between higher education institutions and enterprises (Knowledge Alliance) or to address sector-specific labour market needs (Sector Skills Alliance).

The paper advances the following considerations as elements that would explain lack of accessibility:

- Limited representativity of the sector in shaping EU programmes: few stakeholders from the DM sector participate or are invited to participate in the stakeholders' consultations to shape current programmes (notably H2020 and COSME)⁷²;
- Lack of awareness: there is limited visibility and promotion of funding opportunities for the DM sector in programmes other than CE, for instance on the participant portals of other programmes or on dedicated webpages to DM stakeholders.⁷³ Creative Europe desks might also provide stakeholders with fewer information on additional funding opportunities;
- Complexity of funding rules: funding procedures are often complex and different across different programmes. This is an obstacle to participation, especially for small players.

4.3.2 Synergies with CE and across programmes

Synergies imply not only combining EU funding to finance a project or initiative, but, more widely, joint or coordinated efforts from programmes across policy fields to achieve greater impact and efficiency. The different EU programmes have a certain degree of compatibility and display potential for synergies, with the purpose to amplify research and innovation investments and their impact by combining different forms of innovation⁷⁴ and competitiveness support⁷⁵. Synergies are thus about obtaining enhanced impacts on competitiveness of SMEs, jobs and growth, in line with the Europe 2020 strategy, by combining different EU funds and instruments in a strategic and cohesive manner.⁷⁶ For instance, Horizon 2020, COSME and ESIF generally fund two complementary types of activities in relation to R&I:

1. **Upstream activities** – which involve building the appropriate capacities to R&I, such as research infrastructures, equipment, innovation infrastructures or social capital. These capacities are usually developed with Structural Funds.
2. **Downstream activities** – which lead to the market and creation of economic value. They stem from research, development and demonstration activities, technology transfer, innovation audits to identify potential demand for R&I, or pilot lines for first production and pre-commercial procurement projects, support to clusters, awareness raising and dissemination activities. They are usually developed with funding from H2020 and COSME.

Furthermore, these actions are highly compatible with Creative Europe which does not support R&I infrastructures for the DM sector, nor large-scale investment in culture-driven regional

⁷² See for instance stakeholders' consultations on COSME mid-term evaluation here https://ec.europa.eu/info/files/cosme-interim-evaluation-responses-registered-october-2017_en or on COSME beyond 2020 here <https://cor.europa.eu/en/our-work/Pages/OpinionTimeline.aspx?opId=CDR-3215-2017> or on Horizon2020 mid-term evaluation here http://ec.europa.eu/research/evaluations/pdf/archive/h2020_evaluations/h2020_stakeholder_consultation_042017_web.pdf#view=fit&pagemode=none

⁷³ Source: https://ec.europa.eu/culture/policy/audiovisual-policies_en

⁷⁴ According to the European Commission this implies all forms of innovation ranging from technological, social, user-driven innovation, to creativity, design and process innovation

⁷⁵ E.g. by fostering SMEs internationalisation, building capacity or improving policy making and analysis

⁷⁶ European Commission, Enabling Synergies between European Structural and Investment Funds, Horizon 2020 and other research, innovation and competitiveness-related Union programmes, 2014

development, but does well in connecting AV (and wider DM) professionals to foster co-productions, development and circulation of AV content.

Equally, Creative Europe's strong support for skills development both specific to the DM industries and to business development is complementary with support coming from Erasmus+ in the formation of young talents and lifelong learning activities, in enhancing cross-sectorial collaborations and cooperation between education institutions and the DM industry through students' mobility. These actions are further complemented by ESF in helping the general workforce to acquire digital and creative skills and COSME's support to develop entrepreneurs' experience to access to international markets.

Lastly, Creative Europe's international focus is complementary with support to cooperation and circulation of AV content (especially features films) supported by external and development and cooperation programmes.

Box 1: Basic principles for synergies⁷⁷

Synergies among programmes: joint or coordinated efforts by EU programmes at strategic level to achieve greater impact and efficiency in a policy area.

Combined funding of different EU programmes in the same project:

- No substitution of national/regional or private co-funding to EU projects/programmes directly managed by the Commission
- No double financing (the same costs are not to be financed twice by any budget)

Successive projects that build on each other to deepen results.

Parallel projects that complement each other.

According to the above principles, synergies across programmes can potentially be established at three levels: strategic, programming and project levels. The research shows that while synergies are possible in relation to the DM sector and its impact in wider policy areas, their potential is not sufficiently tapped into in the current EU funding streams, as detailed below.

Strategic level - coherence and alignment of shared policy objectives

The research shows that there is little alignment across programmes and initiatives in support to the DM sector, as their Regulations and work programmes advance no common understanding of the scope of the sector (as detailed in section 3). While Horizon 2020 addresses topics such as media convergence, other programmes bundle support in calls dedicated to CCI. Most of the support available through international cooperation programmes focus on traditional DM branches such as the creation, production and distribution of local DM works (film, documentary or short movies) or circulation of European films abroad (film festivals).

Furthermore, the analysis shows a gap between the funding dedicated to technological innovation and DM/creativity in R&I at European level.⁷⁸ According to a survey carried out by the Horizon 2020-funded Vital Media project, 42% of the respondents define the degree of support received by the EC for both research and technological development in the Media Convergence and Social Media sector as poor (36%) and very poor (6%).⁷⁹ In relation to Horizon 2020 co-funded actions, for instance, 7 out of 10 contractual Public Private Partnership focus on ICT-related topics, but none of them is specifically addressing the needs of the DM industry, nor have representatives of the DM industry in their board.⁸⁰ The European Institute of Technology (EIT) has a dedicated Knowledge Innovation Community (KIC) on digital (EIT Digital) but currently it is not addressing the specific skill needs for CCI or DM.⁸¹ Also, the presence of DM stakeholders in major

⁷⁷ idem

⁷⁸ Source : <https://theartsplus.com/2018/10/11/european-manifesto/> and <https://nem-initiative.org/wp-content/uploads/2018/09/whitepaper-policyrecommendation.pdf>

⁷⁹ Source: <https://nem-initiative.org/wp-content/uploads/2018/07/vitalmedia-d1-2-v1-0-final.pdf>

⁸⁰ Source: <https://ec.europa.eu/programmes/horizon2020/en/contractual-public-private-partnerships>

⁸¹ Source : <https://eit.europa.eu/eit-community/eit-digital>

technological *fora* is not very prominent: for instance, in the newly launched Blockchain Observatory and Forum, only one member of the Working Groups comes from the DM sector.⁸²

Support to DM industry is also unbalanced in terms of downstream and market uptake: several initiatives such as the Startup Europe Initiative⁸³ and the European Digital SME Alliance⁸⁴ have a clear focus on ICT while no explicit reference is made to DM (or CCI). According to NEM, there is the need to increase support for innovation, with the aim of overcoming the so-called “Valley of Death”⁸⁵ affecting media research and new media products and services.

In addition, there is currently no mechanism to support unfunded Creative Europe projects of good quality (which did not get funded due to budget limitations) through other compatible programmes. This mechanism could be highly beneficial considering the very low success rate of the Creative Europe programme.⁸⁶ Such mechanism exists between other programmes (e.g. the “Seal of Excellence” between Horizon 2020 and ESIF).

Programming level - coherence of priorities and compatible implementation frameworks

Few aligned priorities for the support of the DM sector are displayed in the work programmes of the analysed Union funds. For instance, there are no dedicated actions in Creative Europe to media convergence, nor specific references in Erasmus+.

Furthermore, there is no explicit reference to possible synergies with Creative Europe in work programmes of other funding instruments, which decreases the possibility of pool funding or continuity between different projects, or complementary project run in parallel.

The support to dissemination of project results across programmes could be improved: for instance, new tools, technologies and standards developed through Horizon 2020 could be highly beneficial for the DM industry at large, but there is little support from other programmes notably Creative Europe to further scale up, disseminate and exploit such potential.

Lastly, support to circulation of new DM content at international level could also be improved. While synergies with international development and cooperation programmes exist in relation to circulation of feature films (e.g. support to film festivals), there are no dedicated actions to support the internationalisation of other type of content or other group of DM stakeholders beyond film producers and distributors. There is opportunity to network DM clusters and hubs.

Project level – pool funding from several sources

The research did not find any evidence of a DM project co-funded by several EU programmes, nor on parallel projects that complement each other up, but have different EU funding sources.

In the field of media and journalism, initiatives and projects are currently financed under different budget lines (either co-financed by the EC or financed by the EP and managed by the EC in case of preparatory actions) and lack of a dedicated programme.

In conclusion the mapping and analysis of past actions show two main drawbacks in the support for the DM sector.

1. While opportunities exist across EU funding streams, few DM stakeholders manage to benefit from them;

⁸² Source : <https://www.eublockchainforum.eu/news/eu-blockchain-observatory-and-forum-names-members-core-working-groups>

⁸³ Source: <https://ec.europa.eu/digital-single-market/en/policies/startup-europe>

⁸⁴ Source: <https://www.digitalsme.eu/>

⁸⁵ The Valley of Death refers to the period of time spanning from when a start-up firm or research outcome receives an initial capital contribution to when it begins generating revenues. During the Valley of Death curve, additional financing is usually scarce, leaving the firm vulnerable to cash-flow requirements. Source: <https://nem-initiative.org/wp-content/uploads/2018/09/whitepaper-policyrecommendation.pdf>

⁸⁶ Between 2014-2017, the success rate of application was of 16% in the Culture sub-programme and 38% in the MEDIA sub-programme. Source: KEA, Creative Europe: Towards a new programme generation, 2018

2. There is little alignment between Creative Europe and other programmes in support to the DM sector.

These drawbacks can be overcome through a more holistic approach at EU level in what concerns the growing DM sector. This implies on one side acknowledging the increasing impact that the convergence between DM and ICT technologies has on wider economy and society and on the other side, gearing proper support for EU DM sector to remain competitive on international markets.

At a strategic level, the impact of the DM sector in different policy areas (such as research and innovation, competitiveness of SMEs, education and skills development or regional development) should be enhanced by complementing the priorities and actions of Creative Europe with those of Horizon 2020, COSME, Erasmus+ or ESIF. The DM sector can further contribute to international cooperation through the continuation of different programmes (notably ACPCulture+, MedFilm, DEVCO and EEAS programme implementing cultural diplomacy objectives).



5. Overview of future funding in the MFF 2021-2027

5.1. Introduction

The following paragraphs present an overview of possible funding opportunities for the DM sector in the next MFF 2021-2027 and a preliminary assessment of possible complementarities and synergies with the future Creative Europe and across future programmes.

The legislative package comprising proposals for the MFF 2021-2027 tabled by the European Commission is currently under discussion at the European Parliament and the Council at the time of this report. Therefore, the analysis is based on available information (namely the proposals for Regulations establishing the future programmes) which might be subject to changes.

As a general comment, an improvement compared to the previous programming period, there is an increased attention to synergies across programmes, which have been explicitly mentioned in all proposals for Regulations. Furthermore, the proposal for a Regulation clearly foresees funding compatibilities and enhanced coordination with the other future EU funding streams (article 16).

5.2. Future programmes

5.2.1 Horizon Europe

Horizon Europe, the Framework Programme for R&I, is the successor of Horizon 2020 and it will benefit from a proposed overall budget allocation of almost €100 billion for the period 2021-2027.

No explicit reference is made to DM sector in the text of the proposed Regulation (nor to cultural and creative industries) despite the strategic contribution of the sector to reach the programme's objectives, notably foster the EU's industrial competitiveness and its innovation performance as well as tackle societal challenges and promote a more inclusive society.⁸⁷

However, in recital 26, the proposed Regulation states that the programme should "...seek to remove barriers and boost synergies between science, technology, culture and the arts to obtain a new quality of sustainable innovation". This underlines an opportunity to support actions to facilitate the cooperation between the DM industry, CCI, technology and other sectors in R&I.

Explicit reference to creative industries is also made in the text of Annex I of the proposed Regulation, in relation to Pillar II "Global Challenges and industrial competitiveness" as contributors towards a sustainable industrial economy.⁸⁸ However, there is no mention of the role of DM sector in relevant clusters, notably the cluster "Digital and Industry".

5.2.2 Digital Europe

The Digital Europe programme is a newly proposed investment programme which would support the digital transformation of the industry for the benefit of EU businesses and citizens, with a proposed overall budget of €9.2 billion for the period 2021-2027.⁸⁹

The proposed Regulation does not make any explicit reference to the DM sector, while the latter is a key component of the digital economy.⁹⁰

5.2.3 InvestEU

The InvestEU Programme builds on the European Fund for Strategic Investments (EFSI) and it would pool together the multitude of EU financial instruments currently available to support

⁸⁷ COM(2018) 435 - Proposal for a Regulation establishing the Horizon Europe Programme– the Framework Programme for Research and Innovation

⁸⁸ COM(2018) 435 – Annexes to establishing Horizon Europe – the Framework Programme for Research and Innovation, laying down its rules for participation and dissemination

⁸⁹ The programme would be structured into five Focus Areas reflecting five key policy objectives, namely: "high-performance computing", "cybersecurity and trust", "artificial intelligence", "digital skills" and "deployment, and best use of digital capacities and Interoperability"

⁹⁰ COM(2018) 434 - Proposal for a Regulation establishing the Digital Europe Programme

investment in the EU. The InvestEU Programme would consist of the InvestEU Fund, the InvestEU Advisory Hub and the InvestEU Portal, and aims to trigger €650 billion in additional investment between 2021 and 2027.

While the proposed Regulation establishing the new Creative Europe programme indicates that InvestEU would incorporate the Financial Guarantee Facility for the cultural and creative sector⁹¹, the proposed Regulation establishing InvestEU does not explicitly mention this point.⁹²

The proposed Regulation refers to European culture and creativity in recital 17, specifying that the programme “will support culture and creativity”. Annex II further specifies that “cultural and creative sectors; media, audiovisual sector and journalism” are eligible areas for funding, which opens opportunities for the DM industry.⁹³ However, culture and DM are not mentioned as one of the main target areas.

5.2.4 Single Market programme

The Single Market programme would be a new €4 billion programme dedicated to empower and protect consumers and provide support to Europe's SMEs to take full advantage of the Single Market.⁹⁴

The draft programme Regulation does not explicitly mention the DM sector nor CCI.⁹⁵ However, the programme can offer opportunities to support businesses in the DM sector, notably SMEs, in market uptake.

5.2.5 ERASMUS+

Building on the current Erasmus+, the next programme would provide learning and mobility opportunities to 12 million people, in comparison to 4 million people in the current programme benefiting from a doubling of the budget to 30 billion euros for the period 2021-2027.

The DM sector is not explicitly mentioned in the draft programme Regulation.⁹⁶ However, the new Erasmus+ would promote activities to “foster opportunities in forward-looking knowledge fields” which can possibly include support to the DM sector. Opportunities can be envisaged to support skills development in relation to relevant technologies such as AI, robotics, data analysis, arts/design.

The proposal for a Regulation (in the memorandum) recognises “the role of culture and creativity in education to contribute to increased resilience of European society” and clarifies that the programme “will deploy focused actions to help the Union unleash its potential for innovation, creativity and entrepreneurship in the digital economy”. It also recognises the need to improve skills development in relation to the digital environment. This could offer opportunities to reinforce the cooperation between institutions and organisations active in education, training and youth (including schools, higher education institutions, hubs) and the audiovisual industry and stakeholders (e.g. film festivals, audiovisual clusters) to lower the gap between the skills and competencies developed by training in education and the ones that are in demand by the fast-changing labour market, also in relation to vocational training and life-learning. Erasmus+ can also facilitate the exchange of good practices and peer learning with other CCI and sectors across Europe and beyond to make professionals able to work internationally.

⁹¹ COM(2018) 466 - Proposal for a Regulation establishing the Creative Europe Programme

⁹² COM(2018) 439 – Proposal for a Regulation establishing the InvestEU Programme

⁹³ COM(2018) 439 – Annexes to the Proposal for a Regulation establishing the InvestEU Programme

⁹⁴ In addition, €2 billion allocated under the InvestEU Fund, in particular through its SMEs Window, will offer debt and equity financing to SMEs under the “Competitiveness” Focus Area. The Single Market programme would replace the COSME programme

⁹⁵ COM(2018) 441 - Proposal for a Regulation establishing the Single Market Programme

⁹⁶ COM(2018) 367 - Proposal for a Regulation establishing the Erasmus+ Programme

5.2.6 European Structural and Investment Funds (ESIF)

For the next MFF 2021-2027, the Commission proposes to modernise Cohesion Policy, which will benefit from a proposed budget of €373 billion. The new Cohesion Policy will focus on 4 investment priorities: innovation, support to small businesses, digital technologies and industrial modernisation.⁹⁷ To reduce disparities, the funds will continue to be allocated based on the main criterion of GDP per capita.

Under its objectives “Smarter Europe” and “A more connected Europe”, the European Regional Development and Cohesion Funds will support the digital transformation of the economy at regional level and create regional networks and systems. This can offer opportunities for the DM sector considering its pivotal role in digital transformations and applications in a wider range of areas, for instance smart cities.

An important new feature is that the future Cohesion Policy would support locally-led development strategies. As such, urban and territorial authorities will be more involved in the management of EU funds, while increased co-financing rates will improve ownership of EU-funded projects in regions and cities. This translates into an important opportunity for the DM sector, which could benefit from the increased ownership of cities and regions to leverage funding destined for the wider creative industries sector.

Another important aspect is that the initiative ‘Stairway to excellence’ would be renewed in order to help regions prepare for the 2021-2027 budgetary period.⁹⁸ The initiative supports regions in developing their innovative strategies, in identifying adequate EU resources to finance innovative projects and in pairing up with other regions with similar assets to create innovative clusters. This provides an opportunity for the DM sector to position as a strategic asset for regional innovation, in line with the ‘Stairway to excellence’ initiative.

5.2.7 External and Development Cooperation programmes

Within the new MFF 2021-2027, most of the current instruments in the area of external cooperation and development will be streamlined under the newly proposed Neighbourhood, Development and International Cooperation Instrument (NDICI). The new programme has a proposed allocated budget of €89.2 billion, which represents +11 % compared to the respective programmes in the current MFF.

No explicit reference is made to the DM sector in the draft programme Regulation.⁹⁹ However, support to the cultural sector is foreseen under the Thematic Programme “Global Challenge”, in particular the “People” action line to:

- Promote initiatives for cultural diversity and intercultural dialogue for peaceful inter-community relations;
- Support culture as an engine for sustainable social and economic development and reinforce cooperation on cultural heritage.

Following the development of the EU Strategy for International Cultural Relations, development cooperation and trade policies has acknowledged the importance of the CCI. There is an opportunity to leverage on the strategic importance of the DM sector as a tool for public diplomacy to help make the EU more visible and a stronger global actor in the international arena (beyond film festivals) as well as to providing opportunities to the internationalisation of EU companies in this field.

⁹⁷ COM(2018) 375 - Proposal for a Regulation laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, and the European Maritime and Fisheries Fund and financial rules for those and for the Asylum and Migration Fund, the Internal Security Fund and the Border Management and Visa Instrument

⁹⁸ Further information: <http://s3platform.jrc.ec.europa.eu/stairway-to-excellence>

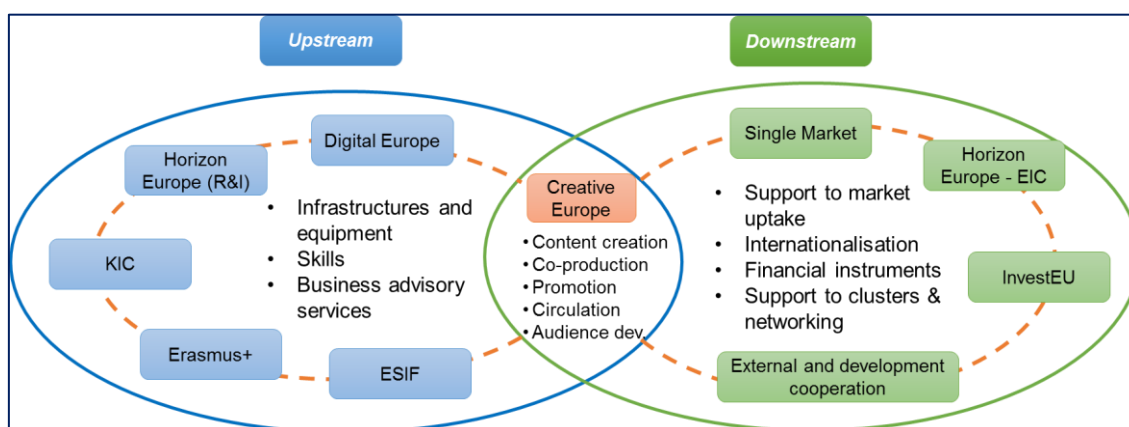
⁹⁹ COM(2018) 460 - Proposal for a Regulation establishing the Neighbourhood, Development and International Cooperation Instrument

5.3. Analysis and conclusions

Compared to the current MFF 2014-2020, according to the proposed Regulations the new MFF 2021-2027 would increase available funding for R&I (e.g. +29% of proposed budget for Horizon Europe compared to the current Horizon 2020) and support for the digital transformation of the EU through a dedicated programme (Digital Europe) and other funding available across all programmes. The budget available for Erasmus+ has been doubled and the focus on digital skills reinforced. This can result in opportunities for the development of the European DM sector.

The overview of future programmes shows that there are opportunities to support the DM sector under different policy areas to complement the scope of the dedicated Creative Europe programme¹⁰⁰ as illustrated in the figure below:

Figure 1. Combined support from the Union's funding streams in complement of Creative Europe's actions



Source: own elaboration (2018)

Even if not explicitly mentioned in the text of the proposed Regulations, the paper identifies the following key areas as possible sources of funding to support DM sector based on the analysis of the previous programmes in the MFF 2014-2020:

Research & Innovation

Horizon Europe can support the DM sector through the following clusters:

- cluster “Digital and Industry”: this cluster could offer opportunities to ensure a strong engagement of the DM industry with the ICT and tech sectors to address key challenges in R&I, reinforce cross-sectorial cooperation to help generate added value through creative and cultural inputs, in particular in the following areas of intervention¹⁰¹:
 - *Next Generation Internet*, for examples to reinforce digital infrastructures (formation of innovation networks, virtualisation, cloud, ...); data management (metadata, security, ...); services (business models, user experience, personalisation, ...); content and format (immersivity, interactivity, enriching and engaging new formats that deliver added value), standards as well as further explore the application of new technologies such as IoT, Big Data and blockchain. Following the positive examples of the current Horizon 2020 programme (e.g. NEM, MediaRoad), CSA could be instrumental for setting up cross-sectorial innovation networks to strengthen cooperation with and within DM industry, ICT sector and CCI, existing networks and clusters, to reflect on common

¹⁰⁰ The new MEDIA strands will support targeted actions (e.g. access to content, promotion and audience development) fostering the competitiveness of the cultural and creative sectors, in particular the DM sector and their adaptation to the digital environment. The cross-sectorial strand aims, among other priorities, at a better understanding of the dynamics of DM and supporting initiatives across the European news media sector, in the domains of media freedom and pluralism, quality journalism standards and media literacy.

¹⁰¹ Source: <https://nem-initiative.org/wp-content/uploads/2018/09/whitepaper-policyrecommendation.pdf> and <https://nem-initiative.org/wp-content/uploads/2018/03/nem-ngi-wg-january-2018.pdf>

- strategies for the future development of the sector at European level as well as help bridging the gap between tech and creative industries;
- *Artificial intelligence and robotics*, for instance to develop new AI-based content creation tools or technology for automated data selection and management;
 - *High performance computing and Big Data*, for instance to further explore the possibilities of Big Data for DM industry;
 - *Key digital technologies*, for example in relation to development of software or sensors;
- Cluster “Inclusive and Secure Society”: this cluster could offer opportunities to support the media through the digital transformation and treat the DM as a key sector for democracies and inclusive societies. Actions could promote cross-collaborations with other sectors beyond ICT, address societal challenges through novel application of DM content and foster non-technological innovation. Possible areas of interventions could be:
 - *Cultural heritage*, for instance to improve the connection between cultural heritage with DM industry;
 - *Social and Economic Transformations*, for example to further explore the possibility to apply innovative DM tools to promote inclusive growth and reversing inequalities, respond to migration and integration challenges and intergenerational solidarity, explore education and training systems to foster and make the best use of the EU's digital transformation. In particular, actions focused on new media for democracies could promote an active intervention in the sector, focusing on innovation and industrial adaptation as to secure proper access to diverse information across a healthy sector.
 - Clusters “Health”, for example to foster innovative applications of DM content in healthcare (e.g. in relation to personalised healthcare) or to support people with disabilities;
 - Cluster “Climate, energy and mobility”, for instance in relation to the *Communities and Cities* area of intervention to improve the application of DM digital technologies to urban planning and smart cities.

Digital Europe would be highly complementary to Horizon Europe to provide upstream inputs to R&I. The research identifies the following Focus Areas as possible sources to channel support to DM sector:

- Focus Area “deployment, and best use of digital capacities and Interoperability” (objective 5): cultural and creative sectors are explicitly mentioned in the draft Regulation in relation to this Focus Area as “area of public interest” (article 8). This Focus Area could support the DM sector to deploy and access to state-of-the-art digital technologies (from AI to advanced computing) and know-how, both for businesses and SMEs;
- Focus area “artificial intelligence” (objective 3): this Focus Area can be instrumental to facilitate the use of AI testing and experimentation facilities in Member States for the DM sector, for instance to test new solutions notably in cooperation with Digital Innovation Hubs, or to improve standards and interoperability at EU and international level;

Competitiveness of SMEs and support to clusters

The Single market programme could complement Horizon Europe and Digital Europe by providing downstream support to businesses in the DM sector in terms of market uptake and internationalisation opportunities. In particular, the paper identifies the following opportunities for SMEs in the “Competitiveness” Focus Area notably through the support of the Enterprise Europe Network:

- Support uptake of innovation in the market;
- Facilitate access to market and internationalisation;
- Foster value chain collaboration through strategically connecting ecosystems and support to clusters;
- Reinforce creative entrepreneurship through mentoring scheme and support to start-ups.

InvestEU could offer important opportunities for the DM sector to leverage additional funding in addition to grants available by other programmes through its four policy areas or “windows”:



- “Sustainable infrastructure” Policy Window, which could support digital infrastructures, storage technologies;
- “Research, innovation and digitisation” Policy Window, which could support market uptake of research results, development and deployment of digital technologies and services, in particular through AI, IoT, blockchain and other distributed ledger technologies, advanced digital skills;
- “Small businesses” Policy Window, which can facilitate access to finance for SMEs and small mid-cap companies (in duly justified cases);
- “Social investment and skills” Policy Window, which can support education, training and other related services.

Horizon Europe could provide support to innovative SMEs in the DM sector through Pillar III “Open Innovation”. It could be instrumental to support innovative SMEs to scale up breakthrough and market-oriented innovations, in particular through the “Accelerator” which also targets individual entrepreneurs (mainly start-ups and SMEs), and overcome the so-called “Valley of Death”.

Education and skills development

Erasmus+ Key action 2 “Cooperation among organisations and institutions” could be particularly interesting to:

- Establish partnerships for cooperation and exchanges of practices or foster innovation;
- Create joint master degrees adapted to the need of the digital market sector;
- Support spill-overs with the DM industry by supporting the use of VR/DM, serious gaming and other advanced DM content for learning

Key action 1 “Individual mobility” can support individuals to develop creative skills and transition towards the job market of DM sector through mobility and collaborative projects. The international dimension of the programme would also open up opportunities of cooperation with third countries.

Digital Europe could complement Erasmus+ through the Focus Area “digital skills” (objective 4). This Focus Area could be of strategic importance to facilitate creative talents and media work force to adapt to the new digital environment. The Focus Area could offer good opportunities to students, technology experts as well as creative entrepreneurs to pursue training (and career) in the advanced digital technologies supported by the programme such as AI, blockchain, data management. The programme can facilitate on the job training to complement formal education, for instance through Digital Innovation Hubs.

Furthermore, it could be interesting to explore the possibility to set-up a specific Knowledge and Innovation Community (KIC) under the EIT to strengthen the DM innovation ecosystem by fostering the integration of business, research, higher education and entrepreneurship.

Regional development

European cities and regions, notably through DM and media clusters, are increasingly driving investment in CCIs for regional development. The Smart Specialisation Strategy on CCI developed by more than 100 regions in Europe would be the opportunity for the DM and DM sector to participate in defining regional policy objectives and have a more prominent role and funding in the next ESIF, for instance by leveraging new alliances and interconnections between DM/media clusters and hubs with traditional players in the film/TV industry, or to promote cross-collaborations with other sectors.

The new European Territorial Cooperation (ETC) programme (INTERREG) could also support projects to exchange best practices amongst regions to improve the mainstreaming of the DM sector in different policy areas.

External relations and development cooperation instruments

Even if not explicitly mentioned in the text, support to creative entrepreneurship including in the DM sector could be conceived in the geographical programmes, for example in relation to the following areas of cooperation:

- poverty eradication (e.g. promoting cooperation in the areas of science, technology and research, and open data and innovation);

- inclusive and sustainable economic growth and decent employment (support to entrepreneurship; development of the tourism sector; promotion of affordable, inclusive and reliable digital connectivity and strengthening the digital economy);
- Specific for the Neighbourhood area, achieving progressive integration into the Union internal market and enhanced sectoral and cross-sectoral cooperation.

Additional support for the DM sector is expected to be channelled through the new generation of programmes conceived to give full implementation to the 2016 Joint Communication, notably:

- the new Africa, Caribbean and Pacific (ACP) Culture programme, focussing on creation and production, access to market and circulation, image education, and technological and financial innovation, starting in 2018;
- the programme "Investing in Culture and Creativity"¹⁰²;
- EU-Western Balkans Culture programme as of 2020.

In conclusion, the analysis of the proposed programme Regulations shows that the high level of complementarity of the future programmes could be instrumental in establishing synergies with the future Creative Europe programme.

However, the analysis also shows two main drawbacks that need to be addressed to improve synergies:

- *No explicit recognition of the strategic importance of the DM sector:* the analysis reveals a little or no explicit recognition of the strategic economic, social and cultural importance of the DM sector in the digital economy. As the EU aims to increasing its share of global digital markets, it is surprising that programmes such as Horizon Europe and Digital Europe do not explicitly mention the DM sector as a key component of clusters or focus areas related to digital transformation and skills.
- *No reference to synergies with Creative Europe in some programmes:* the proposals for Regulations establishing Horizon Europe, InvestEU and ESIF do not mention Creative Europe as one of their synergy programmes.

On another note, the *#Digital4Culture strategy* (which aims to strengthen coherence between cultural, digital and audiovisual initiatives¹⁰³) could be an opportunity to streamline support to foster digital transformation in the DM sector. However, proposed actions focus mostly on featured films (e.g. European week of heritage film, EU repository of films, financial mechanisms for large-scale film projects)¹⁰⁴ and there is little attention to innovation in the DM industry at large, including video games, AV/VR, etc.

¹⁰² Source: COM(2018) 267 - A New European Agenda for Culture

¹⁰³ The strategy will build on the copyright, audiovisual and broadcasting proposals under the Digital Single Market strategy and plant the seeds for future actions under the next MFF of the Union. Source: COM(2018) 267 - A New European Agenda for Culture

¹⁰⁴ Source: <https://cineuropa.org/fr/newsdetail/346082/>

6. Operational recommendations

DM is a strategic sector of economic, social and cultural importance in a world increasingly connected whose language has become predominantly visual. At the same time, the DM industry is a critical component of the growing CCI in Europe. DM stakeholders are confronted with new creation, production and distribution challenges linked to digital transformation whilst playing an essential role in the expression of Europe's cultural diversity.

It is important to reassess EU policy actions and funding programmes to ensure that the DM industry plays a full part in contributing to a competitive and inclusive EU capable of promoting diversity in cultural expressions.

The paper puts forward a set of operational recommendations to enable a better access of the DM sector to EU funding programmes and improve synergies amongst different programmes in the future MFF 2021-2027;

The paper also provides concrete examples of future support to the DM sector cutting across different sources of EU funds.

6.1. Basis and justifications

The research shows that there is a potential to better integrate the DM sector in EU programmes and streamline funding opportunities. DM content drives the digital economy and it permeates multiple sectors, such as tourism, cultural heritage, education, healthcare, architecture and marketing. The DM industry is the source of European digital content, yet to be fully recognised as transversal element in different programmes. A more horizontal approach in policy making would foster cross-sectorial collaborations and yield positive spill-over effects. It is important to mention that synergies will be all the more possible with the future Creative Europe programme, as the proposal for a Regulation clearly foresees funding compatibilities and enhanced coordination with the other future EU funding streams (article 16). A better integration of DM sector would address the following policy objectives:

- Reinforce the competitiveness and internationalisation of the DM sector in an evolving global digital market place;
- Streamline creativity and content production in other policy areas (such as research and innovation, regional development or external relations) as part of a strategy to brand Europe as a place of innovation and creation capable of promoting cultural diversity internationally;
- Help the creative work force to adapt to a new ecosystem driven by digital technology.

The mapping of current programmes in the MFF 2014-2020 and the overview of future programmes in the MFF 2021-2027 have identified the following issues that need to be addressed:

- There is no agreed vision and definition of DM at European level across policy areas;
- Today, the bulk of dedicated EU funding support for the DM sector is channelled essentially towards the traditional cinema sector for the development and distribution of feature films;
- DM industries have limited support across EU programmes to contribute to creative spill-overs in other sectors, despite the strategic importance of DM in fostering innovation, economic growth and addressing societal challenges (such as health and wellbeing, social inclusion, demographic change);
- Support to the DM industry in programmes other than Creative Europe is often bottom-up and project-driven and lacks a coherent long-term strategy;
- There is no alignment between H2020 (technology) and Creative Europe (content) which limits the innovation in content (e.g. new storytelling, new formats);
- There is limited support to market uptake of DM products and services, as well as for the development of new business models;
- There is little consideration for the potential of the DM sector in Smart Specialisation Strategies, even if European regions and cities are increasingly driving investment in CCI for territorial development notably through DM and creative clusters/hubs;
- No funding programme is sufficiently addressing the issue of digital distribution, which is essentially dominated by powerful media players established outside the EU and data

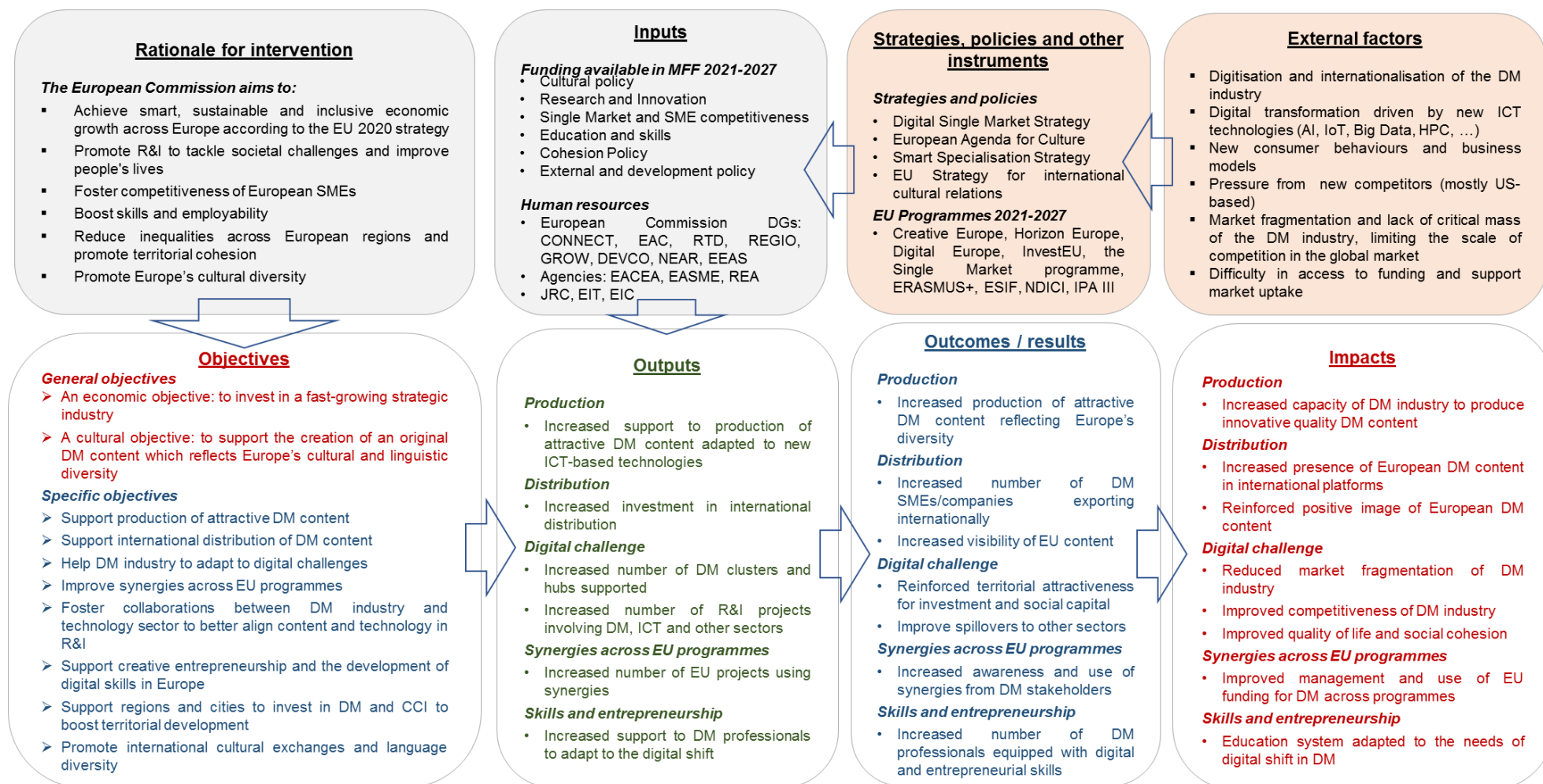
management (on preferences for instance) is not necessarily inclined to benefit European stakeholders;

- Support actions for the DM sector within the external relations and development cooperation programmes seem to reflect a narrow consideration of the DM sector mostly focusing on local DM works and distribution of European featured films (e.g. film festivals);
- There is a general lack of awareness on funding opportunities outside Creative Europe amongst the DM stakeholders which limits the accessibility to these opportunities.

On this basis, the paper proposes the following Logical Framework for a strategic support to the European DM sector:



Figure 2. Logical Framework for strategic support to the European DM sector



Source: KEA elaboration (2018)

6.2. Operational recommendations

The paper puts forward three sets of operational recommendations to enable the DM sector to have better access to EU funding programmes and improve synergies between Creative Europe and different programmes. This would then enhance the impact of the DM sector in wider policy areas and reinforce its competitiveness in an evolving global market driven by the digital shift and promote cultural diversity.

A. Provide information and guidance, raise awareness amongst DM stakeholders

1. Create a 'one-stop-shop' type of platform where all funding opportunities for DM will be displayed and constantly updated to complement the work of Creative Europe desks which have a more regional approach and outreach. This 'one-stop-shop' platform would ideally be managed by DG CONNECT. The platform can be complemented by a practical guide or publication on the different funding opportunities for the DM sector (the "Mapping of Cultural Heritage actions in European Union policies, programmes and activities" could serve as an example¹⁰⁵);
2. Improve the collaboration between the Creative Europe desks and other supporting desks such as Horizon Europe's national contact points (NCP) or the Erasmus National Agencies in order to stretch out possibilities of synergies. The Creative Europe desk in France (*Relais Culture Europe*) could serve as a good example to raise awareness of funding support available in other programmes¹⁰⁶;
3. Organise discussion forums or information seminars with stakeholders to present funding opportunities during major tech events and festivals such as *Ars Electronica*¹⁰⁷, *Festival Futur.E.S*¹⁰⁸, *Slush*¹⁰⁹ or in new dedicated cross-sectorial events, with the support of the European Commission;
4. Identify and disseminate good practice examples for synergies and cross-sectorial collaboration (e.g. tourism, healthcare, education), for instance through international competition or prizes to showcase the best innovative solutions developed for the DM sector and maximise the impact and outreach (similar to the Horizon 2020 Prizes, S+T+ARTS Prizes or the #Digital4Culture Award).

B. Improve consultations with DM stakeholders

1. Involve representatives of the DM sector in the development of the annual work programmes as well as in mid-term programmes' evaluations;
2. Channel the voice of DM SMEs across Europe through networks and collaborative platforms, following the example of the European Digital SME Alliance¹¹⁰;
3. Ensure the support and sustainability of existing networks and initiatives (e.g. the NEM Initiative or relevant project consortia related to DM such as MediaRoad) fostering cross-sectorial collaboration and the development of a common vision between DM, ICT, CCI and other sectors in the next programming period, for instance through appropriate CSA in Horizon Europe;
4. Dedicate funding to enlarge the representativity of DM stakeholders across traditional subsectors (e.g. via creative hubs, AV/media clusters).

C. Plan synergies between CE and other programmes at strategic and programme level

Strategic level

¹⁰⁵ Source: https://ec.europa.eu/culture/sites/culture/files/2014-heritage-mapping-version-2017_en.pdf

¹⁰⁶ <http://www.relais-culture-europe.eu/les-programmes-europeens/les-autres-financements-europeens/>

¹⁰⁷ <https://ars.electronica.art/news/>

¹⁰⁸ <https://blog.futuresfestivals.com/>

¹⁰⁹ <https://www.slush.org/>

¹¹⁰ <https://www.digitalsme.eu/>

1. Establish a common vision and definition of the DM sector amongst concerned Directorate Generals of the European Commission (including DG CONNECT, DG EAC, DG RTD, DG REGIO, DG GROW, DG DEVCO, DG NEAR, EEAS) and the European Parliament;
2. Streamline the common vision and definition of the DM sector not only in future legislations and policy documents but also in outreach communication activities to raise awareness across Europe;
3. Ensure that the national Managing Authorities that implement cohesion policy are aligned on the vision and definition of the DM sector and recognise its multi-dimensional impact in the Smart Specialisation Strategies to drive investment in DM sector for regional development;
4. Make explicit reference to the DM sector in the text of the Regulations establishing the future programmes (notably Horizon Europe, Digital Europe, the Single Market programme, InvestEU, ESIF) to ensure funding for the DM sector;
5. Ensure that Creative Europe projects that are high-ranked but unfunded due to budget limitation are funded through other appropriate EU programmes through the “Seal of Excellence Certificate” (currently applied to Horizon 2020 projects);
6. Foresee in the programme Regulations the possibility to use funding to finance actions under the Creative Europe programme (e.g. NDICI could finance some actions in the international dimension of Creative Europe);

Programming level

1. Explicitly include *ad hoc* actions and initiatives to support the DM sector in annual work programmes (e.g. the “Digital and Industry” cluster of Horizon Europe; the “Digital Skills” focus area in Digital Europe) as well as in Partnership Agreements in the ESIF framework in alignment with DM policy priorities;
2. Where appropriate, explicitly foresee the participation of DM stakeholders including artists and creative industries to R&I calls to better integrate the development of new digital technologies and tools relevant for the DM sector with the “creative” component;
3. In line with the strategic vision developed, streamline support to DM clusters and hubs via coordinated actions amongst Creative Europe, Horizon Europe, the Single Market programme and ESIF, also through the DIHs specialised in DM (currently members of NEM);
4. Seize the opportunity to build a strong repository of DM content (whether heritage or newly produced) that are feeding digital networks and social media to ensure visibility of such content on various digital platforms;
5. Explore the possibility to create a specific Knowledge and Innovation Community (KIC) dedicated to CCI and notably the DM sector through the European Institute of Technology (EIT) to engage with businesses, education institutions and EU local, regional and national authorities;
6. Foresee a specific Public Private Partnership (PPP) dedicated to DM content under the new Horizon Europe programme;
7. Make sure that experts in DM are included in the panel of experts in the evaluation of relevant project proposals.

6.3. Concrete examples of future support to the DM sector across different programmes

The paper proposes some concrete examples of support to the DM sector across different future programmes to illustrate the operational recommendations in the section 6.2.

Support the digital transformation of the media sector

- Horizon Europe can support media innovation such as R&I projects to develop innovative products and solutions at the intersection of DM and ICT (e.g. Big Data and semantic web¹¹¹,

¹¹¹ Semantics and data mining coupled with Big Data analytics and algorithms could improve the prediction of users’ behaviour and preferences and allow creators to produce more customised products and services.

content verification, AI-based content creation tools) and contribute to address the gap between creativity and technological advances;

- The Single Market programme can support DM businesses and SMEs in the market uptake (both in the EU and beyond) of new DM products and services developed through Horizon Europe, for instance in light industries (such as manufacturing or textiles);
- InvestEU can complement the funding available from the Single Market programme to support the market uptake through equity and loans tailored for DM SMEs;
- Creative Europe can act both downstream by proposing actions to facilitate the dissemination and exploitation of such innovations across the wider creative sector (for instance through competitions or prizes), or upstream by foreseeing specific actions for the development of new business models for DM industries;
- Digital Europe can offer training schemes to professionals in the DM sector to acquire advanced digital skills for the deployment of products and solutions in cooperation with relevant industries (for instance through the “Digital Skills” Focus Area) or testing facilities (for instance in the “Artificial Intelligence” Focus Area through Digital Innovation Hubs);
- Erasmus+ can complement Digital Europe in skills development by providing training and mobility schemes for younger beneficiaries through international cooperation projects involving universities and DM companies, or establishing long-life-learning and vocational training programmes for DM professionals;
- Erasmus+ (in particular through Strategic Partnerships) could further support audience development by improving new digital media literacy, for instance targeting groups such as children and teenagers;
- ERDF can support downstream activities such as students’ placement within DM companies;
- ESF could be used to create and nurture interest for the DM field and technologies among economically and socially disadvantaged young persons in dedicated apprenticeship programmes. ESF could thus complement learning and mobility opportunities offered by Erasmus+ via an approach aimed at strengthening the digital know-how of regions and render them more cohesive;
- NDICI or EEAS funds can foresee specific calls for proposals to improve international cooperation and showcase of new DM content (e.g. through festivals).

Cross-collaboration for societal challenges in sectors like healthcare, tourism, cultural heritage or education

- Horizon Europe could support the application of DM content (e.g. VR/DM, 3D or video games) for wider societal needs (e.g. in the healthcare sector to tackle autism or physical disabilities; in tourism or cultural heritage to improve immersive and interactive users’ experience and reach out to a wider audience; in the education sector to improve pedagogical tools). Furthermore, research can help the discoverability and usability of vast DM archives and untap their potential for wider societal applications, or develop digital technologies that facilitate the conservation of DM content and services (e.g. human-machine interface);
- Cities and regions could leverage ERDF to establish media parks or to promote networks of clusters (notably the Digital Innovation Hubs located in DM clusters) hosting both research facilities and showrooms for innovations using DM technologies applicable in a wide array of sectors, from entertainment to healthcare.

Support to digital skills

- Erasmus+ (in particular through Knowledge Alliances) could be instrumental in developing new multi-disciplinary curricula and/or blended courses in DM, which require a high degree of cross-overs between disciplines (e.g. storytelling, encoding, software development for storytelling in new media, data and interoperability, technology, user experience, marketing and pitching, project management, entrepreneurial skills ...) and stronger collaboration between education institutions and the DM industry. This could be supported by students’ and teachers’ mobility schemes;

- The new Creative Europe could build upon these acquired skills set to encourage networking and collaboration between DM professionals and young entrepreneurs to develop future transmedia projects, for instance under the new *#Digital4Culture strategy*;
- Digital Europe can complement the offer for professionals by including training on the use of advanced computer software techniques, AI-based tools, Big Data management for DM industry professionals;
- The Single market programme would complement with focus on entrepreneurial and business skills for instance through the EEN;
- In the same vein, ESF could also be used to develop DM specific skills (from design and editing to wider computer and programming skills), for instance by creating masterclass after-school programmes for promising young talents.

Support to the internationalisation of the DM industry

- Specific Coordination and Supporting Actions under Horizon Europe could be dedicated to the creation of international networks of practitioners and creators working in the DM sector to encourage international collaboration and co-productions as well as to imagine common solutions to implement cultural diversity on DM;
- NDICI can foresee specific calls for proposals to reinforce the cooperation between EU and third countries professionals in DM for instance through exchange and mentoring visits, or supporting the international circulation of DM content through the creation of networks, alliances and exchanges between EU and international players;
- NDICI should focus on networking clusters, creative hubs and DM incubators throughout the world to attract talents and help the internationalisation of DM industry (focus could be on cultural heritage and tourism where EU is a strong actor).

Annex - Bibliography

- ACPCulture+ (2018) 5 years Results Impact Data, ACP Secretariat
- Allied Market Research (2014), 3D Technology Market,
- AVIXA (2017), IHS Markit (2017) Global AV Industry Outlook and Trends Analysis (IOTA)
- BCC Research (2018), Virtual Reality Technologies: Global Market to 2022
- CISCO Visual Networking Index: Forecast and Methodology 2016-2021
- European Parliamentary Research Service Creative Europe programme 2021-2027
- European Audiovisual Observatory, Yearbook 2017
- European Commission (2017) Digitising European Industry progress so far, 18 months after the launch
- European Commission (2014) Enabling Synergies between European Structural and Investment Funds, Horizon 2020 and other research, innovation and competitiveness-related Union programmes
- European Skills Council for employment and training in the Audiovisual and Live Performance sectors (2016) Trends and skills in the European audiovisual and live performance sectors
- EuroTransmedia project (2016) Vision document 2030 and beyond
- European Union Blockchain Observatory & Forum (2018) Blockchain innovation in Europe
- KEA (2018) Creative Europe: Towards a new programme generation – for the European Parliament
- KEA (2015) Feasibility study exploring different possible modus operandi for making available a package of European films – for the European Commission, DG CONNECT
- IDEA Consult et.al (2017) Mapping the Creative Value Chains – for the European Commission
- I3 's, MediaRoad's and Vital Media's Policy Recommendations for the Next Multiannual Financial Framework
- IHS Technology (2015) Cinema: how cinema is evolving within the value chain. UNIC Cinema Days: October 2015
- Market Research Future (2018) Over the top Content Market Research Report Global Forecast,
- McKinsey&Company (2016) Global Media Report 2015
- Paris, Thomas & Busson, Alain & Simon, Jean. (2016), 'The European Audiovisual Industry and the Digital Single Market: Trends, Issues and Policies'. Digiworld Economic Journal. 101.
- PwC (2017) Perspectives from the Global Entertainment and Media Outlook 2017–2021
- PwC (2015) The Digital Future of Creative Europe. The Impact of digitisation and the Internet on the Creative Industries in Europe (published originally in 2013 and thoroughly reviewed and updated for 2015)

Online articles and position papers

Dayan, Zohar (2018), 'Visual Content: The Future of Storytelling' in Forbes, consulted online <https://www.forbes.com/sites/forbestechcouncil/2018/04/02/visual-content-the-future-of-storytelling/#49d801963a46>

Leclercq, Thierry *Mariya Gabriel annonce de nouvelles initiatives MEDIA dans le numérique*, CINEUROPA <https://cineuropa.org/fr/newsdetail/346082>

McSpadden, Kevin (2015), 'You now have a shorter attention span than a goldfish' in *Time*, consulted online: <http://time.com/3858309/attention-spans-goldfish/>

Munson, Ben (2018), 'Amazon, Hulu and Netflix to triple original content spend by 2022', in *FierceVideo*, consulted online <https://www.fiercevideo.com/video/amazon-hulu-and-netflix-to-triple-original-content-spend-by-2022-report>

NEM Position Paper "Artificial Intelligence in the Media and Creative Industries" (July/September 2018)

NEM Position Paper "Data for Media" (July/September 2018)

NEM "Policy Recommendations for the Next Multiannual Financial Framework" (September 2018) by I3, MediaRoad, and Vital Media projects

NEM Position on Next Generation Internet (January 2018)

NEM Digitalising European Industry -Digital Innovation Hubs (December 2017)

Solis, Brian (2015), 'Why we're hungry for remarkable content' in LinkedIn Pulse, consulted online <https://www.linkedin.com/pulse/why-were-hungry-remarkable-content-infographic-brian-solis/>

Shlomi Ron, 'What is Visual Storytelling?' in Visualstorytell 2016, <http://www.visualstorytell.com/blog/what-is-visual-storytelling>

The Starts+ (2018) European Manifesto on supporting innovation for cultural and creative sectors. <https://theartsplus.com/2018/10/11/european-manifesto/>

EU Legislative acts

Communication (2018) 267 - A New European Agenda for Culture

Communication SWD (2016) 195 – A New Skills Agenda for Europe

Communication (2016) 180 - Digitising European Industry Reaping the full benefits of a Digital Single Market

Communication (2010) 183 - Green Paper Unlocking the potential of cultural and creative industries

Directive of the European Parliament and of the Council amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) in view of changing market realities

European Parliament Report 2016/2072(INI) on a coherent EU policy for cultural and creative industries

Joint Communication JOIN/2016/029 - Towards an EU strategy for international cultural relations

Proposal for a Directive COM/2016/0287 - on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services in view of changing market realities

Proposal for a Directive COM2016/0593 - on Copyright in the Digital Single Market

Proposal for a Regulation COM(2018) 434 establishing the Digital Europe programme

Proposal for a Regulation COM(2018) 435 establishing the Horizon Europe programme

Proposal for a Regulation COM(2018) 439 establishing the InvestEU programme

Proposal for a Regulation COM(2018) 460 establishing the Neighbourhood, Development and International Cooperation Instrument

Proposal for a Regulation COM(2018) 466 establishing the Creative Europe programme

Proposal for a Regulation COM(2018) 367 establishing the Erasmus+ Programme

Proposal for a Regulation COM(2018) 375 laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, and the European Maritime and Fisheries Fund and financial rules for those and for the Asylum and Migration Fund, the Internal Security Fund and the Border Management and Visa Instrument

Proposal for a Regulation COM(2018) 441 establishing the Single market, competitiveness of enterprises, including small and medium-sized enterprises, and European statistics and repealing Regulations (EU) No 99/2013, (EU) No 1287/2013, (EU) No 254/2014, (EU) No 258/2014, (EU) No 652/2014 and (EU) 2017/826

Regulation (EU) No 1287/2013 establishing a Programme for the Competitiveness of Enterprises and small and medium-sized enterprises (COSME)

Regulation (EU) No 1288/2013 establishing "Erasmus +" - the Union programme for education, training, youth and sport

Regulation (EU) No 1291/2013 establishing Horizon 2020 - the Framework Programme for Research and Innovation (2014-2020)

Regulation (EU) No 1295/2013 establishing the Creative Europe Programme

Regulation (EU) No 1300/2013 on the Cohesion Fund

Regulation (EU) No 231/2014 establishing an Instrument for Pre-accession Assistance (IPA II)

Regulation (EU) No 232/2014 establishing a European Neighbourhood Instrument

Regulation (EU) No 233/2014 establishing a financing instrument for development cooperation for the period 2014-2020

TFEU, Consolidated version of the Treaty on the Functioning of the European Union, Official Journal C326, 26/10/2012

Consulted websites

Audiovisual sector support https://ec.europa.eu/culture/policy/audiovisual-policies_en

ACPCulture+ <http://www.acp.int/node>

Big Data Value Association <http://www.bdva.eu/>

CORDIS <https://cordis.europa.eu/>

Creative Skills Europe project website www.creativeskillseurope.eu

Culture and Creativity website - Eastern Partnership (EaP) <https://www.culturepartnership.eu>

DEVCO Projects and results https://ec.europa.eu/europeaid/projects-results_en

EACEA – Erasmus+ https://eacea.ec.europa.eu/erasmus-plus_en

EASME – COSME <https://ec.europa.eu/easme/en/cosme-0>

EIT Digital <https://www.eitdigital.eu/>

Erasmus Mundus Journalism website <http://mundusjournalism.com/>

European Audiovisual Observatory <https://www.obs.coe.int/en/web/observatoire/home>

European Alliance of Digital SMEs <https://www.digitalsme.eu/about/membership/>

European Blockchain Observatory & Forum <https://www.eublockchainforum.eu/news/eu-blockchain-observatory-and-forum-names-members-core-working-groups>

European Centre for Press and Media Freedom <https://ecpmf.eu/>

European Cluster Collaboration Platform <https://www.clustercollaboration.eu/>

EU Cluster Portal http://ec.europa.eu/growth/industry/policy/cluster_en

EUNIC <https://www.eunicglobal.eu/clusters>

Euranet+ <https://euranetplus-inside.eu/>

Euronews <https://www.euronews.com/>

European Commission Law portal https://ec.europa.eu/info/law/better-regulation/initiatives_en

European Commission Digital Single Market website <https://ec.europa.eu/digital-single-market/en/policies/shaping-digital-single-market>

European Federation of journalists <https://europeanjournalists.org>

FIWARE initiative <https://www.fiware.org/>

Horizon 2020 website <https://ec.europa.eu/programmes/horizon2020/en/>

ICT and Art - the STARTS initiative <https://ec.europa.eu/digital-single-market/en/ict-art-starts-platform>

KEEP.EU website <https://www.keep.eu/keep/>

IMPACT Accelerator <http://www.impact-accelerator.com/smart-content/>

INTERREG Europe <https://www.interregeurope.eu/>

InnovFn website <http://www.eib.org/en/products/blending/innovfin/products/index.htm>

Mapping Media Freedom <https://mappingmediafreedom.org/>

Media Freedom Projects <https://ec.europa.eu/digital-single-market/en/media-freedom-projects>

MedCulture <https://www.medculture.eu/about/overview>

Med Film <https://www.medculture.eu/fr/information/news/appel-propositions-med-film>

NEM Initiative <https://nem-initiative.org/>

Open Media Hub project website <https://openmediahub.com/>

Pan-European network of Digital Innovation Hubs (DIHs) <https://ec.europa.eu/digital-single-market/en/digital-innovation-hubs>

PPP 5G <https://5g-ppp.eu/>

Smart Specialisation Platform <http://s3platform.jrc.ec.europa.eu/home>

Smart Specialisation Platform – Digital Innovation Hubs <http://s3platform.jrc.ec.europa.eu/digital-innovation-hubs-tool>

Smart Specialisation Platform - Eye@RIS3 <http://s3platform.jrc.ec.europa.eu/map>

Startup Europe <https://ec.europa.eu/digital-single-market/en/news/startup-europe-initiative-promote-european-entrepreneurship>



51 rue du Trône
1050 Brussels
Belgium

T. +32 2 289 26 00

W. www.keanet.eu

🐦 @KEAtweets

f KEA CREATIVE EUROPE

in KEA CREATIVE EUROPE