



Europe's content industries: New opportunities for storytelling, funding and technology

Europe's creative and cultural industries are big, important and growing fast. How can EU programmes help?

A Science|Business workshop gathered suggestions. Here are the results.

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How to create a European advantage...

The cultural and creative industries (CCI) are big: about 4.2 per cent of European Union GDP. They are important, employing 6.7 million Europeans in 2.45 million companies, large and small. They are diverse: indie films, online news, fashion catwalks, ancient libraries, trendy podcasts, blockbuster Van Gogh exhibitions, streaming pop songs and much more. In fact, they're so diverse that Eurostat doesn't even have a formal statistical category to describe them all.

And – surprise – these industries are politically important, for European society and for Europe's place in the wider world. They are a vital part of our heritage, our culture and our future. They employ, entertain and inform us at home, and abroad they are key to what EU leaders recently proclaimed as the “soft power” they wish to project to the wider world.

So it is that, in the past few years, mounting rounds of legislation and funding in Brussels and member-state capitals have been aimed at strengthening these industries. A portfolio of new EU programmes is being developed in Brussels that could help. There's the €94.1 billion Horizon Europe R&D programme to include action on CCI. There's the €9.2 billion Digital Europe programme for infrastructure they could use. There's Creative Europe, a €1.85 billion package of targeted measures. And there is the €38 billion InvestEU programme, which also helps finance cultural and creative activities.

How will these bold initiatives work? What more could or should be done? Those were the questions under discussion at a special roundtable organised 11 April 2019 in Brussels by Science|Business, supported by the European Commission and hosted by the Basque Delegation to the EU. “We've come to the point now, where we're thinking about what could come next,” said Claire Bury, deputy director-general of the Commission's Directorate-General for Communications Networks, Content and Technology (better known in Brussels as DG Connect.)

The discussion included policymakers, academics, and creative industry representatives. Participants exchanged a diversity of views, but there was general agreement among them that Europe needs to integrate its fragmented market for cultural content to compete with major digital platforms, and to overhaul competition policy to address what some see as anti-competitive practices in digital industry. Participants also agreed on a need for open standards in new technologies, and effective coordination of the many different EU programmes that affect the cultural sector. And above all, they urged networking – ways to get Europe's techies and creatives connecting, sharing and building a future together.



From left to right: Guillaume Klossa, Rikke Ennis, Joao Santos, Bernhard Grill and Anne Bajart.



Table of contents

How to create a European advantage...	3
Chapter 1: What's new in this industry?	6
Cultural creative sector economic indicators relative to other industries	
Cultural and creative sector value added at factor cost 2016, millions of euros	
Cultural creative sector share of total employment, 2015	
The nature of demand has changed	
Market and data concentration weakens producers' hands	
The European market is fragmented	
VR, AI and other technologies	
Chapter 2: New initiatives	11
Horizon Europe	
Creative Europe	
Digital Europe	
InvestEU	
Audio-visual Media Services Directive (AVMSD)	
Copyright Directive	
Chapter 3: Challenges for the industry	13
Tech and culture don't mix	
The sector needs better access to data	
European companies lack scale	
The audience isn't listening	
Chapter 4: Conclusions	16

I. What's new in this industry?

According to the European Investment Fund, the cultural and creative sector accounted for 4.2 per cent of EU GDP in 2014. Its contribution to the economy in terms of value added – the value of the sector's output minus its consumption costs – was €290 billion in 2016. That year, it employed 6.7 million people across 2.45 million companies.

Cultural creative sector economic indicators relative to other industries

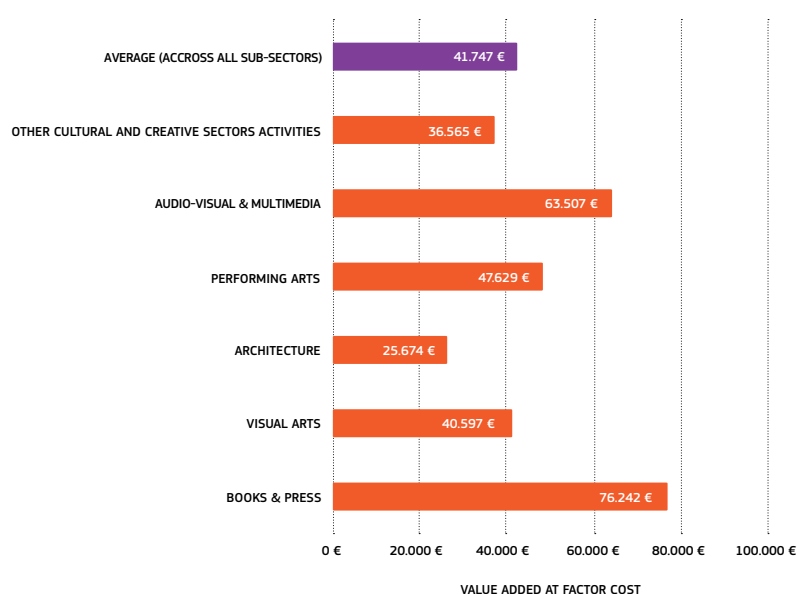
Criteria	ICT	Accommodation and food services	CCS
Percentage of EU GDP ⁽²⁰¹⁵⁾	4% ⁽²⁰¹⁵⁾	4% ⁽²⁰¹⁵⁾	4.2% ⁽²⁰¹⁴⁾
Value added	EUR 570 billion ⁽²⁰¹⁵⁾	EUR 252.9 billion ⁽²⁰¹⁵⁾	EUR 290 billion ⁽²⁰¹⁶⁾
Employment	6.3 million ⁽²⁰¹⁵⁾	11.1 million ⁽²⁰¹⁵⁾	6.7 million ⁽²⁰¹⁶⁾
Number of companies	1.1 million ⁽²⁰¹⁵⁾	1.9 million ⁽²⁰¹⁵⁾	2.45 million ⁽²⁰¹⁶⁾
Average company size (Employment /Number of companies)	5.73 employees per company ⁽²⁰¹⁵⁾	5.84 employees per company ⁽²⁰¹⁵⁾	2.7 employees per company ⁽²⁰¹⁶⁾

Source: European Investment Fund

The sector includes just about everything you can view, listen to or read: the core of European culture from a Federico Fellini film to a Jacques Brel song. Subsectors include audio-visual, which contributed a value added of €63.5 billion in 2016; press and books with value added of €76.2 billion; the performing arts (€47.6 billion), visual arts (€40.6 billion) and architecture (€25.7 billion). Other activities, such as fashion design, amount to €36.6 billion.

Cultural and creative sector value added at factor cost 2016, millions of euros

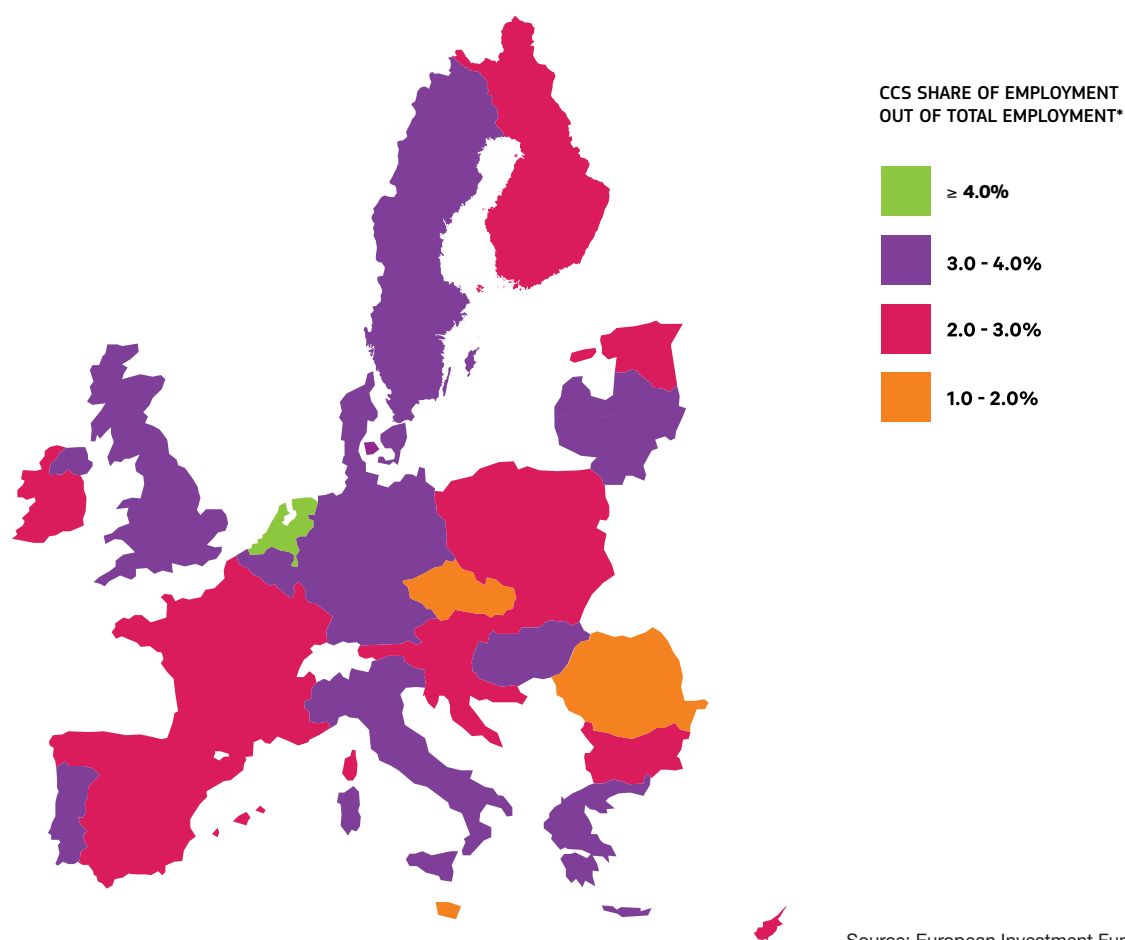
Value added at factor cost 2016 (million EUR)



The sector is also a major employer. Eurostat data indicate that in the Netherlands the sector accounts for more than 4 per cent of total employment, and at least 1 per cent in every EU country.

Source: European Investment Fund

Cultural creative sector share of total employment, 2015



Source: European Investment Fund



The roundtable discussion was hosted by the Basque Delegation to the EU.

The nature of demand has changed

The rise of streaming platforms as the primary distribution method for audio-visual content has changed consumer behaviour in ways that open up new opportunities for content creators.

The Internet is now the main distribution medium for audio, video, and written content, and has in many cases caused these once-distinct formats to converge into the same services. Podcasts, audiobooks and user-uploaded video streaming create new audiences for long-form discussion, educational content and literature. Social media create new opportunities for self-expression, but also resurrects old questions about the proper limits to freedom of speech. Many people will now binge-watch an entire TV series over a weekend. Who says attention spans are short?



“
Everybody is developing their own solution. You don't have these tools to connect [the sector] to other ecosystems”

Guillaume Klossa

Guillaume Klossa was a special advisor on media policy to Andrus Ansip, a vice president of the European Commission who is responsible for the digital single market portfolio. Klossa is the author of a major report on the future of the European media sector entitled “Towards European Media Sovereignty,” which looks at how Europe can strengthen its role in digital media.

New business models are also affecting behaviour. Whereas TV – whether funded by advertising, subscriptions, or government – has in the past shown the same thing to all viewers at the same time, streaming platforms use algorithms to target particular content to individual users based on their habits and preferences; that can make production of niche content a more realistic investment. Similarly, podcasting and audiobooks allow people to spend more time learning and engaging with ideas and literature. These formats attract large audiences willing to pay attention for hours at a time to lengthy, highbrow discussions that traditional news programmes simply do not have time for.

Market and data concentration weakens producers' hands

While online copyright theft remains a problem, the rise of legal distribution platforms such as Spotify, and Netflix have helped to reduce the problem by presenting content in ways users are willing to pay for. However, the concentration of the market around such a small number of platforms has also weakened content creators' bargaining power in copyright negotiations. Music producers, film studios, and news organisations cannot easily walk away from deals with the platforms.

Uneven access to data compounds this problem. The dominant platforms have more data on consumer behaviour, putting them in a strong position to infer what their viewers want and make best use of data-driven technologies like artificial intelligence. But content creators cannot achieve anything like the scale necessary to collect comparable data.

The European market is fragmented

In this as in many European industries, fragmentation is a special issue – for both good and bad. Bernd Fesel, managing director of the European Creative Business Network, said there were three kinds: “The first level is fragmentation in culture, the other is fragmentation in the market, and then you have a fragmentation in policy. All three levels are different,” said Fesel. Fragmented culture, he argued, is to be celebrated; it is the nature of Europe. Normal commercial forces will fix any unnecessary market fragmentation. But divergence in policy across Europe, he said, is “the real problem” to be addressed by policymakers.

Culture, language, and nationality are necessarily intertwined. The market – “of course it is fragmented,” said Marta Marin, delegate of the Basque Country to the EU, who said the sector is “by nature” fragmented because of Europe’s cultural diversity – though she stressed this in itself was not a problem, but the isolation of different parts of the sector. Basque is a minority language with around 850,000 active speakers in Spain and France. Generally, Basque viewers want at least some Basque content. Across the EU, there are more than 60 indigenous languages, not to mention languages spoken by immigrants. A 2012 Eurobarometer report states that just over half (54 per cent) of Europeans can speak at least one additional language to a conversational standard, and 38 per cent can speak the most widely-spoken language, which is English.

“

If we want to reach the same audience [data] in terms of volume and quality as Facebook or Google in Belgium, we have to merge the database of eight companies, at least"

Jean-Paul Philippot



Jean-Paul Philippot is general administrator at Belgium’s Radio Télévision Belge de la Communauté Française (RTBF), a major national broadcaster. Between 2009 and 2018, Philippot served as president of the European Broadcasting Union (EBU), a trade association that represents the interests of European public-service broadcasters.

There are other causes of fragmentation, such as the market structure. “If we want to reach the same audience [data] in terms of volume and quality as Facebook or Google in Belgium, we have to merge the database of eight companies, at least, – media companies, telco companies, and consumer goods companies” said Jean-Paul Philippot, general administrator of Belgian francophone broadcaster RTBF, “because we are fragmented.” Competition law controls how much traditional media companies can collaborate with one another, whereas online platforms incorporate many functions at once.

On the other hand, the fragmentation of Europe's media sector creates rivers of content. Philippot said that in the coming year, "as public broadcasters in Europe, we will produce more or less €20 billion of original content." That's more than all the US-based platforms together.

VR, AI and other technologies

And then, emerging technologies are opening up vast new vistas for artists and producers. Bernhard Grill, one of the inventors of the popular MP3 audio-format and director of audio and media technologies at Germany's Fraunhofer, said virtual reality and artificial intelligence will have a major impact on the sector's future. Given European contributions to major audio formats like MP3 and its follow-ons, Europe is well placed to "shape the fourth generation of our technology."

VR will be particularly important. "Immersiveness is something which is going to happen," said Grill. "We're doing a lot of media productions now from football stadiums, from concert halls, and so on, where you get the feeling that you're right in it. So it's not something where you have some sort of window where you look at the thing; but you can be inside, to really experience the audience, to sit in the middle and have the feeling like you're right in the crowd at the football game or in the concert hall."

But Europe's creative industries will have to get better at exploiting new technologies. As an example, Grill described a new audio-visual format that his team had worked on for use in VR, called MPEG-H. It is now being deployed in Asia, but not in Europe. Nevertheless, "much of the groundwork is actually done here in Europe."



II. New initiatives

All these changes have galvanised lawmakers in Brussels and other EU capitals. The European Commission recently published several legislative proposals affecting cultural and creative industries, some of which have already made it into law. Some of them build on the Commission's Digital Single Market agenda, first outlined in 2015, from which 30 legislative proposals have flowed. Others are in separate policy domains, such as research and innovation. But taken together, they add up to profound change in the way the European markets will operate. The initiatives include:

Horizon Europe

From 2021, Horizon Europe will be the EU's next big multi-year R&D programme. The Commission has proposed a budget of €94.1 billion over seven years, while the European Parliament wants €120 billion. The final amount will be decided in negotiations over the EU's overall long term budget. Nevertheless, the plan is to allocate some portion of that money to a so-called "cluster" of R&D projects dedicated to culture, creativity, and "inclusive society," which would include – among other priorities – support for the cultural and creative sector. The Parliament has proposed that the cluster receive 2.5 per cent of a €120 billion budget, or €3 billion.

Creative Europe

Creative Europe is a funding programme dedicated to Europe's cultural and creative sectors. The current version of the programme, which began in at the start of 2014 and will expire at the end of 2020, has a budget of €1.46 billion. The Commission is proposing that the successor programme, of the same name, should have a budget of €1.85 billion, whereas the Parliament wants €2.806 billion. As with Horizon Europe, the amount will be settled as part of negotiations on the EU's overall budget. By awarding grants, the programme aims to support EU-level cooperation on cultural diversity, cultural heritage, and the competitiveness of cultural and creative industries, particularly the audio-visual sector.

Digital Europe

Digital Europe is a proposed €9.2 billion programme aimed at building up Europe's digital capacities, by purchasing cutting-edge equipment and developing advanced digital skills. It's five focus areas are supercomputing, AI, cybersecurity, digital skills, and digital transformation. Resources acquired through Digital Europe will be made available to governments, businesses and academia.

While the programme does not focus on cultural and creative industries, it does highlight the sector as one it aims to help by giving it access to cutting-edge digital resources. The Commission, Parliament, and Council have reached a "partial" agreement on the programme's content, but like its sister-programmes Digital Europe won't be finalised until the EU budget is confirmed in 2020.

InvestEU

Within days of the Juncker Commission taking office in 2014, it moved forward with creating an innovative programme to leverage public-sector money to attract private funds into economically important projects. Now, the Commission has proposed a new edition from 2021, with a €38 billion budget. Included: finance for cultural and creative industry projects.

Audio-visual Media Services Directive (AVMSD)

The latest version of the AVMSD was adopted in November 2018. It is a set of legal principles that member states are required to transpose into national law, not a funding programme. However, the AVMSD effectively forces platforms to invest in European content because it requires, among other things, that on-demand media services' catalogues contain at least 30 per cent European works.

Although businesses can comply by purchasing licenses to show European content, the Directive also gives member states the option of adding an additional requirement to invest directly in local

content production, provided the requirements are “proportionate and non-discriminatory.” But the 30 per cent rule only applies where providers select and curate their own content catalogues. For example, it does not apply to user-uploaded videos on YouTube, but it does apply to Netflix and Amazon. Providers with low turnover or low audience numbers are also exempt, and member states can create additional exemptions for companies where the requirements would be “impracticable or unjustified by reason of the nature or theme of the audio-visual media services” in question. The AVMSD also extends some existing broadcasting rules to online platforms, including video-sharing sites, such as protecting minors from inappropriate content.

“The AVMSD was about levelling the playing field in relation to video sharing platforms, said Bury, “but it was also about European quotas, and about the promotion of European works.”



Claire Bury, Deputy Director-General of DG Connect, European Commission.

“
The AVMSD was about levelling the playing field in relation to video sharing platforms, said Bury, “but it was also about European quotas, and about the promotion of European works.”

Claire Bury

Copyright Directive

The Copyright Directive is a highly contentious update to EU copyright law. It was adopted on 15 April 2019. One of its most controversial provisions extends to press publishers the exclusive right to authorise or prohibit use of their intellectual property, “in whole or in part.” The right was already available to other content creators, such as authors and musicians, under existing law.

Some argued that the change would amount to a “link tax,” where press publishers would be able to charge platforms for the small “snippets” of their content typically that accompany links on social media sites like Facebook and Twitter. Whether or not the legislation will have this effect was itself part of the debate, but the final text states that the right will not apply to “private or non-commercial use of press publications by individual users,” nor to “acts of hyperlinking.” In any case, the rule will allow publishers to charge news aggregators for using large extracts of their work.

The copyright directive is “basically about getting people to pay for content when it’s made available,” said Bury. “Because industries have not been able to keep abreast of developments, younger people have begun to think, ‘well, we can have access to content for free.’ Well, maybe some kinds of content, you can have access for free. But where it requires a significant investment, where there is real creativity in it and originality, you have to pay a reasonable price for it. Most kids these days have started to realise that.”

III. Challenges for the industry

Tech and culture don't mix

A key challenge highlighted by participants is that Europe's cultural and creative sector is not well connected to the sources of technological innovation that could help make it more competitive.

“

The young generation is influenced by YouTubers, and gaming, and those kinds of things – so how can we make sure we don't lose them?"

Andreas Ehret



Andreas Ehret is vice president of technology for multiscreen services audio at Dolby, where he manages teams in San Francisco, Nuremberg, and Wrocław. Ehret has been with the company for over 11 years, and previously worked as group manager for audio coding software at Fraunhofer, the major German research institute.

In part, this is a function of fragmentation of the sector. When it comes to new technologies for the media sector, “everybody is developing their own solution,” said Guillaume Klossa, an advisor to the EU’s Digital Single Market Commissioner Andrus Ansip. “There is no cooperation,” he said; “we are losing a lot of money by duplicating” efforts. Compounding the fragmentation problem is the disconnect between the media sector and the tech sector. “There is a gap when it comes to tools to connect [the sector] to other ecosystem,” said Marín.

Another problem is expertise, as well as access to funding. Ugo Bacchella, chairman of the Fitzcarraldo Foundation, said the backgrounds in arts and humanities of most leaders in the sector mean they often “do not understand the potential of digital innovation.” He added that where there are digital innovators in culture, they struggle to attract financing due to the lack of funding to support innovation within cultural institutions. Furthermore, their ideas “are not really scalable, because most of the people working on digital innovation in culture are highly motivated in changing the culture,” but “their purpose is not just to sell a new product so they move to health or to a different business sector.”

The sector needs better access to data

Another challenge is that companies in Europe’s creative sector lack access to data. Data is a feature of the major U.S. content platforms’ competitiveness because it feeds algorithms that direct users to content that they might enjoy. That helps increase the chances they’ll renew their subscriptions and allows even niche, special interest content to make money. By providing audience insights, data can also guide investment decisions when buying distribution rights and financing new productions. But

without the large, pan-European customer bases that the U.S.-based platforms enjoy, no company in Europe's fragmented cultural sector has been able to get a similar degree of access to data.

European companies lack scale

Another problem: purchasing power. Because of their global reach, multinational platforms like Netflix and Amazon have the financial muscle to achieve European scale by buying-up distribution rights for all European territories. That translates into an advantage when operating in the individual European countries, since producers often want to secure bulk deals for many territories at once. Danielle Kadeyan, founder of Media Finance Partners investment group, said, this permits the mostly US-based platforms to "buy X number of territories in one go." But "if you are the platform for the French market, or the German market, [and if] I am the producer or I am the distributor, I may be interested in doing one deal with one entity, as opposed to doing a deal with several market players."

The audience isn't listening

Audiences are changing in ways that traditional broadcasters are struggling to cater for. Kadeyan argued that younger people are losing interest in television, whose broadcasters are European. But they're favouring online platforms like Netflix and YouTube, based in the US. "The traditional broadcasters have lost the young people. The young people don't want to watch television," she said. "My concern is, how do you monetise all this, because those young people, who are 15, 18, 20 - they are the clients of tomorrow, they are the 'eyeballs' of tomorrow."

Dolby's Andreas Ehret is also concerned that young people are losing interest. "I think the traditional content industry in film or broadcasting may be facing a challenge there, in potentially losing that generation," said Ehret. "The young generation is influenced by YouTubers, and gaming, and those kinds of things - so how can we make sure we don't lose them?" he asked.



From left to right: Anna Heiskanen, Aalto University; Lily Díaz-Kommonen, professor and head of research, Aalto University's Department of Media; Simone Lippold, Frankfurt Book Fair.

“

Make sure that open standards prevail," says inventor of MP3 audio



Bernhard Grill, one of the inventors of the popular MP3 audio format, urged European policymakers to “make sure that open standards prevail” to stop monopolies from controlling new innovations in digital media.

In an interview with Science|Business, Grill said it was important “that distribution formats do not end up being controlled by a single company,” as new digital services are frequently offered through proprietary apps that can’t be accessed by other market players.

Grill is director of Germany’s Fraunhofer Institute for Integrated Circuits (IIS), where he leads development of new audio technologies and standards. In 1992, Grill was awarded the Joseph von Fraunhofer award for his role in developing mp3, the audio coding technology that made it easy to share – and, later, to sell

– digital audio files over the Internet. Fraunhofer has since developed MP3 successors AAC and HE-AAC, which are used in all consumer electronics devices and services, and a fourth generation is now taking off.

“

Policymakers should prioritise open standards as a safeguard against monopoly"

Fraunhofer’s
Bernhard Grill

Digital media standardisation didn’t go far enough

Grill argued that too many new services were in dire need of more open standards. “Whatever media distribution will happen in the future,” said Grill, “I think it’s important for Europe to be independent of single companies that actually control large parts of the media distribution chain, where you actually need to go to these companies because they’re the only ones that make this technology available.” He said that despite the near-ubiquity of open technology standards, like MP3 and MPEG video, new forms of standardization were necessary to create interoperability within services such as video streaming, as currently such services are wholly controlled by individual companies like Netflix and Amazon, even though they use MPEG video.

Grill also talked about some of the new media technologies that were just around the corner. The next generation of audio codecs, said Grill, “will bring completely new listening experiences to consumers.” He said that one of the new standards, MPEG-H creates 3D sound so immersive “that consumers can experience the live atmosphere of a rock concert or a soccer match in the living room.” He added that television viewers will be able to easily adjust the audio mix to their liking, such as making speech louder and clearer, or picking out the radio chatter of a particular race team in motorsports.

Two other new codecs Grill described are Enhanced Voice Services, or EVS, which dramatically improves the reception and audio quality of telephone calls, and xHE-AAC, which enables reliable music or video streaming even over crowded mobile phone networks, or in areas with bad reception quality.

Building the holodeck

Looking further into the future of media and entertainment, Grill said a major advance would be finding a way to capture light and sound fields for live-action virtual and augmented reality content. Light and sound fields describe the area around and behind an object. “This ultimately would be the holodeck in Star Trek. I fear that I might not live long enough to see that fully happen,” said the 58-year-old Grill, “but that’s the dream behind [it].” Though he added that MPEG standardization was already leading in that direction. Cracking the light fields problem would mean for example, achieving “six degrees of freedom” in VR content, meaning the ability to move freely throughout a scene and around objects and people. Currently, that is only possible with computer-generated graphics; there is no way to do it with real camera footage.

IV. Conclusions

1. Europe should invest in new technologies

Grill said Europe should invest more in new technologies that will promote competitiveness and productivity in the media sector, such as virtual reality and artificial intelligence. He said AI will be “as important as microelectronics nowadays.” Just as no devices today are sold without microprocessors inside, “the same thing you will see with artificial intelligence.” However, he said, “what you [European policymakers] are spending is way too low.” He argued that successful investment in AI today is “where the retirement money will come from in the future – not spending the money, but creating the technologies that will pay for pensions later on.”

Grill added that the creative industry isn’t as proactive in adopting new technologies as it should be. “If you go to a film set today, it’s still very analogue,” said Grill. “There’s nothing like networked cameras, or things like that.” Grill also expressed concern about the extent to which new digital services are confined to proprietary apps, as opposed to standardized technologies that can be accessed by a wider variety of market players.

2. Support open standards

Grill also recommended open standards, meaning generally-agreed standards for interoperability between devices and systems, which are not controlled by particular companies. “Whatever media distribution will happen in the future, I think it’s important for Europe to be independent of single companies that actually control large parts of the media distribution chain, where you actually need to go to these companies because they’re the only ones that make this technology available.” He gave examples of current near-ubiquitous open standards, such as MP3 and MPEG video, arguing that new forms of standardization were necessary, such as in video-streaming services like Netflix and Amazon, which are not currently interoperable despite using MPEG standards.



“
Only if we are
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Rikke Ennis

Rikke Ennis and Joao Santos have embarked together on a venture to tackle the platform giants. They run NutAlone, a Copenhagen-based video-on-demand platform for European content. NutAlone focuses on bringing small, independent, or unreleased films to the market at the same time as offering fair terms to rights holders, who receive 10 per cent of the fee paid by users. Copyright holders can upload their content to the platform directly. The platform is co-funded by the EU under the Creative Europe programme.

Precisely how policymakers should go about ensuring open standards prevail, however, is a separate question. “How do we make sure that those standards are interoperable? What kind of things should we do? Should we be having more regulatory sandboxes, for example? How should we be really walking the talk on that question of interoperability and standards?” asked Bury.

Open standards are not to be confused with open source, where source code is published and can be reused or edited by anyone. Proprietary systems can still adhere to open standards of interoperability.

3. Support pan-European cooperation in digital media

Some degree of fragmentation in European media is inevitable due to cultural and linguistic differences. But the cultural industry could do more to cooperate at a European level so that it can also compete with American platforms. “Only if we are gathered across Europe as a community, as ‘civils,’ you could say, that’s where we could have the same power as the ‘globals,’” said Rikke Ennis. Ennis and Joao Santos run NutAlong a video-on-demand platform for European content.

4. Connect culture with technological innovation

Needed: new ways of connecting tech innovators with the cultural sector. That would make best use of new technologies, and make it easier to finance and scale up new projects. Policymakers should promote “association between content developers and tool-makers,” said Lily Díaz-Kommonen, media professor at Aalto University in Finland. She also said that while it is natural to discuss the fields one thinks of first in the cultural sector today – such as film and journalism – new technologies may yield new types of cultural output.

“What about all the other formats that are out there that do not exist yet, that are possibly the big money-makers of the future?” she asks. “For example, location-based media – not in the sense of old-time locative media, but bringing together augmented reality with virtual reality. It’s important to find a way of mapping what is out there, and then how do we connect these things together?”

5. Break up the silos

Fesel argued that fragmentation of public policy and of policymaking is “the real problem” for the sector. “The cultural committee is only discussing culture. The economic committee thinks that theatres, music, museums, are not an economic factor. And so you have a lot of siloed policies, though most politicians agree this should be disrupted,” he said.

“We need an innovation programme for policy,” argued Fesel. He praised what Christian Ehler, a member of the European Parliament who was a leader of the legislative efforts in the field, did “with the intergroup, bringing together those different levels of committees, is a sensational innovation in policymaking. And if we would have more intergroups at city level, at regional level, even in national parliaments, I think our sector would thrive much better.”

Cooperative work is also needed inside the Commission itself, several participants said. As the number of initiatives in this field grows, so too will the need for greater coordination – so they all work additively, rather than at cross purposes.

6. Confront anticompetitive practices

Ehler, the European Parliament member, argued that the main priority should be to confront anticompetitive behaviour by online platforms. “We started with copyright, and next we have to start with anti-trust law. We have to destroy the platforms, and we have to regulate algorithms,” said Ehler “I’m not an ideologist, I’m EPP, I’m a market liberal. But I don’t like platforms, because they hate competition,” he said.



“
*Just to make clear:
copyright was just
the beginning...*”

Christian Ehler

Christian Ehler is a member of the European Parliament for the German state of Brandenburg. He is a member of Germany’s centre-right Christian Democratic Union, which is part of the European People’s Party, the largest group in the European Parliament. He served as rapporteur for the Horizon Europe Specific Programme, one of the two pieces of legislation establishing Horizon Europe.

“What they are, are monopolists. And step by step we are urging now the Commission and Mrs. Vestager [the competition commissioner]. We want to use anti-trust law in the next [parliamentary] term to go against these platforms. We have to be really careful that we don’t warm-up French concepts of protectionism. But this is infringing against a free market economy. Just to make that clear: copyright was the beginning of the war.”

(Representatives of Amazon and Netflix declined invitations to join the discussion, or to comment afterwards.)

While participants quickly reached general agreement on the general goals for policy, defining the steps they needed to take to achieve that was much harder.

Summing up, Bury said effective policy coordination by the Commission would be key to tackling the challenges raised. It will be important to combine “what we do in Horizon with what we do when we come to deploy the technologies, and the way the different programmes work together.”

Bury said the creative sector needs to define its priorities so that “we can see how they fit together and we can make sure we’ve got a critical mass of money.” One possible idea for coordination could be to create a new “flagships” for the sector – bringing together several funding lines so money can be concentrated where it will count. The problem in the digital space: “It’s not about throwing a little bit of money at something. You’ve got to throw a lot of money at it. You’ve got to take a big risk on innovation.”

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Academia

Aalto University	Tallinn University of Technology
Amsterdam University of Applied Sciences	Trinity College Dublin
École Polytechnique Fédérale de Lausanne	TU Berlin
ESADE Business School	University College London
ETH Zurich	University of Amsterdam
Imperial College London	University of Birmingham
Karolinska Institutet	University of Bologna
KTH Royal Institute of Technology	University of Eastern Finland
KU Leuven	University of Luxembourg
Norwegian University of Science and Technology	University of Pisa
Politecnico di Milano	University of Twente
Polytechnique Montréal	University of Warwick
Sorbonne University	

Public organisations

Barcelona Supercomputing Center	Innovate UK
Business Finland	Innovation Norway
CERN	Pasteur Institute
Centre National de la Recherche Scientifique (CNRS)	Québec Research Fund
COST Association	Republic of South Africa - Department for Science and Technology
European Investment Bank	Research Council of Norway
Eureka	Spanish National Research Council (CSIC)
Fraunhofer	
Hospital Saint Joan de Deu	

Associations

ACM Europe Policy Committee	Photonics 21
ATTRACT	The Guild
European University Association	

Group members

Deusto International Research School (DIRS)	GEANT
International Consortium for Health Outcomes Measurement (ICHOM)	Simmons & Simmons
	Tataj Innovation