White Paper

Empowering Creative Sectors for Innovation, Sustainability, and Global Influence

Strategic Dialogue on the Future of Europe's Creative Economy

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CONTENT

On June 4th, the ECBN/CreativeFED brought together creative professionals, policymakers, and allied European Projects to discuss the latest developments in the European Creative Ecosystem. This conference marks the beginning of an ongoing Open Strategic Dialogue on the Future of Europe's Creative Economy between professionals, policymakers, and institutions like the Commission and Parliament, serving as a bridge between different sectors, professions, and institutions.

At this year's Strategic Dialogue on the European Creative Economy (#SDECE25), over 70 delegates, including professionals from the cultural and creative sectors, members of the European Parliament, and representatives from the European Commission, convened to explore through four provocations new strategic positions on key challenges facing Europe's creative economy.

The first provocation, "*Creative Skills for a Sovereign Single Market and Competitiveness*" focused on how creative talents and cross-sectoral competencies can enhance the EU's capacity to act in a competitive, innovation-driven market - linking the development of human capital directly to European agency and economic sovereignty. The second session, *"The Creative Economy as an Engine of the New Clean Industrial Deal"* examined the role of the creative sectors in driving the green and digital transition, emphasizing how creative innovation can build strategic autonomy and resilience across industries and territories. The third topic, "*Creatives for Europe – European Democracy Shield"* explored how creative professionals contribute to democratic renewal by shaping pluralistic narratives, promoting civic engagement, and fostering cultural literacy - thereby reinforcing Europe's normative agency in a contested global arena. Finally, the fourth provocation turned to the geopolitical dimension: "*Cultural Sovereignty and Strategic Autonomy*" This discussion addressed how Europe's Cultural and Creative Industries can function as a strategic soft power - advancing cultural autonomy across regions, countering external dependencies in digital and symbolic infrastructures, and laying the foundation for a European model of cultural and symbolic sovereignty.

This conference white paper aims to synthesise the diverse perspectives shared by participants, the Advisory Board, and allied European projects. It serves as an interim result and a strategic milestone, laying the groundwork for CreativeFED's initiatives in the coming year. The outcomes of #SDECE25 will directly inform CreativeFED's future activities and shape its advocacy agenda at both national and European levels.

On the day before the main conference, a dedicated policy co-creation workshop convened representatives from 9 EU-funded projects. United under the overarching theme of strategic cultural autonomy, these projects - together representing more than €30 million in EU investment - engaged in sharing experiences, exchanging insights, and assessing how their findings could inform and respond to pressing European policy priorities.

Management Summary

On June 4, 2025, over 70 policymakers, creative professionals, and EU project leaders convened in Brussels for the Open Strategic Dialogue on the Future of Europe's Creative Economy. Organised by ECBN/CreativeFED, this milestone event launched a long-term dialogue on how culture and creativity can shape Europe's future resilience, competitiveness, and sovereignty.

The dialogue introduced Cultural Strategic Imagination as a critical concept—building on cultural agency, autonomy, and sovereignty—to unlock the transformative role of the Cultural and Creative Sectors (CCS) in Europe's green, digital, and democratic transitions.

Key outcomes and policy recommendations across six strategic themes:

Creative Skills & Competitiveness
- Recognise creative skills as transversal enablers of innovation.
- Propose a European skills recognition framework, foresight hubs, hybrid curricula, and new tools like Art Coins and micro-credentials.

Green Deal & Sustainable Innovation
- Embed CCS into the EU Green Deal, circular economy, and public procurement.
- Develop new cultural sustainability indicators and creative labs to drive behavioural and systemic change.

Creativity as Democratic Infrastructure
- Position culture as a pillar of democratic resilience.
- Support civic participation, pluralistic narratives, and trust-building through structural funding and inclusion in EU democratic innovation frameworks.

Cultural Autonomy as Smart Power
- Reframe cultural autonomy as a strategic digital agency.
- Invest in public cultural infrastructures, European AI models, and ethical, open-source tools to ensure cultural sovereignty.

Representation & Strategic Procurement
- Strengthen CCS voice in EU governance through an inter-DG taskforce and permanent advisory group.
- Open public procurement to CCS with adapted rules, creative criteria, and pilot programmes.

Creative Ecosystems & Capacity Building
- Build connected, cross-sector innovation ecosystems across regions.
- Fund long-term network infrastructures, especially in underrepresented and rural areas.

This white paper marks a strategic waypoint in advancing the role of culture in shaping Europe's future - economically, democratically, and geopolitically - and calls on the EU to fully integrate cultural policy into its core strategies for sustainability, innovation, and sovereignty.

Brussels, June 2025

1. Background

As Europe navigates an increasingly complex and volatile global landscape - shaped by geopolitical instability, digital dependencies, democratic backsliding, and the accelerating climate crisis - culture is emerging not only as a mirror of identity, but as a powerful strategic asset. At this year's conference, participants critically examined the role that Europe's Cultural and Creative Industries (CCIs) must play in safeguarding and shaping Europe's capacity to act, adapt, and lead. Central to the discussion at the conference was the evolving triad of Cultural Agency, Cultural Autonomy, and Cultural Sovereignty - each representing a different but interconnected layer of Europe's strategic cultural posture:

Cultural Agency

Cultural agency refers to the capacity of individuals, communities, and sectors to act, influence, and reshape cultural dynamics. It emphasizes empowerment, participation, and the ability to act meaningfully within existing systems. European creative professionals must be recognized not only as cultural producers but as active agents of democratic change, innovation, and cohesion, especially in times of social and institutional fragility. Often operational and immediate, cultural agency allows creative actors to intervene in public life - for example, when a local arts organisation shapes urban policy through participatory cultural projects.

Cultural Autonomy

Cultural autonomy is the freedom to make cultural decisions independently, without external imposition. It supports the principle of self-determination within shared systems, such as the EU, and underscores the importance of pluralism, linguistic diversity, and decentralised cultural governance. Autonomy allows creative ecosystems to remain adaptive and locally rooted, while still being connected to a broader European vision. Like the Basque Country producing multilingual, locally grounded narratives that challenge mainstream formats while remaining part of the European cultural space.

Cultural Sovereignty

Cultural sovereignty addresses the supreme authority over a society's cultural content, infrastructures, narratives, and identity. It relates directly to symbolic power and geopolitical independence - especially in an era where global tech platforms, algorithmic systems, and AI-generated content threaten to displace or distort European cultural expressions. Protecting cultural sovereignty means ensuring that Europe controls its own cultural memory, storytelling architectures, and creative infrastructures. This could result in a pan-European consortium of creators developing open-source cultural AI tools to train models on European archives and languages, ensuring Europe's digital heritage is not filtered through non-European platforms.

Europe's public is overwhelmingly in favor of strengthening its cultural autonomy:

These layers - agency, autonomy, and sovereignty - are interconnected and mutually reinforcing. Yet, on their own, they do not fully capture the unique strategic role of Europe's creative talents. Discussions at #SDECE25 revealed a broader insight: Europe must not only protect what it has but also dare to envision what it could become. Delegates agreed that none of the three dimensions of cultural power - agency, autonomy, or sovereignty - are alone sufficient to define the transformative potential of the creative sector. Creative professionals do more than support the Green Industrial Deal, contribute to the Competitiveness Compass, or uphold European sovereignty in storytelling and infrastructure. Their value also exceeds the essential calls for cultural autonomy and the empowering function of cultural agency. What is needed is a forward-looking capacity - *a strategic cultural imagination* - to guide Europe toward more just, resilient, and visionary futures.

CCIs as European Smart Power

Concept	Key Question	Scale	Focus
Cultural Agency	Who can act and shape cultural dynamics now?	Individual / Group	Empowerment & Action
Cultural Autonomy	Who decides cultural direction independently?	Organisational / National	Self-determination within systems
Cultural Sovereignty	Who owns and controls cultural infrastructures and narratives?	Geopolitical	Ultimate Authority & Protection
Cultural Strategic Imagination	What futures can we creatively envision and design?	Long-term / Visionary	Foresight & Transformation
Soft Power	How can culture influence others without coercion?	International / Diplomatic	Attraction, Persuasion & Values Projection
Smart Power	How can culture be combined with economic and political influence?	Systemic / Strategic	Integration of Soft & Hard Power for Global Impact
Cultural Strategic Imagination	What futures can we creatively envision and design?	Long-term / Visionary	Foresight & Transformation

CCIs moving European Soft Power to Smart Power

Yet, as underscored at #SDECE25, the three dimensions, Agency, Autonomy and Sovereignty - while essential - are not sufficient on their own to define the full strategic potential of Europe's creative sector. What is needed is a more integrated and future-oriented approach: one that combines cultural empowerment with systemic transformation and geopolitical relevance.

In times of conflict and crisis, Cultural and Creative Industries (CCIs) emerge as a vital source of soft power for Europe - one that operates not through coercion or economic dominance, but through empathy, narrative, and cultural resilience. As societies face disinformation, polarisation, and the erosion of trust, creative practitioners play a critical role in shaping public understanding and reinforcing democratic values. Through storytelling, visual arts, performance, and digital media, CCIs produce alternative narratives that resist propaganda, foster solidarity, and uphold human dignity. This narrative power becomes especially significant in contexts where traditional diplomatic channels are constrained or ineffective, allowing culture to step in as a form of nonviolent resistance and meaning-making.

CCIs also offer a powerful mechanism for social cohesion and healing during and after conflict. Creative expression helps communities process trauma, rebuild identity, and preserve collective memory in the face of displacement or cultural erasure. Whether through local arts initiatives, participatory design, or transnational cultural collaborations, CCIs provide the tools for communities to reimagine their future while remaining rooted in their traditions and values. This cultural resilience not only strengthens local ecosystems but contributes to long-term stability, making CCIs an essential part of any integrated crisis recovery and peacebuilding strategy.

Viewed through a strategic lens, CCIs represent a distinctly European form of soft power - grounded in pluralism, openness, and freedom of expression. By investing in CCIs as agents of democratic resilience and cultural sovereignty, the European Union can extend its influence in a way that is consistent with its values and fundamentally different from the logic of hard power (economic and political influence). However, as the nature of global conflict becomes more hybrid and multi-dimensional - intertwining narrative warfare, economic pressure, and technological dependency - the limitations of soft power alone become clear. In this evolving landscape, CCIs are not only symbolic actors but also strategic assets capable of influencing economic systems, digital infrastructures, and societal transitions. This positions creative actors at the heart of a broader shift from soft power (cultural influence) to smart power - where culture, economy, and diplomacy converge. In this model, CCIs serve not just to reflect or represent Europe, but to actively shape the future by integrating cultural creativity with technological innovation, policy design, and geopolitical relevance.

The Need for Cultural Strategic Imagination

Cultural Strategic Imagination is the ability to envision and prototype alternative cultural futures. It blends creativity, foresight, and systems thinking to inform long-term cultural strategies, policy frameworks, and innovation agendas. Where agency mobilises action, and sovereignty protects space, strategic imagination enables direction - it offers the vision needed to navigate complexity, embrace uncertainty, and shape Europe's cultural trajectory with purpose and foresight.

As Europe moves from a reactive posture of soft power to a proactive approach of smart power - combining cultural influence with economic and political leverage - the role of imagination becomes increasingly critical. Smart power provides the operational framework, aligning cultural and economic instruments for strategic influence. Yet without a forward-looking vision, smart power risks reinforcing the status quo rather than transforming it. This is where cultural strategic imagination becomes indispensable: it equips Europe not only to compete globally, but to lead with vision, to anticipate disruptive change, and to co-create sustainable, inclusive futures. It transforms CCIs from tools of influence into architects of possibility, empowering them to drive societal transitions that are not just resilient, but regenerative.

In this light, the conclusion of the conference was clear:

> Europe must actively invest in and develop its capacity for cultural strategic imagination. This means empowering its CCIs not only as economic actors, but as foresight agents, narrative builders, and innovation leaders - central to shaping a sovereign, autonomous, and resilient cultural future for Europe.

2. Process and Preparations

On the day preceding the main conference, a dedicated policy co-creation workshop brought together representatives from nine EU-funded projects. Aligned with the overarching theme of strategic cultural autonomy, these projects - collectively accounting for over €30 million in investment - shared experiences, exchanged insights, and explored the relevance of their work to current European policy challenges.

This preparatory phase served to transform practical project findings into early policy recommendations, reinforcing the recognition of culture as a strategic driver of innovation, resilience, and democratic renewal in Europe. The discussions reflected a broad range of thematic contributions, from skills development and green innovation to democratic participation and cultural sovereignty. These insights laid the groundwork for the policy dialogue that followed, directly informing the second conference day's exploration of competitiveness, sustainability, democracy, and cultural self-determination.

The second day of the Strategic Dialogue - the main conference event - brought together policymakers, cultural professionals, institutional representatives, and civil society actors for a dynamic exchange of ideas. Structured around a series of provocations, roundtables, and an open debate, the programme explored the evolving intersections between culture, democracy, and innovation. Discussions delved into pressing topics such as institutional trust, the power of imagination and narrative, the cultural dimensions of climate policy, the ethical implications of digital infrastructure and AI, as well as the future of skills and education in Europe's creative and knowledge economies.

This inclusive format fostered a highly participatory and forward-looking process. Grounded in the evidence and insights gathered during the preparatory phase, the conference ensured that the resulting policy reflections were not only rooted in real-world project experiences, but also strategically aligned with the broader goals of resilience, competitiveness, and democratic renewal. The exchange reaffirmed the need to recognise culture as a driving force in shaping Europe's sustainable, digital, and socially cohesive future.

3. Outcomes and Policy Recommendations

Topic 1: Creative Skills for a Sovereign Single Market and Competitiveness: Cultural Autonomy as An Economic Strategy

Problem Statement

Creative skills are undervalued and inconsistently recognised across the EU's education, labour, and innovation systems. This limits the competitiveness of the Cultural and Creative Industries (CCIs) within the Single Market.

Creative skills should be acknowledged as transversal assets essential to the green, digital, and social transitions. A forward-looking approach is needed - establishing regional foresight hubs, investing in hybrid skill sets that combine arts, technology, and ethics, and supporting agile learning ecosystems. Strategic instruments such as Art Coins, collective rights mechanisms, and impact-based cultural funding were proposed to close structural gaps and support fair remuneration models.

In alignment with the Draghi Report and the Competitiveness Compass, which both emphasize the need for strategic investments in innovation and boosting Europe's global competitiveness, the following policy recommendations are proposed to help the European Commission strengthen Europe's open strategic cultural autonomy, support the CCS as drivers of innovation, and enhance Europe's role in the global creative economy:

A. Future Fit - Creative Talents and Skills

Position creative skills as transversal enablers of innovation, key to strengthening Europe's competitiveness, economic sovereignty, and cultural autonomy.

To unlock the full potential of Europe's Cultural and Creative Industries (CCIs) within the single market, culture must be formally positioned as a strategic economic sector. This includes recognising creative skills across education and labour systems, reducing fragmentation, and embedding CCIs in EU competitiveness strategies.

2. Recommended Action

Establish a European Skills Recognition Framework for CCIs, integrate creative skill sets into national curricula and labour classification systems such as Micro-credentials, and launch European as well as regional foresight hubs to anticipate future competence needs. Pilot funding tools such as Art Coins and impact-based cultural funding models to close economic gaps. Create a European and regional

Skills Alliance to support a wider acceptance of micro-credentials and recognition of Life-Long Learning modules. Intensify the financial support of actions like the Large-Scale Partnerships to help in capacity building and networking of sectoral and regional stakeholders

DG EAC, DG EMPL, DG GROW, EIT Culture & Creativity, national education ministries, CCI clusters, and Pact for Skills partners should build on the outcomes of EU-funded projects such as CYANOTYPES, S+T+ARTS Echo, and Label4Future, which have identified hybrid skill sets - combining arts, technology, and ethics - as critical for driving green, digital, and social transitions. These institutions are encouraged to strengthen funding for similar initiatives and work toward integrating these future-fit competencies into formal recognition systems across Member States, addressing existing fragmentation and advancing a coherent European skills agenda.

3. Expected Impact and EU Strategic Alignment

Achieving increased mobility, formal recognition, and fair valuation of creative competencies is essential for unlocking the full economic and strategic potential of Europe's Cultural and Creative Industries (CCIs). Currently, the fragmented recognition of creative skills across Member States limits cross-border labour mobility, hinders collaboration, and undervalues the unique contributions of creatives in driving innovation.

By embedding creative competencies - particularly hybrid skillsets combining artistic, digital, and ethical dimensions - into formal education, vocational training, and labour classification systems, Europe can ensure that cultural professionals are both visible and valued within the Single Market. This formal recognition not only enhances employment opportunities and sectoral resilience but also aligns cultural autonomy with broader EU goals such as competitiveness, social inclusion, and strategic sovereignty. When creative talent is recognised and remunerated, it enables a circular reinforcement of cultural and economic value creation. In this context, cultural autonomy is no longer a soft policy aspiration, but an active economic strategy that contributes to Europe's innovation leadership, industrial transformation, and long-term competitiveness on the global stage.

By supporting these efforts, the CCI Sectors and talents will help Eu strategic alignment with supporting the European Skills Agenda, Pact for Skills, Single Market Strategy, and Creative Europe policy goals.

Policy Recommendations outlines:

1. Creative skills remain undervalued and inconsistently recognised across the EU's education, labour, and innovation systems, limiting the competitiveness and mobility of CCIs within the Single Market.

2. Creative competencies must be acknowledged as transversal enablers of green, digital, and social transitions - key to Europe's strategic sovereignty and economic resilience also in the context of the competitiveness compass and the clean industrial Deal

3. Hybrid skill sets combining arts, technology, and ethics - identified by EU projects such as CYANOTYPES, S+T+ARTS Echo, and Label4Future - are essential for future-fit CCIs and should be formally recognised and supported across Member States.

4. A forward-looking skills strategy is needed, including:

- A European Skills Recognition Framework for CCIs

- Integration of creative skill sets into national curricula and labour systems

- Establishment of European and regional foresight hubs to anticipate future skill needs

- Support for micro-credentials, lifelong learning, and the Large-Scale Partnerships

- Innovation in funding tools (e.g. Art Coins, impact-based cultural funding, collective rights mechanisms)

5. Key institutions and stakeholders (DG EAC, DG EMPL, DG GROW, EIT Culture & Creativity, national ministries, CCI clusters, and Pact for Skills partners) are urged to reinforce funding, alignment, and policy integration.

6. Expected impacts include:

    a. Increased cross-border labour mobility

    b. Formal recognition and fair valuation of creative competencies

    c. Strengthened sectoral resilience and competitiveness

    d. Alignment of cultural autonomy with EU strategic goals

B. Establish a European Creative Innovation Fund

Innovation-Driven CCS – Investing in Creative R&D for Sustainability and Digital Transformation

1. Policy Objective

To increase investments in research and development (R&D) within the Cultural and Creative Sectors (CCS), with a particular focus on sustainability, digital technologies, and interdisciplinary collaboration. Unlocking the innovation potential of CCS requires targeted R&D investment, enabling creative actors to actively contribute to Europe's technological leadership, ecological transition, and strategic autonomy. CCS should be recognised not only as beneficiaries of innovation policy but as drivers of future-oriented, cross-sectoral R&D, particularly in areas such as AI in the arts, immersive storytelling, sustainable design, and cultural infrastructure.

2. Recommended Action

Establish a dedicated Creative R&D Fund at the European level to support cross-border creative-technological partnerships, prioritising projects that combine artistic experimentation with digital transformation and ecological innovation. The fund should encourage transdisciplinary cooperation between CCS actors, researchers, technology developers, and sustainability experts. Inspiration can be drawn from the Horizon Europe model, especially regarding mission-driven innovation, cascading funding (FSTP), and international collaboration.

The recommended action should encompass transdisciplinary cooperation with all aforementioned stakeholders, critically including educational providers. Collaborative models that link training directly to research, particularly applied research, would ensure that educational provisions are responsive to technological and sustainability-driven advancements within industry. This approach would facilitate the transfer of innovation, knowledge, and an industry-oriented mindset into educational settings. Consequently, research and development can serve as a conduit, simultaneously fostering market-driven solutions and relevant training pathways. For this reason, we recommend a policy focus on driving national and regional ecosystems (not just cross-border) to facilitate such models, with dedicated focus on measuring the impact and effectiveness to ensure continuous improvement .

Support should be channelled through existing frameworks such as Creative Europe, Horizon Europe, and the Competitiveness of Enterprises and SMEs (COSME) programme, while expanding their mandate to explicitly address creative R&D. Priority areas should include digital arts and AI, circular design systems, green transition through cultural methods, and experimental use of immersive technologies. Coordination across DG EAC, DG RTD, DG CNECT, and DG GROW will be critical, alongside support from EIT Culture & Creativity, national innovation agencies, and cross-sectoral European networks.

3. Expected Impact and EU Strategic Alignment

Strengthening R&D within the CCS will reinforce Europe's innovation ecosystems by integrating cultural creativity into technological and green transition pathways. It will enhance the competitiveness of European CCIs, support sustainable design-led innovation, and help reclaim leadership in cultural technology development. Transnational R&D investment will also reduce fragmentation, enable scalable experimentation, and unlock the full value of artistic inquiry in addressing complex societal challenges.

This policy direction is fully aligned with the Competitiveness Compass, the Horizon Europe Strategic Plan, the European Green Deal, and the vision of Open Strategic Autonomy. By recognising CCS as a high-potential R&D frontier, Europe can foster innovation-led growth that is not only economically competitive but also socially and culturally transformative.

Policy Recommendations outlines:

1. Competitiveness and Creative talents
2. To increase investments in research and development (R&D) within the CCS, with a focus on sustainability, digital technologies, and interdisciplinary collaborations
3. Create a dedicated fund to support cross-border creative and technological partnerships. This fund should prioritize projects that explore digital transformation, AI in the arts, and sustainable design innovations.

4. This initiative directly supports the Competitiveness Compass, which calls for innovation-driven growth and the fostering of sectors that contribute to Europe's technological leadership. The Horizon Europe program provides a potential model for such a fund, particularly in its support of research and transnational collaboration.

5. The Competitiveness Compass stresses the importance of investing in human capital and developing a skilled workforce to drive economic and technological innovation. Education and training in creative sectors can provide the necessary skills to meet these goals, particularly in green innovation and digitalization.

6. Support the integration of digital literacy, into education and training programs for the creative workforce

Cross-Sector Innovation Partnerships

7. To create stronger linkages between the Creative and Cultural Sectors (CCS) and other industries (e.g., manufacturing, healthcare, education).

8. Encourage the establishment of innovation hubs where creative industries collaborate with other sectors on innovative solutions. This could include smart city projects, healthcare technology, and sustainable manufacturing.

9. Strengthen Intellectual Property (IP) Protection for European Creatives,

10. To create stronger linkages between the Creative and Cultural Sectors (CCS) and other industries (e.g., manufacturing, healthcare, education).

11. Encourage the establishment of innovation hubs where creative industries collaborate with other sectors on innovative solutions. This could include smart city projects, healthcare technology, and sustainable manufacturing.

Establish a Collecting Society for Creative and Digital Rights in the AI Era

12. Establish a European AI Rights Alliance and a creative and digital rights collective copyright management organization to ensure fair remuneration for creators whose works and publicly available cultural data are used to train AI models.

13. As generative AI platforms increasingly rely on scraping and processing vast amounts of public digital content - including artworks, texts, designs, and audiovisual materials - there is an urgent need to develop rights-based mechanisms that recognise and compensate the creators of these cultural assets. Without regulatory intervention, creators face systematic appropriation of their work without consent, attribution, or compensation.

14. The European Commission should support the creation of a sector-neutral, pan-European collecting society or mandate existing CMOs to develop a dedicated structure for AI training rights

management. This body would license, monitor, and collect compensation from AI companies using European digital content, based on transparent, traceable, and rights-respecting frameworks. A system of automated content tracking, metadata embedding, and cultural data provenance should be developed in collaboration with CCSIs and tech partners.

Topic 2: The Creative Economy as an Engine of the New Clean Industrial Deal: Sustainability, Green CCIs, Resilient Economy

Problem Statement

CCIs are insufficiently integrated into the EU's green industrial strategies, despite their unique ability to influence societal behaviour and foster sustainable innovation.

Participants called for integrating CCIs into clean industrial deal, the circular economy, and broader sustainability frameworks. New metrics are needed to assess cultural contributions to the green transition, including behavioural change, artistic influence, and long-term social impact. By embedding cultural indicators into climate policy, Europe can better harness the creative sector's power to accelerate just and inclusive transitions.

1. Policy Objective

Culture and creativity are critical to achieving the goals of the European Green Deal and building more resilient economies. CCIs contribute to climate action not only through sustainable production practices, but by shifting consumption patterns, fostering ecological awareness, and influencing behaviour. Embed CCIs in the Green Deal, Circular Economy, and Clean Industrial Deal as drivers of systemic sustainability and climate awareness.

2. Recommended Action

1. Include CCIs in green public procurement and EU resilience programs. Develop new sustainability metrics that capture cultural behaviour change, artistic innovation, and ecological influence. Support cross-sector experimentation through creative labs focused on circularity and low-carbon innovation.

2. The support of EU projects such as GreenCCIrcle, CRAFT-IT4SD, and SACCORD show how CCIs reduce environmental impact, drive behavioural shifts, and reframe consumer cultures. Also, Studies on regional CCIs such as Kreativwirtschafts Report Austria, Hamburg Kreativwirtschaftsbericht or the Bayern Kreativwirtschaftsbericht showcase the greening of the CCIs as well as cross-sectorial innovations through the CCIs and the resilience of cultural and creative sectors.

3. DG EAC, DG CLIMA, DG GROW, Member State green ministries, cultural foundations, and circular economy networks should intensify actions and funding of projects supporting the triple transition.

3. Expected Impact and EU Strategic Alignment

Greater integration of Cultural and Creative Industries (CCIs) into climate action strategies is essential for advancing Europe's green transition. Beyond their contributions to sustainable production and innovation, CCIs possess unique capabilities to influence public behaviour, shift cultural norms, and translate

environmental policies into compelling narratives and experiences. By embedding cultural approaches into sustainability frameworks, the EU can significantly amplify the societal uptake and impact of climate policy. This includes supporting CCIs in developing new, sustainable business models that align economic viability with environmental responsibility, while fostering long-term ecological awareness and behavioural change. Recognising culture as a driver of green transformation reinforces the broader strategic goals of the European Green Deal, the New European Bauhaus, the EU Industrial Strategy, and the Circular Economy Action Plan, all of which call for systemic, inclusive, and culturally grounded approaches to sustainability.

Policy Recommendations outlines:

1. Cultural and Creative Industries (CCIs) are underutilised in EU green strategies, despite their ability to drive behavioural change, shift cultural norms, and innovate sustainably.

2. CCIs must be embedded into the European Green Deal, Clean Industrial Deal, and Circular Economy frameworks to contribute to a just and inclusive transition.

3. Key policy proposals include:

    a. Integrating CCIs into green public procurement and EU resilience funding

    b. Developing new sustainability metrics that capture cultural impact, behavioural shifts, and artistic innovation

    c. Establishing cross-sectoral creative labs focused on circularity and ecological innovation

    d. Strengthening inter-DG cooperation and coordinated funding across cultural and climate policy areas

4. EU projects such as PACESETTERS, GreenCCIrcle, CRAFT-IT4SD, and SACCORD demonstrate the role of CCIs in reducing environmental impact and rethinking consumption models.

5. Regional studies (Austria, Hamburg, Bavaria) confirm CCIs' contribution to green innovation and economic resilience.

6. Impact: Greater cultural engagement in climate action, sustainable creative business models, and stronger public support for the green transition.

7. Strategic alignment: Fully supports the European Green Deal, New European Bauhaus, EU Industrial Strategy, and Circular Economy Action Plan.

Topic 3: Creatives For Europe European Democracy Shield: Creativity as Democratic Infrastructure: Creativity as Democratic Infrastructure

Problem Statement

Culture is the democratic infrastructure of Europe - it enables civic participation, builds institutional trust, and counters disinformation through narrative plurality and creative expression. Ensuring access to culture is essential for a resilient, inclusive, and values-driven European Union. Culture's role in sustaining democracy is undervalued, despite its power to foster participation, build trust, and counter disinformation.

1. Policy Objective

The conference reaffirmed that creative professionals play a vital role in shaping public discourse, fostering civic awareness, and defending the core values of democracy. As storytellers, educators, and cultural mediators, they contribute to building institutional trust, countering disinformation, and promoting active citizenship. However, many cultural actors still face challenges in navigating the complexities of EU policy, funding mechanisms, and governance structures. To fully realise their democratic potential, they must be systematically included in the design and implementation of democratic innovation processes and civic engagement initiatives. Culture should no longer be treated as an accessory to democracy but recognised as a pillar of democratic infrastructure - essential for promoting inclusion, media pluralism, and civic education across Europe. This calls for greater coordination and support from institutions such as DG JUST, DG CNECT, the European Parliament's CULT and LIBE committees, Creative Europe Desks, and civil society organisations.

2. Recommended Action and Evidence Base

To strengthen democratic resilience across the EU, cultural participation must be systematically integrated into the Union's democratic innovation tools and frameworks. This includes establishing formal pathways for creatives to contribute to the development of civic and democratic policies, ensuring their perspectives are embedded in policy design from the outset. Independent cultural actors and public-interest media platforms should receive structural support to safeguard their autonomy and amplify their capacity to foster inclusive dialogue. Evidence from EU-funded projects such as CREDEX, MOSAIC CoVE, and PACESETTERS demonstrates that creative practitioners are not only powerful communicators, but also active co-creators of democratic space - enhancing civic literacy, encouraging participation, and giving voice to underrepresented communities across Europe.

3. Expected Impact and EU Strategic Alignment

Creative ecosystems have the potential to significantly strengthen institutional trust, deepen civic engagement, and reinforce the democratic fabric of European societies. By fostering inclusive cultural participation and amplifying diverse narratives, they contribute to more open, transparent, and resilient democratic systems. Investing in the cultural dimension of democracy not only enhances social cohesion but

also builds the public's capacity to engage critically with institutions and media. These efforts align closely with key EU policy frameworks, including the EU Democracy Action Plan, the Media Freedom Act, the European Education Area, and the Citizens, Equality, Rights and Values Programme (CERV) - all of which recognise the foundational role of culture in supporting democratic life.

Policy Recommendations outlines:

1. Culture is a core pillar of Europe's democratic infrastructure, enabling civic participation, institutional trust, and resistance to disinformation through storytelling, education, and inclusive dialogue.

2. Despite its strategic relevance, culture's role in sustaining democracy remains undervalued, and cultural actors often lack access to EU policy making, funding, and governance structures.

3. Creative professionals should be systematically included in the design of democratic innovation policies and civic engagement processes, recognising their role as mediators, educators, and co-creators of democratic space.

4. Key policy actions include:

   - Integrating cultural participation into EU democratic innovation tools

   - Establishing formal advisory pathways for creatives in civic policymaking

   - Providing structural support for independent cultural actors and media platforms

   - Evidence from EU projects (CREDEX, MOSAIC CoVE, PACESETTERS) shows that creatives enhance civic literacy, empower underrepresented voices, and build inclusive democratic spaces.

5. Creative ecosystems contribute to:

   - Stronger institutional trust

   - Increased civic engagement

   - Greater democratic resilience

6. Strategic alignment with major EU frameworks:

   - EU Democracy Action Plan

   - Media Freedom Act

   - European Education Area

   - Citizens, Equality, Rights and Values Programme (CERV)

Topic 4: Europe's Strategic Cultural Autonomy as a global signature: Creative Autonomy As Smart Power

Problem Statement

Cultural autonomy was reframed not as isolation, but as a form of strategic agency - Europe's ability to shape, govern, and protect its cultural ecosystems in an interconnected world. As global tech monopolies increasingly control access to digital content, cultural autonomy becomes central to sovereignty and resilience. Europe risks losing control over its cultural ecosystems to global digital monopolies, undermining its ability to project identity, values, and sovereignty.

1. Policy Objective

Reframe cultural autonomy as strategic agency and soft power in the digital age - ensuring European ownership of content, platforms, and infrastructures.

Participants highlighted the risks of cultural dependence, including the estimated yearly €500 billion outflow to non-EU platforms. In response, policy proposals included the development of public cultural infrastructures, regional AI models, ethical and open-source tools, and mechanisms to track content origin and data flows. The introduction of a "Cultural Footprint" metric and "Cultural Impact Tickets" was suggested to visualise and measure the value and reach of European culture. This shift also calls for a rethinking of soft power - emphasising smart power and agency as the foundation of a future-facing cultural strategy.

2. Recommended Action and Evidence Base

To strengthen Europe's cultural sovereignty in the digital age, it is essential to invest in public digital cultural infrastructures, the development of regionally grounded AI models, and ethical, open-source technological tools that reflect European values. Complementing these efforts, innovative mechanisms such as the Cultural Footprint and Cultural Impact Tickets should be introduced to measure, track, and visualise the global reach and societal value of European cultural content. Feedback from projects like S+T+ARTS Echo and CRAFT-IT4SD has underscored the urgency of this agenda, highlighting the significant outflow of cultural revenues to non-EU platforms and the pressing need to reclaim digital autonomy within the cultural sector.

3. Expected Impact and EU Strategic Alignment

Advancing digital sovereignty in the cultural sector will enable Europe to better protect cultural rights, assert greater control over its digital ecosystems, and ensure a more prominent and independent global presence for European creative content and values. Strengthening Europe's capacity to govern its own cultural data, platforms, and technologies is essential for maintaining cultural diversity, ethical standards, and public value in the digital realm. These efforts align closely with the EU's broader digital policy agenda, including Europe's Digital Decade, the Digital Services Act, the AI Act, and the Open Strategic Autonomy framework, all of which support a resilient, values-driven, and self-determined digital future for Europe.

These recommendations should impact the institutions such as DG CNECT, DG EAC, AI policy bodies, Creative Europe, Horizon Europe clusters, national cultural ministries.

Policy Recommendations outlines:

1. Cultural autonomy must be redefined as strategic agency, enabling Europe to shape, govern, and protect its cultural ecosystems in an increasingly interconnected and platform-dominated world.

2. Europe risks losing control over its cultural infrastructure, with an estimated €500 billion annually flowing to non-EU digital platforms - undermining sovereignty, cultural identity, and economic independence.

3. Policy focus must shift from soft power to smart power, ensuring European ownership of content, platforms, and technologies while reinforcing values-driven digital leadership.

4. Key policy proposals include:
    -   Investment in public digital cultural infrastructures
    -   Development of regional AI models rooted in European values
    -   Support for ethical, open-source technological tools
    -   Introduction of Cultural Footprint and Cultural Impact Tickets to track, measure, and visualise cultural value and reach

5. Project evidence from S+T+ARTS Echo and CRAFT-IT4SD confirms the urgency of reclaiming digital cultural sovereignty and building capacity to govern Europe's own content flows and platforms.

6. Expected outcomes:
    -   Enhanced protection of cultural rights and diversity
    -   Reduced dependence on non-EU platforms
    -   Stronger global presence and visibility of European cultural content
    -   Greater control over data, narrative infrastructure, and digital ethics

7. Strategic alignment with EU frameworks:
    -   Europe's Digital Decade
    -   Digital Services Act
    -   AI Act
    -   Open Strategic Autonomy framework

8. Relevant institutions: DG CNECT, DG EAC, AI policy bodies, Creative Europe, Horizon Europe clusters, and national cultural ministries.

Topic 5: Strengthening Representation and Voice of the Cultural and Creative Sectors in EU Governance and Strategic and Creative Procurement

Policy Recommendation: Strengthening the Institutional Role of the Cultural and Creative Sectors (CCS) in EU Policy Making

1. Policy Objective

Despite their significant economic, social, and cultural contribution, the Cultural and Creative Sectors (CCS) remain structurally underrepresented in EU policy making. The disbanding of DG GROW's cultural unit and the absence of consistent engagement mechanisms have weakened the CCS's influence in key policy areas such as the green transition, digitalisation, and innovation. The objective is to secure institutional visibility for CCS, strengthen their policy engagement capacity, and embed them more effectively in cross-sectoral missions and programme design at the EU level.

2. Recommended Action

The European Commission should:

1. Re-establish dedicated cultural units within relevant Directorates-General (e.g. DG GROW, DG RTD, DG CNECT, DG EAC).

2. Create an inter-DG taskforce on the Cultural and Creative Economy to ensure policy coherence and cross-sector integration.

3. Launch a permanent EU Creative Economy Advisory Group to act as a bridge between institutions and sectoral stakeholders.

4. Guarantee CCS participation in EU consultations, expert groups, and Horizon Europe mission boards.

5. Fund coordination structures for CCS advocacy and provide national-level policy training to build capacity for effective representation across Member States.

3. Expected Impact and EU Strategic Alignment

These measures will lead to better aligned policies, improved strategic use of the CCS's innovation potential, and stronger democratic legitimacy through inclusive policy design. Embedding CCS in EU decision making frameworks will enhance the cultural dimension of key transitions, improve the design of innovation instruments, and reinforce cultural resilience across the Union.

This recommendation aligns with the goals of the European Green Deal, Digital Europe Programme, Horizon Europe, and the EU's ambitions for Open Strategic Autonomy.

Policy recommendation: Unlocking public markets through strategic and creative procurement

1. Policy Objective

Public procurement represents a powerful but underused lever for innovation and cultural value creation. The Cultural and Creative Sectors (CCS) often face limited access to public tenders, despite their potential to deliver human-centred, sustainable, and inclusive public services. The objective is to open public procurement markets to CCS actors, fostering creativity and innovation in service design, placemaking, and community engagement - while also driving demand for cultural innovation at local, regional, and European levels.

2. Recommended Action

The European Commission and Member States should:

1. Adapt procurement frameworks to better accommodate small CCS actors and creative consortia, including the use of innovation partnerships and design competitions.

2. Develop EU guidance and training on cultural and creative procurement practices for public bodies, including toolkits and best practice case studies.

3. Fund pilot programmes that embed CCS in public service co-creation, particularly in areas such as urban regeneration, education, healthcare, and climate adaptation.

4. Incentivise regional and municipal authorities to integrate creative solutions into public tenders, using cultural criteria to evaluate social and community impact.

3. Expected Impact and EU Strategic Alignment

Expanding access to public procurement will diversify markets for CCS, enhance the quality and relevance of public services, and promote a culture of innovation within public institutions. It will also support regional development and contribute to the objectives of the Cohesion Policy, the New European Bauhaus, and the Green and Digital Transitions. By integrating creativity into procurement systems, Europe can activate the full potential of the CCS as strategic partners in public sector transformation.

DG GROW, DG REGIO, DG EAC; national and regional procurement agencies; local authorities and cultural development bodies.

TOPIC 6: Strengthening the building of creative ecosystems for innovation, capacity, and systemic impact

1. Policy objective

The cultural and creative industries (CCIs) are fragmented across regions, disciplines, and sectors, limiting their visibility, policy influence, and contribution to Europe's broader innovation goals. While isolated excellence exists, a lack of connected and well-resourced ecosystems hampers the potential of the sector to scale, collaborate, and align with strategic EU agendas. The objective is to foster ecosystem-building as a strategic priority, supporting cross-border and cross-sectoral networks that enhance capacity building, foster innovation, and embed CCIs into the European research and innovation system.

2. Recommended action

The European Commission, member states, and regional authorities should:

1. Support the development of regional and European creative innovation ecosystems, linking CCIs with universities, research institutions, business clusters, and public authorities
2. fund network-building programs that connect underrepresented regions and sectors, including rural and peripheral creative economies
3. strengthen cross-sectoral alliances through initiatives like EIT Culture & Creativity, Horizon Europe clusters, and interregional innovation investments
4. provide long-term institutional support for CCI networks and knowledge alliances, including digital platforms, physical hubs, and policy labs that enable co-creation and experimentation.

3. Expected impact and EU strategic alignment

Investing in ecosystem building will enhance the resilience, visibility, and strategic integration of CCIs across Europe. It will support knowledge transfer, foster innovation spillovers, and ensure that CCIs are not siloed but actively contribute to Europe's transitions - green, digital, and social. Strong ecosystems are essential for scaling up innovation, unlocking new markets, and reinforcing Europe's cultural sovereignty and economic competitiveness.

This approach aligns with the EU's New European Innovation Agenda, the Smart Specialisation Strategy, Horizon Europe, and the Cohesion Policy. It also supports the goals of the Creative Europe programme and the Pact for Skills, recognising ecosystem development as a key enabler of sustainable growth.

ANNEX I: Global Benchmarking: Economic Contribution and Global Competitiveness of CCS

GDP Contribution

- US: 4.5% of GDP (~$800 billion), 5 million employed (3.4%)
- EU: 4.4% (~€640 billion), 7.5 million employed (3.3%)
- China: 3.5% (~$500 billion), 8 million employed

Cultural Goods Exports

- EU and China both export ~€30 billion / $30 billion in cultural goods
- US export data unavailable, though dominant in IP-based franchises

Film & Gaming Revenues

- Film: US $41B (80% of global), EU €8B (25%), China $10B
- Gaming: US $60B, China $41B, EU data fragmented

Digital Platforms

- Netflix (US): $25B | Douyin (China): $11B | EU: no unified presence

Trend Insight

The US leads commercially in content monetization; China rapidly scales digital platforms; Europe excels in diversity, employment, and legacy — but must coordinate its digital and financial infrastructure to compete globally.

ANNEX II: Acknowledgements of Collective Contributions

CreativeFED warmly acknowledges the collective effort behind this work.

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CRAFT IT 4 SD	*CRAFT-IT4SD*	*https://craft-it4sd.eu/*
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- *Members of the Advisory Board of ECBN/CreativeFED*

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- *Speakers and Delegates #SDECE25*

CreativeFED – European Federation for the Creative Economy (EFCE)

CreativeFED, short for the European Federation for the Creative Economy (EFCE), is a newly established non-profit organisation serving as the umbrella body for Europe's Cultural and Creative Industries and Sectors (CCIS). As the successor to the European Creative Business Network (ECBN), founded in 2011, CreativeFED builds on a legacy of advocacy and coordination within the European creative economy.

Representing a diverse and dynamic ecosystem, CreativeFED supports the activities of more than 200 organisations and maintains active communication with a network of over 2,500 creative professionals and institutions across Europe.

Each year, CreativeFED organises flagship initiatives such as the European Creative Industries Summit (ECIS) and other strategic programmes aimed at strengthening, promoting, and connecting Europe's cultural and creative industries at both national and EU levels.

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