
tems
trusted
european
media data
space

Introduction

Thanks to its breadth and diversity, the **Trusted European Media Data Space (TEMS)** consortium has been able to identify a wide range of needs, expectations, and challenges across the media sub-sectors represented in the project. However, acknowledging that some blind spots may remain, a survey targeting external media stakeholders was conducted at this stage to ensure that TEMS is shaped to serve the broadest possible utility within a highly fragmented media landscape.

The survey aimed to validate the consortium's market perception and refine its understanding of the data-related needs and objectives of different media sub-sectors. Crucially, it sought to better understand how media organizations—regardless of size, legal status, or geographical location—engage with data in their daily operations, and how they perceive the opportunities and challenges of participating in a secure B2B media data space. It also aimed to identify the key factors that could drive engagement with TEMS and its core principles, recognizing that building a shared community of interest will be both a major challenge and a key success factor for the initiative.

From a **technical standpoint**, the survey explored the varying levels of technological maturity across the media industry. Many media players remain unfamiliar with data-related issues and lack the resources to address them. Yet, they are essential future participants in TEMS and should be empowered to benefit from it, contribute use cases, and adopt relevant technologies alongside larger, more technically equipped actors. Understanding these disparities allows TEMS to propose inclusive and feasible solutions for different levels of technological adoption.

From a **business perspective**, respondents were invited to envision themselves as both data providers/sellers and data consumers/buyers, reflecting the dual roles that actors may play within the data space. They were also asked to consider potential business models, express preferences or concerns about different mechanisms, and indicate their willingness to pay for access to data products and services.

On **governance**, the survey invited participants to imagine TEMS as a future entity fostering trust and contributing to the sector. Respondents shared their expectations regarding onboarding procedures, rule-setting, and mechanisms to embed trust within governance and compliance processes. The questionnaire also explored legal needs that TEMS could address and how stakeholders envision its governance structure. At the heart of these reflections lies the ambition for TEMS to generate trust not only within the founding consortium but across the broader media ecosystem.

In conclusion, this survey was designed to gather external insights that will help ensure TEMS is useful, relevant, and trusted across all dimensions. It explored multiple topics such as data usage and management, strategic readiness, AI adoption, digital ecosystem challenges, and expectations regarding data sharing and monetization. While not all respondents answered every question, the dataset provides rich insights into the current state of data practices and strategic thinking within the media sector.

Methodology

The design of the questionnaire followed the same collective and iterative three-dimensional approach (technology, governance, business) applied internally for the TEMS trials / use cases, with the relevant partners being involved in the corresponding tasks. Hence the division of the survey into these different areas. The survey also strived to make the concept of data space intelligible and avoid getting trapped in overly abstract or technical terms.

The survey was distributed in four languages (English, French, German, Spanish) by all TEMS consortium members between January and end of April 2025, targeting a wide range of stakeholders across the extended media ecosystem. The survey was also available on-line on the TEMS institutional website.

A total of **83 respondents** from **23 countries** answered the survey, representing a diverse mix of public, private, semi-private entities, NGOs, and associations. The results in the various languages were processed and translated into English. As respondents did not always answer every question, and multiple-choice responses could be cumulative, percentages were calculated based on the number of respondents for each individual question.

Unpacking the survey findings and why they point towards tems

Data is essential but poorly managed

A large majority of respondents (72%) consider data to be very important for their operations, yet less than half (46%) have a dedicated data team while 34% have none.

Most organisations use internal data sources such as finance, HR or content, while external data is used mainly for audience (52%) and market (60%) insights. This shows that while data is widely recognised as central, its management remains uneven and underdeveloped. TEMS can help address this gap by providing structure, catalogue of tools, services and expertise that many organisations currently lack.

Fragmentation and resource constraints

More than a third of respondents (37%) reported having no data strategy, while a further 28% said their strategy is only partially implemented and an equal proportion reported having one.

The most frequently cited obstacles were financial constraints, fragmented internal approaches, technical complexity or low prioritisation by management. These findings suggest that while many organisations are willing to improve, they struggle to move forward or make their strategies operational. By offering accessible, flexible and affordable solutions, TEMS has the potential to help overcome these systemic barriers.

AI adoption is growing but uneven

AI is already playing a role across the sector, though at different levels of maturity. Around 28% of respondents use AI broadly, 25% do so with restrictions, another 25% are still experimenting with limited use and nearly a quarter of respondents (31%) use AI for specific tasks.

Common applications include translation, subtitling, speech-to-text, metadata enrichment and creative tasks. However, concerns around GDPR, intellectual property and editorial integrity remain significant. This reflects both an appetite for AI and ongoing hesitation due to compliance and ethical concerns. A trusted European framework such as TEMS could offer a space to test, share, and scale these technologies securely.

Strong interest for a secure media data space

The survey highlights a strong appetite for a shared, secure data environment with 76% of respondents expressing interest in what TEMS could offer. Respondents value improved collaboration across the media value chain (64%), access to high-quality data (61%) and innovation (60%) as well as a greater operational efficiency (52%).

Some respondents highlight the benefits of transparency and interoperability through common standards; others see TEMS as a way to achieve greater independence from US technical providers while fostering collective intelligence within Europe. The fact that most organisations wish to act as both data providers (59%) and data consumers (61%) underlines the dual value of sharing and acquiring data within a balanced and transparent ecosystem.

Flexible business models are needed

When asked about TEMS business model, 43% expressed a preference for subscriptions, but a majority of 57% favoured alternatives such as pay-per-use, service-based arrangements, contextual or revenue-sharing models. Most respondents are willing to contribute financially to cover technical and governance costs provided the features and pricing are appropriate (72%). Only a small proportion (12.5%) were ready to pay outright, while 17% considered only free options.

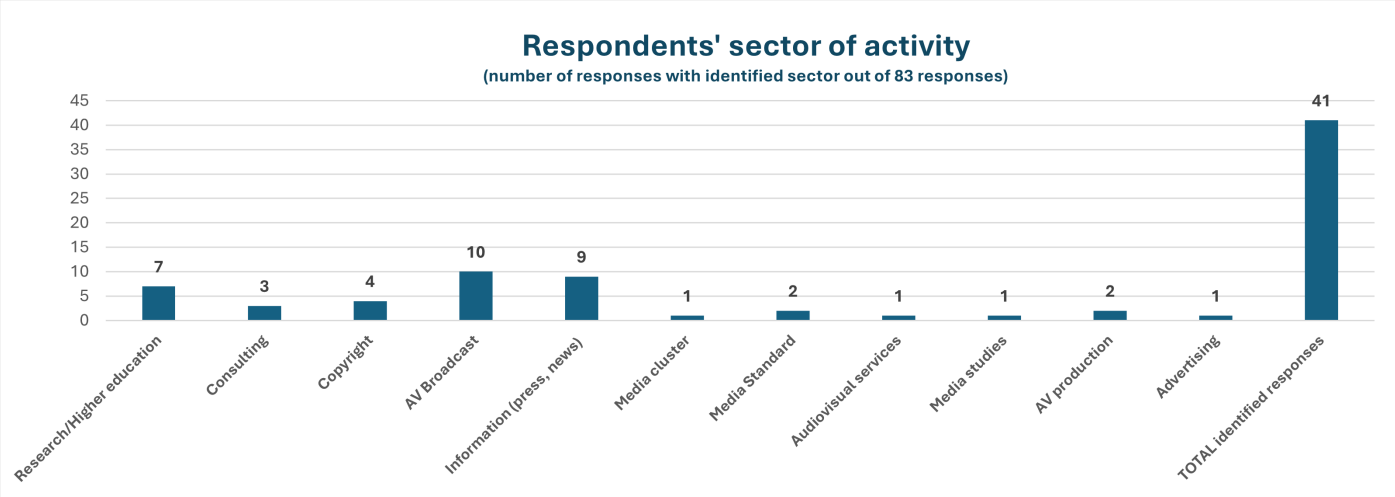
This highlights the need for TEMS to explore and test flexible mechanisms on the market, so as to facilitate the participation of organizations of all sizes and capacities. TEMS will also need to offer data services and features that are sufficiently attractive to generate financial commitment from its participants.

Trust and control are non-negotiable

The survey makes clear that no media organisation will consider joining a shared data space without strong safeguards. Respondents overwhelmingly require privacy policies (88%), IP protection (86%) and robust data and privacy protection (92%). To share their data, respondents expect to retain control over it (87%), have full transparency on usage and revenues (88%), operate under clear and accessible contractual terms (69%). Establishing trust through clear governance, legal compliance and flexible contracts is therefore essential, and TEMS is being designed to meet these expectations.

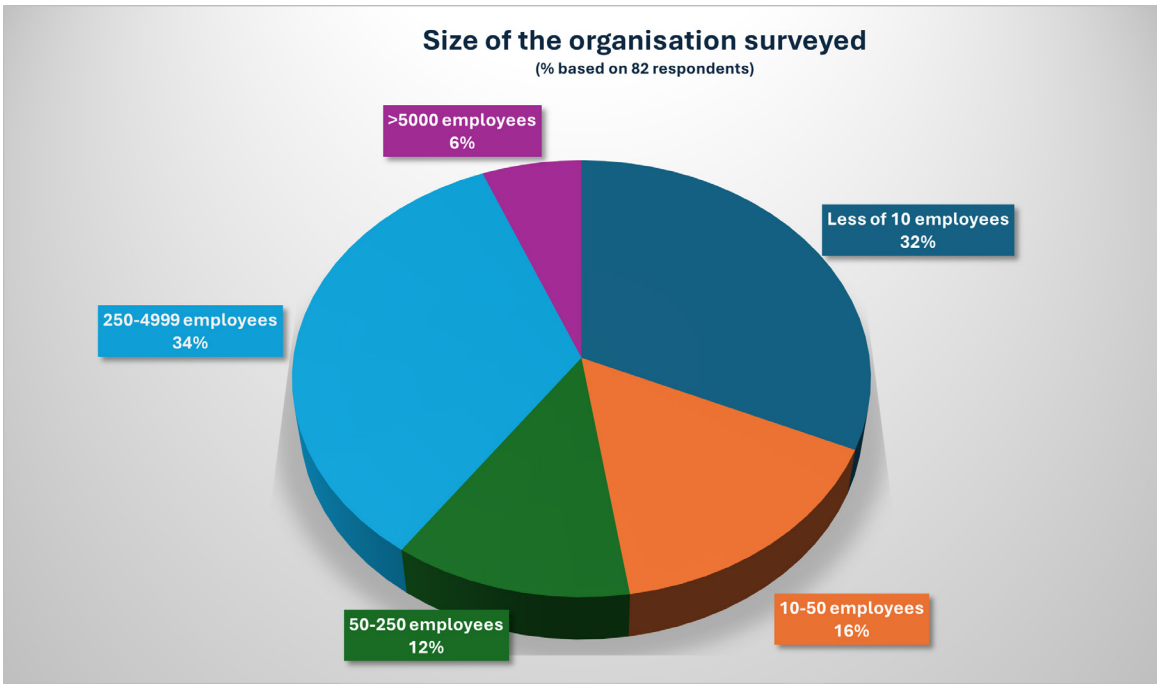
The survey confirms both the ambition and the obstacles facing the media sector in its use of data. With TEMS, the industry has a unique opportunity to unlock the full value of its data and build a stronger future together.

Q1: Your field of activity and your juridical status (private/public/semi-private company, NGO, association, other)

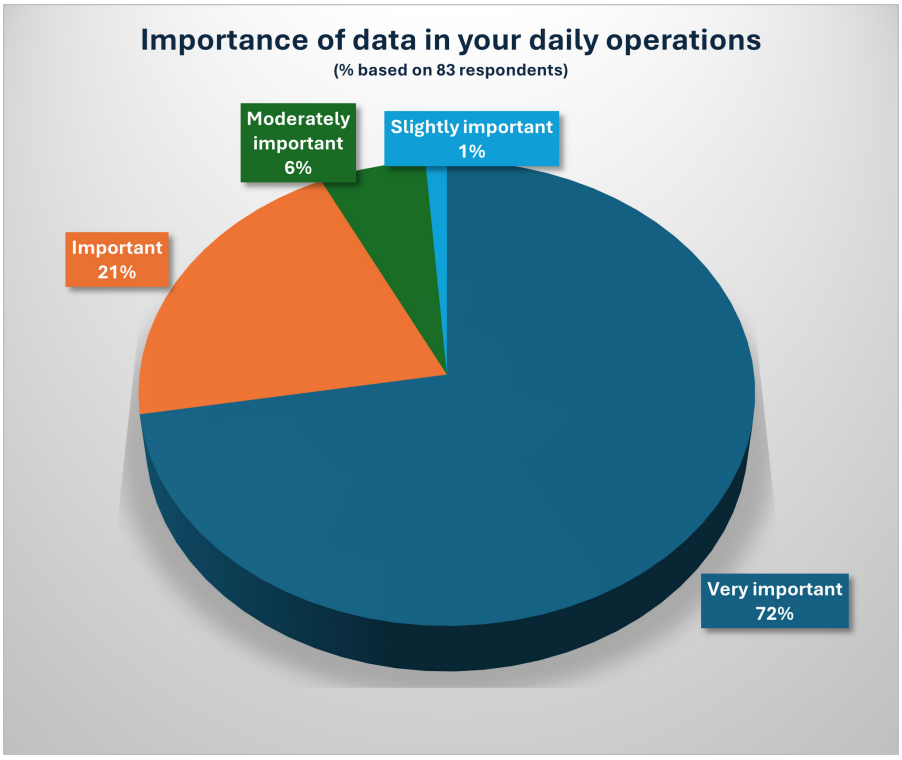


Q2: Your location

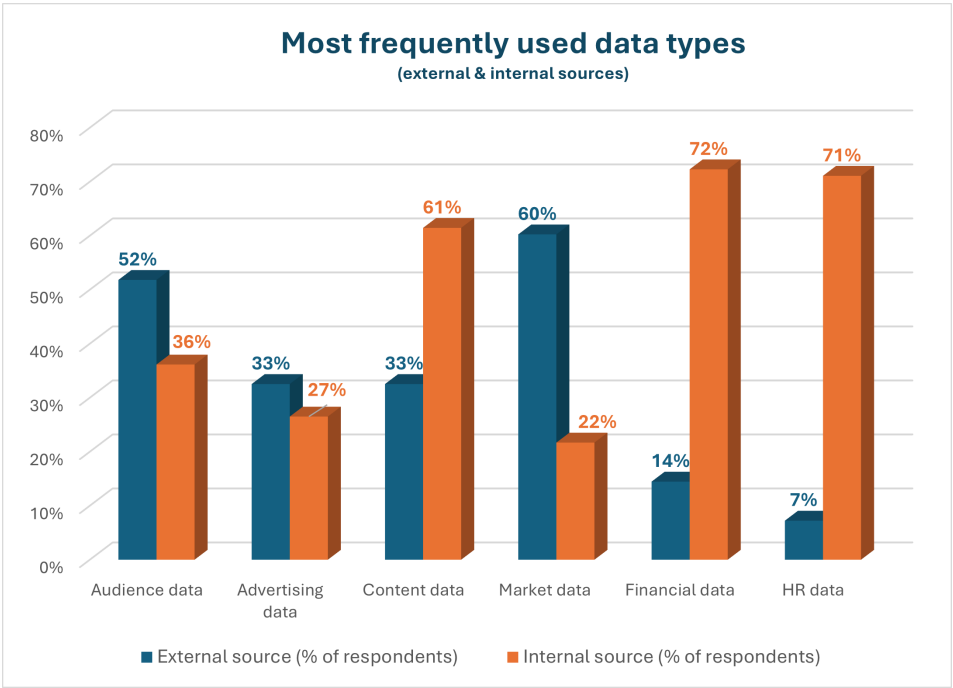
Q3: Size of your organisation:



Q4: Data can be any piece of information digitally coded and automatically used in workflows, such as: HR data, financial data, content metadata, audience data, the content itself, external data, etc. Given the different types of data your organization uses on a daily basis, please provide us with your perspective. How important are data to your daily operations?



Q5: What types of data does your organization use most frequently? Please specify if the data is internal and/or external. Select all relevant options.



Q6: If your organisation uses other types of data, you can detail here:

Respondents most frequently reported using aggregated and mixed data sources that is, processing data from multiple sources and in various formats. As one participant explained: "We have a listening centre, and we use many different kinds of data sources for a wide variety of tasks". Official and administrative data were also commonly cited, including stakeholder/member information and public registry data.

Other types of data mentioned include:

- Technical and industrial data ("3D files", "enriched metadata on distributed content", "industrial data")
- Behavioural, audience, market and advertising data (users' data, "internal digital consumption data")
- Rights and licensing data ("content and party identifiers, attribution data, copyright management information")
- Content and media data (information on audiovisual works, "diverse types of content")
- Research and knowledge data (Bibliographic data, studies, public research data)
- Fact-checking and investigative data ("sensitive journalistic research")
- Machine-to-machine data (IoT data)

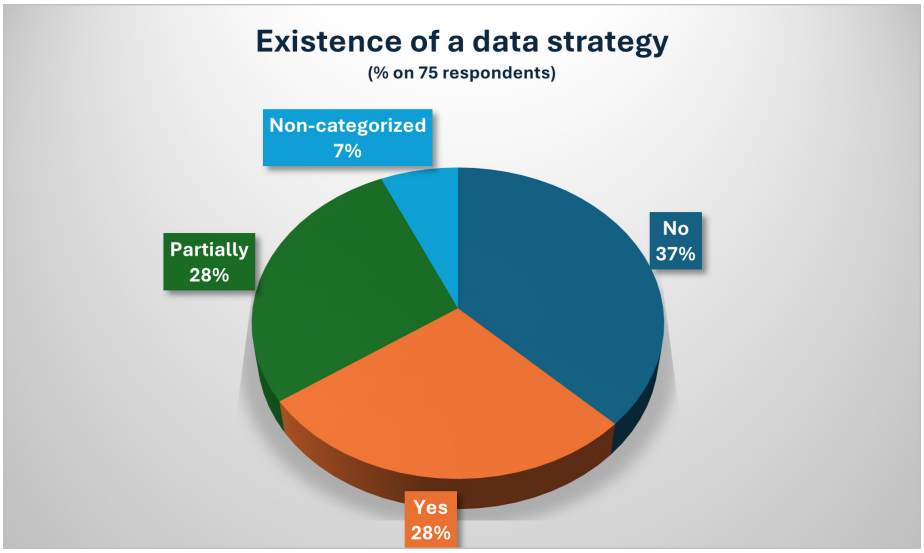
Q7: Does your organization currently have a dedicated data management person or team? If yes, what are its/their main missions (harmonize data formats, monitor data quality, appoint data owner, etc.) and what type of data are managed?

Data management encompasses different realities from one organization to another. Some have dedicated roles like Chief Data Officers (CDOs) or Data Protection Officers (DPOs), while many fragment data management across departments and teams, each handling distinct types of data. As a result, data management is shaped not only by the type of data involved but also by its final usage.

When organisations declare they don't have a dedicated data management team, this doesn't mean nothing is being done. Some organizations are integrating data management practices into their existing or individual workflows. Some also outsource this task.

17% of the surveyed organisations mentioned managing data without having a dedicated team. Most often, data management is distributed across the organization. Other organizations emphasize the use of data for operational purposes, meaning on an ad-hoc basis depending on their needs or according to their types and tools available for processing them.

Q8: Do you have a data strategy? If so, is it fully or partially implemented? If not implemented, what are the main barriers that prevent your organization from implementing it? What do you need to get started?



Organisations without a data strategy (37%)

Overall findings:

- Most respondents do not have a data strategy in place.
- Some are completely unaware of any such initiative, while others admit there is fragmentation (each project/team has its own approach).
- Several highlight barriers such as lack of resources, budget constraints, or lack of prioritization.
- A minority indicates that a strategy is under consideration or planned but not yet implemented.

The "No" responses reveal that most organizations are either:

Without a strategy due to lack of awareness or low data dependency.

- Interested but constrained by resources, budget, or management focus.
- Without a consistent strategy due to internal fragmented approaches
- In very early planning stages (thinking of hiring, considering AI as a driver).

This group overall demonstrates that while data strategy is widely recognized as important, practical challenges — especially budget, prioritization, and governance — prevent many organizations from moving beyond intention.

Organisations with a data strategy (28%)

Overall findings

These organizations do have a data strategy, though the level of maturity varies significantly.

Some describe fully implemented and evolving strategies, while others acknowledge limitations (outdated strategy, partial coverage, fragmentation, or obstacles like regulation or data heterogeneity). Several answers highlight compliance (GDPR, EU AI Act) and data governance as central pillars. A few responses are very operational/technical (storage methods, archiving, data lakes) rather than strategic.

Conclusion

The "Yes" responses reflect a wide spectrum of maturity:

Some are fully mature, with strategies that are implemented, evolving, and tightly linked to compliance and governance. Others have basic or outdated strategies, often focused on data infrastructure or minimum compliance. A few highlights advanced practices, where data is at the core of the business model (media, broadcasting, clusters).

This group demonstrates that while strategies exist, their scope, depth, and implementation vary greatly — from technical data storage to sophisticated, partnership-driven ecosystems.

Organisations with partial data strategy (28%)

Overall findings

Respondents in this group acknowledge that a data strategy exists, but it is only partially implemented.

Their answers reveal that they are somewhere between awareness and maturity: they have launched initiatives, but full adoption is hindered by organizational, technical, financial, and cultural obstacles.

Several note that the strategy is still a "work in progress", not yet fully operational.

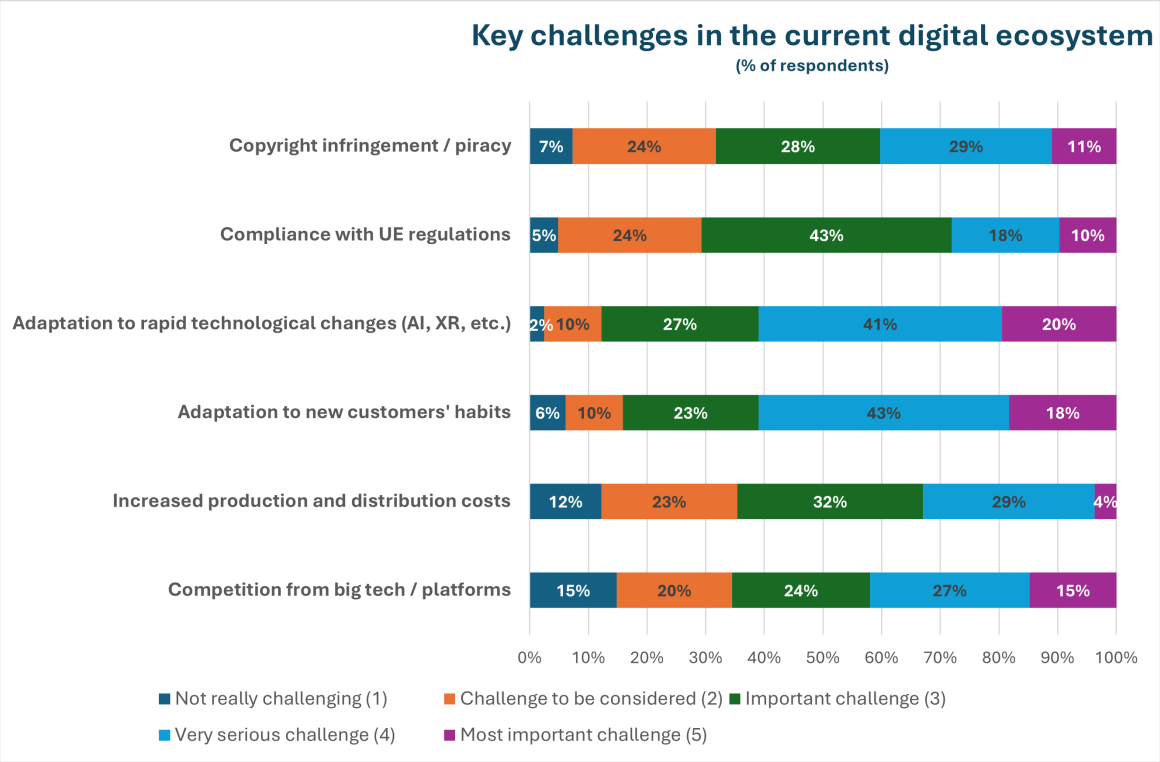
Conclusion

The "Yes, partially" group shows organizations in a transition phase:

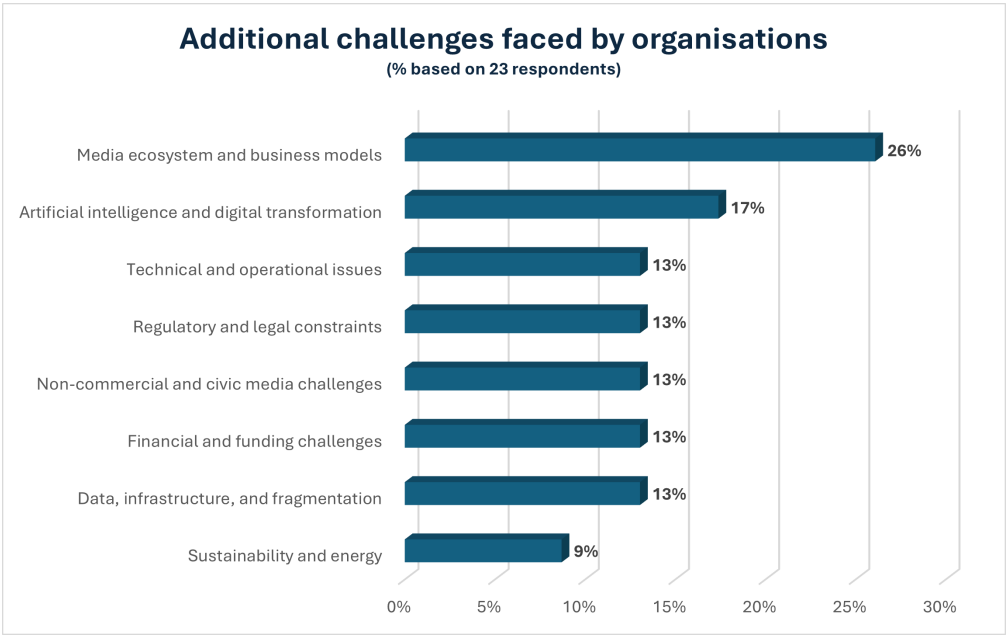
- They have a strategy on paper or partially implemented, but they struggle to scale it across the organization.
- The biggest barriers are resource constraints, technical complexity, governance gaps, and lack of stakeholder alignment.
- To progress, they need investment in people and tools, better governance and prioritization, and a cultural shift towards data-driven practices.

Compared to the "Yes" group (more mature) and the "No" group (lacking strategy), this group clearly represents the "in-between maturity stage", aware of the importance of data but facing real challenges in making it operational.

Q9: What are the main challenges you face in the current digital ecosystem? Please evaluate the degree of importance of each challenge



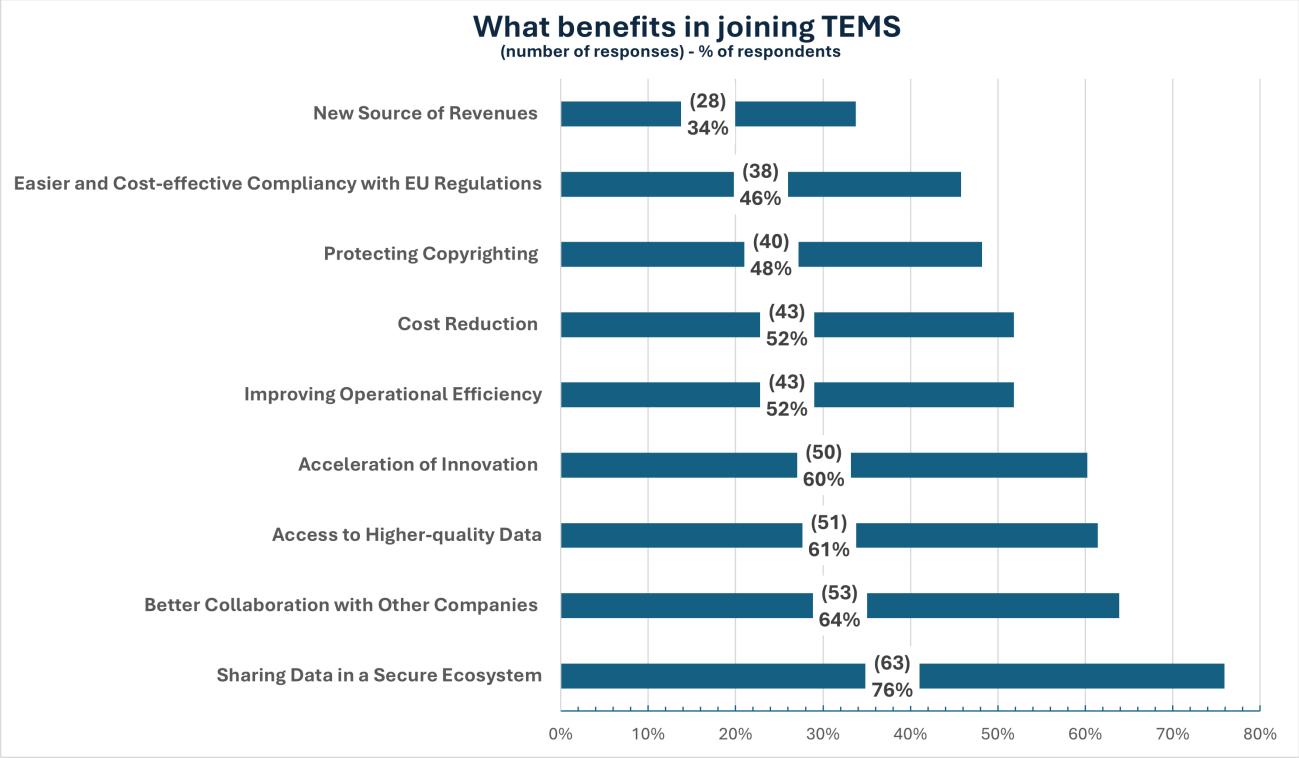
Q10: If your organization faces other challenges, you can elaborate here.



Examples of challenges

- **Media ecosystem and business models**: « The challenge of effectively monetizing digital content in a context of abundant free content, requiring the implementation of innovative and attractive business models. »; « Data inertia and resignation in the creative industries. Many complaints, but only a few actions »
- **AI and digital transformation**: « The need to effectively integrate new technologies while maintaining operational performance, creating a complex balance between rapid innovation and the stability of existing systems. »; « The Lack of an EU LLM›s representing European values and culture. Most LLM's now represent foreign (US) values and standards because of the cultural biased trainings data »; « Shifting the way we work and think to a digital structure is a challenge ».
- **Data infrastructure and fragmentation**: « Multiple challenges due to the fragmented nature of the market »; « Balance between pooling and confidentiality »;
- **Regulatory and legal constraints**: « Regulatory asymmetry », « Local laws that tighten UE measures »
- **Sustainability and energy**: "Reducing the environmental impact of digital advertising will be a key focus"
- **Technical and operational issues**: « Diversity of digital channels »; « Dependence on Google »; « Fight against obsolescence ».
- **Financial and funding challenges**: « Devastating budget cuts »
- **Non-commercial and civic media challenges**: « No funding structures for data management » in the non-profit sector; « Time ».

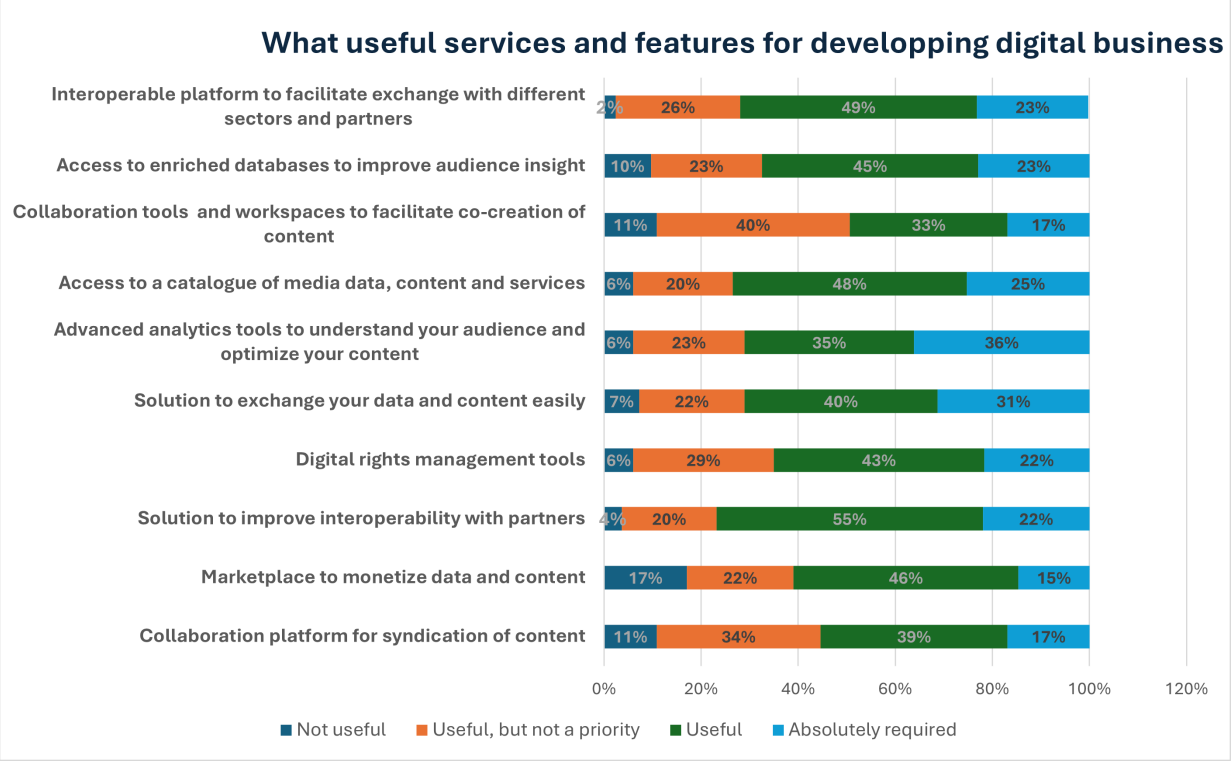
Q11: What benefits would you see in joining a secure B2B media data space? Select all relevant options.



Q12: If you see other benefits (in joining a secure B2B media data space), please detail here

- « LLM's/ Data representing European values and culture »
- « Collaboration generates new ideas and new distribution formats »
- « Education, awareness increase, information, and the skills on data processing, data analytics etc »
- « Interoperability and standardization: a B2B data space can establish a common framework among industry players, improving collaboration »
- « Efficiency and fluidity »
- « Strengthening end-user trust through increased transparency and traceability of data exchanged within a secure and controlled framework."
- « Ownership of the data and content produced »
- « Sandboxes: testing AI innovations cost-effectively; better exchange with companies and public institutions »
- « Greater distribution of non-profit media content »

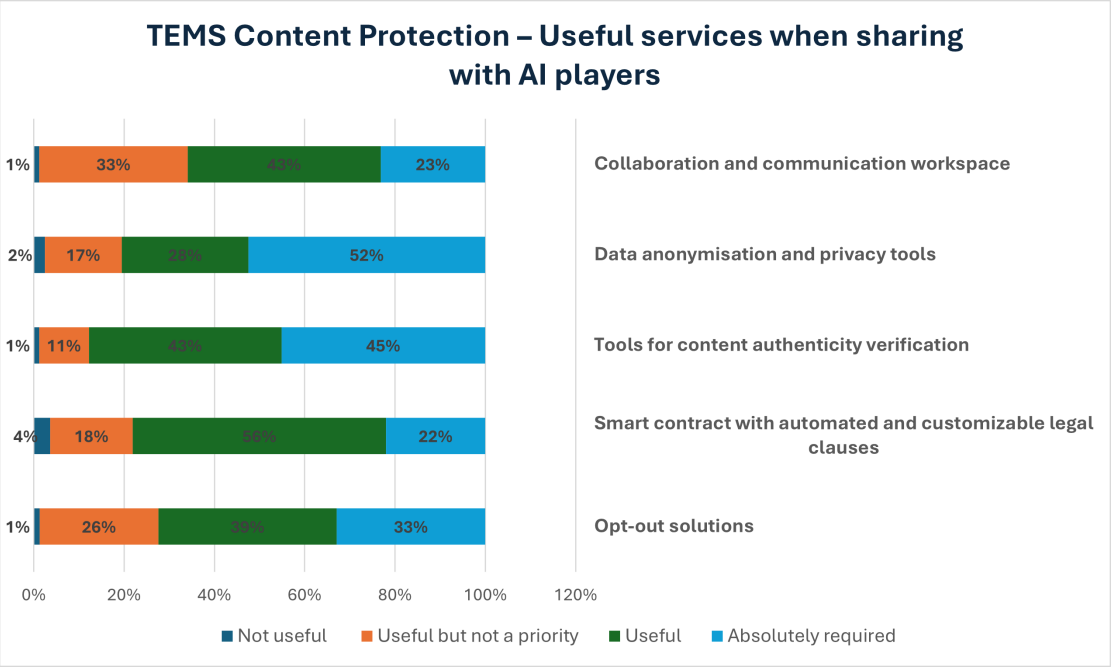
Q13: Which features or services would be most useful for developing your business in the current digital ecosystem?



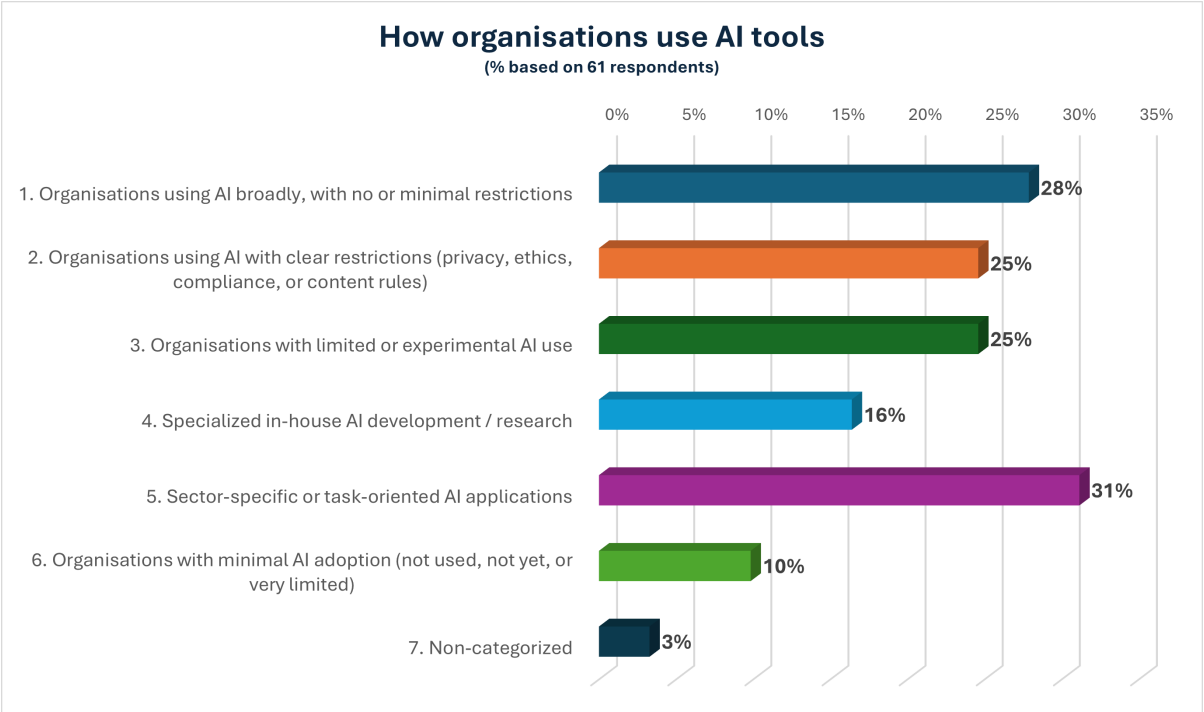
Q14: If you think of other features or services, please detail here indicating their level of usefulness:

- "Using common metadata descriptors and harmonized standards for provenience of news."
- "Common tools to implement EU regulation"
- "Access filtering according to confidentiality level and partnerships"
- "Solution for marking content and guaranteeing authorized uses only".
- "Curating your own content"
- "Cross-Language Search"
- "Development of a European public as a counterweight to American and Chinese platform economies"

Q15: Regarding the protection of content, TEMS intends to position itself as a trusted and digital facilitator between data/content providers and AI actors. Assess the usefulness of the following services



Q16: What kind of AI tools are used today in your organization? Do you restrict the use of some AI tools in your organization and why?



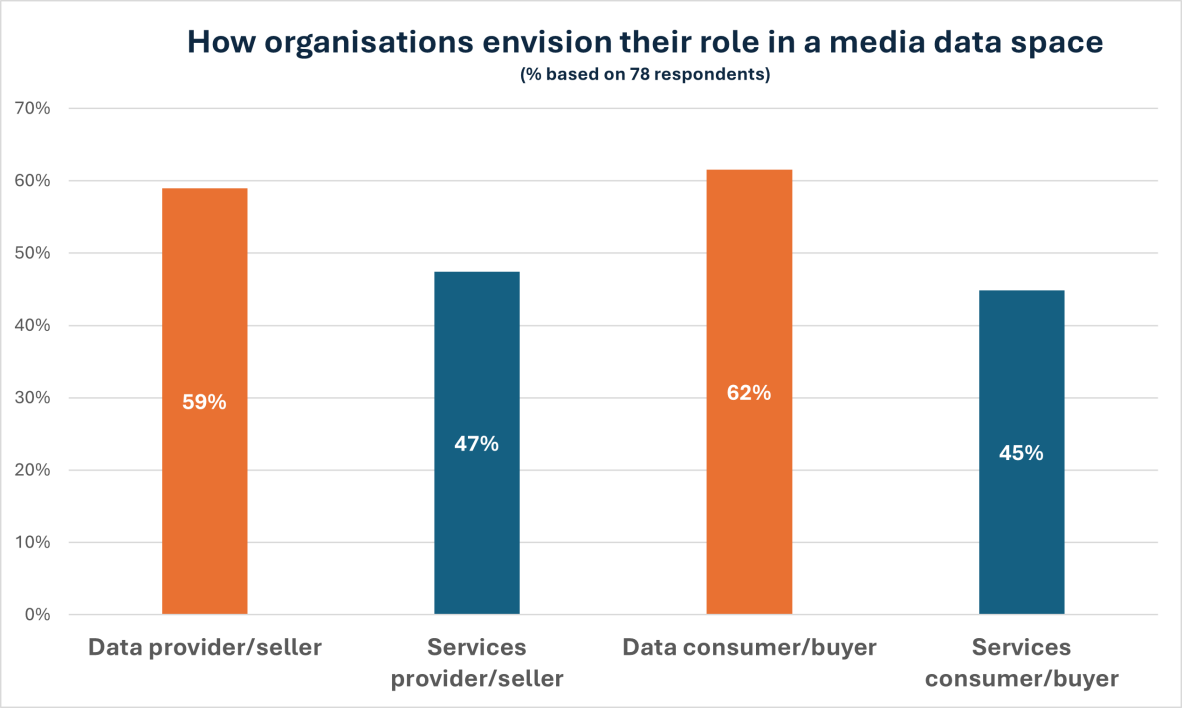
Key insights

1. *Broad adoption* (category 1): Many organizations already use AI extensively, especially generative AI, LLMs (ChatGPT, Claude, Gemini, etc.), and productivity tools.
2. *Restrictions* (category 2): Where restrictions exist, they mostly relate to data privacy, IP ownership, ethical use, or compliance (e.g., GDPR). Some also prohibit using AI for published content.
3. *Experimental or limited use* (category 3): A significant number are testing AI, using it for limited cases (meeting notes, translation, subtitles, etc.).
4. *In-house development* (category 4): Several organizations develop proprietary AI systems, often in computer vision, robotics, or internal business tools.
5. *Task-specific usage* (category 5): AI is widely applied for translation, transcription, voice-to-text, metadata enrichment, and creative tasks.
6. *Minimal adoption* (category 6): A smaller group openly states they don't use AI yet or use it very little.

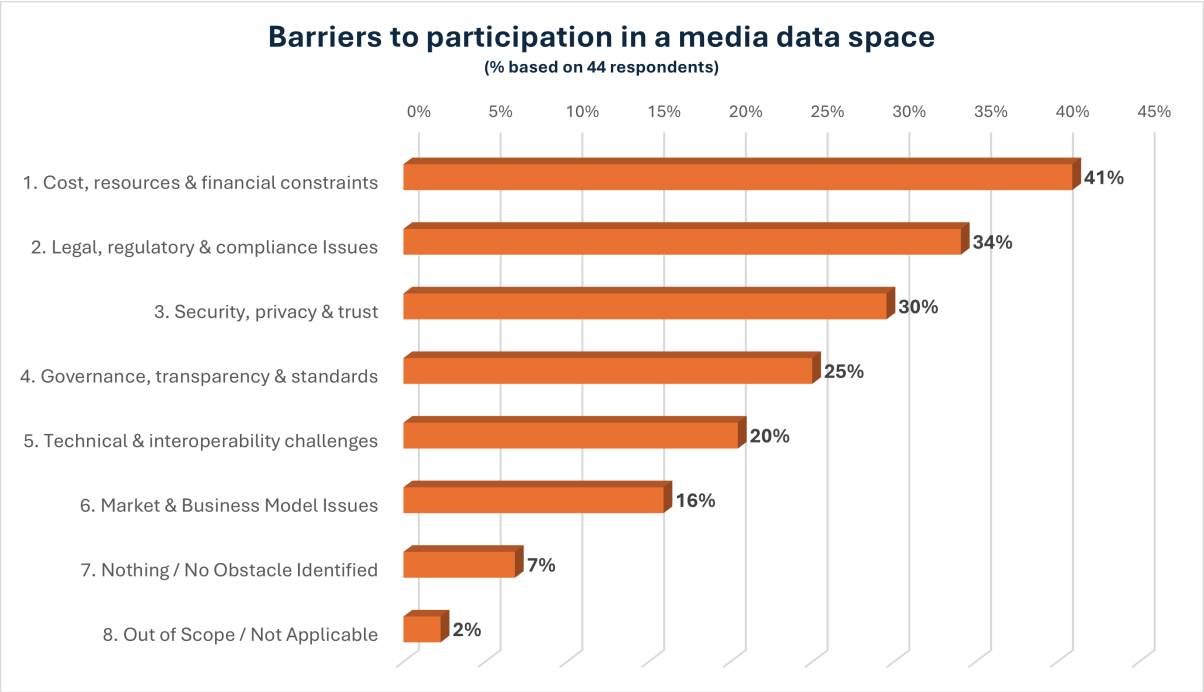
This breakdown shows a spectrum of maturity:

From no/limited use → experimental → broad integration → in-house development. Restrictions mostly appear once AI is integrated into workflows, suggesting a maturity step where governance becomes necessary.

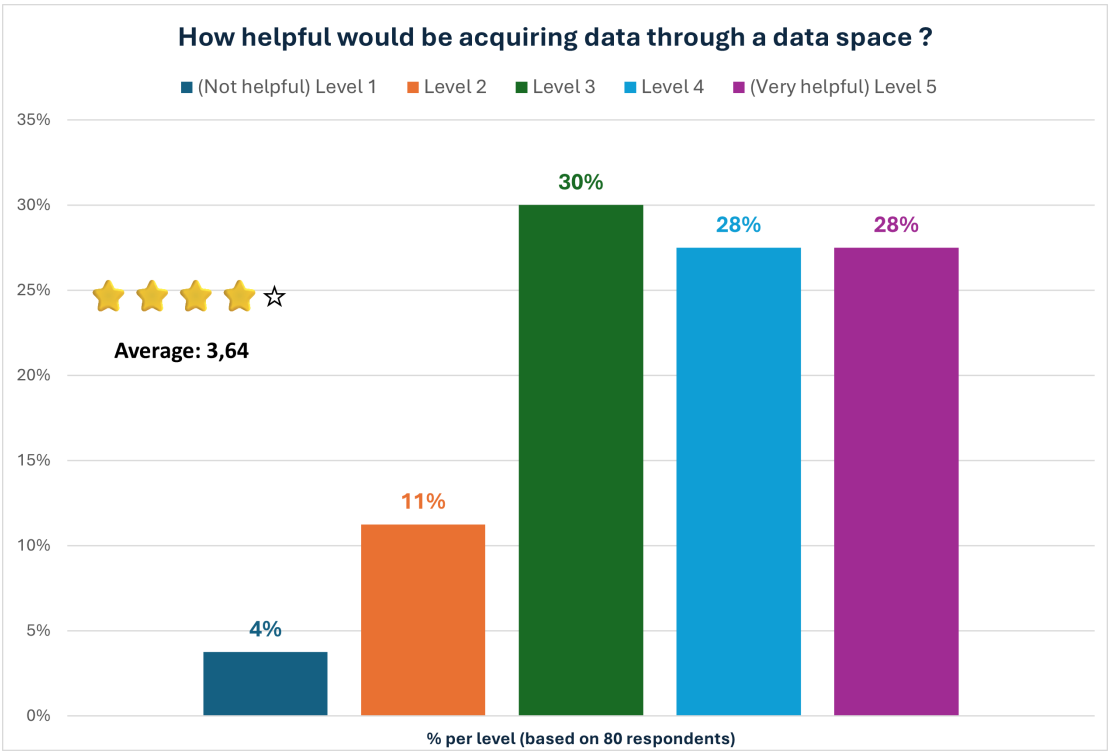
Q17: If your organization participated in a media data space, what would be its role? (Your organization can cumulate several types of roles, ie to be both supplier/seller and consumer/buyer of data)



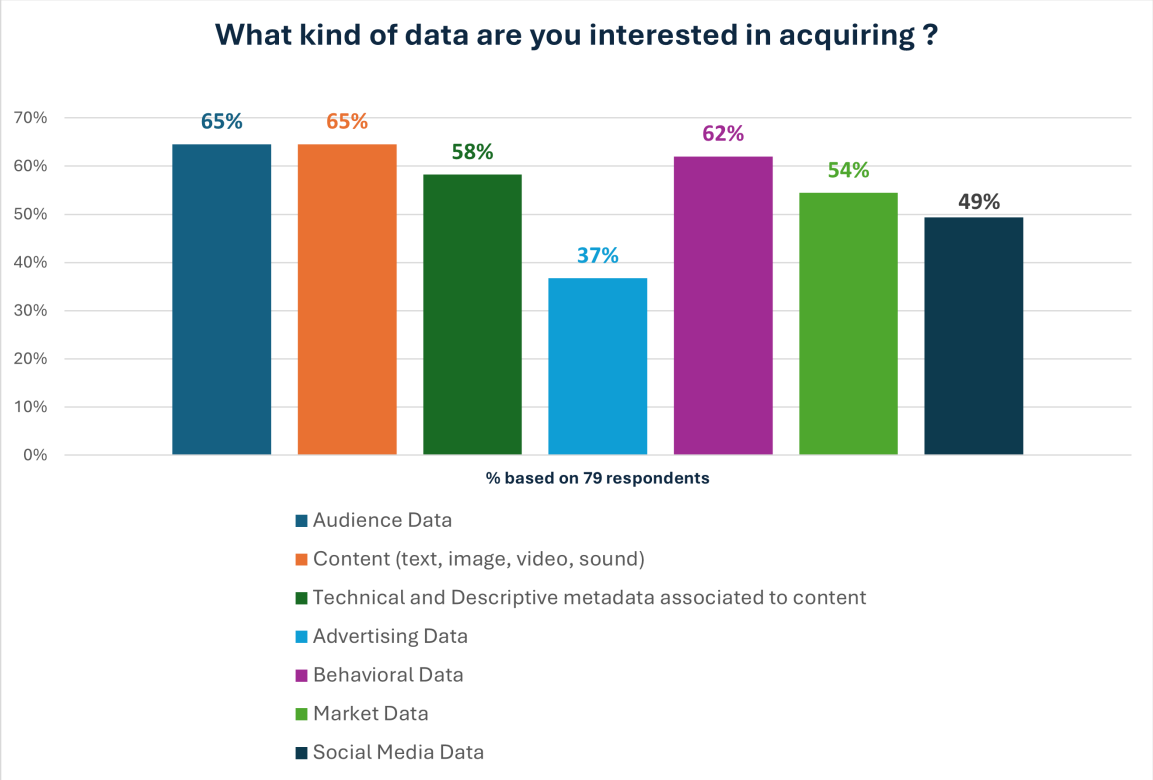
Q18: What may prevent your organisation from participating and consuming in a media data space?



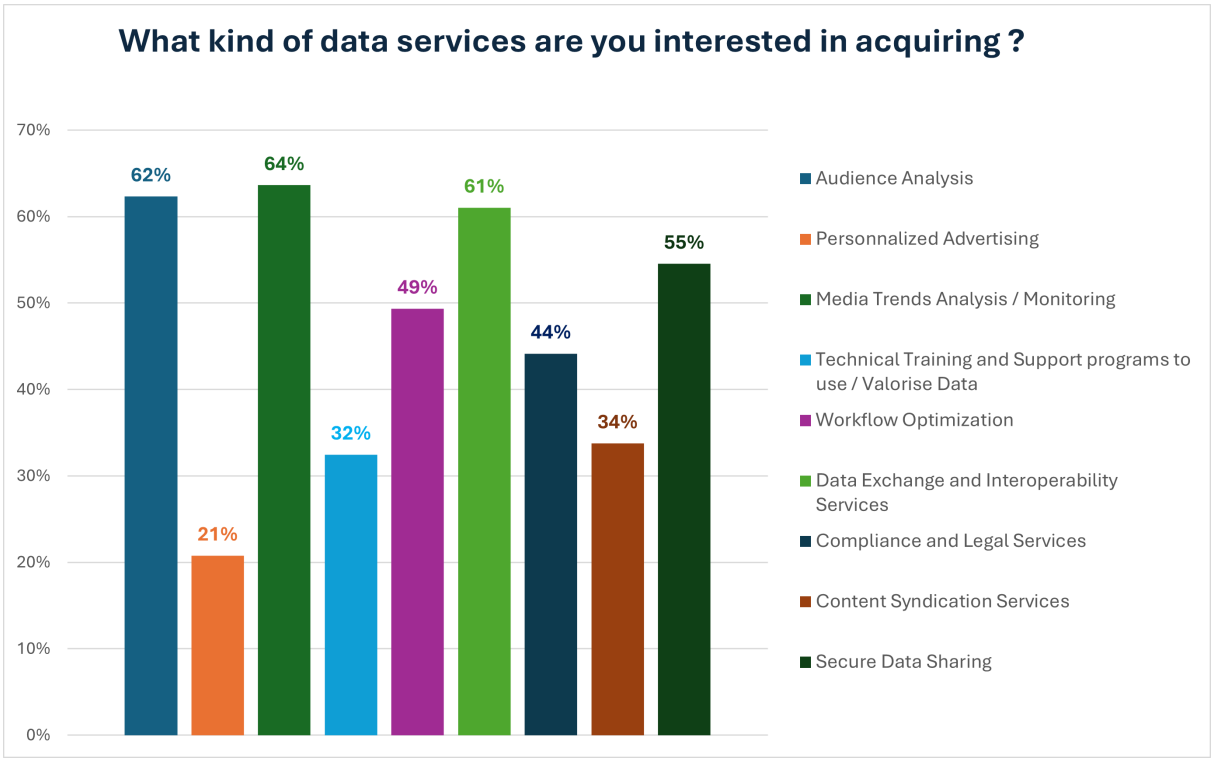
Q19: How helpful would acquiring data (with or without monetization) through a trusted data space from other media companies be for your organization's workflows or products?



Q20: What kind of data are you interested in getting from other companies? Select all relevant options.



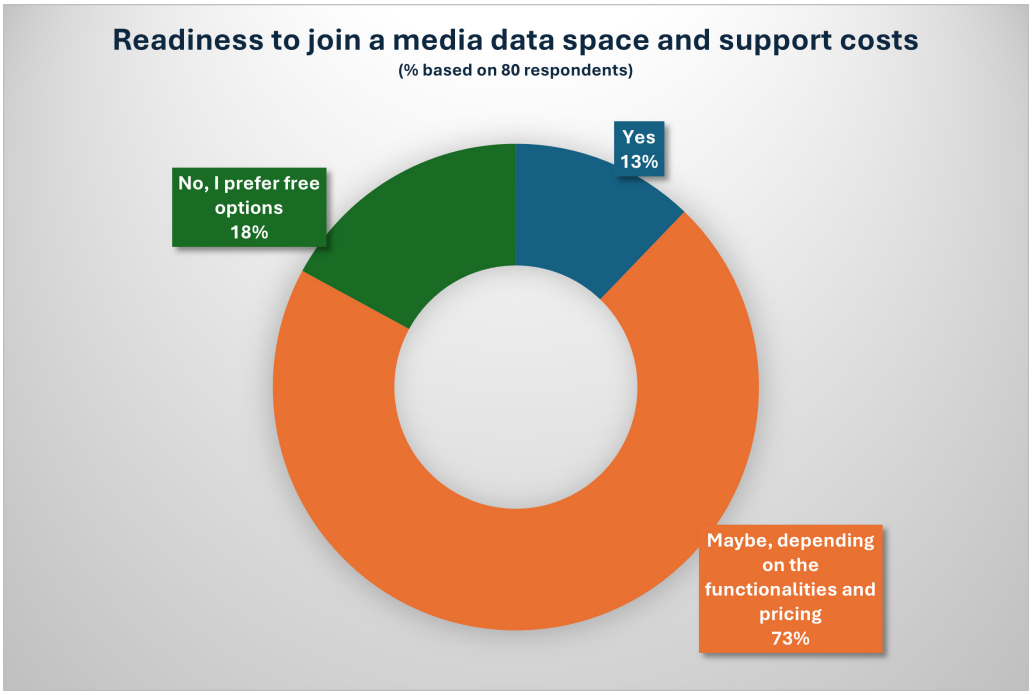
Q21: What kind of data services are you interested in getting from other companies? Select all relevant options.



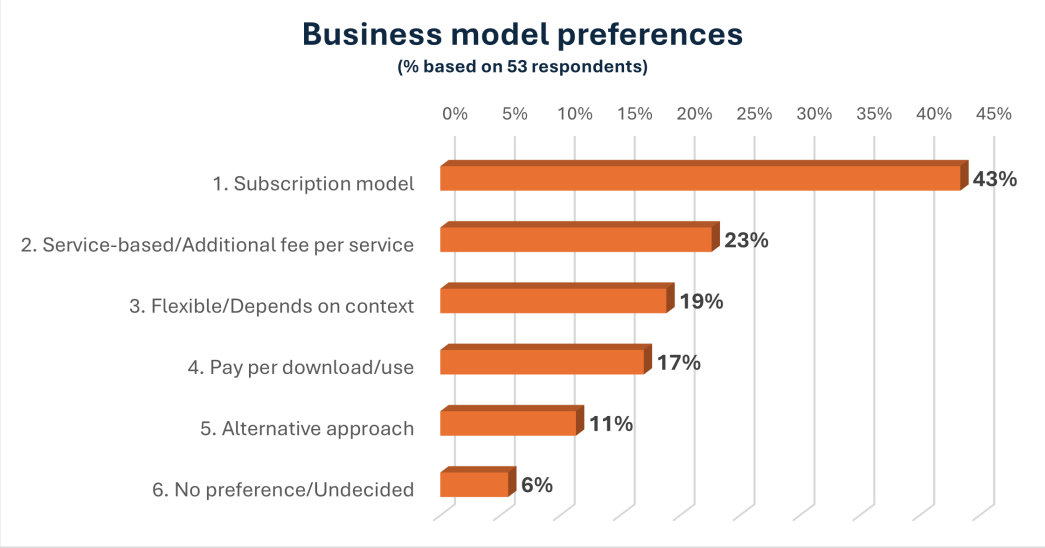
Q22: You can detail here other kind of data and data services your organisation could be interested in:

- "We are interested in international perspective."
- "Business analytics data"
- "Technical workflows in digital distribution (digitization, encoding, packaging, delivery to platforms)"
- "AI-generated data"

Q23: Would your organisation like to become a participant to a media data space and, as any other participant, provide financial contribution to cover its technical and governance costs?



Q24: If the data and services are valuable for you, what business model would you prefer? Here are some suggestions: monthly/annual subscription, pay per download, additional fee per service, etc.



Pricing options

(Based on the 53 respondent preferences. The answers are more numerous because some belong to multiple categories.)

1. Subscription model

Description: Predictable, recurring fees (monthly, annual, flat rate).

- Annual subscription
- Monthly subscription
- Monthly/annual subscription (flexible/unspecified)
- Flat rate

Main takeaway: The strongest cluster of respondents (+40%) favour predictability and budgeting ease through subscriptions.

2. Service-based / Additional fee per service

Description: Fees tied to concrete services, features, or "pay-as-you-go" structures.

- Additional fee per service
- Service-based pricing
- Pay-as-you-go / usage-based
- Freemium or progressive model

Main takeaway: Flexibility-driven: these respondents want to pay for what they actually use, with some appetite for freemium/entry-level offers.

3. Flexible / Context-dependent

Description: No single model chosen — willingness to adapt pricing to service type, content value, or partnership context.

Main takeaway: A sizable group prefers adaptability over commitment, suggesting demand for hybrid or modular pricing menus.

4. Pay per download / Pay per use

Description: Pay only when accessing or using content/services.

- Pay per download
- General pay per use

Main takeaway: A clear minority prefers usage-based pricing, highlighting sensitivity to fairness and avoiding fixed costs.

5. Special / Alternative approaches

Description: Niche or innovative pricing schemes.

- API usage pricing
- Partnership-based
- Association pricing with partner benefits
- Open source / non-profit orientation

Main takeaway: Smaller cluster suggests openness to non-traditional, community-based, or value-sharing approaches.

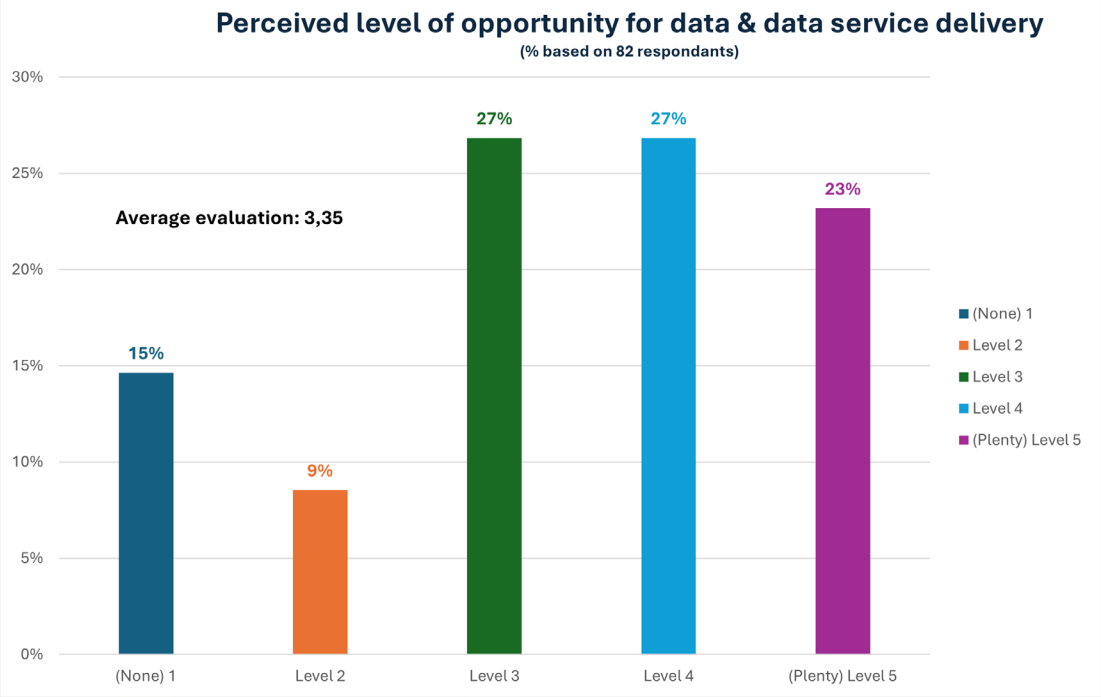
6. No preference / Undecided

Description: Lack of clarity or strong stance.

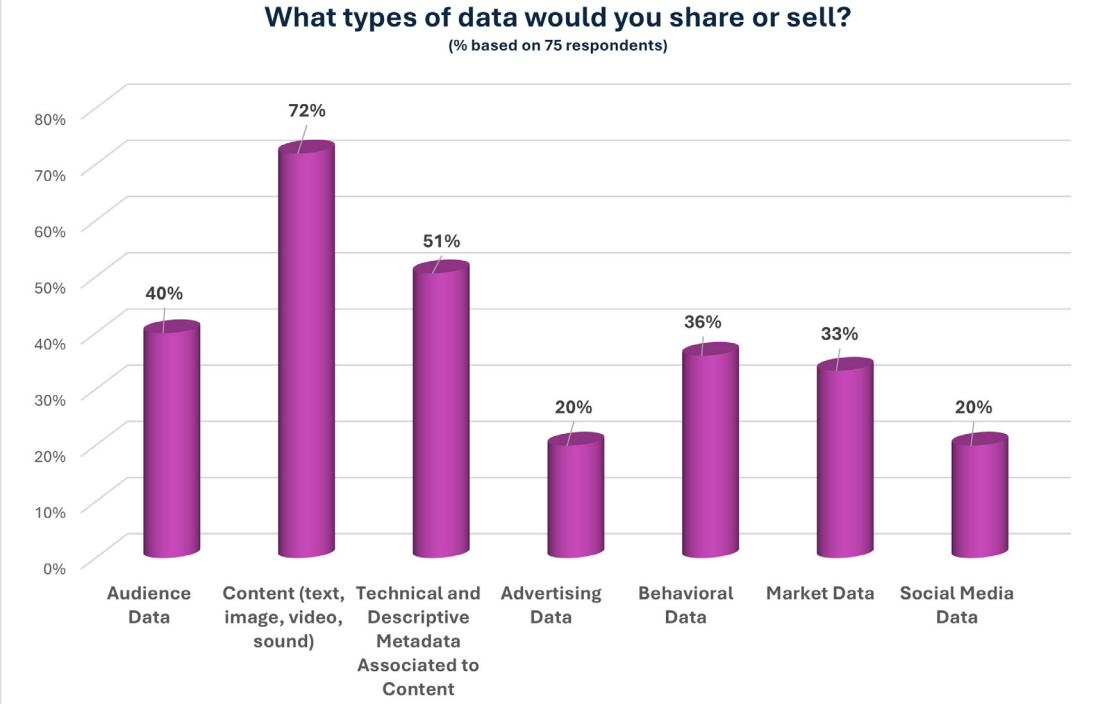
- No preference
- Undecided

Main takeaway: Very limited group where respondents don't have clear opinions.

Q25: For your organisation, do you see business opportunities in delivering data or data services to other companies of your sector (with or without monetization)? None (1) Plenty (5)



Q26: What kind of data would you like to share/sell? Select all relevant options.



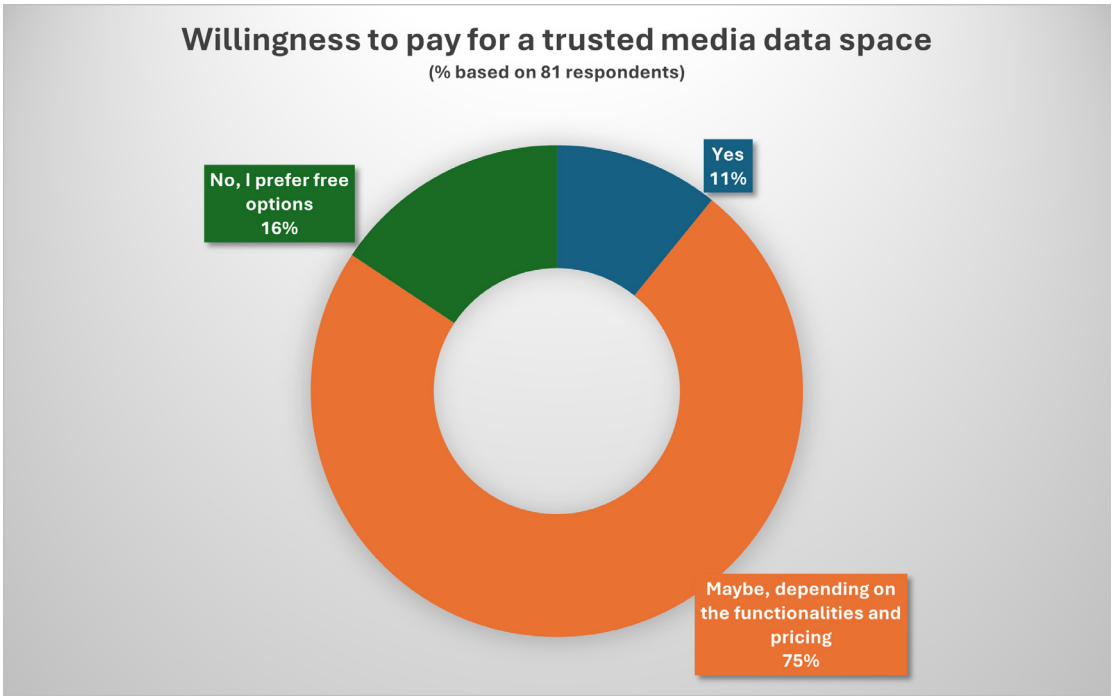
Q27: What kind of data services would you like to offer? Select all relevant options.

No respondents

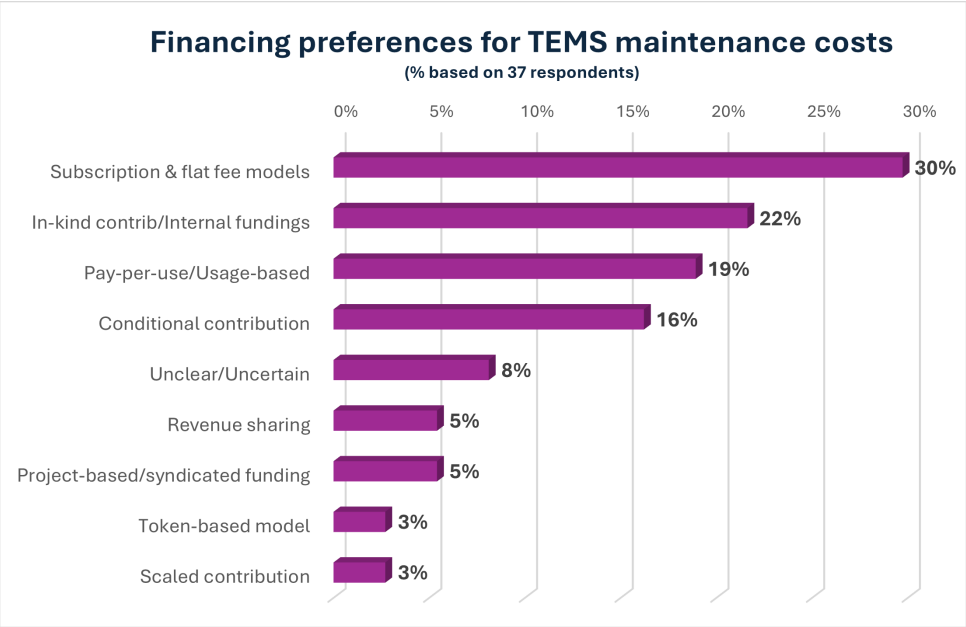
Q28: You can detail here the other kind of data and or data services you could offer:

- "A Copyright Data Exchange" under construction
- "We can only offer data that is already public open-source data"
- "Standardisation information and tools for content metadata and content provenance."
- "3D data"
- "Article syndication"
- "Talent files, HR, tools, sources of funding, studies, etc."
- "Certification data"
- "Recommendations"

Q29: Would you be ready to pay for a trusted media data space that brings your data and data services a broader visibility and opportunities of cooperation?



Q30: How would you prefer to contribute financially to the costs of maintaining the media data space?



The story behind the stats

1. Strong preference for subscription and flat fee models

The most common choice is a subscription-based approach (monthly or annual) or a fixed fee.

This reflects a clear desire for predictable and stable costs, which are easier to budget for compared to variable or performance-based models.

2. Significant role for in-kind contributions and internal funding

Many participants prefer non-monetary support (resources, expertise, services) or using internal budgets rather than direct financial payments.

This suggests a willingness to engage without adding new cash costs, especially for organizations with limited financial flexibility but available resources.

3. Moderate interest in usage-based models

Nearly two out of ten organisations favour pay-per-use or usage-based billing, linking costs to actual consumption (e.g., API calls, services).

This indicates an appetite for fairness and proportionality, especially among participants who expect varying levels of usage.

4. Conditional willingness to contribute

Other participants explicitly state that contributions depend on demonstrated benefits, governance clarity, or return on investment

This underlines a “wait-and-see” attitude, meaning financial models need strong value communication to convert these stakeholders.

5. Some uncertainty and lack of clarity

A minority of respondents were vague or indicated uncertainty, reinforcing that some participants need more information before committing to any financial model.

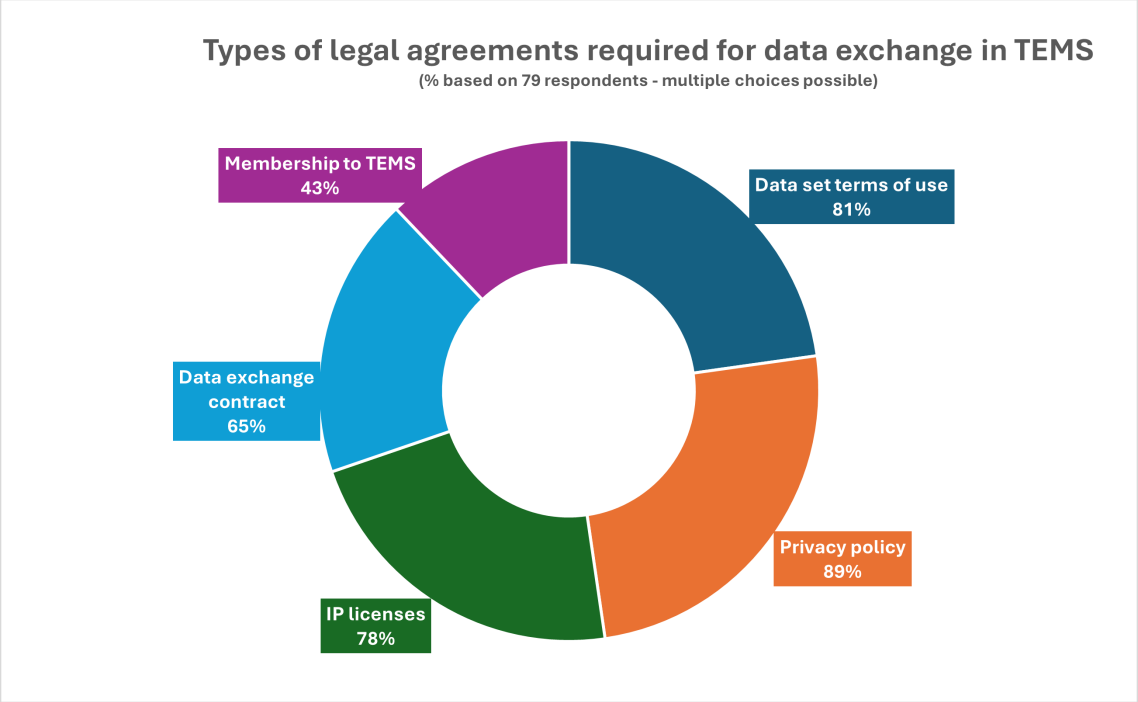
6. Alternative models are mentioned but rare

Several niche models appear but with low frequency:

- Revenue sharing / value-based
- Project-based or syndicated funding
- Token-based
- Scaled contribution by size or turnover

These options may be relevant for specific segments or future stages, but they are not dominant preferences.

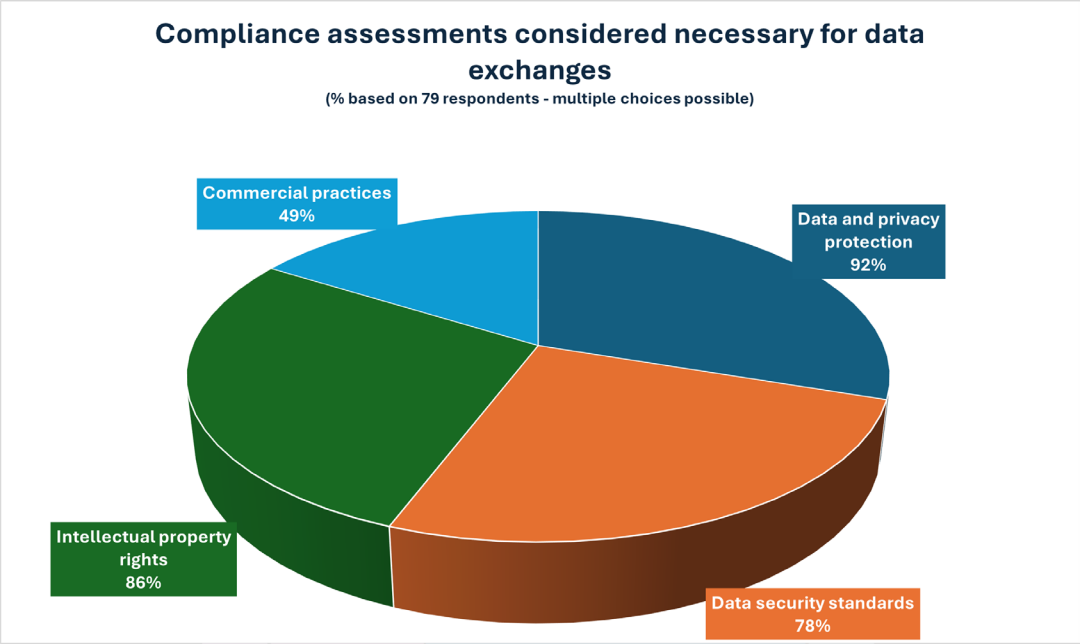
Q31: Which categories of specific legal agreements -such as rules and contracts- are required for your data exchange/data product via TEMS? Select all relevant options.



Q32: If you prefer another option, please detail it:

- "Fair use policy"
- "Community / creative commons licensing to make some content available for free if the publisher is willing."
- "It would also be necessary to integrate strict guarantees on data protection and the prevention of unauthorized secondary uses."
- "Ethical guidelines. Compliance."

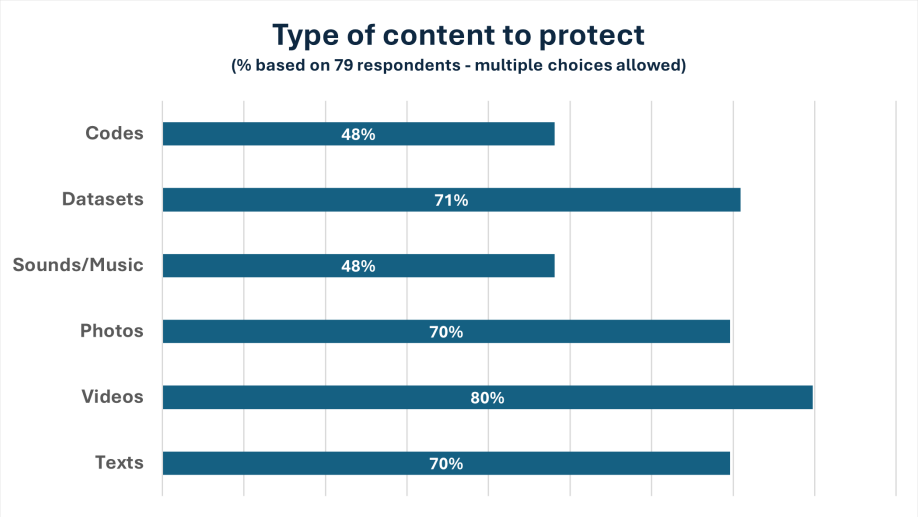
Q33: What compliance assessment do you consider necessary for data exchanges? Select all relevant options.



Q34: If you think of other types of conformity assessment, please detail:

- "Data quality"
- "Purpose limitations for commercial partners"
- Labelling of AI-generated content. Declaration of willingness for content to be used for AI training and data mining."
- "Participants should be located and operate within the European Union."
- "Add a compliance assessment related to the transparency of data usage".
- "Application of European Social Standards, Corporate Social Responsibility standards, European and international tax conventions"
- "Payment terms and responsibilities"
- "Security concepts"
- "Trust assessment, verification of data accuracy, ethics"
- "The conformity assessment must be such that it does not create additional hurdles for costs."

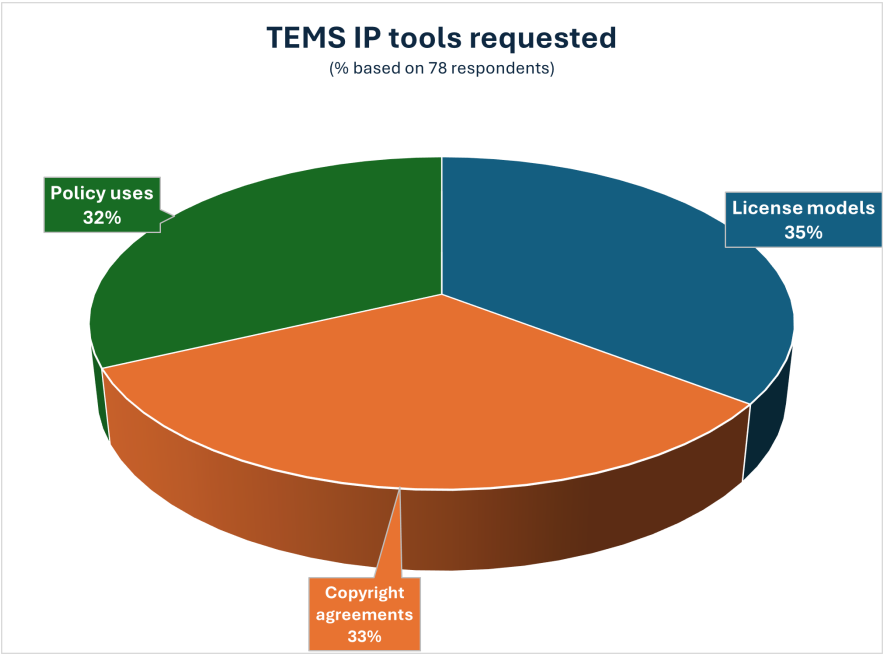
Q35: What do you need to protect under intellectual property? Select all relevant options.



Q36. If we missed a type of content or data, please add it:

- "Allowing fair use for public good, pedagogical or scientific needs"
- "3D data"
- "AI models. Web-based services (not source code, but an actual tool that can be used)"
- "3D data"
- "Commercial/marketing data (sales data and consumer profiles)"
- « Ideas/Patents »
- "Audio/Podcasts"

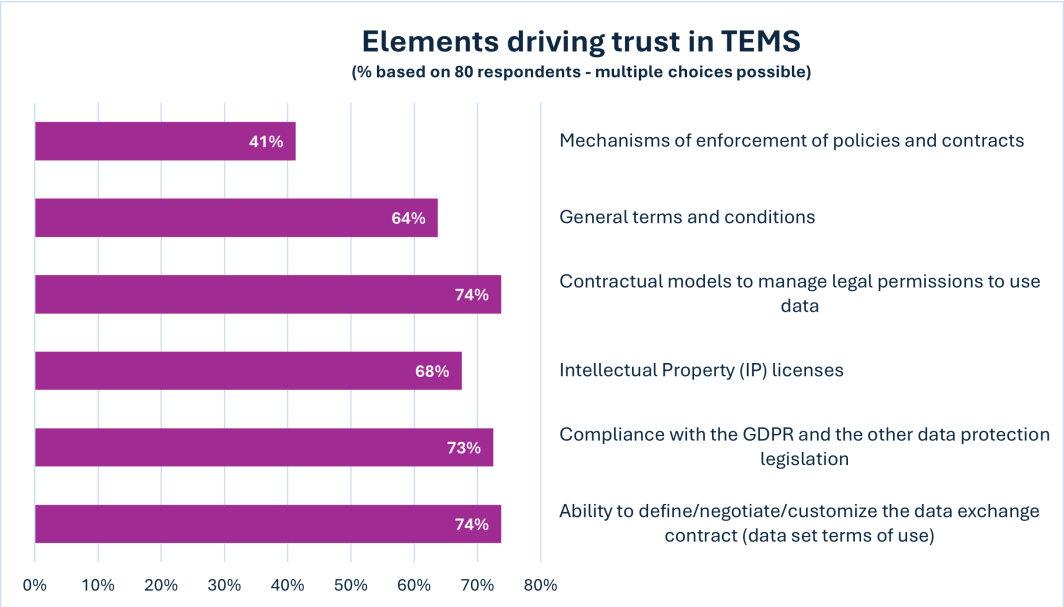
Q37: What kind of protection mechanisms should TEMS provide for intellectual property, in the context of data transaction/exchange? Select all relevant options.



Q38. If you think of other kind of protection mechanism, please detail:

- "It would be useful to add a digital fingerprinting mechanism to identify and trace the origin of datasets, particularly in the event of unauthorized use or illicit dissemination.
- "A system for logging access and transactions (time-stamped logs, user identifiers, declared purpose) would ensure complete traceability of uses"
- "C2PA"
- "Quality criteria, participation criteria (citizen media)"

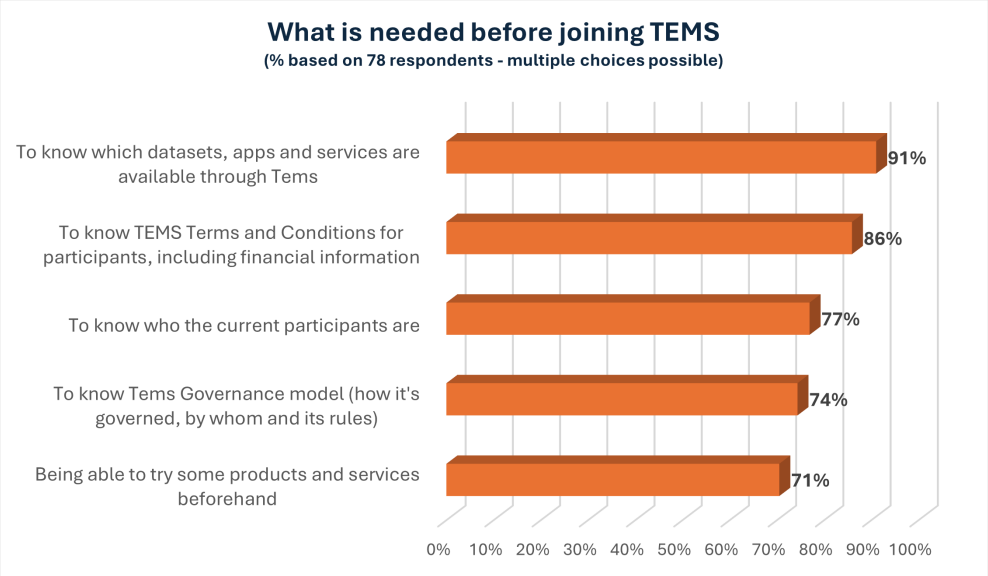
Q39: What elements would make you want to trust and join TEMS? Select all relevant options.



Q40. If you think of other motivating factors, please detail:

- "Kind of data available, costs, reliability, interoperability"
- "How governance works"
- "The implementation of a clear and balanced business model that ensures a fair distribution of value between data contributors and users"
- "Transparency regarding the governance of the TEMS"
- "The possibility of benefiting from structured technical or legal support, particularly for stakeholders with limited resources"
- "Participation in governance, democratic bodies, common or even general interests"
- "A transparent organization and transparent tech stack with open-source solutions, no vendor lock-in for specific technical solutions. Offering content with open licenses at no extra cost should be possible."
- "Participation of citizen media"

Q41: What would you need before onboarding as a TEMS participant? Select all relevant options.



Q42: If you think of other needs, please detail:

- "A robust legal framework which is immune to hostile takeover, abuse, sabotage or theft."
- "Source of data"
- "Transparency regarding the mechanisms for valuing and distributing revenue generated by the platform. It would also be useful to have onboarding support, including technical and legal support. Finally, ensuring technical interoperability with our existing systems (formats, APIs, protocols) would be a decisive criterion for smoothing operational integration."
- "Identify, meet the initiators and pilots of the program"
- "Short-term and long-term goals of TEMS participants, their political connotation and the transparent financing of TEMS"
- "What business model and principles are behind TEMS? How is it financed?"
- "Information about the tech stack, use of open-source software and open protocols"
- "Participation, do not lose control over your own data"

Q43: What do you require in order to share data or content within TEMS or even with other third parties? Select all relevant options.