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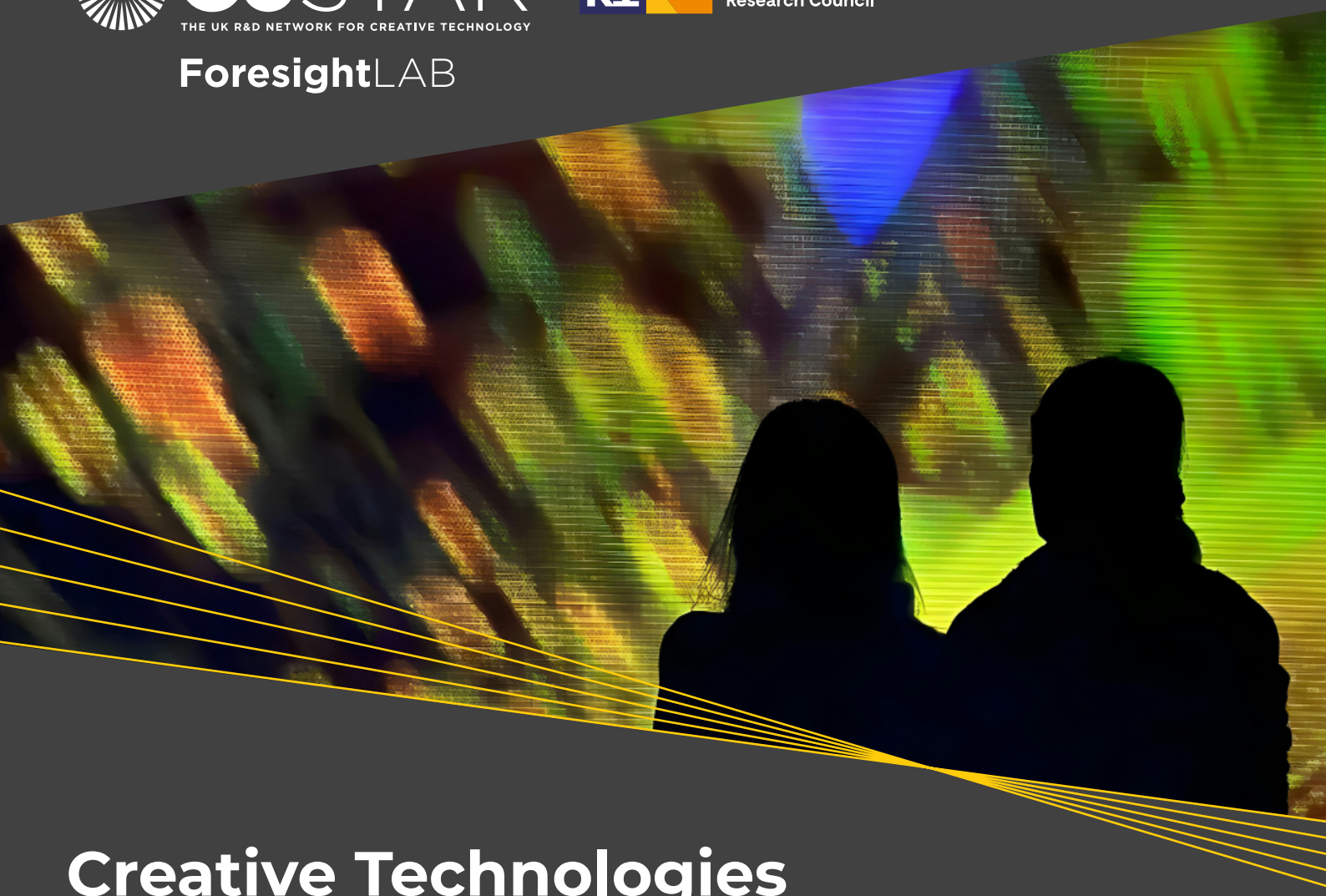

Creative Technologies International Scan #6

A Foresight Lab briefing prepared by Olsberg·SPI

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Creative Technologies International Scans

This Creative Technologies International Scan (CTIS) is the sixth in a series of publications designed to present and unpack global developments of advanced technologies in and for the Creative Industries.

The CTIS is a compilation of key trends and updates from markets outside of the UK, with analysis of the global opportunities and challenges on the horizon. It covers developments between **January and March 2026**, and tracks intelligence related to advanced technologies in and for the Creative Industries.

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Summary of key findings

AI, Regulation and Creative Labour

AI policy is prioritising operational rules on disclosure, consent and human accountability. Governments are moving from high-level ethical principles to concrete compliance requirements that directly affect how screen, games, music and immersive businesses use generative AI tools.

Creator income protection is becoming a central concern in international policy debate. Copyright bodies, unions and cultural institutions are focusing on how value can be retained by creators when AI systems and global platforms sit between them and their audiences.

AI transparency is now a commercial and reputational issue, not only a compliance one. Platform-level disclosure and labelling rules are shaping how content is submitted, discovered and, in some cases, whether it is eligible for distribution at all.

Industrial Policy, Public Investment and Skills

Games, XR and immersive content are being treated as strategic growth industries. Governments are backing creative technology sectors with dedicated funding, start-up support and end-to-end industrial strategies on a scale previously reserved for film and television.

Skills policy is being written in parallel with industrial strategy. Markets that pair investment in studios and infrastructure with training systems, curriculum reform and partnerships with major technology companies are better positioned to capture long-term value from advanced media production.

The US is scaling integrated virtual production and AI infrastructure across new regional hubs. Investment is extending beyond Los Angeles and New York into Georgia, Illinois and Utah, with facilities increasingly built as production ecosystems combining virtual production, XR, consulting and workforce development.

Platforms, Streaming and Market Power

Content regulation is being used to secure domestic visibility and cultural sovereignty. Investment obligations, prominence rules and direct financial contributions are being applied to streaming platforms to redirect spending back into national screen industries.

Streaming services are redesigning user experience around AI discovery and short-form viewing. Conversational search, microcontent and mobile-native formats are shifting how audiences find and consume content, with direct implications for commissioning and intellectual property design.

Formats, Audience Engagement and New Content Models

Generative AI is moving from experimentation into deployable production workflows. Investor appetite remains strong and competitive advantage is starting to depend on how effectively AI tools are integrated into day-to-day production rather than whether they are used at all.

Immersive formats are embedded in mainstream cultural and entertainment strategies. Museums, record labels, live entertainment producers and XR companies are using immersive tools to extend existing intellectual property across physical and digital environments.

Microdrama is formalising as an industry, with dedicated training and infrastructure. Purpose-built campuses, university courses and training academies across the US, Nigeria and Dubai indicate that short-form vertical content is being treated as a lasting content category.

Advanced technology is being integrated into sports entertainment at scale. Long-term partnerships between major rights holders and technology companies are embedding AI, AR and XR into broadcast and live-event infrastructure to enhance both in-venue and viewer experience.

Inclusion, Sustainability and Sector Development

Talent development initiatives are broadening access to creative technology for underrepresented groups. Training, tool access, mentoring and scholarships are being delivered through universities, HBCUs and industry partnerships to widen the creative technology talent pool.

Environmental accountability in the screen sector is moving from commitments to measurable tools. Carbon calculators, standardised frameworks and mandatory corporate sustainability reporting are being introduced across Europe, Latin America and the animation sector to make environmental performance comparable and auditable.

Key findings

AI, Regulation and Creative Labour

AI policy continues to prioritise operational rules on disclosure, consent and human accountability across creative content markets

- Governments are moving AI policy from high-level ethical principles towards concrete operational requirements, focusing on labelling, watermarking, informed consent and clearer compliance duties for businesses working with generative AI tools
- Most jurisdictions continue to anchor copyright and legal responsibility in human creators and rights holders, rather than extending authorship or liability to AI systems themselves
- Performer protections are becoming more specific, with new or proposed rules requiring informed consent and fair remuneration when AI systems use an actor's voice or likeness
- For screen, games, music and immersive businesses, day-to-day AI use is moving into the compliance function, with documentation, disclosure and traceability emerging as routine production tasks rather than exceptional measures.

Case Studies

India – the Ministry of Electronics and Information Technology (MeitY) published amended IT Rules, clarifying obligations around 'synthetically generated information' and harmful manipulated content for intermediaries and digital platforms

South Korea – implemented its AI Basic Act, including watermarking requirements for AI-generated content and safety obligations for 'high-impact' systems

Mexico – proposed Federal Film and Audiovisual Law includes AI labour protections requiring informed consent and fair remuneration for the use of performers' voice or image

United States – the Supreme Court declined to hear the AI 'authorship' case, leaving in place the position that copyright protection remains tied to human authorship

Canada – held its first national summit on AI and culture in March 2026 to inform a new national AI strategy and a planned AI and Culture Advisory Council.

Advocacy for protecting creatives' income in relation to copyright, monetisation and platform power continued, particularly where AI and digital intermediaries are reshaping value capture

- Creator bodies and cultural institutions are focusing on whether creators can retain income from their work when AI systems and global platforms sit between them and their audiences
- Independent analysis points to material projected income losses for working creators, particularly in music and audiovisual, if AI training on protected works continues without licensing or compensation mechanisms
- The debate is narrowing onto specific instruments, including opt-out regimes for rights holders, transparency over training data, and whether new copyright exceptions should be introduced for AI training
- In emerging markets, the emphasis is shifting from adopting intellectual property policies to implementing them in ways that deliver tangible income for local creators.

Case Studies

UNESCO – warned that creators could face revenue losses of up to 24% in music and 21% in audiovisual by 2028 due to generative AI

Creative Commons – published a policy brief outlining options on copyright, transparency, licensing and opt-out mechanisms for generative AI training data

SOCAN (Canada) – called on the Canadian Government to reject any new copyright exceptions that would allow free, unauthorised use of protected works for AI training

Nigeria – inaugurated new committees to implement its National Intellectual Property Policy and Strategy, with the next phase focused on practical benefits for creators, innovators and businesses.

AI transparency is becoming a more visible commercial and reputational issue across platform ecosystems, as disclosure, labelling and creative control move closer to the consumer interface

- AI disclosure is no longer only an internal production matter; storefronts, streaming services and games platforms are introducing labelling and classification rules that affect how content is submitted, presented and, in some cases, whether it is eligible for distribution or charting at all
- Platform-level AI labelling creates new commercial incentives to document AI use, because transparency is starting to influence discoverability, eligibility and audience trust alongside legal compliance
- A distinct issue is emerging where AI tools automatically modify visual or audio content, raising questions about who retains creative control when platforms or hardware alter work without explicit approval from creators
- Labels, publishers and developers will likely need clearer internal processes for tracking AI use across production and marketing, as disclosure increasingly affects market access.

Case Studies

Valve – updated Steam's AI disclosure guidelines for game submissions, refining what developers must report about generative AI use in development and marketing materials

Apple Music – introduced new AI transparency tags requiring labels and distributors to disclose the use of AI in audio, artwork, composition and video

Sweden – a partly AI-generated song was ruled ineligible for the official charts despite achieving millions of streams, highlighting debate over labelling and eligibility in music markets

NVIDIA – DLSS 5 faced backlash over AI-driven visual changes in games, with critics arguing that automated alterations to lighting and shadows could distort artistic intent.

Industrial Policy, Public Investment and Skills

Governments are expanding industrial policy for creative technology sectors, with games, XR and immersive content increasingly treated as strategic growth industries

- Games, XR and immersive content are increasingly being positioned alongside film and television as strategic industries, with governments backing this through dedicated funding, studio support and start-up programmes
- Support is often framed in economic and soft-power terms, including exports, jobs and international cultural influence, which typically unlocks larger budgets than cultural-preservation arguments alone
- Policy is moving from single-stage incentives towards end-to-end support covering development, production and distribution, with particular focus on immersive works and games ecosystems
- Markets that set out clear industrial strategies for creative technology are better placed to attract studios, investment and skilled labour; those without such frameworks risk losing talent to jurisdictions that offer more integrated support.

Case Studies

Tamil Nadu (India) – launched its AVGC-XR Policy 2026, targeting at least 200 start-ups by 2030, support for 100 companies and skills infrastructure across 300 to 400 colleges

Japan – set out plans to increase support for games and wider content industries as part of a strategy to grow overseas sales to ¥20 trillion (~£104 billion) by 2033

Germany – increased annual games industry funding to €125 million (~£107 million) from 2026, with industry continuing to argue for further support and tax incentives

France – the CNC updated its immersive creation support schemes for XR development and production-stage projects, reinforcing end-to-end support for immersive works.

Skills policy is becoming more tightly integrated with creative technology development, as governments move to build workforce capacity alongside sector growth

- Governments recognise that studio infrastructure and tax incentives alone do not build an industry, and are pairing sector investment with training systems, curriculum development and industry-facing education partnerships
- Training for AI, games and immersive work is being embedded in mainstream education, including schools, colleges and vocational institutions, rather than left to short-form industry courses
- Partnerships with major technology companies are becoming a common delivery model for skills at scale, although this raises questions about curriculum influence and long-term dependency on commercial platforms
- Markets that align skills policy closely with industrial strategy are more likely to capture long-term value from advanced production; those that invest in studios without matching workforce support risk hitting capacity limits quickly.

Case Studies

South Korea – committed ₩43 billion (~£21.5 million) to AI training programmes for content creators across music, television, film, animation and webtoons, with more than 3,400 participants expected

Saudi Arabia – integrating game development and esports into secondary, higher, technical and vocational education through agreements with Savvy Games Group

India – the Ministry of Information and Broadcasting launched a national AI skilling programme in partnership with the Indian Institute of Creative Technologies, Google and YouTube

Utah (US) – AI-enabled film ecosystem proposal includes workforce certification programmes linked to AI-supported production infrastructure.

The US continues to invest in integrated virtual production and AI infrastructure

- Investment in virtual production and AI-enabled facilities is expanding beyond Los Angeles and New York, with new sites opening across Georgia, Illinois, New York and Utah, distributing high-end production capacity across a wider set of regional hubs
- New facilities are being developed as integrated production ecosystems, combining virtual production with XR, live events, consulting and workforce development rather than offering a single service line
- Public funding is being used to seed private infrastructure around AI-enabled production, with state and local authorities competing to attract studios through grants, tax packages and training provision
- The emphasis on collaborative workspace, creative community and training alongside technical equipment indicates that successful creative technology hubs are being built around ecosystem depth, not equipment alone.

Case Studies

Atlanta – Disguise opened an experience centre and office, including a full-service virtual production studio, to create a collaborative space for local creatives and technologists

Chicago – Forge Studios launched a virtual production facility in the west suburbs, offering two LED volumes as well as consulting and full-service production support

New York – Pier59 Studios launched Megaverse, an integrated production solution combining virtual production, XR and live event capabilities

Utah – Nuovo Film Festival received a US$2 million (~£1.5 million) grant to build an AI film ecosystem following the departure of Sundance Film Festival.

Platforms, Streaming and Market Power

Content regulation is increasingly being used to secure domestic visibility, investment and cultural sovereignty in platform-led markets

- Regulators are concerned that global streaming platforms, left to market forces, will underinvest in local content and reduce the visibility of domestic productions; investment obligations and local content rules are being used to redirect spending back into national screen industries
- Regulation is moving beyond legacy broadcasting frameworks to target streaming interfaces, prominence on connected devices and financial contributions from platforms that do not commission directly
- For producers, these measures open new commissioning opportunities in regulated markets but also change rights negotiations, as platforms may seek more control in exchange for meeting mandatory local investment levels
- The shared framing of 'cultural sovereignty' across several jurisdictions indicates that content regulation is now being treated as a strategic as well as an economic issue, reflecting concern about dependence on a small number of global platforms.

Case Studies

Australia – the new Australian Content Requirement is expected to oblige major subscription streaming services to invest in new eligible Australian programming

Canada – the Canadian Radio-television and Telecommunications Commission (CRTC) signalled that online streaming services will be expected to contribute financially to Canadian content under the Online Streaming Act

Europe – industry speakers at the European Film Market said financial obligations on streamers are increasingly being used to protect local screen industries and cultural sovereignty

Germany – introduced an 8% statutory investment obligation requiring national and international streamers and video-on-demand services to invest in German film and television content.

Streaming and online video platforms are redesigning user experience around AI discovery, short-form viewing and mobile-native engagement

- Streaming services are moving away from the assumption that audiences want to browse large catalogues and settle into longer-form viewing, adopting shorter formats and more personalised interfaces aligned with how younger, mobile-first audiences already engage with content
- Conversational AI is being introduced as a discovery layer, enabling audiences to search by intent or theme rather than relying on genre menus and recommendation rows
- Short-form 'microcontent' and microdramas are moving into mainstream commissioning categories, with established streaming services integrating shorter formats to reach younger audiences accustomed to social video
- For producers and rights holders, content and intellectual property may need to be designed to work in multiple lengths and formats, with discoverability considered alongside narrative development rather than as a post-production concern.

Case Studies

JioHotstar – partnered with OpenAI to integrate a ChatGPT-branded discovery experience into its streaming platform, enabling conversational search across more than 300,000 hours of programming

Disney+ – announced plans to introduce short-form 'microcontent' in 2026 to attract younger audiences familiar with social video

Omdia – identified microdramas as one of the fastest-growing formats, with revenues expected to rise from US$11 billion (~£8.5 billion) in 2025 to US$14 billion (~£10.9 billion) by the end of 2026.

Generative AI is moving further into deployable creative production workflows, with vendors and investors focusing on practical tools for professional use

- Generative AI is moving out of experimental use and into practical tools designed for specific production tasks, including video generation, visual effects, continuity and project management
- Investor appetite remains strong, with significant funding flowing to companies offering measurable gains in speed, cost efficiency and operational scale, indicating that professional AI tooling is treated as a durable category rather than a short-term trend
- Established players are embedding AI directly into existing creative workflows through acquisitions and partnerships, rather than offering AI as a separate category of software
- Competitive advantage is starting to depend less on whether a studio uses AI and more on how effectively AI tools are integrated into day-to-day creative and production processes.

Case Studies

Adobe – launched Firefly Foundry as a partner programme to support the integration of generative AI into media and entertainment workflows

Runway – raised US$315 million (~£250 million) to scale generative video development, reinforcing investor confidence in video AI as a high-growth creative tooling segment

MITO AI – raised US$4.5 million (~£3.6 million) to build production management software for filmmakers and production teams

Netflix – acquired Ben Affleck's AI film technology company InterPositive to support film and television production workflows.

Formats, Audience Engagement and New Content Models

Immersive formats are becoming more embedded in mainstream cultural, entertainment and fan engagement strategies

- Immersive technologies are moving beyond pilot projects into regular use by museums, record labels, live entertainment producers and XR companies, forming part of standard audience engagement strategies rather than specialist activity
- The range of applications is widening across mobile augmented reality, physical brand activations and large-scale immersive theatre, indicating that 'immersive' now covers a spectrum of audience experiences rather than a single technology
- New hardware launches and developer programmes show that the underlying ecosystem of devices, software and production tools is maturing, which is a prerequisite for wider consumer adoption
- Immersive is increasingly being used to extend the value and reach of existing intellectual property, turning albums, exhibitions and stage shows into multi-format experiences rather than standalone immersive works.

Case Studies

Pico – unveiled PICO OS 6 and previewed its flagship XR headset 'Project Swan', alongside a global early access programme for developers

The Louvre and Snapchat – launched 'The Incredible Unknowns', an augmented reality experience designed to extend exhibition storytelling through mobile-native interaction

Spotify – launched an immersive Bad Bunny experience in São Paulo, bringing album themes into a physical activation space for fans, creators and press

New York – a new immersive production based on The Phantom of the Opera used advanced technical production across a five-floor venue to create a fully interactive audience experience.

The microdrama industry continues to grow and formalise with new training and infrastructure provision

- Microdrama – short, serialised, vertical and mobile-first content – is maturing from a social media trend into an industry with dedicated training programmes, studio space and career pathways
- The format is attracting investment in very different markets, from US universities to academies in Nigeria and specialist programmes in Dubai, reflecting recognition of microdrama as a lasting content category
- Purpose-built production campuses indicate that investors see microdrama as a distinct ecosystem with its own infrastructure requirements, rather than a format to be added to the margins of existing studios
- Emerging markets are positioning microdrama as an opportunity to build industry leadership from the ground up, given the lower capital intensity compared with traditional film and television production.

Case Studies

Cal State University Los Angeles – the first US university to offer a microdrama training course, in partnership with vertical platform DramaBox

Nigeria – the Digital Creator Africa Academy for Microdrama was launched, the first of its kind on the continent

Dubai – broadcast and digital media expo CABSAT announced a two-day microdrama training lab at its summer 2026 event

New Jersey (US) – Filmology Labs announced a US$250 million (~£167 million) content creation studio campus that will house the Verza TV vertical microdrama platform.

Advanced technology is being increasingly integrated into sports entertainment to enhance audience experience

- Major sports rights holders are signing long-term technology partnerships rather than one-off event deals, embedding AI, augmented reality and XR into their broadcast and live-event infrastructure
- Investment is split between improving in-venue experiences through interactive surfaces and augmented reality overlays, and enriching broadcast coverage with advanced tracking, data visualisation and virtual presentation tools
- Sports is emerging as one of the most commercially viable testing grounds for immersive and AI technology, because large, committed audiences make the investment case more straightforward than in speculative entertainment applications
- For technology companies, sports partnerships provide both revenue and credibility, as permanent integration with major leagues signals production-readiness to broader entertainment buyers.

Case Studies

FOX Sports and Kudan (Japan) – Kudan's real-time tracking technology has been permanently integrated into FOX Sports' NFL broadcast infrastructure

France Télévisions – used XR to bring athletes and presenters together in one virtual space for the 2026 Winter Olympics

FIFA and Lenovo – FIFA unveiled a suite of new AI solutions developed in partnership with Lenovo ahead of the 2026 World Cup

Disguise and ASB Glassfloor – announced a strategic partnership to create interactive court surfaces for sports arenas.

Inclusion, Sustainability and Sector Development

Talent development initiatives are broadening inclusive access to creative technology, particularly for underrepresented groups

- Training and access programmes for women, people of colour and other underrepresented groups are expanding, reflecting recognition that, without deliberate intervention, the emerging creative technology workforce risks replicating existing industry inequalities
- The interventions combine practical elements, including training, tool access, mentoring and scholarships, which tend to produce more measurable outcomes than awareness campaigns alone
- Universities, including Historically Black Colleges and Universities (HBCUs), are emerging as key delivery partners, often working alongside technology companies and high-profile individuals to reach communities that mainstream industry pipelines tend to miss
- Inclusion is increasingly being framed as a workforce and competitiveness issue, with a diverse talent pool treated as a strategic asset for the long-term health of creative technology sectors.

Case Studies

Miles College, Alabama (US) – Katt Williams partnered with the Historically Black College to provide AI and augmented reality training for students of colour, including a production campus and a scholarship fund

Bond University (Australia) – launched a generative AI masterclass for women and gender-diverse screen professionals on the Gold Coast

Sundance Institute and Google (US) – Google provided the Sundance Institute with US$2 million (~£1.5 million) in funding for community-led AI training for over 100,000 artists as part of its AI Opportunity Fund

Dallas College (US) – partnered with DHD Films and Vū Technology to open a virtual production soundstage to enhance student workforce readiness in film, digital media and immersive technology.

International efforts to improve environmental accountability in the screen sector are continuing

- Sustainability work in screen production is moving from general commitments towards concrete tools, including carbon calculators, standardised frameworks and mandatory reporting, which make environmental performance measurable and comparable
- The effort is broadening from live-action film into animation and from established European markets into emerging markets such as Brazil, reflecting a move towards more globally applied standards
- Corporate sustainability reporting requirements, including the European Union's Corporate Sustainability Reporting Directive (CSRD), are drawing major media companies into formal, audited disclosure, which creates downstream pressure on production partners and suppliers
- Standardisation remains the critical next step, as shared metrics are needed for productions to benchmark credibly, making common frameworks arguably more significant than any single green initiative.

Case Studies

European Commission – launched the MEDIA Carbon Calculator, a free tool for measuring the carbon footprint of live-action film and television series productions in Europe

Brazil – energy company Petrobras created a Think Tank for Brazilian and Latin American audiovisual professionals to discuss and ultimately produce a manifesto on sustainable film production

Cartoon Movie 2026 – CineRegio, Ecoprod and Green Film launched the ANiMPACT Standards, a new sustainability framework for the animation sector

RTL Group – published its second annual sustainability report, aligning with the European Union's Corporate Sustainability Reporting Directive (CSRD) and the European Sustainability Reporting Standards.

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