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Internationalisation Strategy

("GCA's Internationalisation Strategy")

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About Global Content Alliance (GCA)

GCA aims at initiating a cross-sectoral European network to propel European SMEs producing and distributing media content, with the objective of conquering new worldwide audiences. The digital revolution has deeply impacted the production, distribution and reception modes of media content. One key challenge for media SMEs is the necessity to create value across different media and platforms, an approach known as Transmedia. Another challenge concerns the rise of immersive media such as Virtual Reality and Augmented Reality, and of disruptive technologies like Big Data, Artificial Intelligence, Machine Learning and the Internet of Things.

GCA intends to support SMEs by intensifying networking, collaboration and knowledge-transfer on a European scale. The aim is to strengthen the capacity of European SMEs to compete, to innovate and to connect with global audiences.

This will be achieved by carrying out the following objectives:

- To stimulate EU SMEs to adapt their media production and distribution processes by:
 - Taking into account new global audiences and media usage habits,
 - Reinventing live media experiences, especially for sports, TV Shows and cultural events,
 - Extending new user experiences (UX) to other sectors such as education, training and tourism, and (d) by optimizing business models and marketing strategies with the use of advanced technologies such as blockchain.
- To build, enhance and sustain a European Strategic Cluster Partnership;
- To formulate recommendations to SMEs based on global market analyses, identifying (a) best practices for cross sectoral partnerships and international collaboration and (b) key skills that heighten the competitiveness of the European SMEs in cross-border and global markets.
- To define an internationalization strategy and actions to implement this strategy.
- To define the implementation plan of this joint international plan.



About this document

This document summarises the work performed in the frame of the **Internationalisation Plan** (WP4) including the **Internationalisation Strategy (D4.1)** but excluding the **Implementation Plan (D4.2)**, which will be delivered in early 2019.

The Objectives of the **Internationalisation Plan** are to define a suitable Internationalisation Strategy (D4.1) and to define and carry out preparatory actions within the frame of the Implementation Plan (D4.2)¹.

The goal of the **Deliverable D4.1** is to provide the consortium with a relevant internationalisation strategy (WP4) and to define four target countries it is going to address in the coming months.

The strategy described hereafter is based on an in-depth analysis of the market and the assets of the GCA consortium that can be found in the Deliverable **D2.1**.

At the end, the D4.1 will feed the D4.2 that aims at describing the implementation of this strategy plan that will be rolled-out in the coming months.

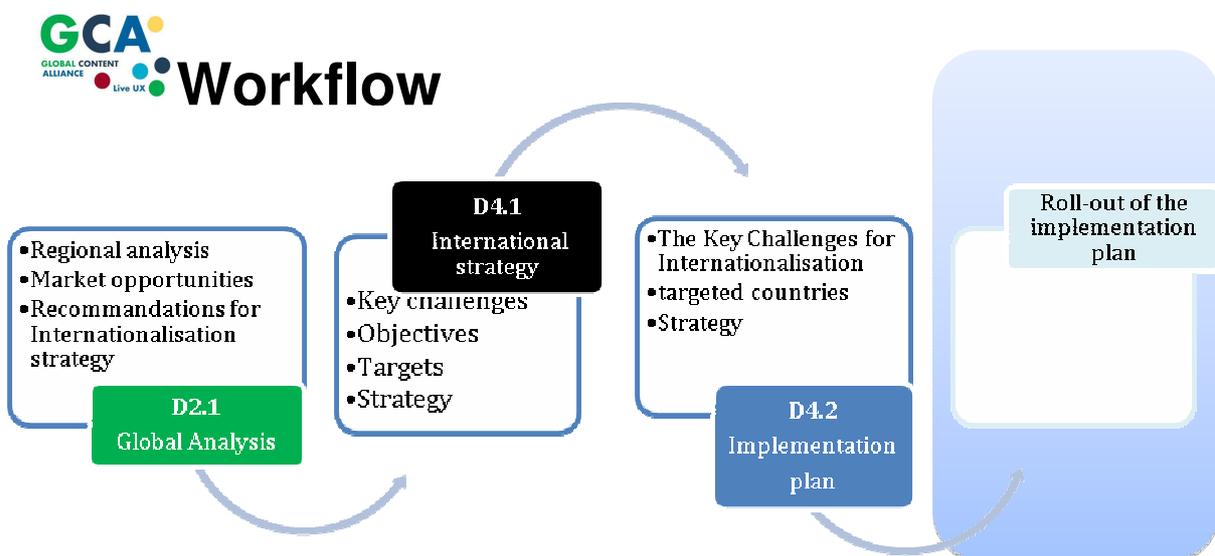
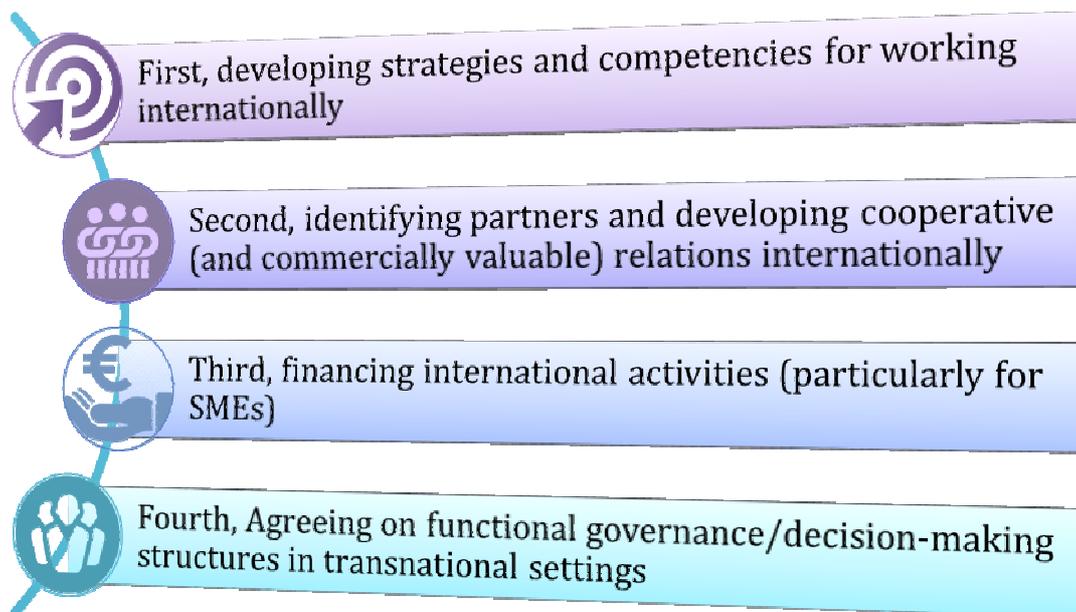


Figure 1 Workflow of GCA Internationalisation plan

¹ COSME programme proposes 2 stages corresponding to 2 calls of proposals. The GCA project is the first stage. The consortium will compete to the stage 2 once the call for proposal is launched.

1 The Key Challenges for Internationalisation

First we have to consider the challenges our SMEs will face towards their internationalisation. Therefore the Key Challenges for Internationalisation identified by the TACTICS Taskforce on Cluster Internationalisation Input Paper, are:

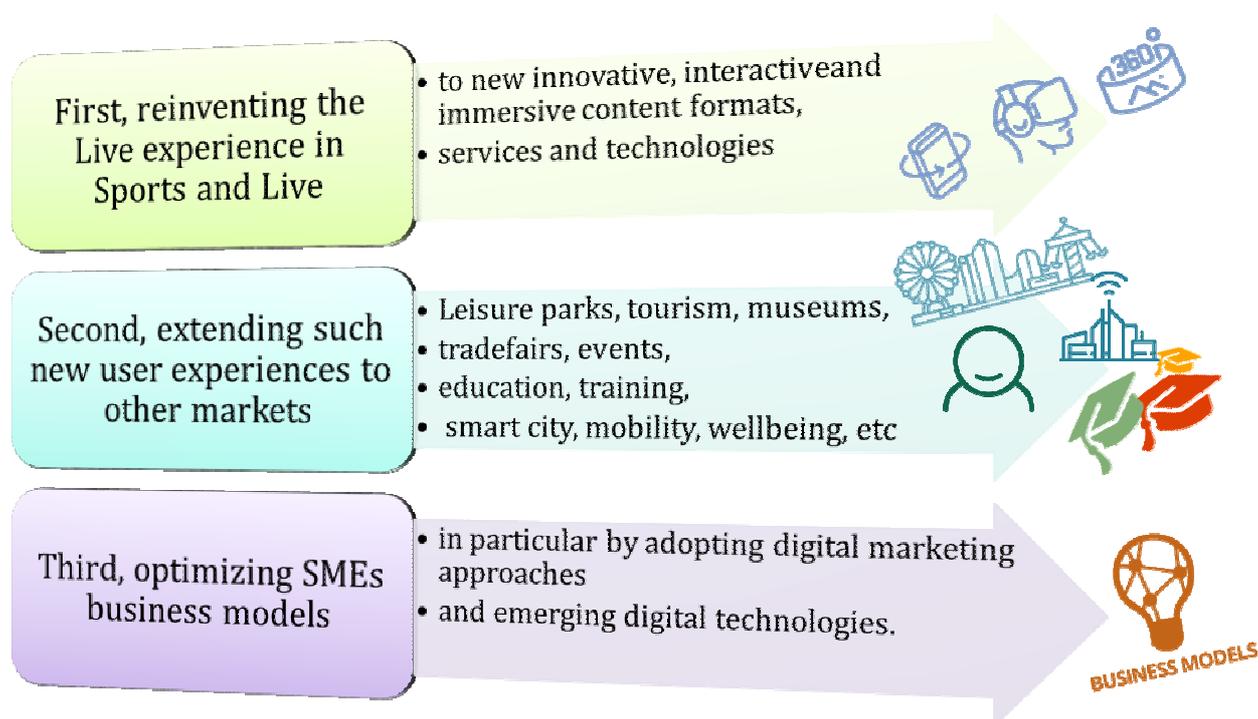


In any case, we will always search for a holistic solution for our tasks by looking at the problem from different angles, especially from the European SMEs and from the potential targets in the third markets perspectives. It will be decisive, if GCA will be able to answer the needs of those targets, after having identified these needs correctly.

2 Objectives of Internationalisation (Mission and Vision)

What exactly is the mission and vision for the international work? What does the cluster want to promote or offer to the surrounding world exactly? These are the main questions, that will lead us to the objectives of the Internationalisation of the Global Content Alliance and it's SMEs.

2.1 The three topics addressed by GCA are the following



Considering these three topics, the **main objectives** of GCA **Internationalisation Plan** (Deliverables D4.1 + D4.2) are:

1. Identify GCA meta-cluster as an internationalisation support for SMEs consortium
2. Build a bottom-up approach that could maintain SMEs interest and contribution
3. Benchmark the foreign markets to target the most relevant countries or zones
4. Define a cross sectoral strategy with other EU clusters active in cross border industry
5. Identify new opportunities of business or partnership
6. Build a network of foreign public and private contacts and organisations
7. Help SMEs to strengthen the capital of companies (included investment approach)

8. Help SMEs to access specific export funding
9. Reinforce SMEs internalisation skills (included Digital Transformation)
10. Help to reinforce competences and innovations on GCA Markets

2.2 The main objectives of GCA Internationalisation Strategy (Deliverable D4.1) are

1. Define and plan the “GCA Internationalisation Strategy” with the best approach
2. Define the right partners for the Internationalisation Strategy
3. Identify a GCA meta-cluster as an internalisation support for SMEs consortium
4. Define a cross sectoral strategy with other EU clusters active in cross border industry to find new opportunities of business or partnership
5. Create an international market analysis aiming at defining the four third markets to address
6. Identify potential targets and projects
7. Outline a first Roadmap for the Internationalisation Plan (Next Steps)

2.3 Target Groups of Internationalisation

The next question we have to consider, is, what is the target group of Internationalisation? We have to clarify our target group. Who needs to be internationalised? Which companies / SMEs? Should the effort be aimed at members who are already international, or at those who are not yet in the international market?

The duty of GCA clusters is to support innovative companies / SMEs that have already started to go international and those that didn't start yet, but are interested in doing so and either have already the right skills, or are willing to get those skills during GCA project.

Furthermore, the GCA has to open the door to new European Clusters and SMEs working in the fields of “Live Entertainment and Sports”, or interested in doing so. GCA will identify actively new potential SMEs in the frame of its Partnership building program – in building the European Metacluster.

We have already started the discussion on the topic of the target groups in the “Global Analysis” (Deliverable D2.1)

In our regional Analysis and cluster mapping, where we compared the 4 clusters and their members, we particularly highlighted their strengths, weaknesses, complementarity and possible synergies.

The most important outcome was the identification of the assets of each cluster and especially the identification of the assets of each member SMEs, allowing them to address the international GCA market. The regional analysis has proven, that the 4 GCA clusters respectively the member SMEs ensure a good coverage of the identified GCA value chains. The GCA SMEs offer almost for every field in “Live Entertainment and Sports” especially in Fan Experience and Fan Engagement a solution, either an innovative technology or good content, or some SMEs even both. This is the reason

why GCA has already a good start position for its internationalisation. But of course, the 4 GCA clusters have to work hard to improve and to reach the pole position in the international competition in the GCA market.

Probably not all SMEs of the 4 GCA clusters will take part at the GCA internationalisation project, as some of them are not working in the GCA fields, or are not interested in it. But at least, the 39 companies that answered the GCA survey are the ones that are most interested in the GCA project. But there are definitely more SMEs who are eligible. Some of those SMEs didn't or couldn't take part at the GCA survey.

The international situation of the GCA SMEs is positive. Most of them have already international activities both in EU and abroad. But the activities are not necessarily very developed and generating a high percentage of their turnovers (the average is 30%. It is under 50% for 31 companies out of 39 and above 70% for the 8 other companies). This situation is not surprising since the main activity that the companies are developing at the international level is "Attending international events/ fairs/ festivals". The 3rd countries that are the most often addressed are the US followed by China (then Canada and Japan). This is also where they attend most fairs outside of Europe.

Main motivations to go international

The main reason for the GCA SMEs to go international is the "**opportunity**". In other words, the companies are expanding where they have a good opportunity to expand. In most cases, this is where they have identified partners and have already connections that make the market easier to address. The second reason to go international is to "**reach fast growing markets**". These motivations are still very high when considering the new targeted countries.

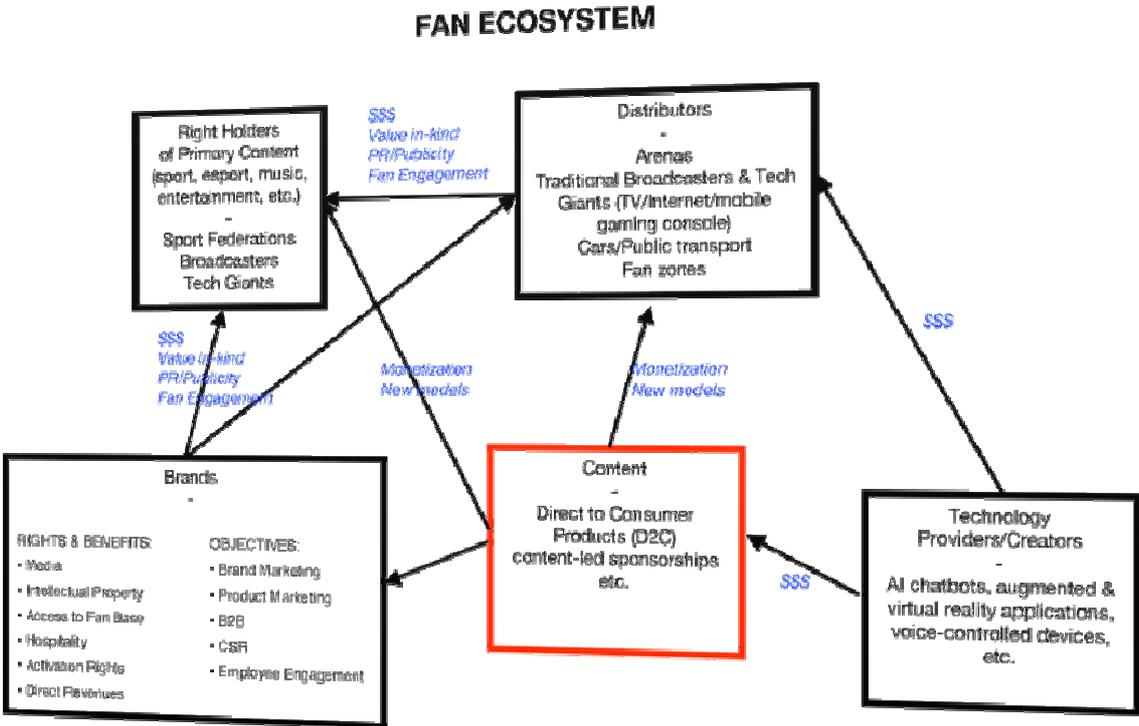
The goal of the GCA internationalisation strategy is to define recommendations to GCA SMEs based on our international market analysis, by identifying and strengthening:

1. Key skills that heighten the competitiveness of the European SMEs in global markets,
2. Best practices for cross sectoral partnerships and international collaboration and
3. Targets along GCA value chains in GCA target countries.

3 GCA business context and approach

3.1 GCA Fan Ecosystem

Before continuing with the GCA Internationalisation Strategy, we have to remind of the GCA Fan Ecosystem respectively the GCA Business Ecosystem that we had already discussed in the Deliverable D2.1 (Global Analysis). It is essential to know, what the key players and the reliances between them are and how this affects the Fans and where the GCA SMEs can make their businesses in the international markets.

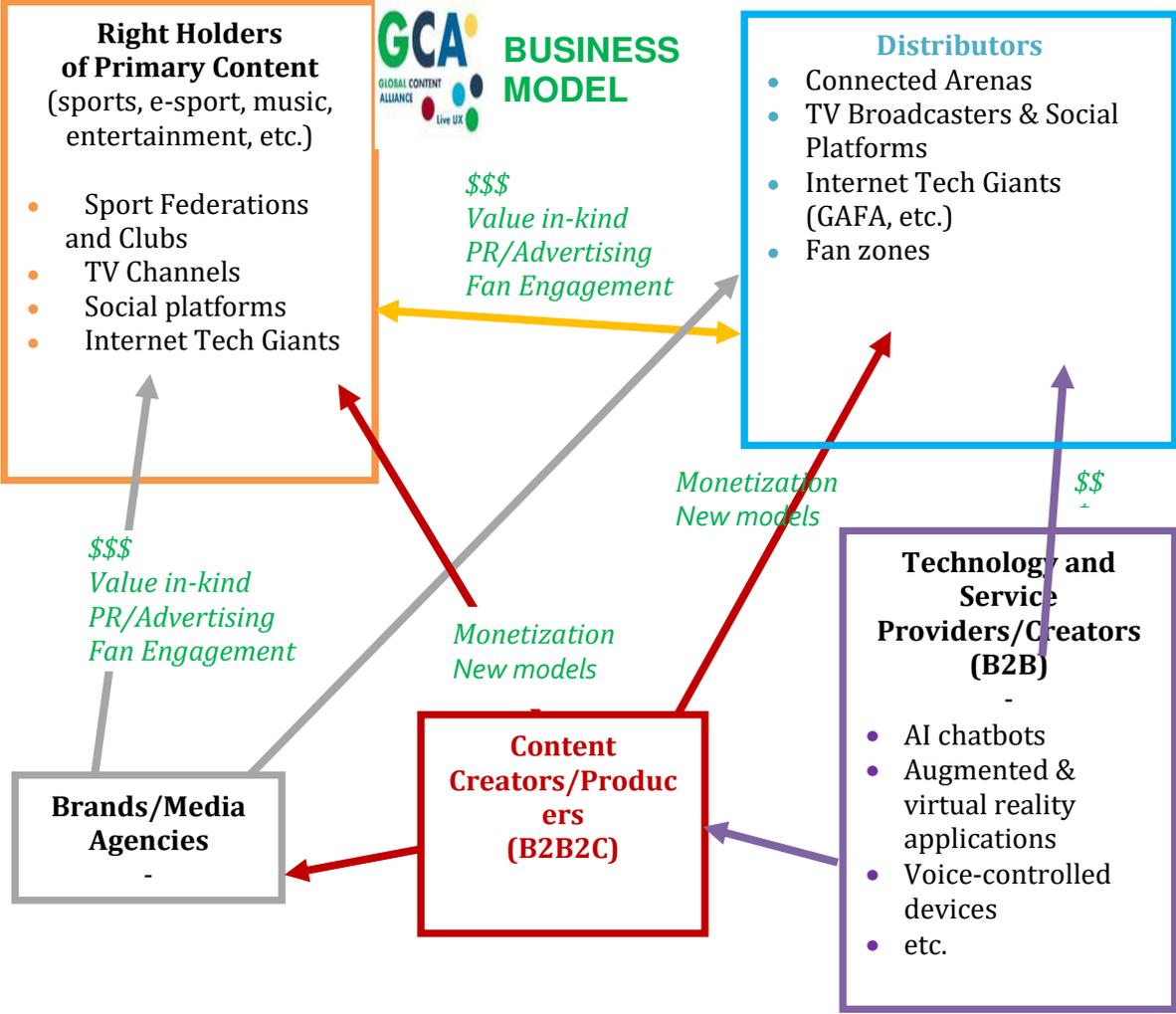


As introduction of the analysis, the picture below (“GCA Business Model”) gives an overview of the game players in this market and the value chains, respectively the money flows.

The picture gives also a definition on the products we are going to sell in the GCA target countries, mainly based on a mix of creative and technological IP:

- Digital contents (secondary content) in B2B2C, generally based on digital innovative technologies, that aims at enhancing the fan experience before, during or after a live event.
- Technologies aiming at enhancing the value of the Primary Content

About the monetization of proscribed products and services, the diagram above highlights the traditional economic model, mainly based on a supply of technologies. This traditional model is today in search of a second wind. Indeed, the technology market (estimated at \$ 100 billion) is declining in favor of a market oriented more towards digital content (estimated at \$ 120 billion). The above diagram thus takes into account this systemic transformation and proposes an offer of innovative business models based in particular on a "big data" approach, at the heart of brand strategies and digital agencies.



GCA ecosystem is made of 5 kinds of stakeholders:

1. The Right holders of the primary contents
2. The Distributors of the primary contents
3. The Brands involved as sponsors
4. The technology providers supporting the creation of secondary content and the

technology providers supporting the distributors

5. The creators of secondary contents, related to the primary contents

Definition of GCA products and services:

Digital contents, generally based on digital innovative technologies, that aims at enhancing the fan experience before, during or after a live event and technologies easing a higher valorisation of the primary content.

GCA partners that will help us to sell GCA products and services are:

1. The Right Holders of the primary contents: Sport Federations, TV Broadcasters, Tech Giants
2. The Distributor of the primary content: Arenas, Traditional Broadcasters, Tech Giants, Car Manufacturers & Public transport, Public Authorities (for fan zones)
3. The Technology Providers that will support the creation of a secondary content (AR/VR, AI, etc.)
4. The Technology Providers that will support the development of the needed infrastructures

Monetization: Who is going to pay for the secondary content?

According to the business model developed by the content creators and/or the technology providers:

1. The Brands and/or
2. The Fans and/or
3. Our Partners (see above)

Who is the final user?

THE FAN !

3.2 GCA Value Chains (GCA Opportunities)

The advent of entertainment on demand has revolutionized the entertainment industry. Advertisers and the media have been forced to adapt to modern listening habits, where consumers watch what they want, when they want, where they want. But live sport events, as well as some great highlights of reality TV, are the last real date. And as TV ratings across all channels clearly indicate, live sports dominate today's fragmented media landscape.

Moreover, the market of the connected stadium (also called “smart stadium”) faces these challenge: Hundreds of thousands of fans are spending time at venues and arenas to cheer for their favourite teams, their country or to attend concerts and events – all around the world every day of the year. Expectations are high – and not only on the performance of teams or artists. Customers also expect to be able to share and enhance their experiences via their mobile devices or any other device before, during and after the show.

In order to take advantage of these new opportunities, where new players compete with traditional ones, GCA consortium has considered 3 main business chains.

3.2.1 Value Chain 1: New Fan Experience at Home*

Definition of VC 1: Some days or weeks preceding or following the event in the stadium/arena (TV, Internet, AR/VR, etc); and throughout the year to maintain fans’ loyalty; at any time and everywhere.

*AT HOME’: here means all the media consumptions besides the arena and fan zone experiences, at anytime and everywhere.

Targets: TV Channels, Social Platforms, Brands and Media Agencies, Internet Tech Giants or related, Users.

Business opportunities: This VC 1 (“At Home”) could be considered as the most regular one for the most of cluster SMEs that are familiar with transmedia content whether involved in production and creation, or in technology or service. Business opportunities, traditionally purely technological, will, in the future, be increasingly linked to innovative content.

3.2.2 Value Chain 2: New Fan Experience in Venues

Definition of VC 2: During a sports or other event in a venue, e.g. arena or stadium where fans can experience a unique live experience.

Targets: Stadium Tenants, Sport Federations and Clubs, Brands and Media Agencies, Social Platforms, TV Channels, broadcasters, Users

Business opportunities: This VC 2 can be considered as the most innovative in the short term, as there are more business opportunities. Brands, Sport federations and clubs, organizers of tours and shows, TVs and digital medias in general, are all looking for new business models that could increase the value of their content.

It's also easier to package a "Venue" offer than "At Home" where the decision makers are very diverse and scattered all along the value chain.

Therefore Value Chain 2 (“In Venues”) and its targets will be the relevant ones for GCA Internationalisation Strategy.

3.2.3 Value Chain 3: New Fan Experience within Fan Zone

Targets : same as in VC 2 (Venues)

VC 3 (“in fan zones”) is not so different from VC 2 because it's pure “Live Experiences” in both cases. People move to a place to have a unique experience they do not have at home and share their emotions both in Live with other viewers and at the same time on social networks, and enjoy exclusive content to the event. Technologies and OTT services involved in the process are the same as well. So, we can melt VC 2 and VC 3 in one and the same chain that can be resumed “At venue”.

As a result, GCA will retain two value chains to explore business opportunities on short term period:

VC 1: New experiences “At Home”

VC 2: New experiences “In Venues”

- 1) VC1 New experiences “At Home”
- 2) VC2 New experiences “In Venues”

3.3 GCA Consortium’s SMEs for VC1 and VC2

There are many GCA SMEs that can be involved in VC1 and VC2. Hereafter, find a brief description of the GCA assets for the specific value chains.

Rights Holders:

Sport Federations, Music rights holders, TV Channels, social platform, tech Giants, telcos.

Consortium’s flagships: RTBF, AB Group, Google, Orange, etc.

Distributors:

TV Channels, social platform, tech Giants, telcos, stadium owner

Consortium’s flagships: RTBF, AB Group, Google, Orange, RTL Spiroudome

Producers and Creators of content:

Producers and creators of content already highly versed in transmedia markets, able to use digital and traditional media to reinvent new formats for TV channels and social platforms, or for media agencies to design a “brand” experience adapted to targeted fan communities and customizable (“My Fan Experience”).

Three of the clusters involved in GCA (TWIST, Media Evolution and Pole Media Grand Paris) have already been positioned on transmedia for many years (EU Region of Knowledge project “Eurotransmedia”, 2013-2016). Transmedia Bayern is a recent cluster. So, its members are mostly positioned on the most digital content markets (interactivity, immersion, e-sports, etc.).

Content creators, technology and application developers involved in e-sport.

Academics and training companies involved in creation and technology in sport and live entertainment. Consortium’s flagships: Ecole Louis Lumière, INA.

Technology Providers:

Consortium's flagships: Developers of new technologies and applications that can offer interactivity, immersion, personalization, emotion, wonder: AR, VR, AI, Hologram, Drone, facial recognition, emotive technologies, etc. for example Eyecandylab (augment.tv), Hologate, HolodeckVR, vAudience or Higgs. The consortium's companies have a deep experience in interactive and immersive technologies and applications. They are used to work for TV channels, social platforms or directly with a brand.

Consortium's flagships: OTT services providers (streaming, content management, data analytics, monetisation, etc.): a lot of consortium's start-ups are involved in these smart services.

Technical companies specialized in shooting and captation devices, in R&D, in cameras and optics. Consortium's flagships: AMP Visual TV, Euromedia, Panavision, TSF, etc.

Technical companies involved in broadcasting and connected arenas engineering. Consortium's flagships: EVS, BCE.

3.4 Cross Sectoral Approach

GCA consortium aims at bringing smart and innovative cross-sector solutions in the fields of image-sound-text in the live sport & entertainment market with impacts in different sectors such as creative industry, smart city, mobility and digital transformation.

Here are some relevant opportunities of cross-sector approach that could be mentioned:

- VC 1 ("At Home"): gaming, museography, wellbeing, silver economy,
- VC 2 ("In Venues"): textile (wearables), e-commerce, retail, food service, leisure, tourism, smart city, transport. There is also an opportunity in strategic alliances in sport tourism: National sport organisations and sport tour operators).

3.5 GCA approach with a focus on „Smart Venues“

As explained in Chapter 3.2.2 the GCA SMEs have the biggest business opportunities in Value Chain 2: In Venues. Therefore the GCA internationalization strategy will focus on the field of "Smart Venues" in the Live Sports & Entertainment industry.

"Smart Venues" not only have the best opportunities in the own, European markets, but they also have huge opportunities in third markets, especially in the selected four target countries, USA, China, Canada and South Korea. An overview with market insights and potential targets of the four target countries was given in Chapter 4.4. Especially for the case of China, we see lots of opportunities in the field of "Smart Venues", due to several new sports stadium construction projects over there. But the U.S. and Canada offer also lots of opportunities in the arena field, as they have many sports stadium modernisation projects.

Take in mind, that stadiums and arenas are not only used for live sports events, but also for esports, or cultural events, e.g. music concerts. There are many multifunctional

arenas in the domestic and international markets that are used for sports and cultural events. The GCA internationalisation strategy will adapt to these particular cases. Especially in the GCA Implementation Plan, the consortium has to develop a special strategy for these cases. Sports events and cultural events, e.g. music concerts have similarities but also differences. The character of a live event, with emotional moments that are experienced live and the (young) fan communities are quite similar. But for example the right holders are very different. The right holders' structure in sports is much more complex than e.g. in the music industry. Esport events can be considered as similar to sports events.

4 GCA Target Countries - International Market Analysis

The international market analysis already started in the Global Analysis (Deliverable D2.1) of Work Package 2. In synthesis, a list of ranked third countries (or regions of third countries) was proposed. This list was greater than what it was realistic to achieve and had to be downsized in a second step in Work Package 4, when defining the internationalisation strategy. One of the main goals of the international market analysis of Work Package 4 is therefore to narrow down the scope and to define the four target markets with the best opportunities for the GCA companies.

4.1 Methodological approach

The methodological approach for the GCA international market analysis is based on the Effectuation method² which means that we had to determine our goals according to the GCA assets and resources to finally define the four target countries we are going to address. This approach is complementary to the more conventional one consisting in analysing each market to identify the ones having the highest potential of development. Effectuation is a pragmatic approach that allows to narrow down the scope of the targeted countries by considering our assets and then selecting only the ones accessible considering our means, strength and weaknesses.

- 1) Based on the D2.1 analysis, the selection of a set of potential interesting countries
- 2) For each of these countries identifying our strength (for instance the existence of already active relationship or partnership) and weaknesses (for instance potential risk at political or economical level or the total absence of relationship)
- 3) Preselection of the targeted countries that meet the requirement of offering a high business opportunity and being accessible to GCA.
- 4) Analysis in depth of each of the preselected countries
- 5) Final selection of targeted countries

² <https://www.effectuation.org/>

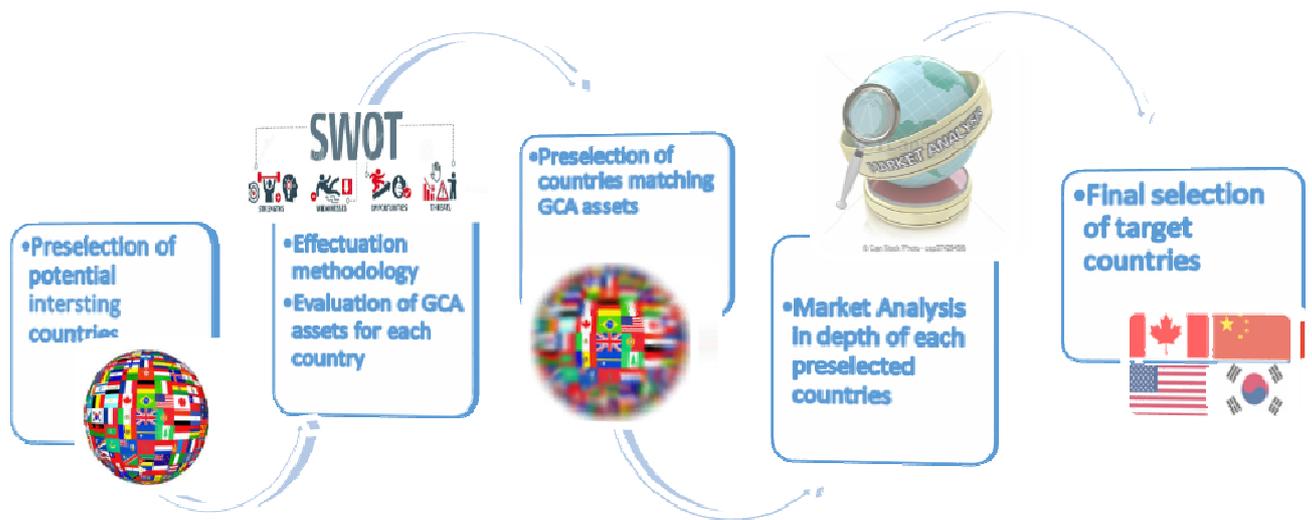


Figure 2 GCA workflow to select targeted countries

The qualitative way of collecting information was reinforced by the compilation of market studies and reports by each GCA cluster coordinator.

The four GCA partners decided to spot specific regions in their researches following their previous knowledge and connections in the specific markets:

- PMGP: North America (USA, Canada), Africa
 - Media Evolution: South America (especially Brazil and Argentine), Middle East
 - Transmedia Bayern: India, China
 - TWIST: Russia, CIS, Turkey
- Obviously the list of the third countries markets that the consortium could address was still large as it included more than 10 countries respectively regions.

This list had been identified through the surveys, the round tables, and various interviews with experts and the researches made by the clusters representatives in the regional analysis and cluster mapping period.

To narrow down the scope and define the most promising third country markets for the GCA project, the consortium used the “GCA internationalisation template” (see Annex), that was established in the Deliverable D2.1 („Global Analysis“). This template using common criteria should make it easier to compare various countries/regions with regards to the GCA goals.

A list of criteria was set up to help analyse the third country markets within a common framework and to target the most attractive and accessible markets for our cluster members. The implementation template consists of three parts:

1. **General criteria** (Economic, policy, social threats, export facilities, creative industries specific criteria),
2. **Criteria relating to value chains** (Primary requirements, Value Chain 1: New experiences start at home/Targets/Criteria, Value Chain 2: New experiences on site/Targets/Criteria) and
3. **Criteria crossing cluster's SWOT analysis, regional analysis and Country/Region access criteria** (Main interest, Level of complexity, Level of business maturity in the country, Availability of Market analysis, and Current active contacts).

Hereafter an extract of the **most important parameters** of the list of criteria (the complete list can be found in the "internationalisation template" in the Annex):

- Countries that have needs but not required competencies
- Countries with many significant stadiums (capable of hosting international events)
- Countries with huge fans communities going to the stadiums
- Countries where every fans have smartphones
- Countries having investment capacities
- Countries with accessible markets (how to get access to this market? Identification of partners?)

After having gathered the data on the target countries / regions that were available, we noticed that the GCA market is too immature to select the target countries on the basis of statistics. This is why we had to do a positive selection of the 4 target countries. We have decided to complete the analysis with another method – the "Effectual Method".

The main character of the "Effectual Method" (see right box) is that it concentrates on the assets and resources you have. You have to look at those assets and resources and decide then where to go.

So the key questions for GCA are:

- ➔ Where do we have the best assets?
- ➔ In which third markets do we have the best connections/contacts/networks?
- ➔ Where do we have the best financing opportunities to go to selected markets?
- ➔ Which markets have the less risks?

By using the Effectual method, which means by looking at our assets, such as good contacts/strong network/partnerships in the third market countries, etc., we have decided, for the following four third markets, that we will address: USA, China, Canada and South Korea.

Definition of „Effectuation“:

"Effectuation" is a way of thinking that serves entrepreneurs in the processes of opportunity identification and new venture creation. Effectuation is a principle introduced by Saras Sarasvathy in 2001. With causal reasoning, entrepreneurs will determine goals to achieve and look for the resources to do so. At the opposite with effectuation, entrepreneurs will determine goals according to the resources in their possession. The most important difference between causal reasoning and effectuation is therefore that an entrepreneur using causation has a given goal and searches for means to reach his goal. If the entrepreneur uses effectuation instead, he will start with the means he has and from this point he looks at possible goals."

In any case these four markets have the most potential in the GCA fields. At the same time GCA has the best assets for these markets.

4.2 Results of International Market Analysis

Here is a short summary of the results of the international market analysis on the big list of more than 10 countries:

Some of the potential target countries, we had in mind at the beginning, could be dropped from our list, by the elimination method. For those countries even the General Criteria were not fulfilled. They are simply too risky at the moment. So South America could be an interesting market, but due to economical crises, e.g. in Argentina, or Venezuela and political threats, e.g. in Brazil, these regions won't be the best GCA targets at the moment. Other South American are economically not strong enough, or don't have the needed infrastructures.

Africa as continent has potential in future, with its very young population and a huge market penetration of smart phones. But at the moment the four selected target countries have more potential and the GCA network is bigger and more important in these target countries.

Russia is an interesting market, but GCA has just missed the FIFA Football World Cup 2018. That would have been a very good opportunity to create projects e.g. in the football stadiums.

Regarding the other CIS countries, e.g. Armenia, Aserbaidshon, Kasachstan, those countries suffer either under economical or political problems, or don't have the needed infrastructures yet.

Turkey was also on our list, but due to economic and political reasons, we couldn't hold it on the list, but can be a potential target in future.

The countries in the Middle East, e.g. the Emirates, Dubai, Katar, etc. are very promising markets with a lot's of potential for the GCA project. Especially Katar with its FIFA Football World Cup in 2022, could be a high potential target. But in this case, GCA has to develop or build up a network there. Saudi Arabia suffers obviously also under political issues and is therefore not eligible at the moment.

Japan and India are the two markets that have also a big GCA potential and therefore should be considered as potential targets on a second level / phase. Japan is technically well developed country with good infrastructures. There are many stadium construction projects at the moment, which are potential value chain 2 targets ("At Venue"). And Japan is home of the 2019 Rugby World Cup and of the 2020 Tokyo Olympics. India with its very young population and highly market penetration of smart phones and big sports fan groups, can be a future GCA target country.

With strong growth in the past decade, India is currently the world's second-largest market of mobile phones. The smartphone industry has definitely seen an upward graph, mobile phone users in India have been actively increasing their exposure to the Internet which will keep the consumption of mobile phone accessories high. Growing smartphone penetration will further push the accessories market in India. In 2014, the percentage of smartphone users was merely 21.4 per cent, which later rose to 29.8 per cent in 2016 and is further expected to rise to approximately 39 per cent by 2019.

The Indian market is very large and offers a vast opportunity for mobile/smart phones and accessories industry. Currently, more than 90 per cent of the mobile components are imported in India and the segment relies heavily on overseas shipments for handsets. Government under its Make in India initiative aims to reform this by encouraging local manufacturing, with incentives etc. With government support in a phased approach the sector shall see a huge transformation positively.³

4.3 The selected third countries Markets

The preferred third countries seem to match well with the specialisation of GCA SMEs, in terms of the market opportunities identified within the Global Analysis (D2.1). Given the previous conditions, taking into consideration some central aspects regarding the *positive entrepreneurial environment* facilitating foreign companies' investments (from a politic, legal and fiscal perspective), and considering opportunities and partnerships we are going to establish with some actors from these countries, the best destinations to target within the GCA project are:



Figure 2 GCA targeted countries

These four third countries are also emerging from SMEs preferences, which corresponds to “Live Entertainment”, notably “Smart Venue” markets with a high potential. This is not a coincidence! GCA SMEs know their potential markets, as they keep on analyzing them themselves for some period.

An important element of our internationalisation strategy is, that GCA is going to address two neighbouring countries, two in North America and two in Asia (“2+2-Strategy”). So Canada is easy to access from the USA (and vice-versa), and South Korea is very close to China, therefore easy to reach from there. North American sports

³ <http://www.convergenceindia.org/mobile-devices-and-accessories-zone.aspx>

& entertainment conferences are often attended by US American and Canadian representatives and conferences in Asia, are attended by Chinese and South Korean representatives. This will be a very effective way to meet potential target contacts of the four countries at such conferences.

The other aspect of our strategy is that with the USA and China we have to big players and with Canada and South Korea two smaller players in the international markets.

4.4 Overview Market Insights of Target Markets (Country Profiles)

An overview of the most significant market insights of the four targeted third countries and live entertainment and sports facts and trends are presented below.

4.4.1 USA – Country Profile



Population	327,167,434 (est. 2018)
Government	Federal presidential constitutional republic
Currency	United States Dollar (\$), 1 € = 1.17 \$
GDP (nominal)	total \$ 19.390 trillion per capita: \$ 59,501
Trade balance	Export: € 1,220,398 mln (Canada, Mexico, China) Import: € 1,762,959 mln (Canada, Mexico, China) ⁴
Ease of doing business ranking⁵	7th / 189
Main states	California, Michigan, Texas, Florida, New York

Why USA?

4.4.1.1 US Market & GCA opportunities:

- Emerging, big market with lots of opportunities
- Very attractive market for GCA fields
- Sports market is very attractive, especially the “Big Four”: (American Football, Basketball, Baseball, Ice hockey) but also Soccer, Golf, Tennis Wrestling)
- Global Sports events/competitions in USA: FIFA Football World Cup 2026 will be hosted by USA, Canada and Mexico

⁴ Data: 2014; source: http://www.infomercatiesteri.it/bilancia_commerciale.php?id_paesi=55

⁵ World Bank Group, Doing Business 2016 - Measuring Regulatory Quality and Efficiency, 13th edition, 2016

US Sports Market:

Sports in the United States are an important part of American culture. American football is the most popular sport in the United States followed by basketball, baseball, hockey, and soccer.⁶ Tennis, golf, wrestling, auto racing, arena football, field lacrosse, box lacrosse and volleyball are also popular sports in the country.

Based on revenue, the four major professional sports leagues in the United States are Major League Baseball (MLB), the National Basketball Association (NBA), the National Football League (NFL), and the National Hockey League (NHL). The market for professional sports in the United States is roughly \$69 billion, roughly 50% larger than that of all of Europe, the Middle East, and Africa combined.⁷ All four enjoy wide-ranging domestic media coverage and are considered the preeminent leagues in their respective sports in the world, although American football does not have a substantial following in other nations. Three of those leagues have teams that represent Canadian cities, and all four are the most financially lucrative sports leagues of their sport. Major League Soccer (MLS), which also includes teams based in Canada, is sometimes included in a "top five" of leagues.

The five major sports leagues:⁸

League	Sport	Teams	National TV contract	Average Attendance	Total Annual Attendance	Ref
Major League Baseball (MLB)	Baseball	30	Fox, FS1, ESPN, TBS, MLBN	30,023	72,670,423	[93]
National Basketball Association (NBA)	Basketball	30	ABC, ESPN, TNT, NBATV	17,884	21,997,875	[94]
National Hockey League (NHL)	Ice hockey	31	NBC, NBCSN, NHLN	17,500	21,525,777	[95]
National Football League (NFL)	American football	32	CBS, Fox, NBC, ESPN, NFLN	67,405	17,255,759	[96]
Major League Soccer (MLS)	Soccer	23	Fox, FS1, ESPN, Univision	22,106	8,267,534	[97]

Annual revenue by league (in USD):

League	Revenues (bn)	TV revenue	Ref
National Football League	\$13.0	\$7.2 bn	[8][9]
Major League Baseball	\$9.5	\$1.5 bn	[10]
National Basketball Association	\$5.2	\$2.6 bn	[11][12]
National Hockey League	\$3.7	\$600 m	[13][14]
Major League Soccer	\$0.9	\$90 m	[15]
Canadian Football League	\$0.2	\$40 m	[16][17][18]

⁶ Jim, Normal. ["Football Still Americans' Favorite Sport to Watch"](https://news.gallup.com). news.gallup.com. Gallup. Retrieved 13 March 2018

⁷ [Global sports market to hit \\$141 billion in 2012](https://www.reuters.com). Reuters. Retrieved on July 24, 2013.

⁸ https://en.wikipedia.org/wiki/Sports_in_the_United_States#cite_note-100

The top four major leagues each have revenues that can be many times greater than the payrolls of less popular sports leagues in the two nations. In terms of overall league revenue, the NFL, MLB and the NBA rank as the top three most lucrative sports leagues in the world, with the Premier League of English soccer and the NHL ranked at fourth and fifth place.

Sports / Fanbases:

Football (Soccer):

Regardless of whether you call it football or soccer, it's a sport with massive global appeal and fan interest. In fact, more than 40% of people 16 or older in major population centers around the world consider themselves interested or very interested in following football, more so than any other sport.

As nations competed for the 2018 FIFA World Cup, Nielsen Sports research shows the popularity of football is growing in the U.S., India and China.

While interest in the sport of football (soccer) is lower in the U.S. than most countries, it stands at 32%, up from 28% from four years prior. Youth participation, an increase in the Hispanic population, the growth of Major League Soccer and the popularity of the FIFA video game have all contributed to the "soccer surge" in recent years in the U.S.⁹

4.4.1.2 Good contacts in the USA:

GCA has many good contacts through regional, national and European representatives (Bavarian, German, etc.).

- Representation of the Free State of Bavaria in New York and San Francisco
- Good contacts to German Accelerator program (4 destinations in USA).

PMGP partner Pervenche Beurier spent 4 years in NYC (2013-2017) as a Audiovisual, New Media and VR Officer in the Cultural Services of the French Embassy and has a large professional network in New Tech in the USA.

These are partners that PMGP could easily contact:

- French Institutional network in the US:
 - Business France Offices in the USA
 - Representatives of Chamber of Commerce and Industry
 - Representatives of La French Tech
 - Representatives of Foreign Affairs
- US Business Networks:
 - Main Festivals in tech and audiovisual (SXSW, Future of Storytelling Filmgate, Sundance TIFF, ...)

⁹ Fan Favorite: The Global Popularity of Football is Rising, Nielsen Sports, 12.06.2018

- VR Associations
- Tech Incubators (1776, NY Media Lab, Creative Lab...)
- Universities and Colleges
- US Companies
 - VR and Immersive production companies or Studios
 - VR and Immersive Technologies
 - Broadcast
 - Innovative Media
- Economic, scientific and cultural attaché of Wallonia in the USA:
 - Business: Walloina Invest & Export with a representative in San Francisco, Houston, New York, Chicago, Washington DC
 - Innovation: Wallonia-Brussels International-Innovation with a representative in Boston

4.4.1.3 How should we go to the U.S.?

GCA should enter the U.S. market together with global players as strategic partners, e.g. FC Bayern München, Red Bull, FIBA, or others.

The potential GCA partners, are also interested in the U.S. market. FC Bayern has opened an office in New York and has a big fan community in the USA.

GCA should use its strong network in the U.S.

4.4.1.4 Targets:

4.4.1.4.1 Right Holders of primary content:

4.4.1.4.1.1 Sports Leagues:

National Football League (NFL), Major League Baseball (MLB), National Basketball Association (NBA), National Hockey League (NHL), Major League Soccer (MLS), United States Tennis Association (USTA), PGA Tour (Golf), U.S. Sailing Foundation (USSF)

Major League Soccer (MLS):

Commercially speaking, Major League Soccer (MLS) has become one of the hottest soccer leagues worldwide. Investors from the US, Canada and elsewhere (such as British soccer star David Beckham) are flocking to the league to get a share of the lucrative and fast-growing North American soccer market, and vying to win the hearts, minds and purses of Latino, millennial and female sports fans alike.

Major League Soccer (MLS) will imminently become one of the world's top 10 soccer leagues by average revenue per team, according to a new Sportcal report.

MLS teams were collectively losing \$100m a year as recently as four years ago and remained in the red in 2015. But data obtained by Sportcal and detailed in 'The Business of MLS', indicates the league has moved into profitability.

Team revenues now average around \$32m and rising. Crucially this includes a share of the annual surplus from the central funds of the now-profitable MLS - with substantial increases in the pipeline.¹⁰

National Hockey League (NFL):

The NHL is one of the most important sports league in the U.S. and is prio 1 on the GCA target list.

Target contact person:

Jay Mellette, Director of Sports Performance and Head Athletic Trainer for the Vegas Golden Knights. In his directorship role, Jay oversees the governance, practices, orientations and quality assurance related to player healthcare and performance management services.¹¹

4.4.1.4.1.2 Sports clubs:

National Football League (NFL):

American Conference: Buffalo Bills, Miami Dolphins, New England Patriots, New York Jets, Baltimore Ravens, Cincinnati Bengals, Cleveland Browns, Pittsburgh Steelers, Houston Texans, Indianapolis Colts, Jacksonville Jaguars, Tennessee Titans, Denver Broncos, Kansas City Chiefs, Los Angeles Chargers, Oakland Raiders

National Conference: Dallas Cowboys, New York Giants, Philadelphia Eagles, Washington Redskins, Chicago Bears, Detroit Lions, Green Bay Packers, Minnesota Vikings, Atlanta Falcons, Carolina Panthers, New Orleans Saints, Tampa Bay Buccaneers, Arizona Cardinals, Los Angeles Rams, San Francisco 49ers, Seattle Seahawks

National Basketball Association (NBA):

Eastern Conference: Boston Celtics, Brooklyn Nets, New York Knicks, Philadelphia 76ers, Chicago Bulls, Cleveland Cavaliers, Detroit Pistons, Indiana Pacers, Milwaukee Bucks, Atlanta Hawks, Charlotte Hornets, Miami Heat, Orlando Magic, Washington Wizards

Western Conference: Denver Nuggets, Minnesota Timberwolves, Oklahoma City Thunder, Portland Trail Blazers, Utah Jazz, Golden State Warriors, Los Angeles Clippers, Los Angeles Lakers, Phoenix Suns, Sacramento Kings, Dallas Mavericks, Houston Rockets, Memphis Grizzlies, New Orleans Pelicans, San Antonio Spurs

Major League Baseball (MLB):

National League: Atlanta Braves, Miami Marlins, New York Mets, Philadelphia Phillies, Washington Nationals, Chicago Cubs, Cincinnati Reds, Milwaukee Brewers, Pittsburgh Pirates, St. Louis Cardinals, Arizona Diamondbacks, Colorado Rockies, Los Angeles Dodgers, San Diego Padres, San Francisco Giants

¹⁰ <https://www.sportcal.com/Reports/Search/57>

¹¹ <https://leadersinsport.com/event/the-sport-performance-summit-vegas/>

American League: Baltimore Orioles, Boston Red Sox, New York Yankees, Tampa Bay Rays, Chicago White Sox, Cleveland Indians, Detroit Tigers, Kansas City Royals, Minnesota Twins, Houston Astros, Los Angeles Angels, Oakland Athletics, Seattle Mariners, Texas Rangers

National Hockey League (NHL):

Carolina Hurricanes, Columbus Blue Jackets, New Jersey Devils, New York Islanders, New York Rangers, Philadelphia Flyers, Pittsburgh Penguins, Washington Capitals, Boston Bruins, Buffalo Sabres, Detroit Red Wings, Florida Panthers, Tampa Bay Lightning, Chicago Blackhawks, Colorado Avalanche, Dallas Stars, Minnesota Wild, Nashville Predators, St. Louis Blues, Anaheim Ducks, Arizona Coyotes, Los Angeles Kings, San Jose Sharks, Vegas Golden Knights¹²

Major League Soccer (MLS):

Current MLS teams:

New York Red Bulls, LA Galaxy, Minnesota United FC, D.C. United, San Jose Earthquakes, Houston Dynamo, Los Angeles FC, Sporting Kansas City, Colorado Rapids, Columbus Crew SC, Orlando City SC, Portland Timbers, Real Salt Lake, Chicago Fire, Philadelphia Union, FC Dallas¹³

Future MLS teams:

Club Internacional de Fútbol Miami (Inter Miami CF), Austin FC, FC Cincinnati, Nashville MLS team

4.4.1.4.2 Distributors

4.4.1.4.2.1 TV-Broadcasters:

ESPN - Entertainment and Sports Programming Network, ESPN 2, Comcast / Comcast Technology Solutions, Comcast SportsNet, Fox Sports, Discovery Networks, CBS Sports Network, NBC Sports/Golf Channel, NBC/NBCSN, Sky Sports, SEC Network, Empire Sports Network, GOL TV, Golf Channel, NBA TV, NFL Network, New England Sports Network, Sun Sports, The Tennis Channel, WWE Network (streaming service), NHL Network, Univision, NBA TV, MLB Network

The major sports leagues have their games televised on the big four U.S. broadcast TV networks—ABC, CBS, NBC, and Fox—enjoy strong TV viewer ratings, and earn significant revenues from these TV contracts. All of the top four major sports leagues have had television contracts with at least one of the original "big three" U.S. broadcast television networks (ABC, CBS, and NBC) since those networks' early years, indicative of the sports' widespread appeal since their inception, continuing today additionally with Fox. In Canada, the NHL has been broadcast on the Canadian Broadcasting Corporation since 1952.

The NFL has the largest TV contracts, and earns over \$6 billion annually from its contracts with Fox, CBS, NBC, ESPN and DirecTV for the 2014 through 2022 seasons.

¹² https://en.wikipedia.org/wiki/List_of_professional_sports_teams_in_the_United_States_and_Canada

¹³ https://en.wikipedia.org/wiki/Soccer-specific_stadium

MLB earns \$1.5 billion annually from its contracts with ESPN, Fox, and Turner Sports (TBS) for the 2014 through 2021 seasons.

All four major sports leagues have launched a network of their own (NBA TV, NFL Network, NHL Network, MLB Network).

There are many relevant TV-Broadcasters in the U.S. market. The most of them are a potential GCA target.

U.S. TV sports rights:¹⁴

Sports rights	Sport	National TV contract	Total Revenues (Per Year)	Ref
National Football League (NFL)	American football	CBS, Fox, NBC, ESPN, DirecTV, Verizon	\$56bn (\$7.0bn)	
National Basketball Association (NBA)	Basketball	ABC, ESPN, TNT	\$24bn (\$2.7bn)	[83]
Major League Baseball (MLB)	Baseball	Fox, ESPN, TBS	\$12bn (\$1.6bn)	
March Madness	Basketball	CBS, Turner	\$8.8bn (\$1.1bn)	
NASCAR	Auto racing	NBC, Fox	\$8.2bn (\$820m)	
Olympic Games	Multi-sport	NBC	\$7.8bn (\$705m)	
College Football Playoff	American football	ESPN	\$5.6bn (\$470m)	
Pac-12 Conference (Pac-12)	College sports	Fox, ESPN	\$3.0bn (\$250m)	
Big Ten Conference (Big 10)	College sports	Fox, ESPN	\$2.6bn (\$440m)	[84]
Big 12 Conference (Big 12)	College sports	Fox, ESPN	\$2.6bn (\$200m)	
National Hockey League (NHL)	Ice hockey	NBC, NHLN	\$2.0bn (\$200m)	[85]
U.S. Open golf	Golf	Fox	\$1.1bn (\$93m)	
FIFA World Cup	Soccer	Fox, Telemundo	\$1.0bn (\$125m)	
English Premier League	Soccer	NBC	\$1.0bn (\$167m)	
Southeastern Conference (SEC)	College sports	CBS	\$0.8bn (\$55m)	
US Open Tennis	Tennis	ESPN	\$0.8bn (\$70m)	
Major League Soccer (MLS)	Soccer	Fox, ESPN, Univision	\$0.7bn (\$90m)	[86]

Discovery Networks:

As a global leader in real-life entertainment, *Discovery* has the ambition to build on its strength of being a differentiated kind of media company with content that serves loyal and passionate fan groups around the world. The recent *Scripps* acquisition along with an inaugural *Olympic Games* delivered for the first time across Europe to all of Europe and a 12-year international multi-platform rights deal for the *PGA Tour* made for a busy first half of the year for the 'New Discovery', underlying its strategy to nourish fans across all screens and services. Interesting to see how this momentum is continuing in

¹⁴ https://en.wikipedia.org/wiki/Sports_in_the_United_States

numerous guises across all of Discovery's worldwide markets. Discovery is also running the sports TV Channels Eurosport 1 and Eurosport 2.¹⁵

Discovery's unrivalled global footprint includes an average of 10 channels across 220 countries and territories. Discovery has strengthened its presence in key markets through numerous transactions including the acquisition of Eurosport, which led to the ground-breaking agreement with the International Olympic Committee making Discovery and Eurosport the home of the Olympic Games across Europe through 2024.

Discovery continues to play a pioneering role as a true innovator across the media landscape by creating new storytelling genres and investing in technology.

Target contact person:

Jean-Briac (JB) Perrette, President and CEO, Discovery Networks International (DNI), a global leader in entertainment with worldwide distribution in both television and emerging digital platforms (oversees and sets the strategy for all of Discovery's business outside the United States).

4.4.1.4.2 Stadium owners:

NFL (American Football):

American Conference: New Era Field, Hard Rock Stadium, Gillette Stadium, MetLife Stadium, M&T Bank Stadium, Paul Brown Stadium, FirstEnergy Stadium, Heinz Field, NRG Stadium, Lucas Oil Stadium, TIAA Bank Field, Nissan Stadium, Broncos Stadium at Mile High, Arrowhead Stadium, StubHub Center, Oakland–Alameda County Coliseum

National Conference: Oakland–Alameda County Coliseum, MetLife Stadium, Lincoln Financial Field, FedExField, Soldier Field, Ford Field, Lambeau Field, U.S. Bank Stadium, Mercedes-Benz Stadium, Bank of America Stadium, Mercedes-Benz Superdome, Raymond James Stadium, State Farm Stadium, Los Angeles Memorial Coliseum, Levi's Stadium, CenturyLink Field

Texas AM University owns Kyle field, the 4th largest stadium in the USA. It is a football stadium with a capacity of 102,733 seats. AWEX-WBI-Innovation, partner of TWIST, has developed a concrete and narrow relationship with Texas AM University.

National Basketball Association (NBA):

Eastern Conference: TD Garden, Barclays Center, Madison Square Garden, Wells Fargo Center, United Center, Quicken Loans Arena, Little Caesars Arena, Bankers Life Fieldhouse, Fiserv Forum, State Farm Arena, Spectrum Center, American Airlines Arena, Amway Center, Capital One Arena

Western Conference: Pepsi Center, Target Center, Chesapeake Energy Arena, Moda Center, Vivint Smart Home Arena Oracle Arena, Staples Center, Talking Stick Resort Arena, Golden 1 Center, American Airlines Center, Toyota Center, FedExForum, Smoothie King Center, AT&T Center

Major League Baseball (MLB):

¹⁵ <https://show.ibc.org/programme-session-item/keynote-jb-perrette>

National League: SunTrust Park, Marlins Park, Citi Field, Citizens Bank Park, Nationals Park, Wrigley Field, Great American Ball Park, Miller Park, PNC Park, Busch Stadium, Chase Field, Coors Field, Dodger Stadium, Petco Park, AT&T Park,

American League: Oriole Park at Camden Yards, Fenway Park, Yankee Stadium, Tropicana Field, Guaranteed Rate Field, Progressive Field, Comerica Park, Kauffman Stadium, Target Field, Minute Maid Park, Angel Stadium, Oakland–Alameda County Coliseum, Safeco Field, Globe Life Park in Arlington

National Hockey League (NHL):

PNC Arena, Nationwide Arena, Prudential Center, Barclays Center, Madison Square Garden, Wells Fargo Center, PPG Paints Arena, Capital One Arena, TD Garden, KeyBank Center, Little Caesars Arena, BB&T Center, United Center, Pepsi Center, American Airlines Center, Xcel Energy Center, Bridgestone Arena, Enterprise Center, Honda Center, Gila River Arena, Staples Center, SAP Center at San Jose, T-Mobile Arena

Major League Soccer (MLS - Soccer stadiums):

Major League Soccer (MLS) is the premier professional soccer league in the United States and Canada. The league has 24 teams in 24 stadiums as of the 2019 season: 21 in the United States and 3 in Canada. At the time of the league's inauguration in 1996, MLS teams used multi-purpose stadiums, often shared with National Football League (NFL) or college football teams. Because of lower attendance, these stadiums had parts tarped off to artificially reduce capacity. Starting in 1999 with the Columbus Crew's construction of Mapfre Stadium, the league has constructed soccer-specific stadiums which are tailor-made for soccer and which have smaller capacity. Today, the majority of MLS stadiums are soccer-specific stadiums.¹⁶

Current stadiums:

Orlando City Stadium (Orlando, Florida), Audi Field (Washington, D.C.), Avaya Stadium (San Jose, California),

Future Stadiums (in planning or construction phase):

Allianz Field (Saint Paul, Minnesota), Inter Miami CF stadium (Miami, Florida), Austin MLS stadium (Austin, Texas), Nashville Fairgrounds Stadium (Nashville, Tennessee)

4.4.1.4.2.3 Internet Tech Giants:

Amazon, Facebook, Apple, Google

Especially Amazon is engaged heavily in sports in the U.S., e.g. with the National Football League with VR-features, but also Facebook started in sports & entertainment.

All those internet tech companies are potential targets, as they are operating in the live sports & entertainment business and are interested in innovative technologies and content as GCA offers.

¹⁶ https://en.wikipedia.org/wiki/List_of_Major_League_Soccer_stadiums

4.4.1.4.3 Brands:

Adidas, Nike, Coca Cola, Pepsi, Intel, Apple, Microsoft, IBM, Audi, BMW, Ford, etc.

4.4.2 CHINA – Country Profile



Population	1,403,500,365 (est. 2016)
Government	Unitary one-party socialist republic
Currency	Renminbi (yuan.¥), 1 € = 7.93 ¥
GDP (nominal)	total \$ 14.092 trillion per capita: \$ 10,087
Trade balance	Export: € 2,056,527.4 mIn (USA, Hong Kong, Japan) Import: € 1,515,687.6 mIn (South Korea, Japan, USA) ¹⁷
Ease of doing business ranking¹⁸	84th / 189
Main cities	Beijing, Shanghai, Chengdu, Chongqing, Hangzhou

Why China?

4.4.2.1 Chinese Market & GCA opportunities

- Emerging, fast growing market with lots of opportunities
- As of 2017, China has the world's second-largest economy in terms of nominal GDP
- In terms of purchasing power parity (PPP) GDP, China's economy has been the largest in the world since 2016
- The growth of the purchasing power of the middle class assures a perspective of growth in the domestic consumption
- Very promising market and future outlooks in media, sports and esports!
- Rapidly-growing sports market
- Chinese government is massively investing in all fields of sports (especially football, but also basketball, skiing, etc.)
- Many sport stadium (and esports)¹⁹ construction projects are ongoing, which is a

¹⁷ Data: 2015; source: http://www.infomercatiesteri.it/bilancia_commerciale.php?id_paesi=122

¹⁸ World Bank Group, Doing Business 2016 - Measuring Regulatory Quality and Efficiency, 13th ed, 2016

very good opportunity for GCA SMEs to offer their products for fan experience and fan engagement!

- Global Sports events/competitions in China: e.g. FIBA Basketball World Cup 2019, Olympic Winter Games Beijing 2022

Policy / Sports / Fanbases:

China is a global sports powerhouse, with a rising domestic sports market and the eyes of the international sports industry trained upon it and its 1.37 billion citizens. Domestic leagues such as the Chinese Basketball Association (CBA) and Chinese Super League are professionalizing, major events like the 2022 Winter Olympics are being successfully bid for, and international teams, leagues and events are busy laying foundations in the country.

The NBA has grown to become China's most popular sports league. According to the league, more than 300 million people in China play basketball. Meanwhile, the NBA is the most followed sports league on social media with more than 150 million followers.

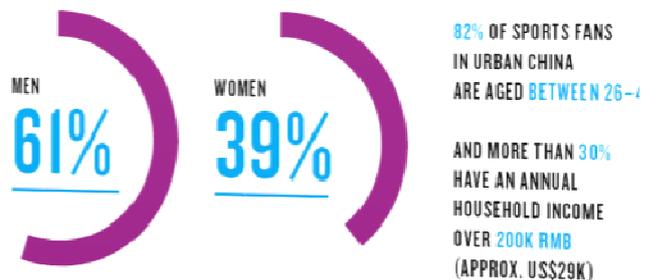
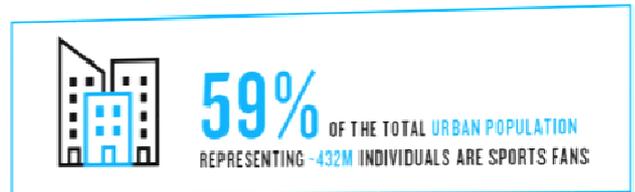
Much of this stirring interest in sport stems from the **Chinese government's plan to build a CNY5 trillion (US\$813 billion) sports industry by 2025**, a strategy covering everything from improved fitness to encouraging foreign investment, grassroots sport to elite performance.

Football, for example, is now part of the school system in the country, and as the report shows, the push towards more active lifestyles is beginning to have a positive impact. A host of new facilities and initiatives are underway to help increase participants and create fans.

Chinese people like sports. 59% of the total urban population are sports fans.²⁰ Walking / jogging, fitness, but also basketball and football are very trendy in China.

MORE THAN HALF OF THE URBAN CHINESE POPULATION ARE SPORTS FANS...

Sports fans in urban China



Source: Nielsen Sports SponsorLink China, May 2017
1,100 respondents; online survey covering Tier 1, Tier 2 and Tier 3 cities in China - a nationally representative sample. Results weighted using Stats China data to project accurately to the 18+ population.

Copyright © 2017 The Nielsen Company

¹⁹ <https://www.sporttechie.com/stadium-china-built-exclusively-esports/>

²⁰ Source: China Emerging Market Focus – Nielsen Sports, 23.08.2017

GCA should develop a special **strategy** for the **Fitness & Health** field, as this topic is very important to the Chinese People and the Chinese Government.

GCA Strategy regarding the “Chinese Social Credit System”:

The Chinese Social Credit System is a challenge and an opportunity at the same time. GCA Internationalisation Strategy has to adapt to the Social Credit System, which was set up by the Chinese Government. The video face recognition systems on public places could be used for the fan experience and fan engagement, by gathering and validating all the different emotions of the fans before, during or after sports or cultural events, e.g. looking for the best, or “most emotional” fans! And the fans can score and collect points for their own social credit system in a playful way. Specific projects with mobile apps can be created by GCA SMEs for this specific field of fan experience.

“Made in China 2025”:

“Made in China 2025” (MIC 2025) is a national strategy announced by China’s State Council in May 2015, to comprehensively update, consolidate and balance China’s manufacturing industry. It has a very specific objective to 2025 and in the longer term with general objectives onwards to 2049 (the 100th anniversary of the founding of the People’s Republic in China). MIC 2025 details nine strategic tasks, including: to encourage innovation and the use of digital technology in manufacturing; to improve the quality and efficiency of manufacturing; to enforce green manufacturing methods; to globalise Chinese brands; and to improve service-oriented manufacturing and manufacturing-service industries. Despite its theme of Chinese technological independence, Made in China 2025 is in reality a source of great opportunities for EU SMEs that can help China to implement the changes required. The EU has extensive expertise in all areas of manufacturing and experience of moving up the value chain and transferring basic low-cost manufacturing to new locations. “Made in China 2025” brings specific market opportunities for EU SMEs.

4.4.2.2 Good contacts in China:

Many good contacts through regional, national and European authorities (Bavarian, German, French, Belgian, Wallonian, etc.)

- French Chamber of Commerce in China
- Benelux Chamber of Commerce in China
- German Chamber of Commerce in China
- Representation of the Free State of Bavaria in Shenzhen, Sichuan and Shandong (they have e.g. informations on the Startup Bootcamp in Chengdu)
- Chinaforum Bayern e.V. (direct contacts to Chinese companies and authorities through them)
- China International Investment Promotion Agency (Germany), Frankfurt
- Good contacts to German Accelerator program in Asia

- European Chamber of Commerce in China (with a Small and Medium-Sized Enterprises Forum)
- The EU SME Centre (European Union initiative that provides a comprehensive range of hands-on support services to European small and medium-sized enterprises (SMEs), getting them ready to do business in China. / Knowledge/Advice and Training Centre, SME Advocacy Platform, Hot-Desks and meeting rooms/ready-to-go workspaces in Beijing). The EU SME Centre helps facilitate market access for European SMEs. Specifically, the Centre assists SMEs to establish, develop and maintain commercial activities in the Chinese market – through export and investment particularly at the crucial early stages of their market penetration strategy.
- Economic, scientific and cultural attaché of Wallonia in China:
 - Business: Wallonia Invest & Export with a representative in Beijing, Canton, Hong-Kong, Shenzhen, Shanghai, Wuhan
 - Culture: Wallonia-Brussels International with a representative in Beijing

4.4.2.3 How should we go to China?

GCA should target and enter the Chinese market together with global players as strategic partner, e.g. FC Bayern, Red Bull, FIBA or others.

The global brands GCA is looking for partnering, are interested in the Chinese market too. This is why, FC Bayern München has opened an office in Shanghai. FC Bayern has a big fan community in China, which helps GCA to develop common projects in the Chinese market.

Wanda Group could be a potential partner for the Chinese market. Wanda Group holds media rights, e.g. the exclusive sales rights to broadcast FIFA's events from 2015 to 2022. Wanda is investing massively in the domestic, but also in the international sports and media markets in order to increase their influence in global sports.

Official support of Chinese Government is requested, for anyone who wants to enter the Chinese market. European SME's need local/Chinese partners to enter the market.

Close cooperation with Chinese officials, especially the Chinese Sports ministry is an essential part of the GCA China strategy.

GCA has to attend relevant conferences and events on the sports, entertainment and media industry in China (the conference list will be provided in the Implementation Plan in early 2019) to meet potential targets and to use this platform to present the GCA offer.

Communication Strategy:

GCA has to adapt its communication strategy to the Chinese market. Communication is key to approaching any market, but developing a communication strategy specifically for China is often overlooked by many European SMEs. The communication environment in China differs greatly from Europe in terms of language and media. The

internet functions almost like an intranet cut from the rest of the world, resulting in a completely different social media ecosystem. You haven't to know how to adapt your strategy to communicate more efficiently with the local market. We have to analyse differences and find the right concepts for adapting a global communication strategy to China.

4.4.2.4 Targets

4.4.2.4.1 Right Holders of primary content:

4.4.2.4.1.1 Sports Leagues:

Chinese Super League (CSL), China League One, China League Two, Chinese Basketball Association (CBA), National Basketball League (NBL), Women's Chinese Basketball Association (WCBA), Chinese Volleyball Super League, FIBA Asia, Kontinental Hockey League (Ice Hockey), American Football League of China (AFLC).

The Chinese Super League is one of the most popular professional sports leagues in China, with an average attendance of 24,107 for league matches in the 2018 season. This is the twelfth-highest of any domestic professional sports league in the world and the sixth-highest of any professional association football league in the world, behind Bundesliga, Premier League, La Liga, Serie A and Liga MX.²¹

China League One is the second-tier of Chinese football clubs. And China League Two is the third-tier of Chinese football.

The Chinese Government is investing massively in football, in particular in infrastructure, football schools, and many more.

The Chinese Basketball Association (CBA), is the first-tier professional men's basketball league in China. The National Basketball League (NBL) is a professional minor league (second-tier). There is also a first-tier Women's Chinese Basketball Association (WCBA). **GCA shall develop a specific strategy for the professional womens sports for all target markets, as it is becoming more important as in terms of business and fans. For example Facebook is investing in this field and pursues an own strategy.**

4.4.2.4.1.2 Sports clubs:

Chinese Super League (CLS):²²

Beijing Renhe, Beijing Guoan, Changchun Yatai, Chongqing Lifan, Dalian Yifang, Guangzhou Evergrande, Guangzhou R&F, Guizhou Hengfeng, Hebei China Fortune, Henan Jianye, Jiangsu Suning, Shandong Luneng, Shanghai Shenhua, Shanghai SIPG, Tianjin Quanjian, Tianjin Teda

Chinese Basketball Association (CBA):

²¹ https://en.wikipedia.org/wiki/Chinese_Super_League

²² <http://csl.lesports.com/>

Northern Division: Beijing Enterprises (Beikong) WG Fly Dragons, Beijing Shougang Ducks, Jilin GBT Northeast Tigers, Liaoning Scale Industry Flying Leopards, Qingdao Double Star Eagles, Shandong High Speed Golden Stars, Shanxi Fenjiu Loongs, Sichuan Jinqiang Pinsheng Blue Whales, Tianjin Ronggang Gold Lions, Xinjiang Tianshan R-C Bank Flying Tigers

Southern Division: Bayi Fubang Rockets, Fujian SBS Sturgeons, Guangdong Hongyuan DGB Southern Tigers, Guangzhou Securities Long-Lions, Jiangsu Kentier Dragons, Nanjing Tongxi Monkey Kings, Shanghai Bilibili Sharks, Shenzhen New Century Marco Polo Leopards, Zhejiang Chouzhou Golden Bulls, Zhejiang Guangsha Lions²³

National Basketball League China (NBL):

Anhui Dragons, Beijing Eastern Bucks, Chongqing Sanhai Lanling, Fujian Lightning, Guangxi Rhino, Guizhou White Tigers, Hebei Xianglan, Hefei Yuanchuang, Henan Roaring Elephants, Hunan Jinjian Miye, Jiangsu Guoli Xiongzi, Lhasa Pure Land, Shaanxi Wolves, Wuhan Dangdai

Women's Chinese Basketball Association (WCBA):

Bayi Kylin, Beijing Great Wall, Guangdong Vermilion Birds, Hebei Win Power, Heilongjiang Dragons, Jiangsu Phoenix, Liaoning Flying Eagles, Shaanxi Red Wolves, Shanghai Swordfish, Shanxi Flame, Xinjiang Magic Deer

4.4.2.4.2 Distributors:

4.4.2.4.2.1 TV-Broadcasters:

National Networks: CCTV (China's state run television network), CCTV-5 (Sports Channel), CCTV-5+ (Sports Events Channel),

Provincial and prefectural networks: Starsports, Anhui TV Sports Channel, BTV Sports Channel, CCTV Football Channel, CCTV Golf and Tennis Channel, Fujian TV Sports Channel, Liaoning Sport Channel, Dalian Sports Channel, Lanzhou TV Sports and Variety Channel, Guangdong TV Sports Channel, Yinchuan Sports Channel, Shenzhen TV Sport Health Channel, Shandong Sports Channel, Haikou TV Live Entertainment Channel, SMG Sports Channel, SiTV Great Sports, SiTV Football, SiTV Five Star Sports, Tianjin Sports Channel, Hubei Sports Channel, Xinjiang Chinese Sports and Health Channel, Jiangsu Sports Channel, Wuxi Sports Channel,

Pay channels: CCTV-Storm Football

Today there are approximately 700 conventional television stations—plus about 3,000 cable television channels—and 1,000 radio stations in China. Television broadcasting is controlled by China Central Television (CCTV), which, with its 22 program channels, is the country's only national network. CCTV falls under the dual supervision of the Propaganda Department, responsible ultimately for media content, and the State Administration of Radio, Film, and Television, which oversees operations.

Even if CCTV is the most powerful network of mainland China, it has only about 30% of audience share all over the national territory. The fact shows how the Chinese viewers are biased in favor of local TV programs, that are more likely to represent the

²³ <http://cbachina.sports.sohu.com/english/>

differences of an audience that is the largest in the world, more than the national or even international programs, that can hardly attend the needs of such a wide public.

The media and communications industry in mainland China is administered by various government agencies and regulators. The principal mechanism to force media outlets to comply with the Communist Party's requests is the vertically organized *nomenklatura* system of cadre appointments, and includes those in charge of the media industry

One of the most expensive media rights deals was in 2015, when the Chinese Media Company Ti'ao Dongli acquired the broadcasting rights of the Chinese Super League until 2020 for 1,25 billions of USD !! Ti'ao Dongli is definitely one of the top targets regarding the distributor side.

4.4.2.4.2 Stadium owners:

Chinese Super League (CSL):

Beijing Fengtai Stadium, Workers Stadium, Chongqing Olympic Sports Center, Dalian Sports Center, Tianhe Stadium, Yuexiushan Stadium, Langfang Stadium, Zhengzhou Hanghai Stadium, Nanjing Olympic Sports Center, Jinan Olympic Sports Luneng Stadium, Hongkou Football Stadium, Shanghai Stadium, Shenzhen Universiade Sports Centre, Haihe Educational Football Stadium, Tianjin Olympic Center Stadium, Dongxihu Sports Center

Chinese Basketball Association (CBA):

Northern Division: Beijing Olympic Sports Center Gymnasium, Cadillac Arena, Changchun Gymnasium, Jilin City Arena, Liaoning Gymnasium, Benxi Gymnasium, Guoxin Gymnasium, Shandong Arena, Shanxi Sports Center Gymnasium, Riverside Sports Arena, Sichuan Provincial Gymnasium, Dongli Gymnasium, Tianjin Arena, Hongshan Arena; *Southern Division:* Nanchang International Sports Center Gymnasium, Zuchang Gymnasium, Dongfeng Nissan Cultural and Sports Centre, Tianhe Gymnasium, Suzhou Industrial Park Sports Center, Suzhou Sports Center Gymnasium, Changzhou Olympic Sports Center Gymnasium, Jiangning Sports Center Gymnasium, Youth Olympic Games Sport Park Gymnasium, Yuanshen Sports Center Gymnasium, Shanghai Indoor Stadium, Shenzhen Dayun Arena, Binjiang Gymnasium, Yiwu Meihu Sports Centre, Zhuji Sports Centre Gymnasium, Hangzhou Gymnasium

Women's Chinese Basketball Association (WCBA):

Nanchang International Sport Center, Shougang Gymnasium, Dalang Arena, Hengshui Stadium, Daqing Stadium, Liyang Stadium, Angang Stadium, Weinan Sports Centre, Baoshan Sports Centre / Baosteel Sports Centre, Shanxi Sports Centre Stadium, Xinjiang Sports Centre / Changji Stadium

4.4.2.4.3 Internet Tech Giants:

Baidu, Alibaba, Tencent, Youku (Alibaba Group), the online video platform, Sina Weibo, etc.

All those internet tech companies are potential targets, as they are operating in the live sports & entertainment business and are interested in innovative technologies and content as GCA offers.

U.S. – Chinese cooperations:

US Sports federations are cooperating with Chinese tech companies. Recently the National Football League (NFL), has announced a digital partnership with Chinese online video platform Youku to bring more content to Chinese fans. But the NFL has also other collaborations in China with their social media partner Sina Weibo and exclusive digital media partner Tencent (2017-2020), apart from the digital video platform Youku. This will bring cross-market opportunities for the GCA consortium, as the Chinese and the U.S. market can be addressed at the same time.

Alisports, the sports business arm of the tech giant, Alibaba in China is can be a target and / or a strategic partner as they are investing in both traditional sports and eSports. Alibaba Group is investing a lot in sports such as Olympic Games, FIFA Club World Cup, World Electronic Sports Games (WESG) and collegiate sports

4.4.2.4.3 Brands:

Tencent, Alibaba, Baidu, Wanda Group, China Mobile, Huawei

4.4.3 CANADA – Country Profile



Population	37,242,571 (Q4 2018 estimate)
Government	Federal parliamentary representative democracy under Constitutional monarchy
Currency	Canadian dollar (\$), 1 € = 1.54 \$
GDP (nominal)	total \$ 1.798 trillion (2018 estimate) per capita: \$ 48,466 (2018 estimate)
Trade balance	Export: € 476,351 mIn (USA, EU, China, UK) Import: € 487,280 mIn (USA, EU, China, Mexico) ²⁴
EU main partners	UK, Germany, Italy, France
Ease of doing business ranking²⁵	14th / 189
Main cities	Ottawa, Toronto, Montreal, Vancouver, Calgary, Edmonton, Quebec City, Winnipeg, Hamilton

²⁴ Data: 2015; source: http://www.infomercatiesteri.it/bilancia_commerciale.php?id_paesi=39

²⁵ World Bank Group, Doing Business 2016 - Measuring Regulatory Quality and Efficiency, 13th edition, 2016

Why Canada?

4.4.3.1 Canadian Market & GCA opportunities:

- Canada is a growing market with a low credit risk
- Canada has the fifteenth-highest nominal per capita income globally
- Its advanced economy is the tenth-largest in the world, relying chiefly upon its abundant natural resources and well-developed international trade networks.
- The Comprehensive Economic and Trade Agreement (CETA) is the new trade agreement between the EU and Canada, which eliminates 98% of the tariffs and will create vast new opportunities across the EU and Canada, opening new markets for exporters, generating high-quality jobs for European and Canadian workers, and forging closer links between the two economies.
- Easy access from the U.S. (neighboring country)
- Attractive Sports market with a variety of sports types.
- New sports stadium construction projects / modernisation projects are ongoing and creation of new football clubs, which is very good opportunity for GCA SME to offer their products for fan experience and fan engagement!
- Global Sports events/competitions in Canada: FIFA Football World Cup 2026 will be hosted by USA, Canada and Mexico

Canadian sports market:

Sports in Canada consist of a wide variety of games. The most common sports are ice hockey, lacrosse, gridiron football, soccer, basketball, curling and baseball, with ice hockey and lacrosse being the official winter and summer sports, respectively.

4.4.3.2 Good contacts in Canada:

GCA has many good contacts through regional, national and European representatives (Wallonian, French, Bavarian, German, etc.).

- Representation of the Free State of Bavaria in Montreal

PMGP partner Pervenche Beurier worked 2 years in Toronto (Canada) as an audiovisual officer and has a large professional network in Canada.

These are partners that PMGP could easily contact:

- French Institutional network in Canada :
 - Business France Offices in Canada
 - Representatives of Chamber of Commerce and Industry
 - Representatives of La French Tech
 - Representatives of Foreign Affairs
- Canadian Business Networks:
 - Main Festivals in tech and audiovisual

- VR Associations
- NFB/ ONF in Canada
- Universities and Colleges
- Canadian Companies
 - VR and Immersive production companies or Studios
 - VR and Immersive Technologies
 - Broadcast
 - Innovative Media
- Economic, scientific and cultural attaché of Wallonia in Canada:
 - Business: Wallonia Invest & Export with a representative in Montreal, Toronto and Vancouver
 - Innovation: Wallonia-Brussels International-Innovation with a representative in Montreal
 - Culture: Wallonia-Brussels International with a representative in Quebec

4.4.3.3 How should we go to Canada?

Especially in the case of Canada GCA should use its big networks on a regional, national and European and private level to enter the Canadian market.

4.4.3.4 Targets:

4.4.3.4.1 Right Holders of primary content:

4.4.3.4.1.1 Sports Leagues:

Canadian Football League (CFL; French: Ligue canadienne de football, LCF), Canadian Premier League (CPL), Major League Baseball (MLB), National Hockey League (NHL, 7 Canadian teams), Major League Soccer, Canadian Lacrosse Association, National Lacrosse League, National Basketball Association (NBA), Canadian Soccer Association

Canadian Premier League (CPL):

The Canadian Premier League (CPL) is a Canadian Tier 1 professional soccer league. The league has announced 7 teams in 7 stadiums for the inaugural 2019 season. The CPL primarily uses multi-purpose stadiums, shared with a mix of Canadian football and rugby union teams.

4.4.3.4.1.2 Sports clubs:

National Hockey League (NHL):

Montreal Canadiens, Ottawa Senators, Toronto Maple Leafs, Vancouver Canucks, Calgary Flames, Edmonton Oilers, Calgary Flames, Winnipeg Jets

Canadian Football League (CFL)²⁶:

East Division: Hamilton Tiger-Cats, Montreal Alouettes, Ottawa Redblacks, Toronto Argonauts; *West Division:* BC Lions, Calgary Stampeders, Edmonton Eskimos, Saskatchewan Roughriders, Winnipeg Blue Bombers

Canadian Premier League (CPL):

FC Edmonton, Valour FC, Cavalry FC, Forge FC, HFX Wanderers, Pacific FC, York 9 FC

Major League Baseball (MLB):

Toronto Blue Jays (Toronto, Ontario) are Canada's only Major League Baseball team

Minor League Baseball:

Vancouver Canadians (Vancouver, British Columbia)

4.4.3.4.2 Distributors:

4.4.3.4.2.1 TV-Broadcasters:

Bell Media Television: (CTV, TSN, TSN2, RDS, RDS2, RDS Info), CBC

Bell Media Television, owns CTV, Canada's oldest, largest, and most-watched private broadcast television network, including 21 owned and operated stations.

Bell Media Television also owns 40 cable television specialty channels, frequently in partnership with U.S. companies which operate similar channels and CTV Two a secondary television system which presently consists of four terrestrial television stations in Ontario, three in British Columbia as well as two cable-only channels, one in Alberta and the other in Atlantic Canada.

Currently, the official television broadcasters of CFL games are cable network TSN while TSN's French-language network RDS broadcasts Montreal Alouettes games for the Quebec television market.

4.4.3.4.2.2 Stadium owners:

National Hockey League (NHL):

Centre Bell (Montreal, Quebec), Canadian Tire Centre (Ottawa, Ontario), Scotiabank Arena (Toronto, Ontario), Bell MTS Place (Winnipeg, Manitoba), Scotiabank Saddledome (Calgary, Alberta), Rogers Place (Edmonton, Alberta), Rogers Arena (Vancouver, British Columbia)

Canadian Football (CFL):

Tim Hortons Field (Hamilton, Ontario), Percival Molson Memorial Stadium (Montreal, Quebec), TD Place Stadium (Ottawa, Ontario), BMO Field (Toronto, Ontario), BC Place (Vancouver, British Columbia), McMahon Stadium (Calgary, Alberta), The Brick Field at Commonwealth Stadium (Edmonton, Alberta), Mosaic Stadium (Regina, Saskatchewan), Investors Group Field (Winnipeg, Manitoba)²⁷

²⁶ https://en.wikipedia.org/wiki/Canadian_Football_League

²⁷ https://en.wikipedia.org/wiki/Canadian_Football_League

Canadian Premier League (CPL):

Current Stadiums: Clarke Stadium (Edmonton, Alberta), Investors Group Field (Winnipeg, Manitoba), Spruce Meadows (M.D. of Foothills, Alberta), Tim Hortons Field (Hamilton, Ontario), Wanderers Grounds (Halifax, Nova Scotia), Westhills Stadium (Langford, British Columbia), Alumni Field (Toronto, Ontario)

Future Stadiums: York Lions Stadium (Toronto, Ontario), York 9 FC stadium (York Region, Ontario)

Baseball:

Rogers Centre (Toronto, Ontario), Olympic Stadium (Montreal, Quebec), Raymond Chabot Grant Thornton Park (Ottawa, Ontario), RE/MAX Field (Edmonton, Alberta)

4.4.3.4.2.3 Internet Tech Giants:

Amazon, Facebook, Apple, Google. Also in the last decade, big entertainment companies opened large branches in Canada (Film Industry studios, Ubisoft...)

4.4.3.4.3 Brands:

Adidas, Nike, Coca Cola, Pepsi, Intel, Apple, Microsoft, IBM, Audi, BMW, Ford, etc.

4.4.4 SOUTH KOREA – Country Profile



Population	51,700,000 (2018)
Government	Unitary presidential constitutional republic
Currency	South Korean won (₩), 1 € = 1.32 ₩
GDP (nominal)	total \$ 1.693 trillion per capita: \$ 32,775
Trade balance	Export: € 448,035 mln (China, USA, Hong Kong) Import: € 367,471.1 mln (China, Japan, USA) ²⁸
Ease of doing business ranking²⁹	5th / 189
Main cities	Seoul, Busan, Incheon, Daegu, Daejeon, Gwangju, Suwon

²⁸ Data: 2016; source: http://www.infomercatiesteri.it/bilancia_commerciale.php?id_paesi=123

²⁹ World Bank Group, Doing Business 2016 - Measuring Regulatory Quality and Efficiency, 13th edition, 2016

Why South Korea?

4.4.4.1 South Korean Market & GCA opportunities

- South Korea is one of the Asian Tiger countries
- South Korea's mixed economy ranks 11th nominal and 13th purchasing power parity GDP in the world
- It is a developed country with a high-income economy and is the most industrialized member country of the OECD.
- The country ranks first among the most innovative countries in the Bloomberg Innovation Index.
- The European Union (EU) and South Korea are important trading partners (free trade agreement)
- South Korea is the EU's tenth largest trade partner, and the EU has become South Korea's fourth largest export destination.
- Very attractive Sports market (football, baseball, golf, volleyball, badminton, winter sports (skiing, ice skating, curling, bob)),
- Very booming esports market
- Young customers (millenials)
- Korean Wave (Hallyu) has a huge fan community and economic power (“Soft power”)

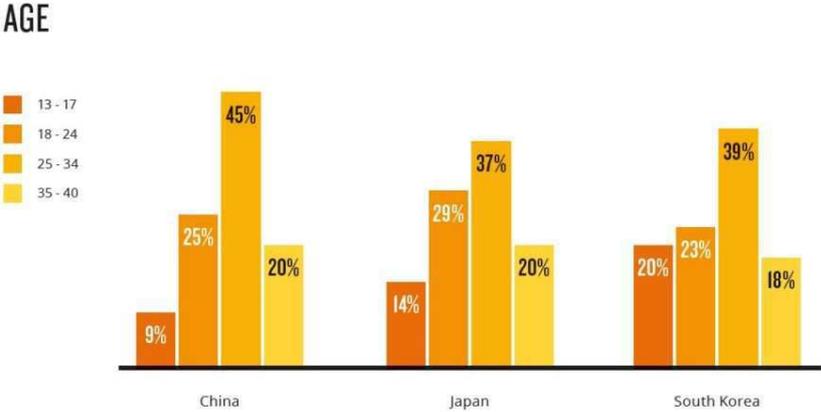
Sports / Fanbases:

Esports:

In South Korea there is a huge esports Fanbase, with many relevant esports events!!!!

As the origin of esports, Asia remains a very important region for the industry as a whole. While gaming across the region remains serious business, followership, engagement and the most popular titles vary greatly market by market. What is an established pastime in South Korea remains a relatively new yet fast-growing phenomenon in Japan.

ESPORTS FANS BY AGE GROUP



The Korean Wave (Hallyu):

South Korea is one of the only countries in the world, if not the only one, that has a dedicated goal to become the world's leading exporter of popular culture. It is a way for Korea to develop its "soft power".

According to a report by the Korean Foundation, there were 35 million hallyu fans in 86 countries in 2015. Out of these, over 26 million live in Asia and Oceania, 7.6 million live in the Americas and 1.6 million in Europe. This speaks volumes about the explosiveness and the way that Korean pop music has proliferated the globe in the last 15 years.

Hallyu has been a blessing for Korea, its businesses, culture and country image. Since early 1999, Hallyu has become one of the biggest cultural phenomena across Asia. The Hallyu effect has been tremendous, contributing to 0.2% of Korea's GDP in 2004, amounting to approximately USD 1.87 billion. More recently in 2014, Hallyu had an estimated USD 11.6 billion boost on the Korean economy.³⁰

There is definitely a huge potential for GCA in this special field of "live entertainment", as the Hallyu fans are quite similar to sports fans, that are in general, the millennials.

Mixed live sports/esports and music events:

GCA has to develop the right common strategy for mixed live sports / esports and music events. The trend is that sports or esports events are combined with music events, where famous music artist or groups appear on such sports / esports events.

4.4.4.2 Good contacts in South Korea

- Economic, scientific and cultural attaché of Wallonia in South Korea
 - Business: Wallonia Invest & Export with a representative in Seoul

Further Existing GCA Network:

- TWIST : Royal State Visit in Seoul in March 2019
- TWIST : Economic mission in November 2019 in Busan
-

4.4.4.3 How should we go to South Korea?

You have relatively easy access from China (neighboring country).

We should use the opportunity of the Royal State Visit in Seoul in March 2019 including GCA partner TWIST for further networking on a high political level.

GCA should build a network to the political authorities, e.g. the Sports Ministry.

³⁰ <https://martinroll.com/resources/articles/asia/korean-wave-hallyu-the-rise-of-koreas-cultural-economy-pop-culture/>

4.4.4.4 Targets

4.4.4.4.1 Right Holders of primary content:

4.4.4.4.1.1 Sports Leagues:

Korea Professional Baseball (KBO), K League (Football), *KBO Futures League (Baseball, 2nd League)*

The KBO League is the most popular sports league in South Korea. There are 10 pro teams in the Korea Baseball Organization.

KBO Futures League is South Korea's second level of baseball, below the KBO League. It serves as a farm league with the purpose is to developing professional players on demand to play in the KBO League. The league consists of two divisions, Southern League and Northern League. Each league has six teams. These leagues are governed by the Korea Baseball Organization (KBO).

K League (Korea Professional Football League) is South Korea's professional association football league including the first division K League 1 and the second division K League 2.

4.4.4.4.1.2 Sports clubs:

Korea Professional Baseball (KBO):

Hanwha Eagles, Kia Tigers, LG Twins, NC Dinos, Kiwoom Heroes, Doosan Bears, KT Wiz, Lotte Giants, Samsung Lions, SK Wyverns³¹

KBO Futures League (Baseball, League 2):

KT Wiz, Hanwha Eagles, Sangmu Phoenix, Kia Tigers, Samsung Lions, Lotte Giants, Hwaseong Heroes, Goyang Dinos, SK Wyverns, Doosan Bears, LG Twins, Police

K League 1 (Football):

Daegu FC, Gangwon FC, Gyeongnam FC, Incheon United, Jeju United, Jeonbuk Hyundai Motors, Pohang Steelers, Sangju Sangmu, Seongnam FC, FC Seoul

K League 2 (Football):

Ansan Greeners, Asan Mugunghwa, Bucheon FC 1995, Busan IPark, Daejeon Citizen, FC Anyang, Gwangju FC, Jeonnam Dragons, Seoul E-Land, Suwon FC

4.4.4.4.2 Distributors:

4.4.4.4.2.1 TV-Broadcasters:

KBS, MBC SPORTS+, SBS Sports, SBS Golf, Sky Sports, SPOTV

4.4.4.4.2.2 Stadiums owners:

Korea Professional Baseball (KBO):

³¹ <http://eng.koreabaseball.com/>

Daejeon Hanbat Baseball Stadium, Gwangju-Kia Champions Field, Jamsil Baseball Stadium, Changwon NC Park, Gocheok Sky Dome, Jamsil Baseball Stadium, Suwon Baseball Stadium, Busan Sajik Baseball Stadium, Daegu Samsung Lions Park, Munhak Baseball Stadium

KBO Futures League (Baseball, League 2):

Iksan Stadium, Seosan Baseball Training Center, Sangmu Baseball Stadium, Kia Challengers Field, Samsung Lions Ballpark, Sangdong Baseball Stadium, Hwaseong Heroes Baseball Park, Goyang National Baseball Training Stadium, SK Futures Park, Bears Park, LG Champion's Park, Byeokje Baseball Stadium

K League 1 (Football):

DGB Arena, Chuncheon Songam Stadium, Changwon Football Center, ncheon Football Stadium, Jeju World Cup Stadium, Jeonju World Cup Stadium, Pohang Steel Yard, Sangju Civic Stadium, Tancheon Stadium, Seoul World Cup Stadium, Suwon World Cup Stadium, Ulsan Munsu Football Stadium

K League 2 (Football):

Ansan Wa~ Stadium, Yi Sun-sin Stadium, Bucheon Stadium, Busan Gudeok Stadium, Daejeon World Cup Stadium, Anyang Stadium, Gwangju World Cup Stadium, Gwangyang Football Stadium, Seoul Olympic Stadium, Suwon Stadium

4.4.4.4.2.3 Internet Tech Giants:

Signal Entertainment Group, Afreeca TV (several esports channels), SK Communications

4.4.4.4.3 Brands:

Samsung, Kia, Hyundai, LG

4.5 Target Market segments

The trends affecting the live sports & entertainment business are faster than ever, and the scale of change greater than ever.

Barriers to entry have never been lower. More markets around the world than ever before are receptive to the power of live sport & entertainmnet. It's never been easier to reach millions, even billions, of fans.

In this global context, GCA consortium

- Selected 2 value chains to target within its international Strategy: new fan experiences « at home » and new fan experiences « in venues ».
- Selected 4 countries to target within its International Strategy: China, South Korea, USA and Canada.

In this global context, the target market segments will be the same in the 4 countries:

- Solutions (new technologies and content) for Broadcasters and Right Holders in order to test new business models
- Solutions (new technologies and content) for Sports Clubs, artists, brands and media in order to find new ways of monetizing audience
- Solutions for Esports sponsors looking for creative content

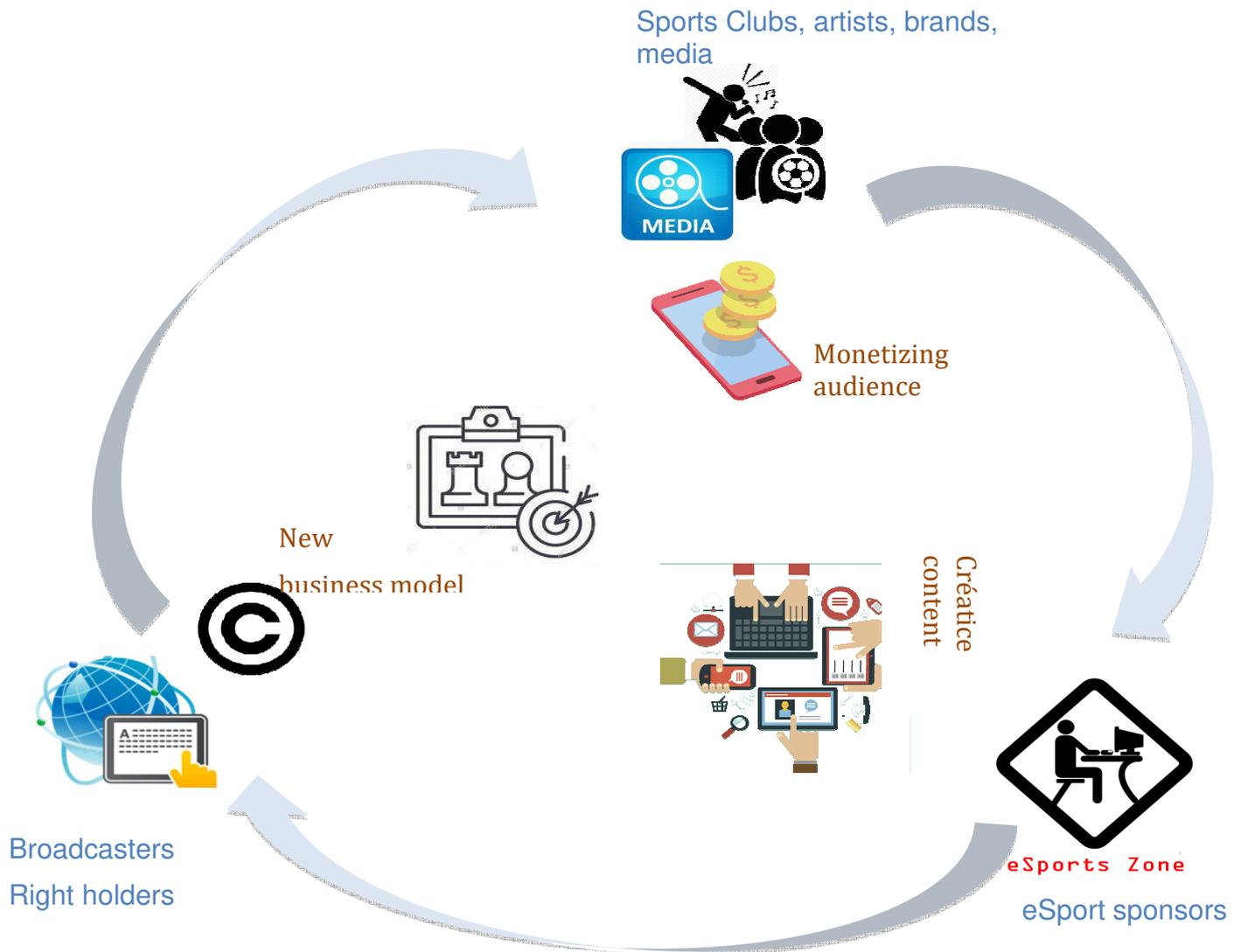


Figure 3 GCA Target market segments

5 The 5 Pillars of GCA Internationalisation Strategy

The core of the GCA internationalization strategy consists of 5 pillars, which the GCA consortium has developed in its strategy sessions. First, it all starts with the brand building respectively brand marketing. The GCA brand has to be build and communicated to stakeholders in the GCA markets. So far not many people know the GCA consortium and the assets it offers to the Live Entertainment & Sports industry. Second, you can't start doing business in international markets, without partnering with the right stakeholders that can be individuals (experts, influencer, or other), companies or institutions. So strategic partnerships are at the core of GCA internationalization strategy. The focus will be on partnerships with global players / global brands, as they can open doors in the target markets. Third, the GCA strategy aims at the creation of a European meta-cluster whose mission is to elaborate a common partnership and a common vision to support the development of SMEs. Fourth, it will be essential to identify new projects, especially in the field of "smart venues". And this on three levels, on a transregional, on a European and on a international level. And fifth, the GCA strategy focuses on the development of other niche markets, such as, smart city or mobility.

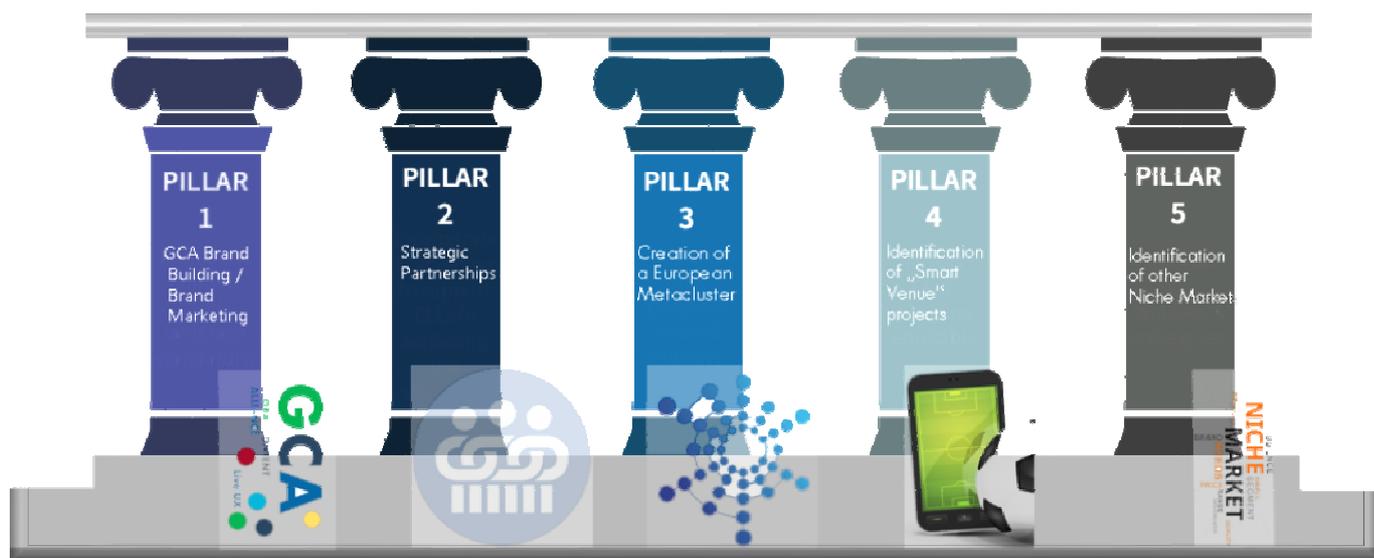


Figure 4: The 5 pillars of GCA international strategy

5.1 PILLAR 1: GCA Brand Building / Brand Marketing



As the GCA industry sector is the media and communication sector, we would have a real opportunity in developing a brand and massively communicating on it to create regional SME buy-in and attract European and foreign partners in third countries and investors. “**Top Sports Tech Innovator**” and “**Best Fan Experience Provider**” must be communicated as **GCA’s Brand Essence / Brand Core**.

GCA Brand Building Tools:

1. Communication & Dissemination tools: Social Media, Website, etc. (WP5)
2. Participation at conferences/events: (organize panels, jury member e.g. of the „Football Innovation Award“ of Future of Football Business Conference 2019)
3. Establishment and enlargement of GCA Advisory Board with: individuals / experts (e.g. Dr. Robert Niemann, sports & entertainment expert) and key players / global companies (Cisco, IBM, SAP, Orange, etc.), other global players will be requested soon (e.g. Red Bull, FC Bayern München);
4. Tasks & Goals: 1. Enhance GCA brand credibility, 2. Validate our Internationalisation Strategy, 3. Door opener to other companies and markets

In order to be able to better represent the GCA project on a European and international level, we have to build a strong GCA brand that we can introduce to potential partners and especially potential targets in third countries. Up to now the GCA is not very known yet. Our goal is to make the GCA brand a known brand and an interesting partner with high business potential.

The next step is to enlarge the Advisory Board with experts and key players for brand credibility and brand building reasons in the sports and entertainment industry on a regional, European and international level.

One of the next steps will be that, Dr. Robert Niemann, expert for international Sports & Entertainment (FIFA consultant, manager of Oliver Kahn, former CEO of DFL, RTL Group, ProSieben, and many more), will become a member of the GCA Advisory Board and will play a key role in the brand building process of the GCA brand, as he has international reputation in sports and entertainment, with excellent business contacts and a big network to all relevant players in these industries, such as Global Players, as FC Bayern München, right holders, as FIFA or DFL (which holds the rights for the German Bundesliga), Dr. Niemann holds SASS Media, which is an agency specialised in international sports business. SASS Media can be a potential business partner for the development of GCA projects in third markets.

We will also invite **global players**, e.g. FC Bayern München, or Red Bull to become a member of our Advisory Board.

Other actions to enhance the brand building of the GCA brand will be defined. We have to organise further actions, where we can promote our GCA brand. The best platforms for our actions will be international conferences, events, and festivals, e.g. with panels (like the panel at the Medientage 2018). We have to concentrate on conferences with a focus on sports and entertainment, especially in our four target markets, China, USA, Canada and South Korea.

Further actions will be explained in the section „Partnership building“. One of our actions to enhance the GCA brand, will be our participation at the Future of Football Business Conference 2019. GCA will be part of jury member of the „Football Innovation Award“. GCA's expertise in the field of sports tech and media tech for the sports industry makes GCA eligible to be member of the jury.

The “Future of Football Business Conference” in Graz, Austria, is an ideal platform to present our GCA brand and project to an international sports industry audience and to make new business contacts. We will enhance our network in both directions. International brands like VfL Wolfsburg, Eintracht Frankfurt, Red Bull Salzburg or the Spanish Football League La Liga, are represented at this conference. Our goal is to enhance our brand awareness and to deepen our business relations to those brands. GCA was already presented at this emerging football business conference in 2018, where the GCA project was presented in the conference brochure³² and many precious business contacts were made.



5.2 PILLAR 2: Establishment of Strategic Partnerships

5.2.1 Strategic Partnerships with Global Brands / Global Players

Partnering with global brands / global players will be crucial for the success of the GCA internationalisation strategy. Obviously, the right strategic partners must be well selected. Going international for European SMEs is a very tough job and in many cases not very successful. But going international for the GCA consortium and its member SMEs will be much easier, if we can partner with global players / global brands. It will be easier, to go to third markets, as China or the U.S., if we can do it together with those global players. The awareness for the GCA in these markets will be higher, if we enter those markets together with a global brand, e.g. as FC Bayern München as a partner. Other potential partners could be FC Bayern Basketball, Red Bull, FIBA, the race track Spa-Francorchamps (Circuit of Spa-Francorchamps), DFL (German Football League / right holder) or the Olympics Games (IOC). The GCA consortium partners (Transmedia Bayern, TWIST and PMGP) are in contact to these brands, or are going to contact them. We will start our conversations in the next months with those potential strategic partners, to see if we can agree for a strategic partnership.

A perfect partner would be FC Bayern München. They are also interested in the same third markets (especially in China and USA), as our GCA SME's. Together we can target these target countries. Important facts: FC Bayern is a global player that has already started its internationalisation (in China, USA and other international markets). And we are in dialogue with the strategy & internationalisation department of the football department and will continue our dialogue with the basketball department.

Other strategic partners in the football business could be: other German football clubs (Dortmund, Wolfsburg, Frankfurt) and European football clubs, who already started their internationalisation process. Dortmund and Wolfsburg are active in China and Frankfurt in the U.S. But international basketball clubs can also be a good strategic partner.

In general global players are right owners, that are interested in new technologies, such as GCA SMEs offer. This is why they will be interested in a cooperation with the GCA consortium.

³² See page 22 of the „Future of Football Conference“ 2018 Brochure in the Annex

The most realistic cooperation with those global players will be in the field of “Smart Venues”. Sports Clubs or other global players working in sports & live entertainment are working on solutions for the best fan experiences and fan engagements. GCA SMEs develop and deliver, or can deliver in future, such “Smart Venue” solutions for global players in the domestic markets, but also in third countries. In 2 years FC Bayern Basketball, together with Red Bull EHC Icehokey and their partner SAP, will build a new multifunctional sports arena in Munich. And of course they will look for the best „Smart Venue“ solutions. GCA and its SMEs must be well prepared to correspond their needs.

Another possible option is, to develop business cases in third markets together with global players, such as FC Bayern München (football), FC Bayern Basketball, FIFA, etc. Our common activities should result in creating business cases in third markets together with our strategic parnters and our SMEs in sports and entertainment fields, especially in fan experience and fan engagement, as they have fans all over the world. But we have to be open, as there are several other fields that can be important in future. We don't know what will happen in one ore two years. Maybe there will be new trends in the sports and entertainment industry. We have to keep in mind, that fields like „Smart City“ or „Mobility“ will be dominant topics in future.

Finally the goals of a strategic partnership with global brands / global players are essential for GCA. These partners will be door openers to other companies and markets. Further they will enhance the GCA brand credibility and GCA will have the opportunity to develop common projects in future. But at the same time the partnership will deliver good solutions for the strategic partners in their domestic markets, but also in the international markets, regarding their own internationalisation.

Another potential strategic partner in the field of OTT (over the top) video is DAZN, which continues its international rollout in many attractive markets. As OTT will play a more important role in future and DAZN seems to establish itself as one of the market leaders, we have to take in account this important key player in live sports entertainment.

5.2.2 Strategic Partnerships with Key Players in Target Countries

Partnering with key players in the target countries is a self-evident and essential measure. Potential partners can be, either the targets themselves (e.g. companies, sports clubs/federations TV broadcasters along the mentioned GCA value chains), or government authorities (e.g. the Chinese Sports Ministry), institutions, conference/event organisers, or other in the third markets. But also internet tech giants, e.g. Amazon, Facebook, Apple and others in the U.S., or Tencent, or Youku (Alibaba Group), the online video platom in China can be potential strategic partners, as they are operating in the live sports & entertainment business and are interested in innovative technologies and content. Especially Amazon that is engaged in sports in the U.S., e.g. with the National Football League with VR-features, but also Facebook is operating in sports & entertainment. Interesting fact. US Sports federations that are cooperating with Chinese tech companies are also potential strategic partners as the tech companies of both countries. Amazon, Facebook, Tencent, Youko, Sina Weibo and others can be targets and strategic partners at the same time. As mentioned before Alisports, the sports business arm of the tech giant, Alibaba in China is also of high interest for a strategic partnership. Alisports is investing in both traditional sports and eSports.

The key players that can become strategic partners of the GCA consortium and will be contacted will be defined in the GCA Implementation Plan. This requires deeper analysis of the target countries and of the potential partners.

The goals of the strategic partnership with key players in the GCA target countries are the same as above. First, they can be door openers to other companies or organisations in third markets. Second, they will enhance the GCA brand credibility and third, together they will have the opportunity to develop common projects.

5.2.3 Strategic Partnerships with GCA Network in Third Countries

As described in detail in Chapter 4.4 (Country Profiles) the four GCA consortium partners have a strong network in the four target markets.

The GCA consortium has an institutional network on three levels. First, on a European **regional** level in the third countries. Each region has its Representatives in the target countries, e.g. the Free State of Bavaria, has a representation in Montreal/Canada and also in China, or in the U.S., or the Economic, scientific and cultural attaché of Wallonia in the USA, Canada, China and South Korea.

On a second level, there are the **national** institutional networks. Each EU member country has its representations in the target countries, e.g. the German Chamber of Commerce Abroad offices in the USA or in China, or the German Accelerator Programs in the USA and in Asia. Or the Business France Offices in the USA and Canada and also the Representatives of the Chambers of Commerce and Industry of each country.

And on a third level, the GCA consortium possesses a strong network to **European** institutional Representatives in the target countries. Among them the European Chamber of Commerce in China that will play an important role for the Chinese market. Why? They have special unit for European SMEs and their mission is: to ensure greater market access and a level playing field for European Companies in China; improve market conditions for all businesses in China; facilitate networking among members and stakeholders; bring informations to its members on doing business in China; gain access to government contacts; leverage high-level opportunities for business development³³

Beside these institutional networks the GCA consortium possesses also business networks to companies, tech festivals, tech incubators and to universities and colleges in those markets, if needed.

Our main goal in this field, is to strengthen all these GCA networks in the four target countries and build strategic partnerships with them. One of the main tasks of the Internationalisation Plan will be to create a list of all GCA networks of the four consortium partners in these countries, with the name of the institutions/companies, the name of the contact persons, addresses, etc. and to validate those contacts. The main question will be which contacts have a strong contact to our targets in the four countries and which of them, can help us to get in touch with those targets we aim.

³³ <http://www.europeanchamber.com.cn>

5.3 PILLAR 3: Creation of a European Meta-Cluster



This section describes a sustainable partnership strategy within European clusters and countries which is an essential part of the GCA Internationalisation strategy and part of Work Package 3. One objective of the project consists in the creation of a European meta-cluster whose mission is to elaborate a common strategic partnership, a common vision compliant with the S3 strategy and to accelerate the development of startups and SMEs, on specific niche markets, by gathering on one hand the key players of these niche markets and on the other hand supply & demand.

This meta-cluster is a response, mainly, to the transformation of the media industry from a vertical industry to a more horizontal industry, the lack of narrative contents corresponding the new needs of the final users, and specifically immersive and interactive contents (which becomes global), and of course the key point related to the positioning of the final user in the value chain (the user experience becomes central).

The key to GCA strategy's success is the focus on "live entertainment and sports" as a niche market selection. In this context and in order to develop our SMEs on this global and bankable immersive and interactive experiences market, we sought a favorable niche market on which we could start and use our narrative and technological skills. This niche market has been identified thanks to several SMEs and large companies (Cisco, EVS, Orange, IBM, etc.), deeply involved in the decreasing market related to the broadcast industry, and now diversifying their activities notably on the market of the "Live sport and entertainment". With this bottom-up approach, we received the feedback of the industry about the existing problems of this market and the reasons why its development take time in Europe. This niche market takes place in a large market estimated to \$100 billions in terms of technology and \$120 billions in terms of immersive and interactive contents.

As a summary, the main goals of the creation of a European meta-cluster, are: first, identify a GCA meta-cluster as an internalisation support for SMEs consortium; second, define a cross sectoral strategy with other EU clusters and get active in cross border industry to find new opportunities of business or partnerships.

The GCA consortium is already in contact with other European Clusters and is leading negotiations with them. Some of them are interested in joining the consortium.

5.4 PILLAR 4: Identification of „Smart Venue“projects



The objective of our meta-cluster is to enhance and enlarge the GCA consortium by developing a common strategy and new structuring common activities. The first activity will be to analyze and identify the ecosystems related to the "smart stadium" / "smart venue" and to select the ones with the greatest potential, in terms of technological players and thus investments. Hence, the goal is to identify the most complementary ecosystem(s), at the European scale, that could lead us to create efficient technological value chain(s), in order to set up the most favorable possible conditions to stimulate the development of narrative and

technological intellectual property.

In any case, the GCA internationalisation strategy will focus on “smart venues” as we have seen in section 3.2.2 (“Value Chain 2: New Fan Experiences in Venues”) that this Value Chain has the biggest potential in national and international markets.

The GCA approach consists of a three step process. In a first step, there will be a **transregional proof of concept**. In a second step, a **European Proof of concept** and in a third step there is the **internationalisation of the projects and project holders**.

Hereafter follows the roadmap with the three steps.

5.4.1 Transregional Proof of concept

In order to create a high quality European consortium, a methodology has been designed and has already been tested in Wallonia, Flanders and North of France, with success, in 2018. In this context, hackathons („hackARENA“³⁴ and „Human2Sport“³⁵) have been organised by the GCA consortium partners at the RTL Spiroudome basketball arena in Charleroi/Wallonia and in Paris/Ile de France in fall 2018. Others will follow. This process led to the identification of projects and project holders (start-up, SMEs and large companies) that respond to the demand of our niche market.

This process is based on one hand on a Human Centered Design (HCD) approach and interdisciplinary co-creation (as practiced by agile methods and design thinking), and on the other hand on an open call for projects.

Hence, and thanks to this process, we are paving the way to the access to finance for start-ups and SMEs by linking them early in their development of their products or services with a transregional ecosystem of partners. These strategic partners have been chosen for their relevant but limited impact in terms of audience.

5.4.2 European Proof of concept

The transregional proof of concept will be translated at a European level in 2019. In this case, our strategic partners will be chosen for their relevant and global impact in terms of audience, for example FC Bayern Basketball or FC Bayern München (Football), as real global players / global brands.

The process described here before will be led by each cluster in its region in order to identify the relevant ecosystems. The projects and project holders (start-up, SMEs and large companies) will then be tested within our regional demonstrator firstly, and within our European demonstrator(s) secondly in order to validate that they respond to the demand of our niche market.

The construction of the new Basketball arena of the FC Bayern Basketball division in 2020, represents a realistic opportunity for the GCA consortium, to carry out it’s project on a European level. Another perfect strategic partner at this level, is Red Bull, as they

³⁴ <https://www.hackarena.be/fr/accueil/>

³⁵ <http://www.human2sport.com/>

will construct the new arena together with FC Bayern Basketball. The arena will a multifunctional arena, that will be used for Basketball (by the FC Bayern Basketball team) and Icehokey (by the Red Bull EHC Munich Icehokey team), as it is very common in the U.S.. Their third arena partner will be German software giant SAP, who is already the main IT partner for the FC Bayern football division, mainly for the Allianz Arena in Munich.

And another option could be a cooperation with FC Bayern Munichs football division. In this scenario, GCA could do its European proof of concept on the Allianz Arena, FC Bayerns famous football stadium. But we have to take in account, that the football arena is already on a high “connected” level. Anyway, the GCA still can provide high potential innovative technology and/or content that can be interesting for the Allianz Arena. GCA analysis found out that FC Bayern is still looking for new innovative solutions to enhance their „Fan Experience“ and „Fan Engagement“ for their football arena. GCA consortium partner Transmedia Bayern is in close contact with the persons in charge.

But beside the new arena case in Munich, there can be other projects at a European level, especially also in other fields of live entertainment, e.g. music festivals or other cultural events.

A proof of concept can be also made in the other three GCA clusters or other European countries. As mentioned before (Section 8.2.1) the race track Spa-Francorchamps (Circuit of Spa-Francorchamps) in Belgium, or the Olympics Games 2024 in Paris³⁶ or the FIBA can be potential strategic partners, with whom projects on a European level can be developed and implemented.

5.4.3 Internationalization of the projects and project holders

After the proof of concept on a European level, we can offer our services to targets in the four target countries, starting in late 2019 or in 2020. But before potential targets in the third countries must have been addressed.

After identifying potential targets and evaluating them, together with our strategic partner or partners, we will create a list with prio 1 to prio 3 targets in the selected four target markets (USA, China, South Korea, Canada).

Then we will address the prio 1 targets and subsequently prio 2 and prio 3 targets. Potential targets in the third markets are related to live sport events in USA (american football, basketball, baseball, ice hockey, football/soccer, esports venues, etc.), China (football, basketball, winter sports, esport venus, etc.), Canada (ice hockey, basketball, etc.), South Korea (football, basketball, esport venues, etc.) and are related to live entertainment shows (music festivals, TV Shows, etc.).

Finally the goal is to have a wide business network in the four target countries in the field of “live entertainment and sport” where we can meet their needs.

³⁶ <https://www.olympic.org/paris-2024>

5.5 PILLAR 5: Development of other niche markets

In this framework, our meta-cluster aims at bringing smart and innovative cross-sector solutions in the fields of image-sound-text & digital for different sectors such as creative industry, industry 4.0, smart city or mobility for instance. Indeed, in many sectors demand for innovative and creative digital solutions is high...but most of the time supply stays very low or is just unsuitable.



As a response to this lack of validated solutions, this proposal aims at validating a market driven methodology whose main goal is the creation of a suitable supply. This pragmatic approach starts from the real needs of an Industry to support our European SMEs in the identification and internationalisation of innovative, scalable and ready-to-market digital solutions.

In order to reach that goal, we have started focusing on a specific promising market (“live entertainment and sport”) as a proof of the concept and will develop other niche markets afterwards, such as tourism and smart venues with using the same approach that mixes creativity, key technologies and innovative business models with the goal to offer new formats, new entertainments, new content uses and new emotions able to compete at a worldwide level in revamping user content experience.

We will open the GCA meta-cluster also to other “smart venues”, e.g. airports, hospitals, automotive, etc.. We consider the GCA project at the intersection of media, smart media and smart city.

6 Impacts and Indicators

Specific impacts have been identified for each objective set by the International Strategy in terms of results and indicators.

N°	Objective	Expected impact	Indicator & measurement
1	Strengthening GCA by consolidating and enlarging the European GCA consortium.	GCA internationally recognised as the reference EU cluster of the domain.	Number of citations ³⁷ Number of new members ³⁸
2	SMEs internationalisation skills (included Digital Transformation) have to be reinforced.	SMEs owning required skills to develop their business abroad	Number of SMEs having benefit from
3	Strengthening the capital of SMEs (included investment approach).	SMEs having raised their capital.	Nbr of SMEs having raised capital Total funding raised
4	Fostering SMEs to access specific export funding.	SMEs going international thanks to the specific export funding	Number of SMEs having benefit from the export funding
5	Providing SMEs to raise their innovation capacity on GCA Markets.	Innovations on GCA Markets reinforced.	Number of new products sold abroad
6	Assisting SMEs to identify targets in third countries.	SMEs having new prospects abroad.	SMEs having identify targets
7	Setting-up a planning (2-4 years) for the realisation of the internationalisation.	SMEs having a 3-year prospecting visibility	Planning setup and

³⁷ Number of publications, websites,... referencing GCA worldwide

³⁸ New members having joined GCA consortium

7 Next steps – towards GCA Implementation Plan

Hereafter follows a short description of the next steps to be taken, towards GCA Implementation Plan.

The goal of the next Deliverable (D4.2) is to develop an Implementation Plan, which means, that actions have to be developed and implemented in a second phase of the cooperation between the members of the consortium.

Obviously it also has to be continued to work on the 5 Pillars of Internationalisation strategy. In this context, on first step the GCA Internationalisation Strategy has to be validated. With the findings of the validation process, the Implementation Plan has to be developed.

7.1 Objectives of Implementation Plan

The main objectives of the Implementation Plan are:

first, SMEs internationalisation skills (included Digital Transformation) have to be reinforced, second, SMEs have to be helped to strengthen the capital of companies (included investment approach) and access specific export funding,

third, competences and innovations on GCA Markets have to be reinforced,

fourth, SMEs have to be supported to find targets in third countries and

fifth, to set up a timetable (2-4 years) for the realisation of the internationalisation.

7.2 GCA Advisory Board Meeting (February 2019)

The next action towards the GCA Implementation Plan will be a GCA Advisory Board Meeting in February 2019 in Paris.

The Mission of this meeting is the validation of the GCA Internationalisation Strategy and the definition of the Implementation Plan. We will work closely together with the GCA Advisory Board members, who are experts of the relevant GCA value chains.

The Advisory Board members will be provided with the Internationalisation Strategy before the Advisory Board meeting, so that they can read and validate the strategy paper for themselves before they come together.

So far these are members of the GCA Advisory Board (as per December 2018):

- Gaël SEYDOUX, Research & Innovation Director, Technicolor
- Samantha WOODS, Head of Customer culture, employee innovation and global internal coms, Orange Business Services
- Philipp SCHALL, CEO, Tellux Next
- Anderson KING, Business Development Manager, USTWO
- Nicolas BOURDON, SVP Marketing, EVS Broadcast Equipment
- Erik KAMPMANN, International Sales Manager, DELTACAST
- Philippe DUBOIS, Innofluence, FEMER.
- Dr. Robert Niemann, Expert for international Sports & Entertainment (e.g.

FIFA consultant), SASS MEDIA

Note: There might be a few changes among the board members until the GCA Board Meeting in February 2019.

7.3 Preparatory of international actions

An integral part of the **Internationalisation Plan (work package 4)** is the preparatory of **international actions (Task 4.2)**. The actions within this work package will also identify preparatory actions and supporting services to provide SMEs with the right skills and tools to approach new markets, concrete and operative actions for enhancing collaborations with third countries. Further actions have to be developed and implemented later on.

The preparatory and implementation of the international actions will be part of the Implementation Plan. Therefore these actions will be described in detail in the **Implementation Plan (D 4.2)**.

7.4 Participation at international Conferences and Events

Participation of GCA and GCA SMEs at international conferences and events is essential for the success of the Internationalisation Strategy and will help to build a network of foreign public and private contacts and organisations in the target countries. This process should be started as soon as possible, as in 2019 many relevant conferences and events will take place.

GCA will try to establish partnerships with relevant media and sports conferences, exhibitions and events in order to enlarge its network and to get in touch with potential target contact persons, who are attending those events regularly.

The participation at conferences and events will be presented in a detailed list in the Implementation Plan (D4.2) in the beginning of 2019.

Annexes

GCA Internationalisation template

Proposed Region/ Country

Criteria / Question	Answer	Comments
1. General criteria		
1.1. Economic, policy, social threats: <ul style="list-style-type: none"> • Geopolitical uncertainty • over-regulation • populism • terrorism • protectionism • increasing tax burden • uncertain economic growth 		
1.2. Export facilities <ul style="list-style-type: none"> • Public or private Export organisations that facilitate the export process: general information, training, facilities, etc. (e.g. Chambre of Commerce) • International Investment organisation (e.g. Invest Montréal) • Export Financing: private and public investors; grants; etc. 		
1.3. Creative industries specific criteria Check the criteria specific to Creative industries that can have: <ol style="list-style-type: none"> 1. Upstream effects: <ul style="list-style-type: none"> • Impact of social media • Immediate availability of products and services • Consumerisation, proliferation and ubiquity of IT 2. Downstream effects: <ul style="list-style-type: none"> • Impact of social media 		

<ul style="list-style-type: none"> • Personalisation of products and services • Changes in entrepreneurship culture • Shortening of life time cycles 		
2. Criterial relating to value chains		
<p>2.1 Primary requirements</p> <ul style="list-style-type: none"> • <u>Equipment:</u> Main figures about connected televisions, mobile, VR headset, drones, etc. • <u>Media Consumption:</u> main figures figures for TV, social media, websites, smartphone apps, radio, newspaper • Fans: <p><i>Strongly connected fans</i> are important because they are:</p> <ul style="list-style-type: none"> - More likely to attend games and live events, participate, and consume sports or entertainment media - Willing to pay more for tickets and spend more on merchandise - More likely to remain loyal over time <p><i>Weakly connected fans</i> are important because they are:</p> <ul style="list-style-type: none"> - Potentially larger in terms of audience size - Most likely there for the social or entertainment factor - Likely to skim between sporting or entertaining experiences <ul style="list-style-type: none"> • Fanbases: <ul style="list-style-type: none"> - Inclusive, integrating women and families - Self-Development of innovative initiatives • <u>Sports:</u> most played or watched sports; niche sports; • <u>Live Entertainment:</u> internationally recognized music bands; huge festivals; etc. • <u>Clubs and leagues:</u> own offering that fans 		

<p>subscribe to; investment in ‘newcomer media’ to grow fanbases.</p> <ul style="list-style-type: none"> • <u>Brands and media agencies:</u> Motivation and experiences to renew fan experience • <u>Connected arenas:</u> Own fan offerings in Sport and Entertainment • <u>Flagship firms and creators in GCA field:</u> activity, level of internationalisation, innovation, possibility of partnerships. 		
<p>Value Chain 1: New experiences start at home, some days or weeks preceding or following the event in the stadium or concert hall (TV, Internet, AR/VR, etc); new experiences to maintain fans consumption throughout the year.</p> <p>Target : TV Channels, Social platform, advertisers, tech giants or related, Sports leagues and federations, users.</p> <p>Criteria:</p> <ul style="list-style-type: none"> - Sports and Entertainment TV Channels and Social platform: offering towards fans in the time laps before, after or off-the-season; innovative experiences; interesting rights properties - Advertisers (brands and media agencies) on Sport and Entertainment TV channel and social Platform - Active prosument (procucer and consumer; a word used by EU) fanbases. 	<p>Fully in line with the targeted region</p> <p>Partially in line with the targeted region</p> <p>Not significant for the targeted region</p>	
<p>Value Chain 2: New experiences on site: within the stadium and/ or within the fan zones (Services, applications, etc.)</p> <p>Target : stadium owners, advertisers, Social Platforms, TV Channels, Sports leagues and federations, users, territorial authorities, advertisers</p> <p>Criteria:</p> <ul style="list-style-type: none"> - Innovative organisation in renewing Live experience (e.g. Mutek) - Flagships firms in technology and service, creation, production - Innovative technologies involved - Active fanbases: self initiatives 	<p>Fully in line with the targeted region</p> <p>Partially in line with the targeted region</p> <p>Not significant for the targeted region</p>	

<ul style="list-style-type: none"> - Territorial authorities that like to offer a fan experience to their citizens - Brands that are involved in sponsorships and want to reach fans through common values. - Stadium tenants who want to offer an exciting stadium experience for a premium price - Sports League and clubs that want to win the loyalty of huge communities of fans. 		
3. Criteria crossing cluster's SWOT analysis, regional analysis and Country/Region access criteria		
Main interest / Motivation of your cluster/members	Describe the main interest in this country/Region	
Level of complexity (barrier to access)	Easy (No risk, direct connection to organisation are possible, English is spoken) Mean Difficult (need specific accompaniment)	
Level of business maturity in the country (in the domain addressed by GCA)	Lower than EU Same as EU Higher than EU	
Availability of Market analysis (market opportunities in the GCA domains of interest)		
Current active contacts (list)? If not, are they easy to reach?		

Brochure FUTURE OF FOOTBALL BUSINESS Conference 2018

See next page

Welcome to the
**FUTURE OF
FOOTBALL BUSINESS**
Conference 2018



presented by



A-COMMERCE

organized by

**FOOTBALL
BUSINESS
INSIDE**

FOOTBALL BUSINESS INSIDE

Connecting Football and Economy.



Dear ladies and gentlemen,
dear guests,

The football business is changing, constantly evolving and adapting to the wishes of fans. New offers are created, new possibilities open up. But also new problems arise, which have to be solved.

The FUTURE OF FOOTBALL BUSINESS Conference was created with the aim of taking a look at current and above all future-oriented topics. At the same time, companies should have the opportunity to get in touch with clubs, associations and other stakeholders in the football industry, to exchange ideas and thus promote developments in the football business.

I hope these goals can already be achieved in the first issue, the #FOFBC18, and look forward to an exciting conference. The date for next year's conference will be announced shortly.

Organizer
Thomas Maurer
maurer@fussball-business.com

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Main Stage

Moderation: Mathias Pascottini

10:00 - 10:30	Arrival, Networking, Coffee
10:30 - 10:50	Juan Iraola, Real Sociedad: Locker Room to Board Room: The Digital Transformation of Real Sociedad
10:55 - 11:15	Christopher Vivell, Red Bull Salzburg: Players Recruitment for FC Red Bull Salzburg
11:20 - 11:40	Felix Welling, VfL Wolfsburg: After three years: VfL Wolfsburg and eSport is a perfect Match
11:45 - 12:20	Panel Discussion: High Time for Digital Transformation Daniel Sprügel, Federico Smanio, Timm Jäger, Mario Leo Moderation: Ralf Leister
12:20 - 13:20	Lunch Break
13:20 - 13:55	Panel Discussion: Football and eSports Daniel Luther, Felix Welling, Stefan Baloh Moderation: Ralf Leister
14:00 - 14:20	Martin Geisthardt, Nielsen Sports: Smart Sponsor by using the correct Data
14:25 - 14:45	Peter Jaeger, Haalo: Future of Sports: What's going on in Wattenscheid
14:50 - 15:00	Jaime Navarro, LaLiga: LaLiga's International Strategy
15:05 - 15:15	Timm Jäger, Eintracht Frankfurt: Startups and new Business Models: Digital Future of Eintracht Frankfurt
15:20 - 15:55	Panel Discussion: The Future of Football Consumption Daniel von Busse, Nikolaus Beier, Bastian Gangnus Moderation: Ralf Leister
15:55 - 16:25	Coffee Break
16:25 - 16:45	Stephan Grad, A-COMMERCE: Make them loyal: Fans & Customers should love you
16:50 - 17:10	Joachim Hilke, Fanatics: How Fanatics is transforming the Merch Industry
17:15 - 17:35	Frank Hüttemann, Bayer 04 Leverkusen: Merchandising International: Chances & Challenges
17:40 - 18:15	Panel Discussion: New Ways for Merchandising Joachim Hilke, Frank Hüttemann, Florian Stadlober, Andreas Lipp Moderation: Ralf Leister
18:15 - 21:00	Networking Evening presented by Jägermeister

Case Study Stage

Moderation: Phillip Seiser

Philip Klöckl, QUS: Monitoring of physical, physiological and tactical Performance in Football

Frank Festen, Content Stadium: How Tech can help you score a Hattrick on Social Media

Veit Manninger, keyper: Stop losing money: No more empty Seats

Workshop Room

Live-Podcast (German)

10:55 - 11:45

„Die beste Liga der Welt im Markencheck“
with Patrick Lenhart (tipico Bundesliga)

Workshop Room

Workshop

14:00 - 15:30

How to start your eSports Business: possible
Integration of eSports in Football Clubs and Businesses

Vladimiro Mazzotti, Zerogrado: Reaching, Engaging and Monetizing the Fan Base

Philipp Breitenecker, elektrabregenz/Beko: A true Partner is not just a Sponsor: Beko & FC Barcelona

A. Ferrufino & M. Ortlechner, Playerhunter: How an Austrian Start-up aims to revolutionize the Football Industry

Jens Leonhäuser, Steilpass: Vision Vorarlberg Arena: How SCR Altach enhances its Power to compete in Future Markets

Jonas Bogaert, ESSMA: The Stadium of the (near) Future

ON STAGE AT THE FOFBC18



Philipp Breitenecker
Marketing Director elektrabregenz/Beko



Angel Ferrufino
Co-Founder & CSO, Playerhunter



Martin Geisthardt
Senior Sales Consultant, Nielsen Sports



Stephan Grad
Managing Director, A-COMMERCE



Joachim Hilke
Managing Director, Fanatics DE



Daniel von Busse
COO TV & Member of the Board, SPORT1



Frank Hüttemann
Head of Merchandising, Leverkusen



Juan Iraola
Head of Digital, Real Sociedad



Peter Jaeger
Co-Founder & CEO, Haalo.io



Timm Jäger
Advisor of the Board, Eintracht Frankfurt



Jens Leonhäuser
Owner, Agency Steilpass



Daniel Luther
Project Manager eSports, ESB



Mario Leo
Managing Director, Result Sports



Andreas Lipp
Managing Director, Sportnex



Bastian Gangnus
Head of Sports Partnerships, 4Sports



Vladimiro Mazzotti
CEO, Zerogrado



Federico Smanio
Head of Digital Transformation, Lega B



Felix Welling
Director Corporate Development, Wofsburg



Philip Klöckl
R&D and Data Analytics, QUS



Jonas Bogaert
ESSMA



Mathias Pascottini
Moderation



Jaime Navarro
Int. Business Development, LaLiga



Daniel Sprügel
Founder, Sports Maniac



Christopher Vivell
Head of Recruitment, RB Salzburg



Manuel Ortlehner
VP Commercial DACH, Playerhunter



Stefan Baloh
Chairman, ESVÖ



Phillip Seiser
Moderation



Nikolaus Beier
Member of Board, LAOLA1



Florian Stadlober
Head of Merchandising, GAK



Veit Manninger
CMO, keyper



Frank Festen
Countrymanager DACH, Content Stadium



Ralf Leister
fussballwirtschaft.de | Moderation

Make your Fans & Customers love you

During the last months I have had several discussions with people from Soccer and Rugby or Motorsport Teams about how well we know the fans of our Teams or Clubs. "Why do people love our brand?" is a very simple question, but nevertheless it's the essential one to get to know what your fans want and how you can build up an even stronger relationship in the future.

This leads us to the next important question "How can we turn our followers into loyal fans?" Your E-Mail-subscribers, your follower on Instagram, people who like you on Facebook ... how do you get them to keep coming back? But let's go through it step by step:

You've got the passion...

The common answer to my first question was "Fans love being part of a team and being better than everyone else". This sounds awesome and heartwarming, but is it true? Do you really know, why each and every one of your fans loves to come to your games? Why they love a certain member of the team more than another one or why they are upset about the last game? Do you have more insights than just normal personas which are very vague and only useful for marketing actions?

Customer Relationship Management is the key: Your fans change during their life and so does their relationship to their preferred team. Players change the club as well as their managers and trainers. That's why it is essential to know what your fans are thinking and what they currently like or dislike in your team.

...now create participation!

It has never been so easy to be in contact with fans in a team than nowadays. Especially because of all the possibilities in social media and e-commerce. Both of them are not only to send information or products to the people but also get back information directly from their hearts to improve your communication strategies, your merchandising plans and also probably to build up strong recruiting possibilities.

This leads us to our second question: How can you turn your followers into loyal fans?

The answer is obvious and seems simple: Caring! **You need to care about your fans.** Give them the feeling, that you care about what's going on in their life. Let them participate in your business – in a way we'd say: Pass them the ball and let them play, even if it's just one shot. Especially those people, who – during their schooltime and maybe now in their job – have always been chosen last to join a team, will

appreciate such an opportunity and will thankfully become a loyal fan. **So create participation – because when they are involved then they will invest!**

To get the audience to feel involved you could take them behind the scenes, to make them see things that other people normally don't get to see. Or ask them questions, allow them to influence you, where to go next, what comes out next. This could easily be done via social media. And last-not-least: Go Live as often as possible and allow people on the other end to participate, asking questions, go behind the scenes.

Establish a community...

People come for the content, but they stay for the community! So when your fans join a soccer game, create a place for

them to connect – and they will connect to each other and stick around. It could be as simple as creating a Facebook-group for your community, a LinkedIn-group or an event. You can become the person or the brand, that creates those moments for people. For sure this will heighten your brand even more.

On top you can give the group an identity by giving it an own name – than people become associated as a group member, when they call themselves with your created name.

If you then frequently feature community members with interesting stories in front of the other community members, this will strengthen the group identity.

...and reward your community members.

By gaining access to your community the

A-COMMERCE Day

COMMUNICATION CONNECTS
PEOPLE BRANDS TECHNOLOGY THE WORLD

08.11.2018 | Wien, Gösserhalle

presented by
plentymarkets
Das E-Commerce ERP

members could (and should) get some free goodies, special deals, early access to events. **Make them feel really special being part of your group.** Give them a little bit more and they will feel a lot more tied to your community. Let your audience participate and feel included in your bigger overall mission by staying in a viral contact, answer quick to their questions or give feedback on their statements. As mentioned above: People who are involved will invest ... what brings us to the next point:

E-Commerce is not a one way street

By definition e-commerce is the way to trade your merchandise goods to your fans – that's it. But the industry has changed a lot during the last years and e-commerce nowadays is getting more and more about customer relationship management and how to get to know the people behind your KPI reports way better.

Each and every ID is a human being, who is hopefully already fallen in love with your brand – and it really does not matter why. What matters is that you get all possible information about what they like / don't like and to avoid them from turning away from your brand.

Your story is their story!

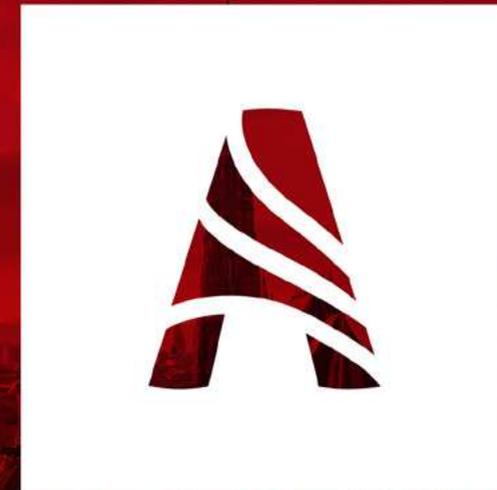
We all know it's all about passion in communication. Show people what they are missing out while they are working in their jobs so that they can take their kids back to the game on weekends. Be open and honest, but always show the passion you have for the sports, the club and of course your beloved fans. Storytelling is

the way to an open communication – as Andrew Stanton, director of Pixar Film proclaimed: **“Make me care. Please – emotionally, intellectually, aesthetically – just make me care!”** What brings us back to the begin of this story.

Good luck on your way to get to know your fans on a personal level - if you need any guidance you can all me any time!



Cheers,
Stephan
Managing Director A-COMMERCE



**DIE FÜHRENDEN E-COMMERCE
BERATER IN ÖSTERREICH.**



A-COMMERCE.AT

The Austrian Football League starts into new Era

A new era has begun for Austrian football. A new league format, a new tv deal and new channels of communication will improve the image of the Austrian Bundesliga.

Along with the start of the 2018-19 season the Tipico Bundesliga, the first tier, has been extended from ten to twelve teams. After 22 rounds the Bundesliga will be divided into two groups – the Champions group and the Qualifying group. The points of the regular season will be divided in half to ensure that the clubs will be closer together for the start of the final season. After 32 rounds the champion will be crowned and the clubs with the first few tickets for the UEFA Champions and Europa League will be known. After that, there will be three more games – called Europa League play-off -, in which the winner of the Qualification group will have the possibility to fight for the remaining international ticket against two opponents from the Champions group.

“The new format ensures that there will be suspense from the beginning until the end. The number of games with something at stake will be significantly higher and there will be three decision phases: the end of the regular season, the final season and the Europa League play-off. We are convinced that these steps will attract larger audiences in the stadiums”, says Christian Ebenbauer, CEO of the Bundesliga. In this season it will be even more thrilling since the champion will likely get a guaranteed spot in the group stage of the UEFA Champions League following the good international results of the past years

and the 11th place in UEFA’s 5-year club ranking. If this year’s winner of the Champions League also qualifies through his domestic league for next season’s Champions League, Austria’s Champion will get a spot in the group stage.

The second tier has started with a lot of innovations as well. 16 teams (instead of ten) compete for the promotion into the Tipico Bundesliga. Even so the most obvious change might be the new name of the league. After nearly 20 years as “Erste Division” or “Erste Liga” (First Division or First League), which has often led to a little bit of confusion, the league now operates under the name of “2. Liga” (2nd league). “Our goal was to give the league its well-deserved place in the Austrian football structure”, says Reinhard Herovits, the league’s CEO and continues to specify the aims of the new league: “We want the 2. Liga to be a development platform for players, coaches as well as for clubs as a whole.” The new league will be a mix of well-established 2nd tier teams and newly promoted amateur clubs.

The start of the new era in Austria’s football doesn’t only consist of new formats but will also be accompanied by a series of innovations. Two new tv contracts will guarantee that the leagues will attract a lot of media attention. The year-long tv partner Sky has obtained the exclusive

rights for the Tipico Bundesliga for at least the next four years. Accompanied by selected live games on A1 TV and highlight shows on ORF, oe24.tv and LAOLA1, the deal ensures that all supporters can follow their team through an interesting mix of pay and free tv.

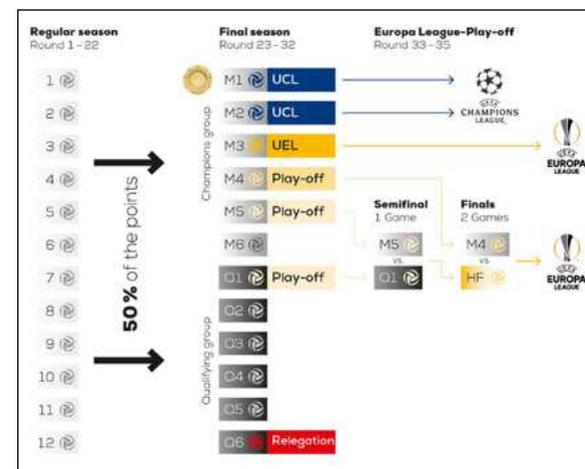
The 2nd league will get broad tv coverage as well. ORF Sport+ und LAOLA1.tv will broadcast one live game per round and a major part of the remaining games will be broadcasted via livestreams on laola1.at and on the club’s websites. After each round there will be a broad choice of highlights and goal parades available, so the aspiring league will have a lot of public attention.

The Austrian league itself features a lot of media outlets to promote the leagues and their clubs. There are two print magazines, one for each league, that will report the best stories, behind-the-scene-pieces and all the facts and statistics. The online world has been divided into Tipico Bundesliga and 2. Liga. While in the past there has only been a shared presence, whether it has been on the website or social media, there are now separate domains and social media outlets for each league. The objective is to present the new positioning and the pictorial language of each league

in their own setting to strengthen the character of each individual league.

The sporting quality will be in focus for the next years. High requirements regarding the measurements and the quality of the pitch and the implementation of a standardized ball by adidas will improve the fairness. The stadium infrastructure, which has already been an object for the past years, will further be in focus as the clubs continue to improve their stadiums. Austria Wien returned into a completely remodelled and modernized Generali-Arena and for example in Altach, Graz or Linz renovation plans, further improvements and plans for a new stadium are underway.

New formats, a broad media coverage, high sporting quality and a modernized stadium experience are the main components of the new era that should lead Austrian football into a bright future. Christian Ebenbauer: “The reformation of the Austrian Bundesliga is a big opportunity to improve Austrian football regarding sports and economics and we are convinced that these steps were not only necessary but more importantly courageous and promising.”



Zerogrado for Sports

CEO Vladimiro Mazzotti: „With our technological solution fan bases are more involved and there is more business for clubs. This way the fan base becomes a concrete capital asset for the clubs.“

Reaching one's fans individually, increasing their involvement and thus increasing one's business. Using three words: reach, engage and monetize. In other words, breaking down any degree of separation between football clubs and their immense fan bases through an innovative technological solution. These are the objectives of Zerogrado, an Italian software company that is launching „Zerogrado for Sports“, onto the international market at the FUTURE OF FOOTBALL BUSINESS-Conference in Graz. This cloud-based solution exploits the potential of the main messaging platforms, allowing football clubs access to newer and higher forms of involvement and interaction with their audience.

„Zerogrado for Sports is an innovative solution capable of superseding the structural limits of traditional social media and achieving unprecedented results in terms of engagement and monetization, thanks to the innovative use of messaging platforms when interacting with fans“, explains Vladimiro Mazzotti, CEO of Zerogrado. „To enable more personal communication methods and by engaging in one-to-one interactions, instead of one-to-many, the platform elevates fans' experience to a level which enables – in conjunction with an opening to the world of exclusive and personalized offers by the clubs – an exponential increment of profits from merchandise, memorabilia and ticketing. To value their own fan base is to increase their clout in all commercial trades with potential partners, transforming the fan

base into a real capital asset for the club“. How? With several solutions created by Zerogrado, from the special dashboard – available to the football clubs at all times – to monitor their audience, to the gamification activities created for their fans. The growth of user engagement takes place through special interaction modules including, for example, the quiz: more correct answers mean more points earned and a better ranking in the list of most loyal fans. The clubs can then reward their best fans with exclusive experiences, from the opportunity to meet the players, to tickets for games, and to offer everyone the possibility to convert their own love for the team into discounts when purchasing merchandise, exclusively signed special-edition products and special hospitality packages for matches.

This valorisation of content, which in fact contributes to „transforming“ the anonymous follower into a fan with a greater inclination to buy, made possible by the technology of Zerogrado, enhances the potential of platforms such as Facebook Messenger and WeChat, bringing results of an absolutely superior level: In fact, 97% of the users is reached immediately and participation rates are up to 20 times higher than those of traditional social media. These engagement rates help to transition the relationship with the fan towards additional business, both for the football club and for Zerogrado, whose business model is based on a transaction commission.



POWER TO BELONG

ZEROGRADO knows that your **ONE** huge fanbase is actually a huge fanbase of **ONES!** Welcome your fans in a world of unique exclusivity, making them feel part of the game.

ZEROGRADO FOR SPORTS, an innovative solution designed to boost **REACH**, **ENGAGEMENT** and **MONETIZATION** of fanbases exploiting the unique features of messaging platforms. Increase **REVENUES** in merchandise, memorabilia and events sales with unprecedented performance results and raise **VALUE FOR SPONSORS**.

Visit our website at zerogrado.com/sports or contact us at sports@zerogrado.com



QUS: The Smartshirt for Insights and Answers in Football

QUS, is a company near Graz, they are developing a smartshirt and want to help with decision making in football. We spoke with the data analysis specialist, Philip Klöckl, he is responsible for the development of software and algorithms.

Under the brand QUS you are developing smart clothing. What is smart clothing?

This is a kind of clothing that has been developed with new technologies that add value to the wearer. The art of such creation relies on the fact that it is still a real clothing. The art of development is that it really stays clothes.

Which clothes are you currently producing?

At the moment we are focusing on a so-called Smart Shirt. We can sew our textile sensor in a variety of fabrics.

What's so special about your clothes?

The special thing about our Smart Shirt is that it is still a real textile, with an excellent wearing comfort.

What data are your clothes gathering?

We measure two different types of data, physiological and physical. Our textile sensors measure the heart rate or HRV and the respiratory rate. In addition we have acceleration sensors and for the position data we use GPS.

Can it also be used in football?

The application possibilities are very diverse. Our shirt cannot only be used in training, but it can also be employed for sleep-tracking or for the monitoring of vital signs during the day. Our goal is to create a holistic solution.

What can you do with this data in football?

During trainings or matches it is possible

to measure the load of the players. With this information it is possible to control the training more precisely. During sleep or leisure, the QUS shirt can be used to measure the regeneration status. Another goal is to include tactical parameters. In combination with vital data, precise key performance indicators can also be developed.

How long have you been working on the idea?

We have been working on this idea since 2014, but the development of textile sensors began more than 10 years ago.

What are your goals with QUS?

With our QUS shirt we will enter the sport market, delivering a solution for Team sports and individual athletes. Our system can be used during training as well, but also for private sessions and for sleep-tracking. All these data allows us to give the users an overall view of his fitness level and training performance. One system that works for numerous options of training. Of course we are working in parallel on new technologies to be one step ahead- therefore the feedback of our users plays a main impact.

What is the next step in the development of smart clothing?

We are currently developing a new cutting-edge technology to record heart rate and respiratory rate. This technology should make it possible that skin contact is no longer necessary.

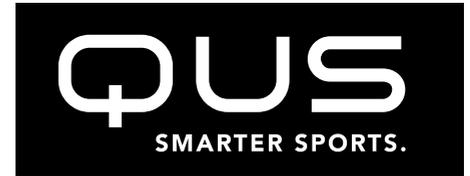
How important is research and development for you?

R & D is in every respect a very important part of our company: in the further

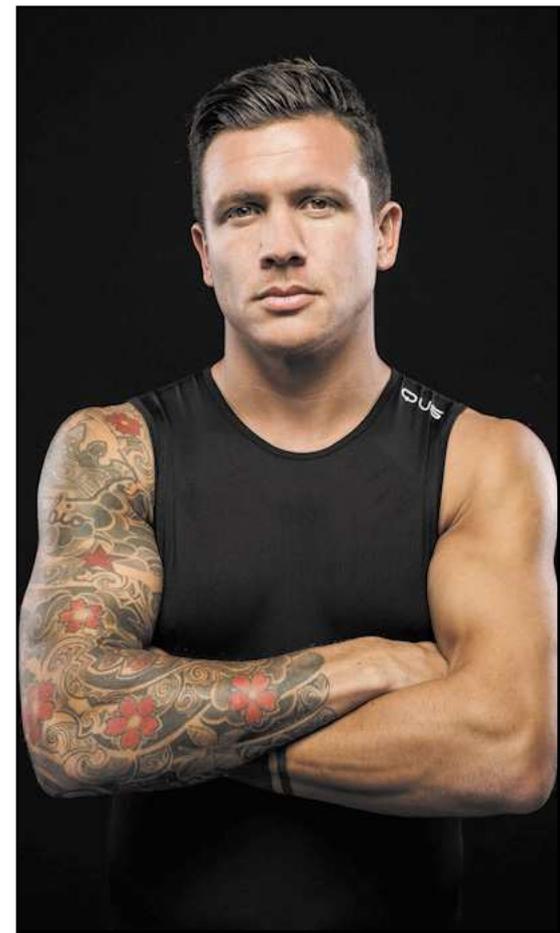
development of our textiles, as well as in the field of data analytics.

Where do you sell your product?

From Q1 2019 our shirt will be on the market in some European countries.



www.qus-sports.com
+43 (0) 664 88683039
info@qus-sports.com





CONTENT STADIUM

CREATE SOCIAL MEDIA VISUALS, ANIMATIONS AND VIDEOS WITHIN SECONDS

“ We have chosen Content Stadium because it's essential that all our teams produce social media content according to the right brand guidelines, in any language, across the world. Within one minute we can create visuals with live data and promote it to multiple social media channels. By being fast, accurate and original, we provide our fans with the right information, at the right time, in the right place. ”



Holger Boyne

Head of Digital, Eintracht Frankfurt

1 Select Template
Choose one of the custom made templates for the correct branding

2 Choose Photo
Select a photo for your post

3 Add Text
Customize the text to your liking

4 Use Dynamic Data
Automatically integrate historical and realtime stats

5 Publish Directly
Publish posts directly to all social media channels

0 - 2	48
BALLBESITZ	10
TORSCHÜSSE	52
ZWEIKAMPFQUOTE	125
LAUFLEISTUNG IN KM	4
ECKEN	
#DFSGE	

Clients a.o.



WWW.CONTENTSTADIUM.COM

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Fan Experience and Smart Stadium: Reinventing the Live Experience

The Global Content Alliance is a European network dedicated to start-ups, SMEs and large companies producing new contents/ technologies in the field of fan experience or how to enhance the fan experience in the context of a live sport/entertainment show in or outside a smart stadium.

The Global Content Alliance will provide accompaniment in many fields and specifically in the field of internationalisation of the members of the network. Our network is already active in Bavaria (Germany), Ile de France (France), Wallonia (Belgium) and Skane (Sweden) and is supported by the European Commission.

The Global Content Alliance aims at initiating a cross-sectoral European network to propel European SMEs producing and distributing media content, with the objective of conquering new worldwide audiences. The digital revolution has deeply impacted the production, distribution and reception modes of media content. One key challenge for media SMEs is the necessity to create value across different media and platforms, an approach known as Transmedia. Another challenge concerns the rise

of immersive media such as Virtual Reality and Augmented Reality, and of disruptive technologies like Big Data, Artificial Intelligence, Machine Learning and the Internet of Things. GCA intends to support SMEs by intensifying networking, collaboration and knowledge-transfer on a European scale. The aim is to strengthen the capacity of European SMEs to compete, to innovate and to connect with global audiences.



Emre Koca
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The Global Content Alliance was funded by the European Union's COSME Programme (2014-2020).



LIKAR Law Offices is a modern, internationally-active business law firm with areas of expertise in commercial, business and corporate law as well as national and international contract and labour law.

In collaboration with MLG Sports Consulting, founded by members of LIKAR law offices in 2017, they combine their experience in sports and football with legal expertise and offer comprehensive support of sportsmen, support with contract negotiations and sports management contracts.

With their broad knowledge in business and focus on sports, they support football clubs interdisciplinary.



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Digital Transformation and AV in stadiums

Interview with



Stefan Pagenkemper
General Manager,
PMS Perfect Media Solutions GmbH

PMS calls themselves a full-service AV integrator and partner for digital transformation. Stefan Pagenkemper, what makes you different compared to other integrators within this market?

PMS covers projects really from start to finish, which means from planning until rollout and servicing. During the project we really try to look one step ahead: you have to get everyone on board to make the best out of the system and still be flexible with the solution and components you pick. And with our own customizable DS and display solutions we are simply extremely adaptable in our offering.

Your offering, what kind of solutions could be most interesting for stadiums?

These days moving pictures are really essential within modern football sta-

diams and are playing a central role in brand and fan communication. This is where our offering comes into play: With PerfectShow™ we can build an individual Digital Signage software for standard DS applications, but also for digital menu boards, fan shop displays or even stream video messaging and TV signals to the club offices. In addition, PerfectControl™ offers precise and spontaneous rights and signal management which can be done even via tablet everywhere in the network.

In your eyes, what makes AV projects in stadiums really successful?

To really implement a reliable and future oriented visually engaging system, you have to get everyone involved already in the early project phase. When you have marketing, IT management and facilities on the same page, you can really create an integrated solution which can last a few years and can even grow easily with new upcoming requirements.



More information about PMS Perfect Media Solutions at www.perfect-media-solutions.de

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für dich.
UND REIN DAS BESTE
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keyper - Easily share and sell Tickets

Personal data is a sensitive and newsworthy topic at present. Who holds our data, which bits of information do they have, and what will they use it for? These are all important questions and ones to which we are all entitled to answers.

Fundamentally is an understanding of our behaviours – our likes, dislikes and how they all come together to form a picture of what we're likely to want or need in the future – is enormously helpful for service providers who want to offer us products or experiences that make our lives easier, surprise, delight or entertain us.

With keyper, every organizer can offer his customers mobile ticketing. The young company stands for the easy sale of tickets and innovations in ticketing.

keyper offers white label technology for easy and secure sharing and selling of tickets by connecting existing ticketing solutions to the mobile platform. With this innovative ticketing, sports clubs can solve their no-show problem, connect their entire audience, gain more relevant data and increase overall sales.

This technology allows fans to distribute their own tickets, while the club retains control of the pricing and the data. It's simple.

If I want to send you a ticket which I have already bought. It will be sent to you as a text message with an automatically generated link. There are several services available such as email, whats app, facebook messenger and messenger. You open the link, accept the ticket and the club's terms. You fill in a few details and can use the ticket; it's painless and you don't have the feeling you've been ripped off; and

for the club, you have just gone from a visitor to an active customer in a real data relationship with the club.

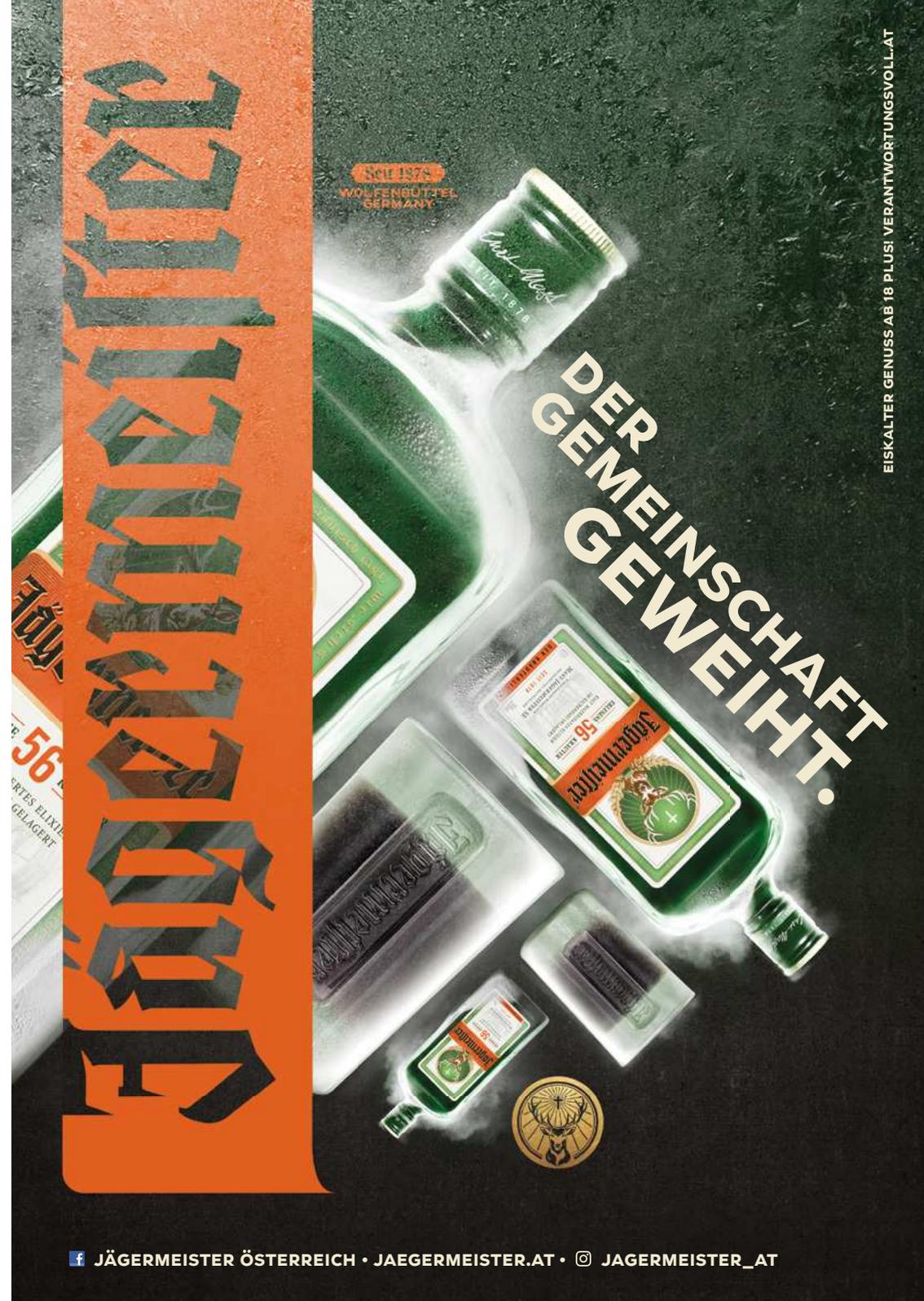
Customers can deliver mobile tickets in a timely manner and get in touch with the providers. When buying multiple tickets, the buyer can simply send the tickets to his friends. The tickets will be re-personalized when they are shared, allowing sports clubs to reach all visitors, not just the ticket buyer.

This opens up completely new possibilities for getting in contact with the visitors. Via the Business Web App, updates can be sent to your visitors at any time, questions about the event can be clarified, and thus a better connection to the visitors can be established.

The SDK is available for iOS and Android. The solution can also save time and effort for distributing partner and sponsor tickets. Changes to events are transmitted to the visitor directly to the smartphone via push notification. For seamless integration into the app, the design can be easily adapted to the wishes.



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eSports at SK Rapid Vienna: New Audiences & new Revenues

Lorenz Kirchschrager and Simon-Peter Charamza implemented eSports at the Austrian first division-club SK Rapid. We were talking about goals, new audiences and monetizing the eSports.

Lorenz & Simon-Peter, you are responsible for eSports at SK Rapid Vienna. What are your tasks?

Lorenz: From the very beginning one of our main tasks was to implement eSports in our club and to reduce prejudices like “eSports is no sport”, “eSports athletes don’t live healthy” and so on. Establishing a competitive team has been another important part of our job. This team should be able to have success and to work as a team. This wasn’t easy because eSportsmen are not used to work as a team, especially FIFA players.

Simon-Peter: We also want to thank the Bundesliga team, first and foremost Philipp Eckhart, who did a tremendous job in organizing the very first eBundesliga season. Clubs and Bundesliga huddled together and did a really nice job. This was important for every stakeholder, like league and clubs, to find some great partners who are also fascinated by eSports and want to support us financially. In combination with league and partners it is our aim to improve the product “eSports in Austria” day by day.

When did you start thinking about entering eSports and when and how did you do it?

Simon-Peter: We started to sharpen our focus on eSports in summer 2015. We worked on a few smaller projects and took part in a focus group, organized by our biggest partners, in which we developed some really cool concepts.

Lorenz: Mentioning those concepts, we recommend to stay tuned. Some big news might come up very soon. According to your question, the initial spark was the premier season of the eBundesliga in autumn 2017. Since then we have intensified partnerships and focus groups with sponsors, clubs, organizations and interested people of other businesses.

How many players do you have, are they signed and professional gamers, and which game are they playing?

Lorenz: During the first eBundesliga campaign 2017/18 seven players have been on our eSports roster. Led by our eSports ambassador Mario Viska, by far Austria’s most successful eSports athlete, the team worked fine as a group and put some really great effort into their own development.

Simon-Peter: Our goal is to increase our roster continuously to improve our quality at the same time. In the mid-term we want to have a main roster that represents SK Rapid Vienna at international tournaments and an eBundesliga roster, riddled with some big and young talents who collect experience in national competitions.

Are any other games beside FIFA an op-

tion for Rapid?

Simon-Peter: Very good question, but our answer is as short as easy. Not at all.

Lorenz: We thought about this many times, but in the end we are a football club and we want to do what we are famous for – playing football and gaining a lot of success. For bigger clubs like Schalke 04 it is comprehensible to focus on other eSports as well. Especially because the Asian market is interesting for the royal blues. We have different initial situation. Therefore games like DOTA, CS, WOW and LOL are off the cards.

Simon-Peter: Cobbler, stick to your last! (laughs)

What are your goals with eSports – short time and long time?

Lorenz: In the short-term we want to implement eSports in our club more and more. It would be great if eSports become a part of our everyday work. At SK Rapid we also aim to be Austria’s first-mover in everything we do. Be creative, be innovative – this is what drives Simon and myself day by day. In the mid-term we want to reach and connect a young target group. On the one hand, we want them to be part of our eSports program. On the other hand, we want them to support our real life football team on the pitch of the Allianz stadium because in the end this our core area.

Simon-Peter: Of course one of our main goals is to have success. We are the record champion of our nation and we also want to be the best eSports team. In the long-term we want to celebrate international successes. SK Rapid, winner of the eSports champions league title – sounds great, doesn’t it? Last but not least, eSports offers a lot of new opportunities

to strengthen existing partnerships and to find new ones. In a small market like Austria, eSports could be the key for some really big partnerships.

How did your fans react to your decision to enter eSports and did new fans join Rapid because of it?

Simon-Peter: Their feedback was very positive. For example, no club welcomed more players and fans at it's eBundesliga club event.

Lorenz: 650 guests, 128 players, 8 partners – the club event was amazing. By the way, one of the players broke the world record in scoring the fastest goal in FIFA 17. Actually, our club event went down in history.

Are eSports an opportunity to reach new audiences and engage them?

Lorenz: Definitely. The tricky thing will be to connect with them long-term...

Simon-Peter: ...and to keep them in our stadium. Won't be an easy task for us.

Do you already have „eSports-only“-sponsors?

Simon-Peter: Yes, XBOX signed a contract with us last season. We feel optimistic ab-

out extending the contract.

Can eSports add relevant revenues to the club's all-over revenues?

Lorenz: Yes. In the interest of full disclosure we can say that the first eBundesliga season was very successful from a financial perspective. Furthermore, due to the enormous media echo around the premier season, our partners as well as SK Rapid could strengthen their brands sustainably.

What do you think is the future of eSports in football?

Lorenz: Growing, growing, growing. Just put in some good effort day by day and eSports will be a big factor within the next few years. It is important to be innovative without forgetting the basics. We should create new services, but also keep an eye on the hard work, like implementing eSports in our daily business.

Simon-Peter: It will be important to establish supra-regional associations and organization, like national associations, UEFA and FIFA. Tournaments and rankings are unclear at the moment. This will be an important task for the next months and years.



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