

# 1. PUBLISHABLE SUMMARY

## **Summary of the context and overall objectives of the project (For the final period, include the conclusions of the action)**

### ABOUT GLOBAL CONTENT ALLIANCE (GCA)

Global Content Alliance (GCA) is a strategic partnership of European clusters, created in 2018 to promote the internationalisation of its member companies in the field of “smart media” and especially around “live sport & entertainment” and “smart venues”. GCA focuses in particular on large companies, SMEs and start-ups who wish to enrich the "Live Experience" with creative content and innovative technologies.

On that respect, Global Content Alliance (GCA) aims, on the one hand, to create a new offer of content formats, services and technologies that can meet the new needs of international audiences and, on the other hand, GCA aims to support SMEs in their internationalisation processes by intensifying networking, collaboration and knowledge-transfer at European level and beyond.

To achieve these objectives, the GCA Consortium wants to work closely with new partners, both European and international, in its future activities, to support start-ups, SMEs and large companies in their internationalisation processes, inside and outside Europe.

### CONTEXT

The digital revolution has deeply impacted the production, distribution and reception modes of media content. 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.

In this new changing environment, which weights €2 trillion in 2017 (see "2017 Top Markets Report – Media and Entertainment – sector Snapshot”, US Department of Commerce), 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.

These audiences, eager of live sport and entertainment are also more and more connected and have accordingly many new expectations in terms of consumption of media & contents.

It is therefore not surprising that the market of the connected stadium (also called “smart stadium”) is also facing new challenges: 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; people 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.

### BACKGROUND

These transformations in the media & entertainment market have led to a need for new business models going beyond traditional, mainly advertising revenues streams, to cope with current and further technology innovation and market trends.

GDP share to grow, along the following main trends:

- Irruption of data as enabler of value generation within the data-driven economy,
- Convergence of business models of stakeholders from media, content, telecom and broadcaster,
- Customization of products and services aiming at empowering users and offering differentiation.

What does this mean for sports? First, we believe, it means opportunity. Barriers to entry have never been lower. More markets around the world than ever before are receptive to the power of sports. It's

never been easier to reach millions, even billions, of fans. This vast opening up of opportunity brings an increase in competition: for sponsors, for media revenue, for fan attention. Sports must work harder than ever to obtain, retain and grow their fan bases and revenue streams. (2018 Top 5 Global Sports Industry Trends”, Niesen Sports)

## CHALLENGES

One of the main challenges for SMEs in the media sector has become the need to create value on different media and platforms, an approach known as Transmedia, where content is definitely the rule! Another challenge concerns the rise of future technologies and trends for media sector such as immersive technologies, artificial intelligence and the Internet of things, new network capabilities, hyper-personalization (customisation of the content) and social medias.

Finally, and as already mentioned, the media sector current business models are being reshaped by challenging technology and market trends. Media sector is moving to even more personalized services, conceding more power to users, aiming at having users more engaged by powering emotional and social connectivity with the content and people.

## STRATEGY OF INTERNATIONALIZATION (conclusions of the actions)

The GCA partners has elaborated an Internationalization Strategy Study which is considered as a strong basis for the elaboration of the Implementation phase .

Here are the main results:

1. Four target countries have been selected: USA, Canada, China, South Korea
2. An analysis of the four sports markets and of the most relevant and potential targets in each target country has been realised (1. Right holders e.g. sports leagues, sports clubs; 2. Distributors, e.g. TV broadcasters, stadium owners, Internet Giants and 3. Brands)
3. The GCA's Internationalisation Strategy is based on 5 pillars:
  - a. Pillar 1: The GCA Brand Building / Brand Marketing;
  - b. Pillar 2: Strategic Partnership (1. with Global Brands/Global Players, e.g. FC Bayern München, Red Bull, SAP, IBM, etc.; 2. with key players in target countries; 3. with GCA network in target countries, regional or national, or EU representations);
  - c. Pillar 3: Creation of a European Meta-Cluster (Enlargement of the GCA consortium to other European partners coming from other European regions
  - d. Pillar 4: Identification of innovative "Smart Venue" projects;
  - e. Pillar 5: Identification of other Niches Markets (e.g. smart city or mobility).

## **Work performed from the beginning of the project to the end of the period covered by the report and main results achieved so far (For the final period please include an overview of the results and their exploitation and dissemination)**

# Project Management (WP1):

# A 2 days kick-off has been organised (Paris, 11-12 January 2018)

# The Project Quality Plan was achieved on March 18.

# Collaborative tools have been put in place, including a cloud allowing the sharing of documents, and a Teleconference tool allowing TC meetings.

# At least one monthly TC Meeting is organised. To date, 16 teleconferences have been organized. The minutes of these TC Meetings are shared within the consortium on the GCA cloud.

# A 1st general Assembly has been organized in Munich (Oct. 25, 2018) to allow the consortium to discuss in person management questions and the next steps of the project.

- # A 2nd general Assembly is being prepared (Paris, Feb. 18, 2019)
- # An advisory board has been defined to expertise the global trends and regional analysis as well as the international strategy. This advisory board has been invited to take part to a brainstorm session scheduled in Paris on Feb. 19, 2019.
- # The analysis phase (WP2) that is feeding the elaboration of the international strategy (WP4) has been achieved at the end of M8 (Aug. 2018):
- # A SWOT analysis of each cluster has been done, based on a common survey sent to all clusters members and on roundtables with best regional experts organised by each cluster. The global mapping of the consortium has been achieved on M8 (Aug. 2018).
- # An economic intelligence work was launched on the main issues of the renewal of the Live experience in sports and entertainment fields, and also on global trends (studies and white papers have been collected on the GCA Cloud).
- # At the end of WP2, several targeted third countries have emerged on which the consortium has collected documentation (facilities, taxes, trading chambers, contacts, etc.) before including them (or not) in the different internalization scenarios.
- # Partnership Building (WP3) with the goal to sustain a long term collaboration plan (including beyond the project' life) for the GCA European Strategic Cluster Partnership:
- # Elaboration of one Partnership Agreement and a Memorandum of Understanding ;
- # Signature of the Partnership Agreement by Pole Media Grand Paris, TWIST, Transmedia Bayern and Media Evolution ;
- # Enlargement of the GCA consortium to 5 other European clusters through the signature of a MoU
- # Enlargement of the GCA consortium to 3 partners located outside of the Cosme Zone : ThinkSport (Switzerland), Brazos Valley Economic Development Corporation (Texas, USA), European American Enterprise Council (California, USA)
- # Identification of 23 new funding opportunities in order to support the development of the GCA consortium beyond the project' life
- # The Internationalization Phase (WP4) that will feed the Implementation phase started on M8 (Aug. 2018).
- # A Strategic Workshop in Munich (Oct. 25, 2018) allowed the consortium partners to agree on their global internationalization strategy.
- # An extensive international market analysis on the potential targeted countries (more than 10) has been done by the consortium.
- # The economic intelligence work is being continued with the intensification of meetings with stakeholders, of researches, of participation in international events on fan experience, and with the identification of the right partners. The result of this work has been summarized in the Internationalization Strategy Document (Deliverable D4.1.). The strategy allowed to narrow the scope of the targeted countries to 4 (Canada, USA, South Korea and China) and to develop a global strategy to approach them. The consortium is now working on the implementation phase.
- # Organisation of the implementation workshop with the advisory board in Paris on Feb. 19, 2019.
- # Implementation plan has been written and define the next steps of the work to be done by the GCA members.
- # Communication and dissemination (WP 5):
- # A logo has been created (Jan 18)
- # A Website has been created (Jan 18) (<https://www.globalcontentalliance.eu/> )
- # GCA is active on social networks: [https://twitter.com/gcalliance\\_eu](https://twitter.com/gcalliance_eu) ; <http://www.facebook.com/GlobalContentAlliance/>

# Communication and Dissemination Plans have been finalised (WP5)

# Communication and dissemination events (B2B Day in Paris; SXSW in Austin; Medien Tage in Munich...) have been organised or attended on which regular reports on have been published.

**Progress beyond the state of the art, expected results until the end of the project and potential impacts (including the socio-economic impact and the wider societal implications of the project so far)**

The actions led during the first strand of the project make us realised that the European companies involved in the “live sport and entertainment” fields are disseminated all over Europe.

Our project will allow them to be gathered and to create a real European task force in the field, with the ambition to reinforce the existing ecosystem and in the future to support the development of new European players and to attract foreign investments.

In the medium and long term, we envisage the following actions:

1. In order to reinforce the existing ecosystem, we aim at:
  - a. Enlarging the existing GCA consortium to other European clusters and worldwide key players of the industry ;
  - b. Enlarging the existing GCA consortium to other partners outside of Europe (USA, Asia, Australia, Africa) ;
  - c. Creating a European meta-cluster with its own legal entity.
2. In order to support the development of new players in the field, we aim at:
  - a. Developing of a European crossborder tech&content accelerator (in the spirit of a Digital Innovation Hub) with the support of the industry, the universities, the research centres, the local incubators, the public and private investments funds, etc.
3. Development of other markets and niche markets related to the Creative Industry

**Address (URL) of the project's public website**

<https://www.globalcontentalliance.eu/>

**GCA**

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ALLIANCE**

