

STADIEM

STARTUP DRIVEN INNOVATION IN EUROPEAN MEDIA

D5.5 IMPACT CREATION AND ASSESSMENT REPORT V2

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Abstract	This deliverable describes the results of the impact assessment for the period M19-M36. The impact assessment is performed on three levels: ecosystem impact, community impact and communication and dissemination impact. The impact assessment makes a comparison where relevant between the beneficiaries of the first cycle of the Innovation Program and those of the 2 nd cycle and addresses if
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	changes in program, community activities or phase objectives in cycle 2 based on cycle 1 learnings had a result and positive impact. The deliverable addresses the exists and business deals of the 2 STADIEM cohorts and details based on these outcomes the impact and relevance of STADIEM for European media/mediatech policy.
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* R: Document, report (excluding the periodic and final reports)



DEM: Demonstrator, pilot, prototype, plan designs

DEC: Websites, patents filing, press & media actions, videos, etc.

OTHER: Software, technical diagram, etc.



EXECUTIVE SUMMARY

This deliverable gives an overview of the impact creation activities framework for the European mediatechnology scaling and corporate piloting project STADIEM for the period April 2022 to September 2023 (M19-M36). It is the second impact assessment report, after D5.4 '*Impact creation and assessment v1*' which was covering the period October 2020 to March 2022 (M1 to M18).

This second impact assessment deliverable addresses the improvements, changes, and comparative results since the previous report. Important here is the coverage of impacts due to the general project strategy that moved from an online only approach due to COVID-19 measures in 2021 and 2022 to a more hybrid formula combining in real life actions with online interactions from the end of the sanitary travel restrictions since May-June 2022.

The impact assessment dives into the community building activities and measure their impact on the beneficiaries and consequently the overall media tech ecosystem (WP1). It serves as a measurement of the impact of STADIEM's activities on highlights its relevance as an innovative and multi-functional program.

The Impact assessment methodology used to generate insights was devised during the second half of the project by the impact task lead Storytek and validated by the consortium. This minimum viable impact assessment concept is presented here and can be read more extensively in D5.4

It also demonstrates the three verticals where STADIEM focuses its impact assessment: ecosystem, program framework and its delivery as well as communication and dissemination.

Finally, the deliverable focuses on the suggested implementation of the impact assessment. It presents the key deliverables across the project where impact results were presented, as well as the three-year implementation process for impact result analysis and publication, that started to publicize the impact results from M24 onwards, based on the findings from the first cohort of STADIEM supported scale-ups.

Main outcomes and lessons learned.

Regarding the ecosystem, this report shows the results from data taken from questionnaires to start-ups and corporates: the impact of high-quality experts, master classes and individual training, mentoring for building a sustainable business case, and expertise from former founders to understand scaling-up efficiently. Start-ups in OC1 and OC2 were at seed-stage and STADIEM developed and tailored solutions to adapt to an earlier stage than expected to maximize viability, success, and sustainability. STADIEM also was important for exists, business deals and investments rounds for the beneficiaries and has shown its relevance and contribution to European Media Policy agenda. STADIEM can be considered as a blue print model for the digital champions agenda. STADIEM serves as a model for successful market intervention, showcasing how targeted support and strategic partnerships can overcome barriers to innovation. Its success underscores the importance of EU backing in levelling the playing field, particularly for start-ups and SMEs facing stiff competition from well-established entities.

The community activities analysed for this deliverable stress the effects of regular activities and a strong relationship between start-ups and their corporate: steady-paced meetings between mother hubs and beneficiaries, as well as start-ups and corporate communication: STADIEM proved to be a strong facilitator to help start-ups and corporate align on their timelines and understand each other's challenges and needs.



This report regards the impact creation activities of the project, covering work done in each reporting period by all active tasks in WP5 (except T5.3) related to communication and dissemination, community building, and ecosystem building. It also presents the feedback collected for the different areas, dimensions, and types of stakeholders during impact assessment. Activities such as tailored workshops with experts and event attendance within the STADIEM project have a significant impact on the viability and sustainability of the beneficiaries.

This last and final report that extends to M36 includes lessons learned from OC1, applied recommendations in OC2 and further lessons learned, but also recommendations for the ecosystem and STADIEM in a potential future form. Any update in strategy and planned activities will also be provided as appropriate.



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ABBREVIATIONS

- **MCB:** Media City Bergen, project partner
- **VRT :** Vlaamse Radio en Televisieomroep, project partner
- **STK:** Storytek, project partner
- **NMA:** Next Media Accelerator, project partner
- **EBU:** European Broadcasting Union, project partner
- **F6S:** project partner
- **MAR:** Martel, project partner
- **Cohort:** the group of beneficiaries belonging to one of the two cycles of the Innovation Program. In each cycle, the cohort was composed of 40 in the Match Phase, min 16 in the Develop Phase, min 12 in the Integrate Phase and min 4 in the Pilot Phase
- **Open Call 1:** the process of getting and evaluating applications for the STADIEM Innovation Program and the first cohort of beneficiaries. Open call 1 ended in May 2021)
- **Open Call 2:** the process of getting and evaluating applications for the STADIEM Innovation Program and the second cohort of beneficiaries. Open call 2 ended in April 2022)
- **OC1:** abbreviation, referring to the first cycle of the STADIEM Innovation Program that had 4 phases (match, develop, integrate and pilot) and one cohort of beneficiaries (May 2021- September 2022)
- **OC2:** abbreviation, referring to the second cycle of the STADIEM Innovation Program that had that had 4 phases (match, develop, integrate and pilot) and one particular cohort of beneficiaries (May 2022-September 2023)



1. INTRODUCTION

This D5.5 “*Impact creation and assessment report v2*” was built on a custom impact assessment methodology to fit STADIEM’s lean and agile strategy. In a timeframe spanning from M19 to M36, following up directly from the first impact assessment report (D5.4 ‘Impact creation and assessment report v1 for the period M1-M18), we gathered various data points which we analysed using analytics and sentiment tools. This provided us with time efficient, unified, and measurable results to align the answers and obtain usable insights.

All hubs from this program contributed to this deliverable: Sandbox Vlaamse Radio- en Televisieomroep (VRT Sandbox), Media City Bergen (MCB), and Next Media Accelerator (NMA), but also F6S and Martel Innovate. We used reports from each hub from the OC1 Develop Phase and OC2 Develop, Integrate and Pilot phases, reports from each start-up from the same phases, data from the OC1 reports from F6S and content from the “Outreach and impact creation activity report” for the communication and dissemination impact section of this deliverable.

This deliverable is divided into three chapters. Chapter 2 presents the ecosystem impact and has four subsections. Section 2.1 presents the questionnaires that provided the data. Sections 2.2 and 2.3 provide the analysis of the data gathered from the start-ups and corporate feedback questionnaires sent during the OC1 Integrate phase and the data from the OC2 Develop, Integrate and Pilot Phases questionnaires to the beneficiaries and corporates that participated in the program. Section 2.4 highlights the key findings that are placed in perspective with the OC2 cycle, followed by recommendations that were implemented to optimize the impact of STADIEM after the end of the current program and its future exploitation scenarios. The last sections discuss the exists and business deals of the beneficiaries due to STADIEM and the relevance and contribution of STADIEM to the European Media Agenda.

Chapter 3 focuses on the community impact. Using the same principles and reports from the previously mentioned phases, we give an overview of the community activities and achievements, based on activity trackers from each hub and corporate feedback from their collaboration with each start-up and hub. We use this data to report on key findings and recommendations for the future of this program beyond the 2 Open Calls.

Chapter 4 focuses on the communication and dissemination impact: we present an overview of the activities, goals and objectives of Martel Innovation’s work from M18 to M36, and will provide, comparison, key findings and input regarding both Open Calls and after.

Table 1 below sums-up the activities from M18 to M36, starting from the end of the period covered in the first Impact Assessment Report (D5.4), until the end of the program. It shows the activities that were run and serve as the broader project background for the data analysed and reported in the present deliverable. The table shows that there is an overlap of activities of the 2 cycles, OC1 and OC2, in May and June 2022. Kick-off activities, as well as mid-term activities, end-of-phase questionnaires and activity tracking will be further analysed and explained in the deliverable, as well as the outcomes of the analysis.



Date	Activity
5 May 2022	OC2Match Phase kick-off meeting
7 Jun 2022	OC1 Pilot Phase kick-off meeting
1 Aug 2022	OC2 Develop Phase kick-off meeting
18 Nov 2022	Develop phase mid-term review
1-4 Nov 2022	Develop Phase mid-term review meetings
13 Dec 2022	Integrate and Pilot Phase introduction
30 Jan-3 Feb 2023	Develop Phase corporate meetings
13 Feb 2023	OC2 Integrate Phase kick-off meeting
13-18 Mar 2023	Integrate Phase mid-term check-ins
19 Apr 2023	Questionnaire to start-ups
19 Apr 2023	Questionnaire to corporate
02 May 2023	OC2 Pilot Phase kick-off meeting
03 Jul 2023	Questionnaire to hubs
15 Sep 2023	Pilot End-of-Phase start-ups questionnaire
19 May 2021 - M36	Activity tracking

TABLE 1: TIMELINE OF THE ACTIVITIES FROM MATCH TO PILOT OF THE 2ND CYCLE



2. ECOSYSTEM IMPACT: START-UPS AND CORPORATES

2.1 OVERVIEW OF THE METHODOLOGY

The methodology used for this deliverable was mentioned in the previous Impact Assessment report (D5.4): STADIEM Minimum Viable Impact Assessment (MVIA) strategy's second step - identify, map, and measure the outcomes of activities. The STADIEM consortium developed it for the first version of the deliverable.

Variables:

After completion of OC2, it resulted in several metrics detailed in the present deliverable:

- Start-ups' countries of origin
- Composition of founders / genders
- Business metrics such as ARR, leads generated, ...
- Use of resources within the start-ups: how much time was devoted to the program.
- Valuation and investments

In addition to that, the methodology incorporated the corporates' feedback (develop in sub-section 3.3) and the STADIEM communication and dissemination plan (section 3).

These variables give a clear understanding of the progress made by the start-ups in terms of scaling-up, sustainability and visibility.

Several questionnaires were sent to beneficiaries during OC1 and OC2 as a base for the Impact Assessment Report that focuses on the Core Area 2: STADIEM framework and program deployment impact at M36. The impact is measured throughout open calls, framework deployment, program deployment, including pilots, and the impact of/on stakeholders involved in those processes.

The data gathering measures the qualitative impact of STADIEM on the beneficiaries and analyses the outcomes at M36 (September 2023). Its purpose is to analyse the financial impact of the program for the start-ups as well as to gather data about the beneficiaries before and during the program in the 2 cohorts. Sentiment oriented questions were handled about:

- Beneficiaries' expectations
- Impact regarding visibility: travels within the program, financing individual travels for the beneficiaries, festivals, and overall media tech events presence, STADIEM "stamp" benefit for the beneficiaries...
- Business capacity: number of acquired leads thanks to the project, number of clients won thanks to the project, investment raised before and during STADIEM, number of paying customers, ARR...

Sustainability: building a strong, adaptable, and sustainable business case, long-term revenue, and profit building, scaling-up, growing the beneficiaries customer base



- Viability: awareness of the beneficiaries' value proposition, negotiation ability with corporate, legal awareness, focus of the beneficiaries on building a business case as much as building their solutions

Besides the first questionnaire, used for the first Impact Assessment report for M1-M18, all the OC2 questionnaires were submitted via STADIEM's toolkit Airtable, to allow consistency and easier data extraction and analysis. It was also the case for the corporate questionnaire, sent-out during the OC2 Integrate Phase of the program, between February and April 2023.

One first outcome of these questionnaires is a mapping of the start-ups in OC1 and OC2. The main goal was to compare both cycles and to highlight the main similarities or differences, as well as to see the impact of the program on the evolution of the start-ups.

○ 2.2 RESULTS AND FINDINGS OF THE START-UPS QUESTIONNAIRES

The main takeaway from both OC1 and OC2 is that both for the OC1 and the OC2, STADIEM beneficiaries were mostly at a very early-stage, in a growing phase, and only 65% of them benefited from several paying customers. The needs and challenges from the beneficiaries were very similar in OC1 and OC2, and we will see below what entails from being at an early stage at the beginning of and during their participation in STADIEM.

● Countries of origin

The beneficiaries in the program come from relatively diverse regions of Europe (see Table 2 below). Regarding the countries of origin, head offices come from 14 European countries. Germany retains the first position and the UK the second in both Open Calls. However, there is a notable difference in diversity between the total number of participants in the two Open Calls: both Belgium and the Netherlands are represented in each call, yet the 2nd Open Call saw increased representation from Southern (France and Spain) and Western (Ireland) regions. In contrast, OC1 had more representation from Baltic countries (Latvia, Estonia) and Northern regions (Norway, Finland).



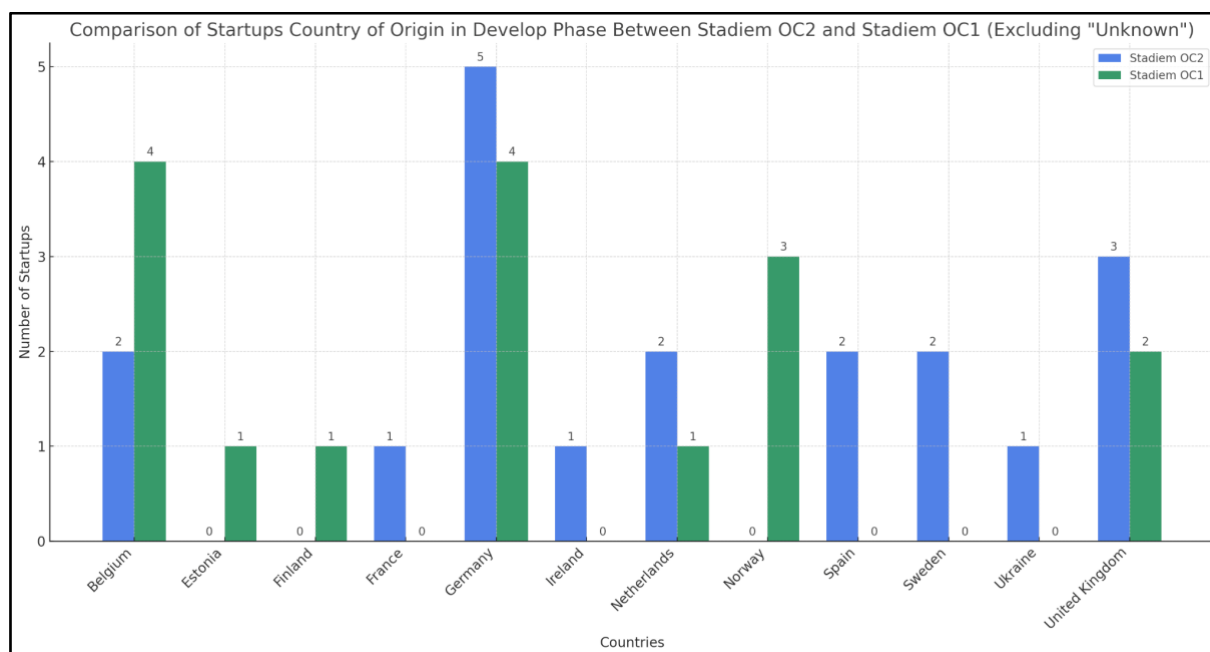


TABLE 2: COMPARISON OF STARTUPS COUNTRY OF ORIGIN IN DEVELOP PHASE OC1 (1ST CYCLE) AND OC2 (2ND CYCLE)

• Employees

Two main insights can be discerned on the level of employees. First, there was a slight increase in the number of people working in each beneficiary if two open calls are compared. During OC1, when asked, the beneficiaries were employing an average of 8.6 employees. In the OC2, this number for the Develop Phase rose to 9.9 employees on average, 12,44 male and 7,78 female.

Secondly, in OC1 and OC2, there is a significant number of start-ups with 2 to 5 employees and only two above a 20 employees threshold (see Table 4: Start-up 7: 35 employees and start-up10: 37 employees). Most start-ups are small, in the category of micro enterprises and not scaling-up yet.

There also seems to be a gap between the smallest size start-ups and start-ups that employ more than 30 employees: tables 3 and 4 (below) show that there are no start-ups, between 20 and 30 employees in OC1 or OC2: the number of employees is not spread out evenly and most of the start-ups remains under 20 employees. There are no start-ups above the limit of 37 employees. One takeaway is that all start-ups are very small to mid-size and all, in OC1 and OC2, have the need of scaling-up to corporate customers, hence STADIEM's relevance as a scaling-up facilitator.



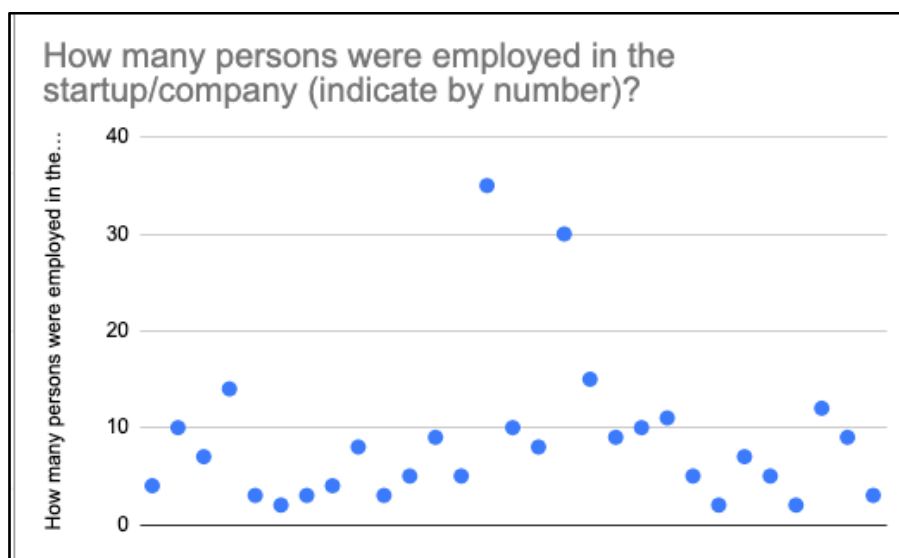


TABLE 3: OC1 MAPPING OF NUMBER OF EMPLOYEES PER BENEFICIARY

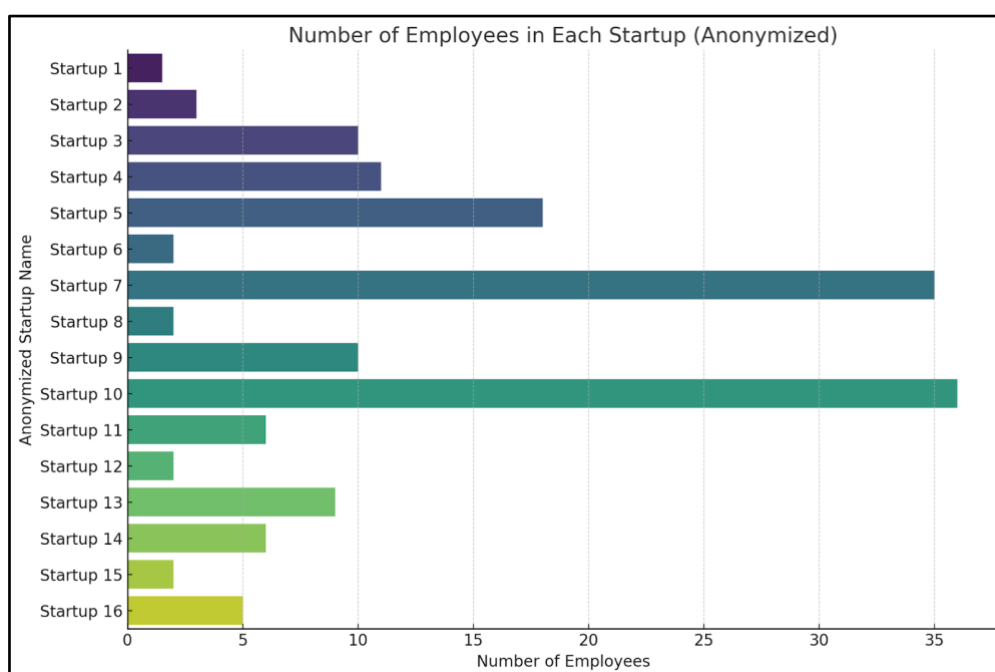


TABLE 4: OC2 MAPPING OF NUMBER OF EMPLOYEES PER BENEFICIARY

• Employees devoted to STADIEM: OC1 and OC2

A key observation from Open Call 1 indicated that the primary focus of the start-ups was majorly on the product itself rather than on scaling up, building a viable business case, or ensuring sustainability. To assess STADIEM's impact on the start-ups, it's vital to understand how the beneficiaries allocate their time and resources towards these objectives, beyond just developing their solution.

In the previous Impact Creation and Assessment report (D5.4), it was noted that during Open Call 1, on average, 2 out of 10 employees dedicated their time to sales. However, a slight

decrease was observed during Open Call 2, with only 1.3 employees on average focusing on sales, as opposed to product development.

For the Open Call 2 it was thus important to understand how many of the internal resources of the startups are used to focus on STADIEM and its specific timeline and tasks.

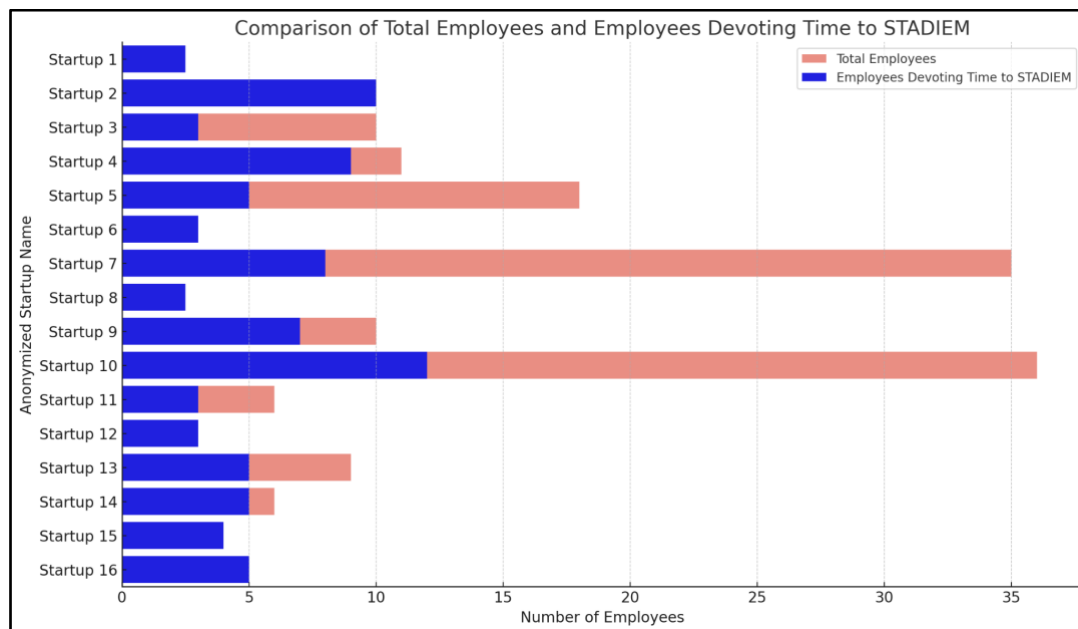


TABLE 5: NUMBER OF EMPLOYEES PER BENEFICIARY IN 2ND CYCLE (OC2): TOTAL (IN RED) AND ALLOCATED TO STADIEM (IN BLUE)

The chart highlights that start-ups with fewer than 5 employees dedicate their entire workforce to the STADIEM program. As the employee count ranges from 3 to 12 for STADIEM engagement, the average number of employees involved is 5.44, collectively contributing 157.75 hours, or an average of 28.9 hours per employee. Table 5 reveals a notable point; the three largest companies (Start-ups 5, 7, and 10) do not commit most of their staff to STADIEM. Among the 16 start-ups with 10 or more employees, only Start-up 3 has fewer than 5 employees participating in the program.

Concerning the beneficiaries' stages, 10 are in the "early/building up product" phase, 4 are in the "growth/scaling customer acquisition" phase, and 2 did not provide a response. These data underscore the reliance of STADIEM OC2 start-ups on the financial support, mentorship, and training offered by STADIEM during their scaling-up phase, as reflected in the impact-related queries directed to them (see Section 1.2).

● Investment

Another key result of both Open Calls data analysis is that the beneficiaries' main focus does not seem to be to acquire investments before they enter the program, and it is also limited once they are in STADIEM: 75% had not raised any investment prior to entering the project and if so, half of the investments remained under the 500K€ mark:

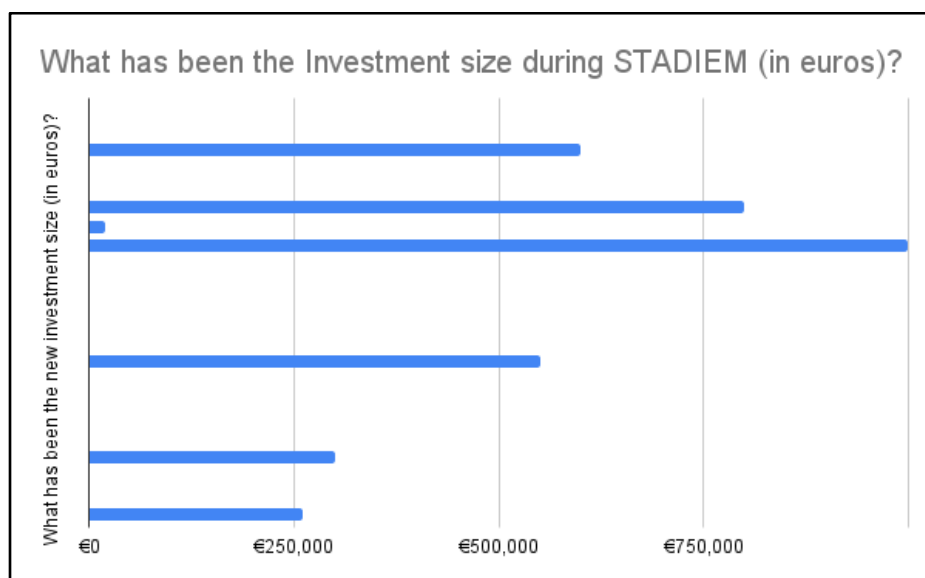


TABLE 6: INVESTMENT SIZE DURING STADIEM (IN EURO) FOR 1ST CYCLE (OC1)

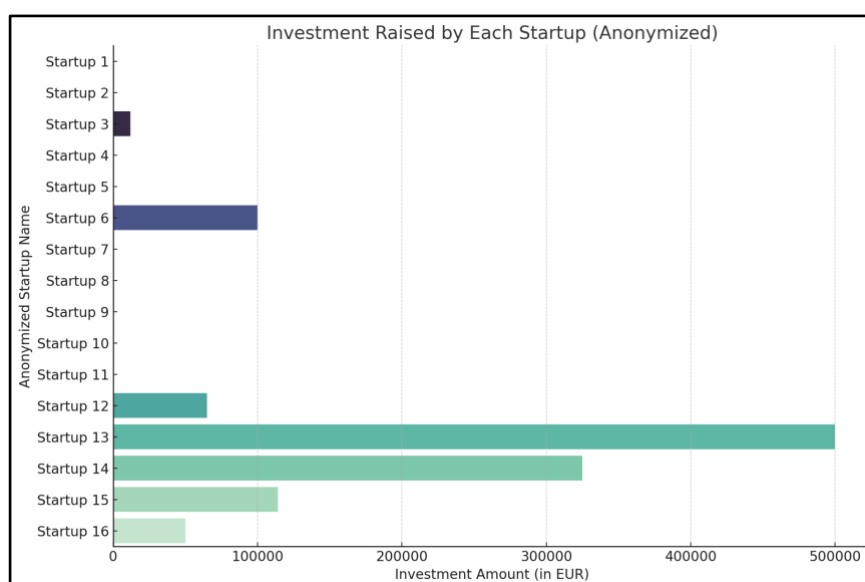


TABLE 7: INVESTMENT SIZE DURING STADIEM (IN EURO) FOR 2ND CYCLE (OC2)

For the OC2 batch, Table 7 above shows that the maximum investment amount raised for a start-up was not greater than 500.000k and that the average amount was 72.875 euro. Also, 50% had not raised any investment yet and very few go over the mark of 200K euro.

When these OC2 numbers are compared with the OC1 numbers (see Table 6), overall trends can be discerned: the start-ups' focus is not on raising investment at their early stages and they favour a product-oriented approach, instead of securing sustainability for their companies and being educated financially before they develop their solutions: very few go over the 200K€ mark, and they seem to need more guidance as to when and how to raise investment early in their process, which is why financial awareness and guidance was a key subject during OC1 and remained so in OC2 with notably STADIEM's Investor Week in mid-November 2022: the start-ups were invited to travel to go to two major international start-up ecosystem events – The Big Score in Ghent (Belgium) and Slush in Helsinki (Finland), within a week to pitch their solutions to investors, get to know and interact with said investors, develop optimal strategies

and learn how to sell to their target audiences. This was a major opportunity for visibility and developing a strong network.

It was also a great challenge, because start-ups were mostly at seed-stage and did not always have realistic or sustainable approaches and knowledge on how to raise investment, who to turn to for expertise or how to make new leads. They highly benefited from STADIEM team and partners introductions to strengthen their networks and find business and client leads, but also mentoring opportunities or expertise from successful fellow founders.

As a consequence from these business opportunities, when beneficiaries were asked about STADIEM's relevance in acquiring new investments, the average note on a scale from 1 to 5 with 1 being irrelevant and 5 being very relevant) was for the Develop Phase 3.25 (the Phase during which the Investor Week was held), indicating that overall they acknowledged the relevance of the programme quite early for financial mentoring.

- **Valuation**

The average valuation for start-ups during OC1 was estimated at 2.2 million euros (M€). However, during OC2, only half of the start-ups responded to the valuation inquiry. The valuations provided by the respondents ranged from 0.9M€ to 10M€, averaging at 4.3M€. This average for OC2 is double that of OC1, but given that 50% of start-ups didn't respond, it may imply that the difference in valuation between the two Open Calls could be minimal. It also suggests a possibility that the beneficiaries may not have a clear understanding of their valuation nor they are in an investment cycle where valuation is prioritized.

The data reflects that the beneficiaries from both OC1 and OC2 may be in a precarious position before joining STADIEM, lacking a robust strategy and timeline. In both the media-tech ecosystem and the broader start-up ecosystem, such inadequacies are major contributors to failure. These figures highlight a learning opportunity for STADIEM to address these challenges during the future iterations of the program.

- **Impact of STADIEM in acquiring new business leads and clients: OC2**



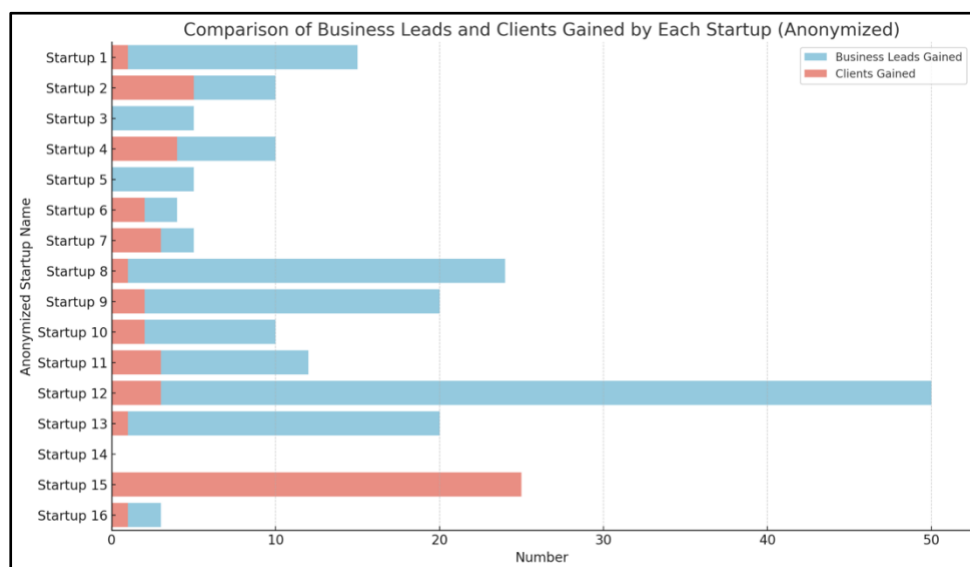


TABLE 8: COMPARISON OF BUSINESS LEADS AND CLIENTS GAINED BY EACH BENEFICIARY IN THE 2ND CYCLE (OC2)

The initial Impact Assessment (see D5.4 'Impact creation and assessment report v1') contained limited data regarding the changes in Annual Recurring Revenue (ARR) as a key metric for the startups improvement in the program. However, a thorough analysis during OC2 illustrates STADIEM's impact on client and business lead acquisition, as detailed in Table 8 above.

- Up to 50 business leads were consistently reported across both versions of the Impact Assessment analysis (v1 and v2), covering both cohorts. STADIEM assisted beneficiaries in securing up to 50 business leads and acquiring up to 25 new clients, significantly leveraging STADIEM's network and introductions for strategic scaling-up.
- At the end of the Develop Phase, the average number of new clients was 3.31, compared to an average of 14.75 clients before the program, marking a 22% increase. The average rating for STADIEM's relevance in acquiring new clients was 4.56, indicating a high level of relevance.
- The average rating for STADIEM's relevance in attracting investments was 3.56, showcasing a positive impact. STADIEM served as a "quality stamp" for potential investors, aiding beneficiaries in securing more investments than they could have otherwise.
- The Annual Recurring Revenue (ARR) for start-ups, initially averaging 192,793€ for OC1 and 231,083€ for OC2, increased to an average of 237,660€ for OC1 and 334,587€ for OC2 during the program. This represents an ARR increase of 18.79% for OC1 and 30.9% for OC2, elevating the overall program impact of ARR by 24.85% at the mid-point of the program.

Table 9 depicts the results for both cohorts (OC1 and OC2) on key metrics:



Indicator	OC1 number	OC2 number	Key explainer
Number of Leads	up to 50	Up to 50	OC1 and OC2 start-ups benefited in the same in capacity from STADIEM's network and facilitation
Number of clients	n/a	Up to 25	OC1 and OC2 start-ups benefited in the same capacity from STADIEM's network and facilitation
Average ARR	192.793€	231.083€	OC1 start-ups participated in STADIEM in 2021, during COVID, when activities had slowed down significantly. OC2 was mostly post-COVID, when traveling was possible and when events had reopened, which can explain the almost 25% increase in ARR difference between OC1 and OC2 start-ups.
Valuation	2.2M€	4.3M€	In the OC2 questionnaire, 50% of the start-ups who answered kept their valuation undisclosed, and OC2 number could be closer to OC1. These results are interesting in showing a potential reluctance in disclosing numbers that would be considered unsatisfactory

TABLE 9: KEY METRICS AND COHORT 1 (OC1) AND COHORT 2 (OC2) SCORES

○ 2.3 OVERVIEW OF CORPORATE FEEDBACKS IN OC1 AND OC2

Corporate feedback is essential for gauging the health of relationships between start-ups, mother hubs, and how stakeholders develop viable methodologies before the Integrate phase to refine their products and business cases. The insights from the two cycles and the associated feedback provided a broader perspective on these relationships and the evolution from the 1st to the 2nd Open Call, along with the impact of changes implemented.

▪ 2.3.1 Communication between corporates and beneficiaries

During OC1, STADIEM encountered early communication challenges, particularly in understanding corporate timelines and identifying relevant project owners. To address these issues, measures were taken in OC2 to provide information and reports earlier than in OC1, aligning better with corporate timelines and start-up workloads. This adjustment brought clarity for beneficiaries and allowed more time for addressing queries from both start-ups and corporates.



To mitigate confusion observed in OC1, OC2 included preparatory meetings during the ongoing phase to introduce the next phase, making STADIEM's expectations clearer and helping beneficiaries better prepare for what lay ahead.

Workshops and expert meetings, initially organized in OC1 to assist start-ups in building efficient business cases, continued in OC2 due to positive feedback. However, OC2 saw more tailored workshops and masterclasses, for example Develop Phase's "Training Tuesdays" (see subsection 2.2.2) or the Integrate Phase "Bootcamp" 3-day workshop (see subsection 2.2.3), to address specific challenges faced by start-ups, such as pivoting strategies or resource shifts, thus empowering them and raising awareness of potential issues.

As detailed in the first Impact Assessment Report (D5.4), during OC1's Develop phase, the four hubs arranged demo meetings between start-ups and their corporate counterparts. Data from these meetings facilitated feedback analysis on collaborations during OC1's Match and Develop phases, revealing that a consistent weekly to bi-weekly engagement between corporates and start-ups fostered a successful agile approach.

This procedure continued in OC2 with similar outcomes. Corporates rated the start-ups' receptiveness to feedback and incorporation of it at an average of 4.3 out of 5, indicating strong collaborative relations (see table 10 below):

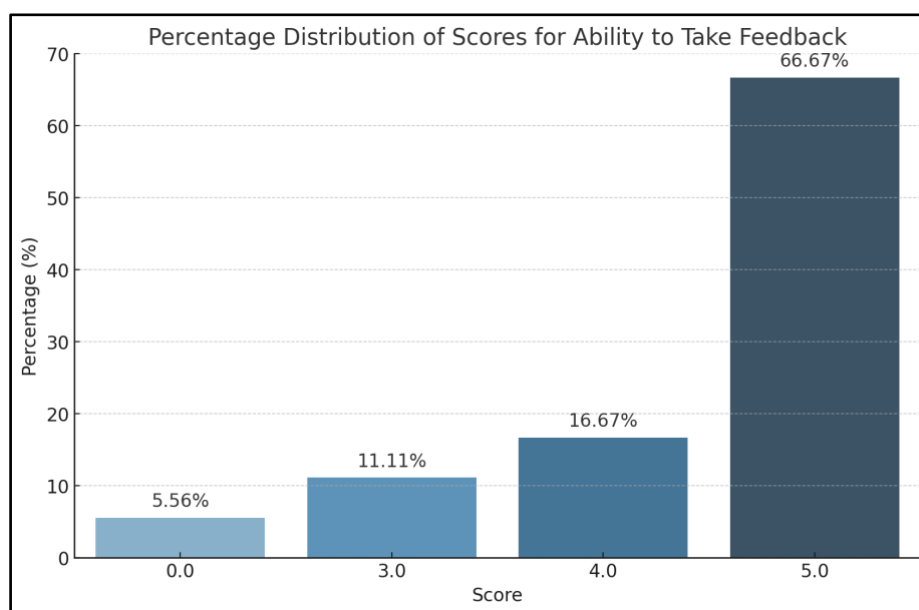


TABLE 10: 2ND CYCLE (OC2) PERCENTAGE DISTRIBUTION OF SCORE FOR ABILITY TO TAKE FEEDBACK

Across both Open Calls, corporates also described their experience with start-ups as positive, highlighting their enthusiasm, openness to feedback, problem-solving competence, and responsiveness. In OC2, corporates rated the start-ups' ability to deliver a solution at an average of 4.1 out of 5, praising their work ethic, adaptability, and willingness to tailor solutions based on corporate feedback, showcasing a flexible and collaborative approach towards meeting deployment requirements.

Several notable points emerged from both cohorts:

- Inconsistent or slow communication from corporates posed challenges for several start-ups, prompting the setup of report availability and outreach support in OC2 to enhance communication and maintain an agile approach.

- Corporates noted that start-ups failing to integrate feedback or clearly communicate their needs and timelines were more likely to face challenges in subsequent evaluations.
- Emphasizing agile implementation of use cases, especially during the short Integrate Phase, was identified as critical.

2.3.2 OC2 feedback from corporate about start-ups value creation

The corporate feedback also entails value creation. The OC2's outcomes show several very satisfactory metrics from the collaboration with start-up's regarding:

• Legal, compliance & SLA

On a scale of 1 to 5, 44.4% of corporates score a 5/5 for start-up's compliance and 27.78% score a 4 (see table 11), so 72,2% at a very high level. The cross analysis of compliance and SLA possession (see table 12) shows that the possession of an SLA is directly proportional to the higher compliance score: out of 8 start-ups that scored a 5/5 for compliance, only 7 had an SLA with their corporate. On the other end, the majority of the lowest scored start-ups did not have one.



TABLE 11: 2ND CYCLE (OC2) PERCENTAGE DISTRIBUTION OF COMPLIANCE SCORES



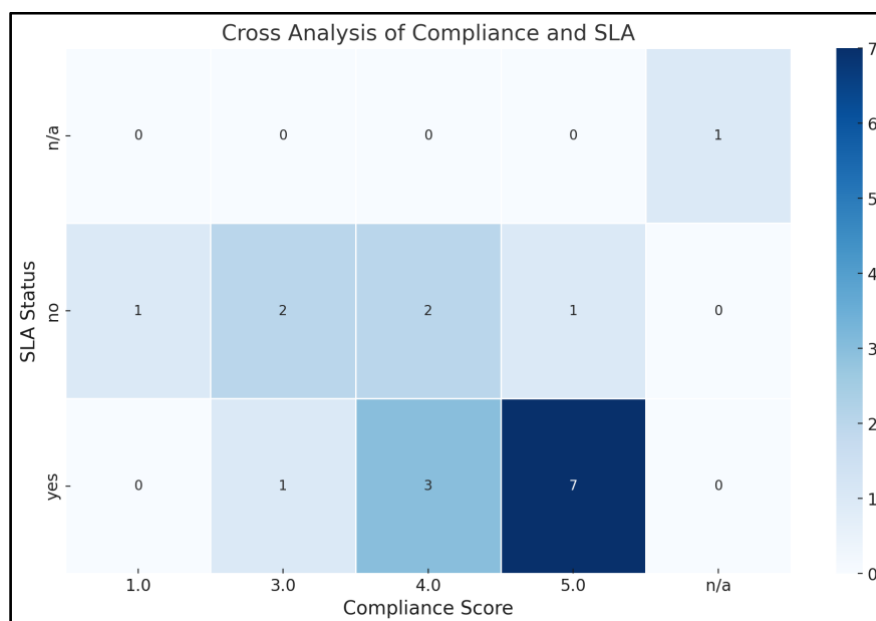


TABLE 12: 2ND CYCLE (OC2) CROSS ANALYSIS OF COMPLIANCE AND SLA

• Risk mitigation

Corporates were highly satisfied with the start-ups ability to mitigate risk: on a scale of 1 to 5, 66.66% of the start-ups scored 4 and 5, the highest scores available. STADIEM's focus on risk mitigation through training during Develop and Integrate Phases (for ex. in "Training Tuesday: Managing and preparing the corporate pilot: aligning startup and corporate expectations" in September 2022) were central in communicating, avoiding, and strategizing risks.

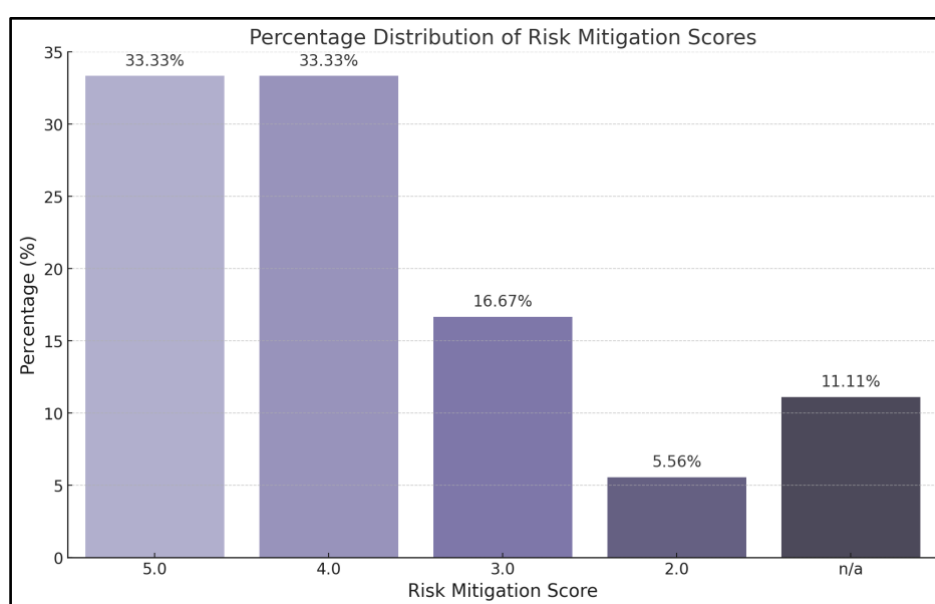


TABLE 13: 2ND CYCLE (OC2) PERCENTAGE DISTRIBUTION OF RISK MITIGATION SCORES

• Product readiness

Start-ups were, in both cycles, very focused on their solutions. They often focused less on building a viable business case early in the STADIEM collaboration. However, corporates gave overall positive feedback for product readiness: by reaching the Integrate Phase, more than 50% of the start-ups scored, on a scale of 1 to 5, a 4 or a 5 regarding their product readiness (see table 14).

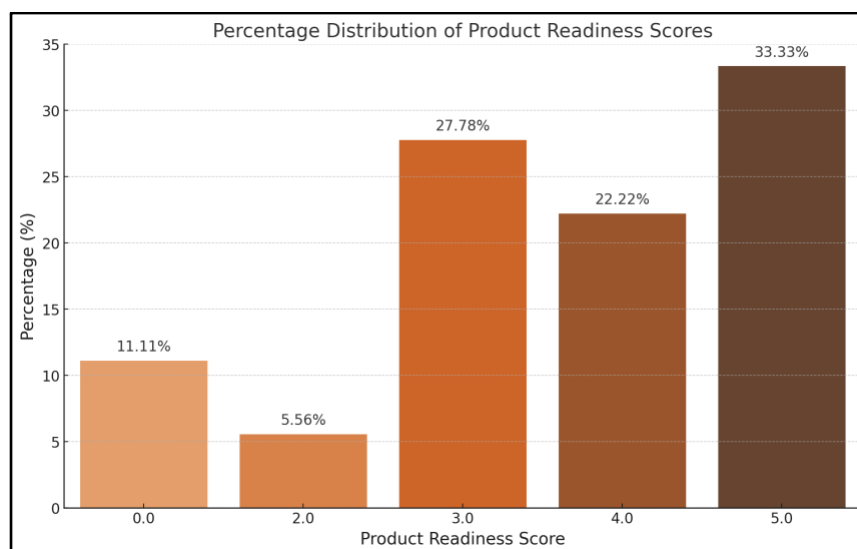


TABLE 14: 2ND CYCLE (OC2) PERCENTAGE DISTRIBUTION OF PRODUCT READINESS SCORES

• Pilot readiness

76.47% of corporates estimated that their start-ups achieved pilot readiness when asked during the OC2 Integrate Phase. Considering that the phase was not finished by the time of the questionnaire, it shows readiness ahead of the mandatory date fixed by the program.

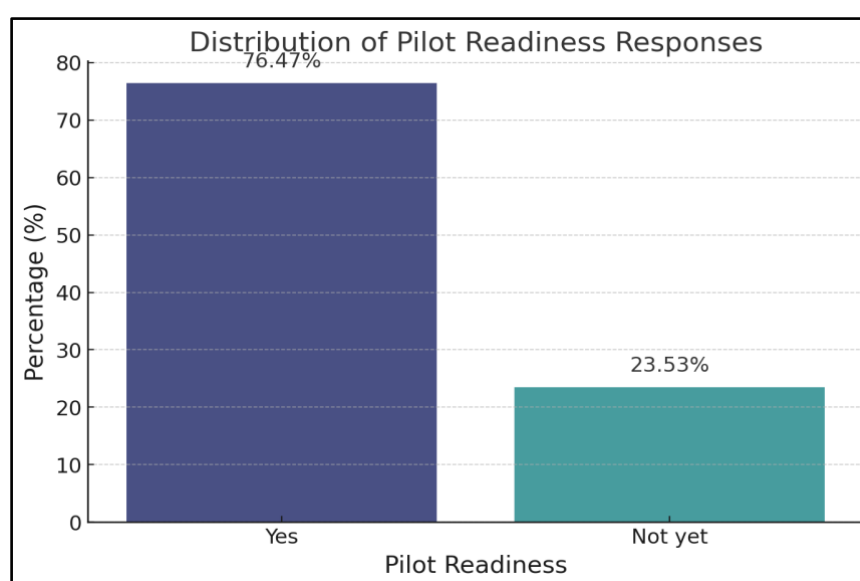


TABLE 15: 2ND CYCLE (OC2) PERCENTAGE DISTRIBUTION OF PILOT READINESS RESPONSES

- **Other aspects of value creation by beneficiaries**

Corporates also quoted several examples of value brought by start-ups:

1. **Audience Expansion:** Attracting new audiences or customers, which is crucial for growth.
2. **Operational Efficiency:** Enhancing productivity and saving time, often translating into cost savings.
3. **Cost Savings:** Direct reduction in expenses, either through manpower optimization, technology savings, or more efficient content creation and management. One key element in terms of cost savings being time, several corporates mentioned savings equivalent to several FTEs. These FTE's could keep growing in parallel to the solution. One corporate mentioned a "realistic time saving that corresponds to 1-3 FTEs. More is possible if the solution can successfully be scaled up and optimized: it would be worth around 10 FTEs (full-time equivalent) for our company". The emphasis here is on operational efficiency, with a specific focus on potential savings in FTEs. The statement suggests significant benefits from enhanced productivity, contingent on effective scaling and optimization of their solution. Another corporate quotes anticipated annual savings of "more than 900K and 300 resource hours, technology expenses, and content creation costs", emphasizing both the diverse and specific benefits the start-ups seeks to offer.

○ 2.4 ADDRESSING OC1 RECOMMENDATIONS IN OC2

Key findings regarding the OC1 beneficiaries have been taken into account and implemented for the OC2 beneficiaries: quality expert interaction, enhanced business training and gender disparity.

- **Quality expert interaction**

During the OC1 Impact Assessment feedback, most start-ups stressed the importance of having good quality speakers and experts along the program, to help them develop their product, but also relationship to their corporate and business cases. It was implemented notably during the Training Tuesdays during the OC2 Develop Phase, and with the organization of a "Bootcamp" during the OC2 Integrate Phase: a 3-day event with two experts (See also D4.4 '*Report on Integrate and Pilot phase – the 2nd cycle*'), opening with a masterclass and Q&A, followed with two days of 1-to1 meetings between each start-up and each expert individually. As for the OC1, the meetings were held virtually, even after COVID19 restrictions were lifted. It allowed more agility and the ability to replay the masterclass for potential start-ups which would not have been able to attend the mandatory event (only 1 out of 12 could not). The satisfaction level was very high, as the experts tailored their meetings to the start-ups, whose pitch decks they had received before. They were able to provide very valuable feedback and guidance for start-ups, which were, even as far as during the Integrate Phase, sometimes not focusing enough on their business cases or financial sustainability.

- **Enhanced business training**

The impact assessment questionnaires also proved that STADIEM, having improved the business-side of the training even more during the OC2, that great experts' input, 1-to-1 meetings and more tailored guidance was key to allow the start-ups to fully comprehend how to do present a pilotable product, but also to understand sustainability that fitted their own company and helped them address their corporate in a more efficient way early in the program,



and be ready to negotiate at a the right value before they had to do it. They were able to prepare ahead and pivot or invest in the necessary experts on their own if needed (for ex legal).

- **Gender imbalance**

Another key finding on the overall program is the gender imbalance: the 2 Open Call combined resulted in 87.2% male founders and 12.8% female. At employee level, the repartition is 66% male, 33% female and 1% non-binary. This lack of balance was seen as a challenge for STADIEM after OC1, but numbers could not be shifted over encouraging female innovation, as gender analytics were not part of the selection process, purely for observation. In that regard, rebalancing the gender gap was not considered satisfactory, as it shows the overall gender imbalance in the media tech sector.

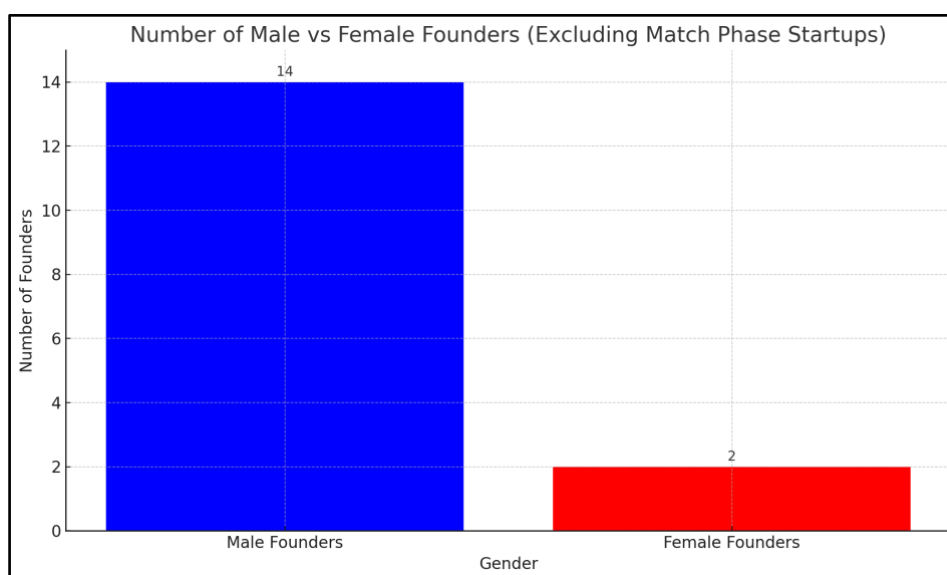


TABLE 16: 1ST CYCLE (OC1) NUMBER OF MALE VS FEMALE FOUNDERS (EXCLUDING MATCH PHASE BENEFICIARIES)

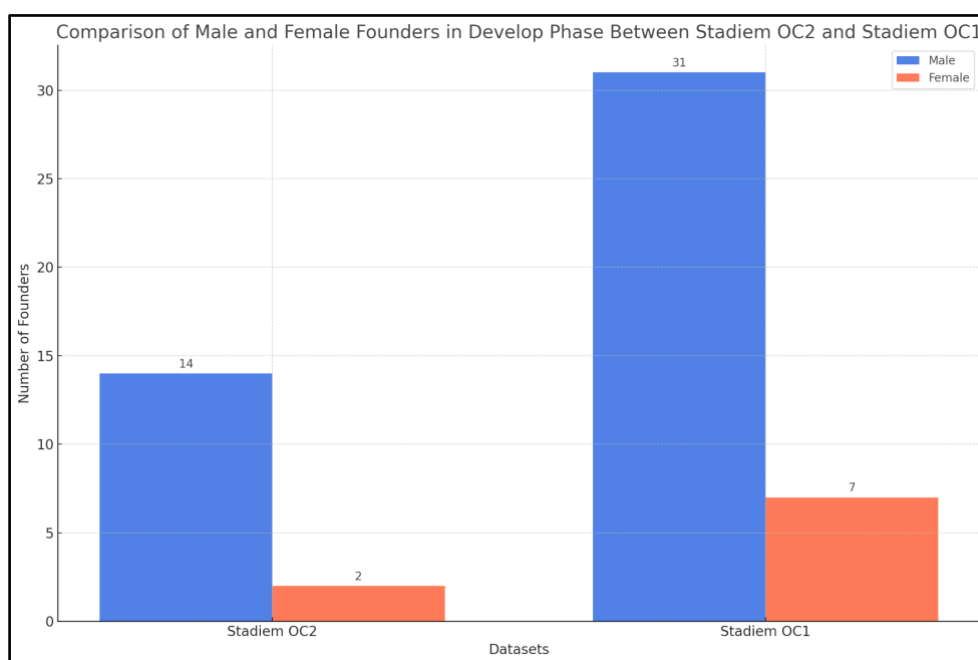


TABLE 17: COMPARISON OF MALE AND FEMALE FOUNDERS IN DEVELOP PHASE BETWEEN FIRST COHORT (OC1) AND 2ND COHORT (OC2)

Quality Expert Interaction:

- During the OC1 Impact Assessment, many start-ups emphasized the value of engaging with high-quality speakers and experts to enhance their product development and foster relationships with corporate stakeholders.
- This feedback was actioned during the OC2 Develop Phase, notably through "Training Tuesdays" and a 3-day "Bootcamp" held during the OC2 Integrate Phase. The Bootcamp, detailed in document D4.4, commenced with a masterclass and Q&A session, followed by two days of individual meetings between each start-up and the two invited experts.
- Despite the lifting of COVID restrictions, these sessions remained virtual, allowing for greater flexibility and the opportunity for those unable to attend the live event to view the recorded masterclass later (only 1 out of 12 start-ups could not attend the live event).
- The response was overwhelmingly positive as experts, having reviewed the start-ups' pitch decks beforehand, provided tailored feedback and guidance. This was particularly beneficial for those start-ups needing to refine their business models or financial sustainability strategies during the Integrate Phase.

Enhanced Business Training:

- The impact assessment revealed that the enhanced business training in OC2, featuring expert input, individual meetings, and tailored guidance, significantly helped start-ups.
- This structured approach empowered them to better present a viable product, comprehend the sustainability tailored to their firm, interact efficiently with corporate entities early on, and negotiate valuations accurately when required.
- Moreover, this setup enabled start-ups to proactively address gaps by engaging additional expertise, such as legal counsel, as needed.

Gender Disparity:

- A notable concern was the gender disparity within the program, with data from the two Open Calls showing 87.2% male founders and 12.8% female founders. The employee demographic was 66% male, 33% female, and 1% non-binary.
- Although recognized as a challenge post-OC1, efforts to encourage female innovation were hindered as gender analytics weren't integrated into the selection process, which was solely observational.
- The gender gap issue, reflecting a broader imbalance in the media tech sector, was not deemed satisfactorily addressed, indicating an area for potential improvement in future iterations of the program.



○ 2.5 EXITS, B2B BUSINESS DEALS AND LIFE AFTER STADIEM

It is a well-known truth in the startup ecosystem, that the key goals to attain for each startup are either an IPO (initial public offering) or an exit. As Sifted points out, *“the exit stage of a startup’s growth is typically when the startup wants to attract additional investment for growth or wants to sell completely and no longer manage the business. The most common routes to exit are going public with an IPO, SPAC or selling to another, larger company [and -sic] The exit process is mysterious and the reasoning behind different decisions is often kept behind closed doors”*¹.

One of the key goals of STADIEM, especially its framework and upskilling components develop and overseen by consortium partner Storytek, was to catalyse long term B2B business deals between the beneficiaries with the explicit goal of enabling long term partnerships, as well and gain insights and build and overall capacity of the portfolio towards exits.

In the overall European business climate achieving exits continues to be seen as an outlier with Atomico pointing out that *“2022 saw a 64% drop in VC-backed startup exits via M&A”*². Therefore, STADIEM has achieved a remarkable result as presented below.

▪ 2.5.1 STADIEM exits, investment deals and business deals

STADIEM is proud to announce that out of the portfolio of 34 startups in the Develop phase, the program catalysed within its three year period 4 exits, 5 investment deals, and 10+ publicly disclosed long term business deals.



TABLE 18: NUMBER OF EXITS, CORPORATE B2 DEALS AND INVESTMENTS ROUNDS IN STADIEM

The following table provides an overview of the exits and investments.

¹ <https://sifted.eu/articles/startup-exit-plans#>

² <https://sifted.eu/articles/europe-startup-exit-ipo-2023>

Startup	Activity
Fansifter	Acquired by Sony
Utelly	Acquired by Synmedia
MusiCube	Acquired by Songtradr
Aixonix	Acquirer not disclosed
Datavillage	Investment raised
Einbliq	Investment raised from Comcast
Zazu	Investment raised
Nowtilus	Investment raised
Filmchain	Investment raised

TABLE 19: OVERVIEW OF EXISTS AND DEALS

While the exit valuations and investment rounds are not yet publicly disclosed due to business confidentiality reasons, **STADIEM can validate that through the acquisitions and investments raised, it has provided a return of investment to the European taxpayer and the policymaker.**

▪ **2.5.2 Factors catalysing exits and investments for STADIEM**

What are the factors that catalysed exits and investments?

Through conversation with founders as well as internal impact analysis the following conclusions can be drawn.

- 1. Public funding as exit catalyst and B2B deal risk mitigation.** All successful founders as well as their corporate counterparts announced that equity free financial contribution was a catalyst in either enabling the validation procedure for exit, investment, or overall risk mitigation for the long term B2B deal. A key factor was also to purchase or commission SLA's, legal assessments, audits, and other critical components of corporate collaboration which usually are out of reach for the startup budgets.
- 2. Systematic process of the STADIEM framework.** Several corporations both in OC1 and OC2 validated that systematic process that aligns with yearly cadence is a significant trust factor enabling effective collaboration on both ends.



3. **Capacity of founders to learn.** All founders who either exited or raised investments during the program were active learners and dedicated to improving their B2B capacity besides building the product. They took advantage of the STADIEM upskilling opportunities, actively sought help and consultation, and openly discussed their strategic needs and options.

▪ **2.5.3 Conclusions for EU, policymakers and ecosystem builders**

What kinds of conclusions can be drawn from the exists and B2B collaboration within STADIEM for the EU, policymakers and ecosystem builders.

1. **Design programs not only for novel innovation but scaling.** STADIEM has validated that focus on scaling innovations and not building new innovations not only can catalyse extraordinary startup growth, but driven innovations cross border and for the large-scale corporate sector.
2. **Enable dedicated funding to catalyse B2B deals involving corporates.** European corporates are often excluded from the innovation programs. STADIEM has demonstrated that with targeted funding to corporate collaborations not only new products enter the market, but long-term business deals will be established, providing not only ROI but policy insights and soft power capacity for European media and startup ecosystems.
3. **Enable and rapidly invest in founder skills and pilots, and market blocker eroders.** STADIEM has proven a correlation between learning focused founders, blocker removing public funding and exits and B2B deals. Dedicated funding and attention should go to paying and enabling market best learning practices (i.e B2B sales, growth, legal etc), acquiring of licenses, audits, and other corporate deal enabling assets, as well as B2B activities that facilitate exits and deals.

Based on the previous, STADIEM firmly believes that a structured, B2B piloting approach in the form of a startup supplier program thus not only yields extraordinary financial returns, but also boosts European success stories in media and startup innovation.

○ **2.6 STADIEM AND ITS IMPACT TO THE EUROPEAN POLICY IN MEDIA AND INNOVATION**

In a recent keynote, Thierry Breton, the European Commissioner for Internal market boldly put forward, *“Referees don’t win matches. For Europe to be a digital leader, we need to invest in innovation, industrial development, and digital infrastructure deployment so that our digital players can grow and expand”*³.

The question, how Europe can be a digital leader has been at the heart of the STADIEM program since its inception - not only by the focus of the original Horizon 2020 call to enable more NGM solutions to the market, but also how can ground-breaking startup to corporate programs contribute to Europe’s competitiveness vis-à-vis global players in the startup, but overall digital content and media ecosystem.

³ https://ec.europa.eu/commission/presscorner/detail/en/speech_23_4346



The following section is based on the strategic and policy analysis carried out by consortium partner Storytek to assess and outline STADIEMs synergies and contribution to the European policy in media, and broadly in innovation.

Undoubtedly, the impact of STADIEM within the context of the European Union's broader policy framework, especially concerning the Media Action Plan, digital innovation, and competitiveness, is multifaceted. The project has not only directly influenced startup and innovation advancement within the media sector but also sets a precedent for future innovation programs, financing design, and boosting economic impact, especially in the framework of Digital Europe, the recent Media Action Plan (MAAP) and the AI act to mention a few.

Artificial Intelligence Regulation & Competitiveness Resilience (Economic, Cyber)

**Europe as a tech and digital
global leader,
standard-setter and (media)
innovation hub.**

Investments Legislation & Policy Dedicated Digital Partnerships

▪ **2.6.1 The Media Industry Outlook**

In May 2023, the European Commission released the “Media Industry Outlook” report⁴, which investigates current trends within the media and their implications for EU media sectors. This report surveys three key areas of media (audio-visual content, news platforms, and video gaming), detailing market summaries, advancements in technology, and new developments in both production and consumer behaviour throughout the 27 nations of the EU.

The report broadly outlines that the traditional media market is highly fragmented with only a handful players reaping the profit, but at the same time paint a positive outlook for innovation driven media sectors that are seen as sources of future growth for Europe. STADIEM’s findings align closely with the Media Industry Outlook, which key trends present in the table below.

Media Outlook 2022-2023	STADIEM findings
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⁴ <https://digital-strategy.ec.europa.eu/en/library/european-media-industry-outlook>

Competition for same attention economy market-	Drastic competition fo EU ventures with Big Tech
EU market is characterized by SMEs with turnover residing with major players.	Launching of new services from startups for corporates “all go” but no validated procedures.
Media companies encounter difficulties to invest.	Who pays for innovation at volatile market?
Consumers are drivers of change (and want new products & and services).	Need for scalability and “gold standard” services to keep and attract customers, and those can be provided by startups or startups to corporate innovations?
Early adoption of new tech is key to adapt?	R&D and innovation budgets for experiments highly capped at EU corporates.

TABLE 20: MEDIA OUTLOOK 2022-2023 AND STADIEM FINDINGS

▪ 2.6.2. Startup innovation and corporate scaling

Europe as global industrial digital media champion= startup innovation + corporate scaling

Investments

Legislation & Policy

Dedicated Digital Partnerships

Based on our three-year experience with 80 startups, and almost a similar number of top European and global companies, **STADIEM can firmly claim that the program can be blueprint for digital media champions in Europe, specifically driven by startup innovation combined with corporate scaling and risk mitigation via public funding.**



The key recommendation is to **devise and enable startup to large entity focused piloting and growth focused interventions at European level to drive viable impact in the market.**

Specifically:

1. The European Market does not call for early stage innovations but scaling of European (media innovations). Thus, tailor policy interventions for growth and piloting.
2. European big (corporate) media wants to play along on pragmatic, market & benefits first approach. Thus, empower, involve, and target large entities currently excluded from programs.
3. Europe can harness and empower extraordinary potential of radical tech (especially AI, synthetic media, Data/ML) from new regions such as Ukraine (represented in STADIEM program). Thus, endorse collaborative pilots of Ukrainian startups and innovators.
4. EU funding is critical catalyst for in corporate and private funding, especially for innovation growth outside R&D departments. Thus provide B2B driven financing for large entities.
5. B2B growth needs audits, certifications, data & privacy compliance. Thus, adjust measures to support elimination of blockers from enterprise growth.
6. Media innovations can be taken to market in 12-16 months. Thus, enable rapid growth vehicles for European success.

2.6.3 STADIEM's contribution to EU digital champion agenda

**Europe as a tech and digital
global leader,
standard-setter and (media)
innovation hub.**

Enabled 4 exits, 10+ B2B
collaborations & direct private
investments

Investments

Findings clearly support EU
innovation, industrial policy
agenda & the Media Action Plan

Legislation & Policy

Business & Innovation
partnerships achieved for 72
projects with European media
players

Dedicated Digital Partnerships

Thus the STADIEM experience contributes to the European digital champion agenda at three levels: investments (with proven exit capacity), legislation and policy (supporting and implementing the policy agenda) and enabling effective, high growth digital partnership (through pilot projects with 72 European corporates).



STADIEM's impact can be also visualized through the following table.

EU	Startups & Innovators	Media Corporates
Europe first, industry first success story	Solution validation with the core of European media power players	Program that listens and attends to real market needs
Clearly demonstrated and market ready innovation vehicle within priority verticals (AI, data, deep tech)	Accelerated B2B sales to (European and overseas markets)	EU funding "critical" in enabling European innovations to the market
Involvement of European corporates previously weary of EU funding	Investment enabling by soft money and clients first	Business procurement unlocked by structured process, and EU back finance (10+ business deals)
Catalysation of direct & indirect, private and corporate financing	Demonstrated revenue and sustainability and outlier exits to Europe and global tech	Live NGM solutions to European customers within 12 - 16 months

TABLE 21: STADIEM'S IMPACT FOR EU, STARTUPS & INNOVATORS AND MEDIA CORPORATES

▪ 2.6.4. Key arenas of STADIEM contribution to EU's policy agenda

Thus, lastly, where does STADIEM provide a blueprint for policy success? The following outlines key areas where STADIEM has contributed to EU's policy agenda.

1. Artificial Intelligence and Innovation:

STADIEM plays a critical role in fostering AI innovation, a cornerstone of digital transformation. By supporting start-ups and projects specializing in AI, STADIEM helps created a robust ecosystem for AI-driven media solutions, enhancing content creation, personalized user experiences, and efficient content delivery.

2. Economic and Cyber Resilience:

STADIEM enhanced economic resilience by diversifying the digital media landscape and encouraging investments in start-ups and SMEs, often unable to raise capital from the traditional VC.

3. Europe as a Global Leader and Standard-Setter:



By championing innovative NGM solutions, STADIEM reinforces Europe's position as a digital leader and standard setter. The program's emphasis on high-quality, scalable solutions reflected Europe's commitment to leading digital innovation globally.

4. Investments and Access to Finance:

STADIEM addressed critical financial challenges in the media sector by facilitating access to investments and funding. It drove the connections between start-ups with potential investors and establishes frameworks for sustainable financial growth.

5. Legislation, Policy, and Digital Partnerships:

STADIEM operated and supported the EU's policy framework, advocating for policies that support digital innovation. Thus, it exemplifies successful implementation of policy directives and highlights the importance of collaboration between start-ups, corporates, and legislative bodies.

6. Ecosystem impact:

In the face of intense competition from Big Tech and a market driven by consumer demands, STADIEM helped European SMEs and start-ups not just survive but thrive. It acknowledged the necessity for rapid, scalable solutions and supports the development of services that meet contemporary consumer needs.

Based on the above, STADIEM serves as a model for successful market intervention, showcasing how targeted support and strategic partnerships can overcome barriers to innovation. Its success underscores the importance of EU backing in levelling the playing field, particularly for start-ups and SMEs facing stiff competition from well-established entities.



3. COMMUNITY IMPACT

The community impact focuses on the role of various objectives and activities in the phases that contributed to the program outcome and is presented from three entry points. First an analysis of the goals of the program and each phase on the beneficiaries is presented, secondly the activities organised by the consortium that were used to gather data for the impact assessment are presented and discussed. In third instance a closer look on provided support will be taken via the lense of the activity tracker. For each of these three angles, comparison with the first cohort of beneficiaries (OC1) and first cycle of the innovation program is made and discussed.

○ 3.1 GOALS AND OBJECTIVES (FOCUS) OF COMMUNITY ACTIVITIES

During OC1 and OC2, each phase had a specific set of goals for beneficiaries. By breaking down each phase's focus, to address STADIEM's impact on the pathway to success for the beneficiaries, the Impact Assessment analyses how each goal is addressed and facilitated, and how the beneficiaries evaluate how their expectations, expectations regarding outcomes, and phases main challenges are being met.

▪ 3.1.1 MATCH PHASE OC1&OC2

● Collaboration STADIEM beneficiary and STADIEM consortium

During the Match phase, one of the main interests of the hubs was to get to know and cooperate with the 40 selected start-ups, which is why, unlike during OC1, the OC2 Match Phase start-ups remained with the same mother hub throughout the whole phase. They were able to build a stronger relationship to their mother hub, and hubs were able to provide longer-term guidance for the phase. They were monitored and counselled to help them build a sustainable relationship with their newfound corporate and identify the best PO for their product- which proved to be challenging for many start-ups, who had issues aiming high enough in the hierarchy to find the most appropriate PO. They also needed to understand and navigate the variations in timelines between a start-up and a corporate as early in the program as possible, to keep up with the steady-paced program. The start-ups had 2 months to travel to not only have a pilotable product to introduce, but also to assess a business case to their corporate.

The main and central activity is traveling to find a corporate and come back at the end of the Phase with a LOI (letter of intent) from corporate. The main goal is also to get familiar with the program and learn how to build their solution and business case with corporate while agreeing with the STADIEM timeline. It requires a lot of clarity from the beginning on between the three actors to achieve completion of the goals set at the beginning of the program.

While asked, OC2 the start-ups stated an average of 4.1/5 regarding the clarity and effectiveness of the collaboration with STADIEM, which is very high. It shows how the program is tailored to fit specific timelines that are beneficial to all parties.

● Match-making support provided by STADIEM



Throughout the program, the four hubs organized individual and 10-start-ups per hub meetings to offer specific help and guidance and to uncover the start-ups' needs and expectations from the program.

Main focuses include opportunity spotting, introductions to corporate, investors, experts. OC2 had the advantage of happening after the COVID-19 travel and sanitary restrictions, allowing now to travel and have in-person meetings with corporates. OC1 focused on remote introductions that still proved to be as efficient, since out of 40 start-ups, 37 came back with a letter of intent (LOI) from their corporate and some managed to secure leads.

During OC2, the average rating for the relevance of STADIEM in matchmaking is approximately 3.38/5. It proved that overall start-ups benefited significantly for STADIEM's networks, introductions and help to find a corporate match.

▪ 3.1.2 DEVELOP PHASE OC1 & OC2

- **Mother hub support and collaboration**

The main activity for the start-ups / scale-ups during the Develop Phase was to develop their solutions in co-creation with their corporate partner(s). As OC1 proved efficient in the common approach the hubs developed, OC2 was tailored on the same model for their activities. Meetings were kept regular with each of the 16 selected start-ups. All 16 selected start-ups participated in a common onboarding meeting at the start of the phase, mid-term reviews, demos with corporate, and final review meetings. This phase is the longest, lasting for 6 months, and allows time to discuss various issues and progress points in individual meetings. The opening of the phase tackles objectives in the phase, specific needs, expectations, outcomes, how the hub can help in that regard, and building a follow-up schedule.

During OC1, as explained in the first Impact Assessment Report (D5.4 '*Impact creation and assessment report v1*', p16), it appeared that needs and challenges were quite varied, with a majority of the beneficiaries in need of regular coaching and progress evaluation, as well as expertise regarding financing and business-oriented steps, whereas a small minority favoured less regular meetings and a more independent approach, an approach usually considered risky. In OC2, the protocols applied during OC1 for mid-term and final review meetings were kept, in addition to coaching for the start-ups' final evaluation from Develop to Integrate Phase. In addition to these meetings, the start-ups had an open line of communication with their hubs in case of unexpected issues or needs.

At the end of this phase, OC2 start-ups gave the average rating for the collaboration with their mother hub in STADIEM of 4.63 (on a scale of 1 to 5), indicating that, on average, they viewed this collaboration highly positively.

▪ 3.1.3 INTEGRATE PHASE OC1 & OC2

- **Workload and relevance of activities**

This phase was the shortest, lasting only 2 months, and was also the last one under COVID19 restrictions during OC1. OC2 Integrate phase was in that regard quite different, since during OC1, several start-ups only finally met with their corporate in real life. OC2 beneficiaries had

therefore more opportunities to build an in-person relationship with their PO and corporate hierarchy. One of the main takeaways from OC1, as stated in section 2 of D.4.2: “*Integration Piloting Phases And Assessment Report for the 1st Cycle (OC1)*”, was how intense this phase proved to be, and how to keep the same focus, but alleviate the timeline with better preparation and earlier activities to implement it. This phase’s main goal is the internal testing, in a moment when STADIEM has a more independent role from the relationship between the corporate and the solution. The focus was in consequence to make regular, but light follow-ups and to make the reporting process as light as possible, using a questionnaire rather than a full report. For the second Open Call, this report was given to the start-ups and corporate at the beginning of the Phase, to allow the maximum amount of time to fill it out. It allowed the start-ups to focus on the product, business case and communication with their corporate.

This facilitated workload seemed to work well, since start-ups, during the OC2 Impact Assessment questionnaire, gave an average of 3.69/5 regarding the relevance of activities. They also gave an average of 4.38/5 for the appropriateness of the workload of STADIEM, indicating that the OC2 significantly improved the protocols to come to an efficient and better-balanced workload for start-ups.

▪ 3.1.4 PILOT PHASE OC1 & OC2

• Quality and efficiency of the program

The last phase of the program took place each time closer to the summer break, which has been a challenge for the start-ups: communication with corporate and respecting deadlines on time by corporate was a little bit more difficult during this major break. It was also the most independent phase, as the start-ups’ focus was releasing a public pilot of their solution, cementing their contracts with the corporate, tackling the business case that they had been building in the phases prior to this one and showcasing their solutions to potential new business leads during events.

The main protocols were similar for the 2 cycles and the program phase ended twice at the end of September. The OC2 start-ups filed their last report in the first half of the month September as the project officially ended on 30/9/2023.

At the end of the Phase, OC1 and OC2 corporates described an overall very helpful and positive collaboration, emphasizing how STADIEM helped tackle new challenges, but also markets, how to expand to other regions and how to improve their sustainability. **The average rating for STADIEM Quality is approximately 4.38/5, a very high number for the overall program and its efficiency. Moreover, the percentage of startups meeting legal requirements was 81.82%, and startups with SLAs in Place reach an all perfect of 100%.**

• Airtable toolkit

The toolkit Airtable, that was implemented at the beginning of the OC1 Integrate phase, was in OC2, unlike the first Open Call, familiar to the start-ups, which had been using it since the beginning of the programme. All data was gathered in it: calendar of activities, documents, reports, activities information, questions... All data being gathered in the same toolkit made following up and data analysis easier, safer, and more efficient for the OC2. There were several levels of access, guaranteeing that start-ups would access what their phase allowed, and the STADIEM team could have access to all common data. This tool proved to be highly simplifying for all the actors using it, being easy to access, to find necessary information, calendar and demands from the STADIEM consortium, and very easy to improve when feedback was less positive regarding specific features.



This toolkit had a welcome page for each phase, gathering all data related to that specific phase: it made the focus of each phase very clear to the beneficiaries and constituted a central and common space for beneficiaries and the consortium to collaborate in.

○ 3.2 SUMMARY OF COMMUNITY ACTIVITIES AND ACHIEVEMENTS

Activities and achievements relevant to the Impact Assessment were the following: during the OC1 Match and Develop Phase, most activities were online and, while being monitored and guided by the hubs, they were mostly about the start-ups setting their KPIs according to feedback and, with help from their hubs, focusing on meeting new clients, customers, leads and investors. OC2 allowed more travel, in-person introductions and meetings, attendance of various events and festivals. It diversified the activities and allowed the program to work as it was designed in the first place, allowing it to analyse its impact fully at the end of the 2nd Open Call.

During the OC1 Develop phase, each hub organized a meeting with both corporate and their start-ups, called a “demo meeting” the 21st and 27th February 2022. The OC2 start-ups organized them between the 30th of January and the 3rd February 2023. This demo meeting, accompanied by a questionnaire for the corporate, allowed the hubs to evaluate the start-ups’ readiness regarding their evaluation meeting, as this was also the last meeting before the evaluation of the start-ups to participate in the Integrate phase. For the 2 Open Calls, it was also the only joint meeting with hubs, start-ups and corporates of this phase. It allowed each hub to compare the answers from the start-ups to the feedback from corporate regarding the framework, KPIs, overall relationship and integration of feedback and pivots. The main outcome from this comparison was that the communication in the collaboration seemed to work, as start-ups and corporate had an overall good understanding of each other’s timeline, needs and expectations. The meetings with all actors in the program was also important for the hubs to discuss with corporate after a common meeting, addressing what had just been discussed. In their written feedback, the majority of beneficiaries were considered on track and ready for their evaluation.

The two Integrate phase kick-offs happened respectively on the 15th March, 2022 and on the 13th February 2023, only having a light check-in between the 11th and 15th, April 2022 and the 13th and the 18th March 2023. This check-in was between each hub and their start-ups to follow up on their progress in the Integration phase and check if they were on track after the corporate feedback from the end of the Develop phase. It also allowed, during OC2, the hub to evaluate how the reports on Airtable were working, and how to gather the data as efficiently as possible, and also to help get the corporate on track ahead of the deadline to avoid last minute challenges. It proved very effective. Since there was no written report from the beneficiaries, the mid-term check-ins were not themselves part of the questionnaires used as a base for this deliverable. However, they were crucial in facilitating the turning point from the first part of the phase into the evaluation period: the mid-term meetings were preparatory meetings for the hubs to align with the beneficiaries on the expectations from the phase. It was also the last mandatory meeting to facilitate the collaboration with corporate to ensure a successful pilot: at the end of the Integrate Phase, the average note of a successful risk mitigation towards a successful pilot was 4.69/5, which shows effective and smooth communication between start-ups and corporate, no matter how intense the phase can be.



It is stressed that, for both cycles in the innovation program, the start-ups that are on track have a very agile approach and did not have major pivots during the Develop phase. They were also majorly the start-ups that were the most open to feedback and that required regular and individual meetings to discuss their progress and challenges throughout the Develop and Integrate phases.

Communication and dissemination activities leader: MARTEL

As Task 5.1 Leader (Outreach and impact creation strategy, plan and tools - M1-M36) Martel was in charge of communication and dissemination through STADIEM's own online outlets and communication tools (such as social media, website, newsletters, press releases), leveraging on Martel's extensive network in the ICT and EU research domain, as well as cross-posting with the accounts of partners, involved start-ups / scale-ups and similar oriented EU-funded projects and initiatives (such as Media Motor Europe, Future Media Hubs and fellow ICT-44 projects Möbius, MediaVerse and COPA EUROPE); the fruitful connection with these two last groups also resulted in the participation and co-organisation of events (see Section 2.5 of D5.9 for more details). The external ecosystem Martel targeted and could tap on also includes Start-up-oriented LinkedIn and Facebook groups; NGI initiative and NGI Explorer; the BDVA newsletter; 5G PPP initiative's Comm mailing list; selected contacts in the FLAME project's network and in the Fed4Fire+ project mailing list; the European Commission portal for competitive calls and calls for third parties. Dedicated one-to-one mailing - in support of Open Calls promotion - has been additionally directed to the National Contact Points (NCP) for the ICT and Future and Emerging Technologies programmes: 186 people have been contacted representing all EC Member States and Third Countries. The paid campaigns orchestrated for both Open Calls - with the direct support of VRT and F6S - resulted in a relevant impact for stakeholders' engagement, in absence of in-person promotional platforms.

▪ 3.2.1 MATCH PHASES OC1 & OC2

STADIEM's OC1 Match phase activities were impacted by COVID19, not in result, but in their development: As the main focus of the phase being to travel in order to meet the hubs and potential leads, customers or clients did not work out, the timeline was affected as everything happened online. The OC2 Match phase allowed way more activities planned in the original framework and followed the initial timeline without changes. The start-ups were able to introduce their solution in various events and were also able to meet the STADIEM team in person, building the community early in the program.

The kick-off for the OC2 Match phase was on May 2nd, 2022 (the OC1 one was on May 19th 2021). It was organized by NMA and introduced the structure of the program, the timeline and the overall goals and expected outcomes. Contrary to the OC1 kickoff, after an online presentation, the start-ups started a series of travels in May and June to Brussels, Hamburg, Bergen and Tallinn.

Both OC2, whether it was online or in-person, organized introductions to corporate that belonged to their own networks, through individual meetings, tailored to each start-up out of the 40 selected beneficiaries (10 per "mother hub"). The OC2 format allowed more spontaneous room for discussion regarding the understanding of the project and personal guidance, even if the OC1 start-ups did not show less results at the end of the phase.

After the OC1 rotation plan for the startups due to the original plan of traveling between the hubs. Thanks to it, no hub had to connect 40 start-ups at once with their network but could organize meetings and calls on demand.

The Match phase lasted for two months with a mid-term review after four weeks for the 2 Open Calls.



One main takeaway from the program is that it proved quite easy for the start-ups to achieve a relevant LOI, which shows that the organization of the OC1 phase was quite agile and successful given the circumstances and necessary changes due to the pandemic. The OC2 version of the Match Phase led to the same result.

▪ 3.2.2 DEVELOP PHASES OC1 & OC2

The Develop Phase was kicked off with an onboarding meeting where all 16 selected start-ups/scale-ups were invited to get a briefing of expected outcomes, processes and deadlines. The OC2 scale-ups were then divided between the innovation hubs, where each was responsible for 4 start-ups, best suited to the hubs' expertise. This process was kept in OC2, as it proved beneficial in OC1: start-ups were reassigned accordingly. The mother hubs assisted with coaching, follow-up, and served as the main point of contact for each start-up/scale-up throughout the entirety of the Phase.

Halfway through the Phase, the consortium organized a mid-term review of the start-ups progress and results, consisting of mid-term review meetings with the hubs, the submission of a mid-term report, a demo with both start-up and corporate, and a mid-term Investment Committee Meeting. The Phase closed with a final evaluation period. It consisted in each start-up meeting with their mother hub for a final review meeting, where they had a demo for the corporate and mother hub, followed by each hub meeting with the corporate to get their insights and questionnaire, and finally on 2nd March 2022 and 8th February 2023, the final Investment Committee Meeting took place, where the 12 top-performing start-ups were selected to proceed to the Integrate Phase.

Throughout the OC1 and OC2 Develop Phases, monthly upskilling sessions called Training Tuesdays were organized. In addition to this, the consortium organized several networking and showcasing events. The start-ups/scale-ups were invited to pitch and network at Future Week in Bergen, to exhibit at IBC in Amsterdam, to pitch at MCB Expo, and to have a Demo Day at the end of the phase. Due to Covid-19 restrictions, IBC and the Demo Day were cancelled for the OC1 start-ups but were held in OC2. Finally, one extra meeting was organized to prepare the start-ups to the next phases: both Integrate and Pilot phases were introduced in a 60-min online meeting: this resulted from OC1 feedback showing that some start-ups found challenging to adapt so quickly to the Integrate phase - that is very short, while on deployment. It happened on December 13th, and was followed by a Q&A. The main outcome of this meeting was a better understanding of how to communicate early with corporate regarding the start-ups business cases mostly, and legal. The start-ups gave positive feedback regarding the clarity that the meeting gave and were able to adapt their timelines accordingly if needed 2 months before the beginning of the next phase.

The mother hubs provided their start-ups with individual check-ins and follow up meetings based on the individual needs and wants. These meetings were additional to the mandatory mother hub and start-up meetings, that are part of the evaluation and selection protocol. In addition to the check-ins, the mother hubs also continued facilitating business and investor introductions with companies in their networks. Most start-ups required some extra individual talks and meetings to tackle specific challenges that they encountered.

The hubs had on average 5 to 10 check-ins and follow-up meetings with each of the 4 beneficiaries for both Open Calls. Besides general inquiries, hubs helped facilitate dialogue and communication with corporate in case of need for mediation or extra internal testing procedures.



The Develop phases were so different because of the differences in restrictions due to COVID mainly. The main change in protocol was introducing phases ahead of their beginning and giving more workshops regarding business, legal, security and sustainability.

▪ 3.2.3 INTEGRATE PHASES OC1 & OC2

The Integrate Phases, although only lasting two months in each Open Call, took over the main organizational principles from the Develop Phase in regard to community activities, during the 2 Open Calls. As for the Develop Phase, a general approach over the hubs was implemented. It was divided between one more formal mid-term review, final report and investment committee, and between individual and more tailored support through 1-to1 check-ins and follow-up meetings. The main difference for the actors of the programme is the condensed way all activities are carried out, due to the short period and the few weeks only between the mid-term review and the evaluation investment committee meeting. The agile approach is crucial during this phase, as it allows hubs to adapt to individual needs more than the more common and scheduled activities of the Develop Phase.

Hubs could also reach out to corporate and organize individual meetings between the corporate and the beneficiary to align on the objectives of the phase if necessary, and the timeline of outcomes, reports and other action items to be ready for the next phase. It helped secure the realization of the key-KPI's established in the integration phase action plan that the start-ups submitted in the week following the kick-off.

The four hubs had a common approach, even in the less formal activities, in order to maintain consistency in the program and the outcomes for the beneficiaries. They had individual meetings with each one of their start-ups throughout the phase, with all participating in an individual onboarding meeting and mid-term lightweight review meeting. Since for OC2 questionnaires to corporate and start-ups were made available at the beginning of the phase, during the onboarding meetings, topics of discussion were objectives in the phase, needs, the content of the questionnaires and how to address them with corporate while filling them out separately, expectations, and tailoring a follow-up schedule that suited the needs, and availabilities of the start-up. The toolkit proved very facilitating for these specific purposes, since it helped centralize data and gain time in addressing questions and issues, through a public "issue tracked" notably, where start-ups could ask questions that would benefit all start-ups. It helped reduce the variety of communication tools and potential miss outs in OC2, unlike the OC1 use of Airtable, Slack, emails, phone and GoogleMeet.

▪ 3.2.4 PILOT PHASES OC1 & OC2

The pilot Phase started with a kick-off meeting on 7 June 2022 and on 2 May 2023. During this meeting, the scale-ups were presented with an overview of the Pilot Phase Framework, activities, objectives, expectations, and next steps, followed by a Q&A session. The following week, the start-ups submitted their proposal for the Pilot Phase, outlining their plans and objectives for the phase.

At the start of the phase, the start-ups were allocated their mother hub. As in previous phases, the hubs assisted the start-ups with coaching and follow-up and served as their main point of contact in the STADIEM consortium. The start-ups main activity in the Pilot Phase was to execute public pilots in collaboration with their corporate partner(s). They also had to demonstrate their pilot to a wider audience, including prospects similar to the corporate partner, and participate in conferences and events, meet with potential users, and disseminate the results of the project. And for those looking for funding, they also were to pitch to investors and



corporates to collect interest. In late May, early June, the consortium invited all the start-ups to present and network at three industry events: Latitude59 in Estonia, MCO Mediatech Festival in Denmark, and Future Week in Norway. To finish the Phase and to again showcase the pilots, it was organized for the start-ups to attend IBC2023 (International Broadcasting Convention) and have the costs reimbursed by a separate financial report due straight after the convention.

The main achievement of the phase is to evaluate and showcase the results that came from the participation in the program at a large scale to a wider community of stakeholders. It resulted in the five events mentioned above. The goal of these events was to showcase the start-ups and their demos to an industry audience, to strengthen the STADIEM community, and for them to make new connections, in line with the objectives of the phase.

As the pilot Phase was active during the summer months of 2023, the industry events took place at the start of the phase before the summer holidays were in effect. In addition, the consortium decided to organize for the start-ups to attend IBC2023 in September, after the official end of the phase, to also create impact after the summer.

With the Pilot Phase being the fourth and final phase, the STADIEM consortium decided it best to leave the STADIEM organized training sessions to the preceding phases of the program. This was also done for the Pilot Phase of the first cycle as the consortium wanted to prepare the start-ups for their pilots ahead of the pilot being live, and to let them focus on the activities of the Pilot Phase during its duration.

As with the process for the first cycle and similar to the preceding phases, the Pilot Phase for OC2 had a proposal, mid-term evaluation and final evaluation. Differing from the other phases, the Pilot Phase didn't have a selection process, as it was the last phase of the program for the start-ups, and no new phase for them to proceed to. They did fill out reports, including their final impressions and achievements made possible by the program.

One of the main objectives of the phase was for the start-ups to disseminate and showcase their pilots, generating interest from relevant stakeholders: the start-ups made an average of 18 business leads, 8 investor leads, and 63 client leads in the pilot phase up until mid-august. The leads were reported by the start-ups themselves in the End-of-phase Report, and exclude the leads made at IBC2023 as that event took place after the reporting deadline.

The start-ups stressed the fact that STADIEM helped bridge the often very risky gap made by long sale cycles, a significant expansion of new market opportunities, a presence at trade shows that established the start-ups as key players in the innovation-driven media tech space and opened doors for future collaborations. They also mentioned the speed at which it was made possible to reach these goals. Corporate also highlighted the positive aspect of the STADIEM facilitation in finances, timeline and network to build a pilotable solution and a sustainable case.

▪ 3.2.5 SUMMARY AND ANALYSIS OF THE ACTIVITY TRACKER and MARTEL OUTREACH ACTIVITY

The activity tracker that was started during the Match and Develop phase OC1, and kept throughout the whole program in both cycles, was developed to gather data on each meeting between the start-ups and their hubs, as well as corporate meetings and overall exchanges between the different stakeholders. It allowed the hubs to follow up on corporate recommendations and availability towards the start-ups. It also helped improve the activities of the 2nd cycle, upon feedback from start-ups and corporate, as well as discussions within the consortium.



During the entire program, meetings (check-ins, follow-up, mid-term reviews, demos, final reviews and other meetings) were recorded for each of the beneficiaries in an activity tracker document. A record contained the date, the duration of the activity, the persons involved (on the corporate level, on the beneficiary level and on the VRT STADIEM team level) in the meeting and a short summary of the various points discussed or remarks made. In that way it was possible for the hubs to see if a previously mentioned issue or recommendation by the corporate was not solved or, more positively, where this feedback from the corporate had been fruitfully taken into consideration. It also allowed hubs to follow up on each other's activities and prepare better for Investment Committee meetings and evaluations.

It was also very valuable, as start-ups had several hubs over their attendance in STADIEM, and hubs were introduced to beneficiaries along the program: being in possession of their activity history allowed more understanding of their specific needs and helped get the start-ups' trust, tailor advice and guidance, and maximize impact.

Martel's record of online activities could leverage on both social media and website analytics, showing a total estimated reach of 1,000,000 stakeholders throughout all communication channels combined (10k in terms of website visitors alone). Martel could also draw an overview of events' reach based on information gathered by the partners, and analysis of registrations for the Open Call's info webinars, for an estimated reach of over 40,000 stakeholders. More details can be found in D5.8 (Outreach and impact creation report v1).

○ 3.3 KEY FINDINGS REGARDING COMMUNITY IMPACT

To conclude this chapter, we can discern four major key findings of the community impact analysis towards setting up an efficient and impactful EU-wide program for scaleup and start-up driven innovation in the media sector:

1. A common agile approach towards start-ups and tracking of issues between hubs.

The hubs had a very common approach regarding the start-ups activities and tracking, which made it easier when 2 of them exited the program thanks to exciting deals and the repartition of the start-ups was readjusted during OC1. A common approach and a unique toolkit made information sharing and data gathering very simple, time efficient and safe. During OC1, regular and close check-in of the activities and one-on-one meetings with each start-up made it easier for them to ask more specific questions that could not be possible in a group meeting or in a short check-in. However, with the issue tracker built in the toolkit, it made it easier to get an answer provided by the hub that had the information at the time, without booking a meeting or sending an email. Unless particularly specific, it was observed that most questions benefited all start-ups to a certain level, and an accessible way to get fast information was indeed a more agile solution.

2. Early involvement of experts and facilitation of training/teaching opportunities. It proved very important to have experts as early as possible in the program, as well as webinars and regular external expertise to teach the start-ups efficient tools to build an efficient and clear relationship with their corporate, develop clear and manageable KPIs and understand how to integrate and pilot their product and develop necessary features. The focus was emphasized in OC2 and the results were visible very fast: for example, several start-ups struggled to understand where and when to focus their resources, as well as how to have a better understanding of their own company from a business point of view, and needed guidance from former successful exit founders or start-ups specialists on early stage sustainability building.



3. Work with each other strong points and look for synergies. The relationship between the hubs and their allocated start-ups was crucial for the program's efficiency, as each hub brings a different input to the consortium, as they are from different countries, different sizes and different structures; in order to help the start-ups in their lean strategy, time efficiency and unified guidance from each hub is needed. That's why the hubs were allocated different start-ups as phases changed (except from OC2 Develop to Integrate, mostly because of the speed of the phase).

The OC2's ability to travel and meet in person was crucial to compare the outcomes between the Open Call & and its online format, and a "normal" Open Call that fitted the framework. But it did prove successful both times, showing that the pivoting to a remote program did not hurt the relationships between hubs, start-ups and corporate. The first Impact Assessment for the period M1-M18 stressed the future importance of members of the consortium to know as much as possible of the ecosystem to offer consistent and efficient work by meeting more in person, but it was very interesting and rewarding to compare outcomes, but also ask if the expectations regarding both the program and its outcomes had been met: the average note were respectively 4.25 and 3.875: start-ups were very satisfied with their expectations being met, but satisfaction regarding expectations towards the outcomes also showed that the program built a clear and tailored communication and guidance to the beneficiaries.



4. COMMUNICATION AND DISSEMINATION IMPACT

○ 4.1 FOCUS ON COMMUNICATION AND DISSEMINATION ACTIVITIES, GOALS AND OBJECTIVES

STADIEM addresses three key points in the European media sector (a) cross border scalability, (b) startup to corporate to market tech transfer and (c) availability of innovative media services in a Digital Single Market framework. As such STADIEM's ambition is to contribute to identifying, nurturing, and retaining promising start-ups and connecting them with media industries by creating concrete opportunities to collaborate.

Outreach and impact creation activities are central to the overall STADIEM goal. They are being closely monitored and coordinated to ensure a broad visibility and an effective engagement of all targeted stakeholders in the Next Generation Media, including those from the media and non-media sectors (verticals). These activities are coordinated by Martel with active contributions from all STADIEM partners, following the following objectives:

- Ensure STADIEM's broad visibility by spreading knowledge about the project and its results, as well as establishing a distinctive and recognizable identity that will support promotional and marketing efforts.
- Reach a wide network of innovators interested in taking part in the STADIEM Open Calls (2).
- Reach, stimulate and engage a critical mass of relevant stakeholders to ensure that (a) the Open Calls and Incubation program of the project are effectively and properly disseminated to the targeted audiences for maximum participation and promotion, (b) the results of the project and 3rd party projects, selected through STADIEM Open Calls, are effectively showcased, leading to validation, improvement and possibly further adoption of the developed technologies and concepts.
- Facilitate exploitation of the project's outcomes and promote the development of innovative solutions based on the STADIEM technologies and concepts.
- To fully support the key players' engagement strategy in the project activities and concepts around the Open Calls and the Incubation program, while promoting and providing great visibility on the 3rd party projects and the best practices learned that will lead to the creation of a new business model in the media domain.
- Establish strong liaisons and ensure close collaboration with relevant initiatives in the media industry.



○ 4.2. SUMMARY OF COMMUNICATION AND DISSEMINATION ACTIVITIES

As mentioned in the Deliverable D5.8 about the Outreach and Impact Creation in the first periodical report (M1-M18), outreach and impact creation activities are central to the overall STADIEM goal. They are being closely monitored and coordinated to ensure a broad visibility and an effective engagement of all targeted stakeholders in the Next Generation Media, including those from the media and non-media sectors (verticals). These activities are coordinated by Martel with active contributions from all STADIEM partners; a breakdown of such activities can be found in the sub-sections here below (and, in greater detail, in D5.9 - Outreach and impact creation activities report v2).

With the conclusion of the Open Calls, the guiding objective for the reporting period enticed a re-routing of targeting towards corporates/investors: with a solid batch of innovative scale-ups on board, the need was now to bring their work - and the STADIEM programme success story – to the attention of such target groups, to maximize the impact on the European Next Generation Media ecosystem, and the continuity of what started and built through the project.

▪ 4.2.1 WEBSITE

Launched at the beginning of the project (M2), the STADIEM website (<https://www.stadiem.eu>) has been developed to act as an information hub presenting the project's goals, activities, and achievements. To this purpose, contents have been constantly updated.

Upon project closure, the website counts around 15,300 unique visitors, who generated around **41,900 page views on an average visit duration of 01'29"**.

The figures below provide the aforementioned plus some additional details: Figure 1 (Traffic overview and visit duration), Figure 2 (Top visited pages) and Figure 3 (Visits per country).

For more details on specific updates performed in the second half of the project, please refer to D5.9 - Outreach and impact creation activities report v2.

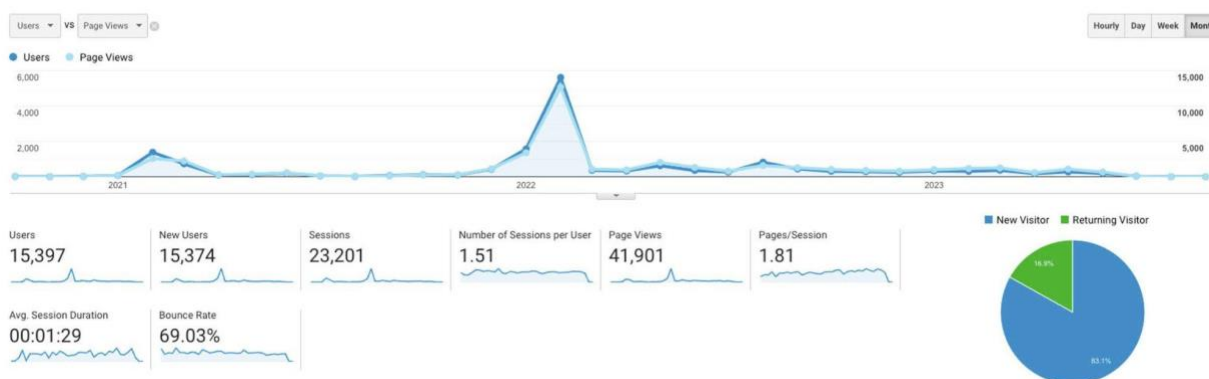


FIGURE 1: STADIEM WEBSITE: TRAFIC AND VISIT DURATION

Page	Page Views	Unique Page Views	Avg. Time on Page	Entrances	Bounce Rate	% Exit
1. /	6,516 (15.53%)	5,403 (15.32%)	00:01:17	5,063 (21.78%)	41.58%	41.02%
2. /open-call-2/	5,264 (12.54%)	4,707 (13.35%)	00:03:19	3,829 (16.47%)	83.70%	78.40%
3. /open-call-1/	1,738 (4.14%)	1,560 (4.42%)	00:02:14	1,080 (4.65%)	75.46%	67.72%
4. /about/	891 (2.12%)	785 (2.23%)	00:01:27	194 (0.83%)	50.00%	35.91%
5. /open-calls/	876 (2.09%)	740 (2.10%)	00:01:19	262 (1.13%)	57.25%	37.90%
6. /scaleups/	825 (1.97%)	698 (1.96%)	00:00:53	155 (0.67%)	39.35%	20.61%
7. /news/	743 (1.77%)	599 (1.70%)	00:00:44	75 (0.32%)	38.67%	20.86%
8. /faqs/	719 (1.71%)	620 (1.76%)	00:03:47	214 (0.92%)	74.77%	59.67%
9. /consortium/	661 (1.57%)	605 (1.72%)	00:01:10	103 (0.44%)	59.22%	36.61%
9. /consortium/	568 (1.35%)	468 (1.33%)	00:00:41	71 (0.31%)	45.07%	20.07%

FIGURE 2: STADIEM - MOST VISITED PAGES ON WEBSITE

Country	Users	% Users
1. Germany	1,253	8.05%
2. Belgium	1,192	7.66%
3. Romania	1,054	6.77%
4. United States	723	4.64%
5. Bulgaria	716	4.60%
6. Cyprus	687	4.41%
7. United Kingdom	646	4.15%
8. Greece	631	4.05%
9. Netherlands	535	3.44%
10. Spain	477	3.06%

FIGURE 3: STADIEM WEBSITE – VISITS PER COUNTRY

All information and e-mails collected are protected under the General Data Protection Regulation (GDPR).

4.2.2 SOCIAL MEDIA

STADIEM established its presence on social media channels to regularly promote the project activities and outputs while encouraging a wider promotion of Next Generation Media solutions. The project has built a fair follower base on several social media channels, namely X/Twitter, LinkedIn, and YouTube, which are all linked to the project's website. In the reporting period, 12 videos were conceived for and distributed exclusively on X/Twitter and LinkedIn - vlogs in support to the STADIEM “Investors Week” activities and two new hubs/scale-ups testimonial series - for a total reach of over 300,000 impressions.

1. X/Twitter

STADIEM uses Twitter as a social network to cover the news in real-time, cross-share relevant and interesting initiatives, and to establish meaningful connections with relevant stakeholders, including policy makers, industry, and the general public. So far, the STADIEM Twitter account has **reached 293 followers** (including project partners, similar projects, interested stakeholders, etc.). In total, around **630 tweets** have been posted. The project also follows 130 accounts, mostly projects and initiatives in similar fields or of approximate nature where partners have been involved.

2. LinkedIn

LinkedIn allows the project to network with individuals and organizations within the media industry and beyond, share crucial information about project activities, and stay up to date on the latest developments in the field. The LinkedIn account has gathered **699 followers** so far. Similarly to X/Twitter, the LinkedIn account is mostly used to share the latest progress of STADIEM, echoing key promotional messages from the project website and sharing relevant news from the project's partners, pertinent projects and the European Commission.

3. YouTube

STADIEM is also running an account on YouTube, one of the leading video-sharing platforms. Since inception, the project has released a total of **24 videos** on the channel (2 of which in the reporting period).

▪ 4.2.3. NEWSLETTERS, VIDEO & PRESS RELEASES

The STADIEM consortium keeps the community and the general public informed about key activities, undertakings, and events by regularly publishing news items and press releases. To date, **38 news items** have been published on the project website.

12 Newsletters in total - collecting such items, plus additional strategic communication - have been edited and distributed to stakeholders through STADIEM's mailing lists as well as made available on the project website (7 issues in the reporting period). At project's end, **around 300 stakeholders** have subscribed to receive STADIEM's newsletter. In terms of further analysis on the efficiency of the communication:

- The 6th newsletter (May 2022) was sent to 287 subscribers / 54% opens / 10% clicks
- the 7th newsletter (September 2022) was sent to 301 subscribers / 50% opens / 6% clicks
- The 8th newsletter (December 2022) was sent out to 303 subscribers / 51% opens / 7% clicks
- The 9th newsletter (March 2023) was sent out to 302 subscribers / 50% opens / 6% clicks
- The 10th newsletter (May 2023) was sent out to 304 subscribers / 51% opens / 8% clicks
- The 11th newsletter (July 2023) was sent out to 303 subscribers / 51% opens / 4% clicks
- The 12th newsletter (September 2023) was sent out to 301 subscribers / 51% opens / 3.4% clicks

In the second reporting period STADIEM released **14 additional videos**, 2 of which were released on the STADIEM YouTube channel and mirrored on STADIEM's website. So far, the project's YouTube Channel reached a total of **over 2,600 views**. As anticipated above, the remaining 12 videos were conceived either as vlogs in support to the STADIEM "Investors Week" activities or as two other different thematic series: all in formats designed for exclusive release on X/Twitter and LinkedIn, for a joint total reach of over 300,000 impressions (more details in the following breakdown). The video output focused mostly on the promotion of Open Calls beneficiaries' activities within the programme and on the personal angle, through vlog or testimonial-style communication created in close collaboration with STADIEM's hubs and scale-ups. As additional output, 3 compilation edits of previously released material were created in the reporting period, for use in the context of showcases at physical events. More details can be found in Section 2.3.2 of deliverable D5.9.



To date, **10 press releases** have been issued by STADIEM, matching with key moments such as the launch of both Open Calls, announcements related to the selection phases of the project's piloting and acceleration programme, and to promote participation to events. All press releases were made available on the dedicated section of the project's website. All press releases created over the second half of the project (releases 7 to 10 – May 2022 to May 2023) were also **distributed to an average of 30 selected contacts in the specialized press** through Prowly; the 10th press release being specifically designed to promote the OC2 Pilots and the round of related events that saw the related scale-ups as protagonists, including IBC 2023. More details can be found in Section 2.4 of deliverable D5.9 '*Impact creation and outreach activities report v2*'

▪ 4.2.4. WORKSHOPS AND EVENTS

In the reporting period, STADIEM organized several workshops and showcases, with the twofold purpose of highlighting the work conducted and kickstarted by the programme - and its advantages - and of strengthening the reach to other stakeholders target groups.

3 workshops were hosted around Europe to present project results to specific target audiences: EBU's Production Technology Seminar reception (Geneva, January 2023), aimed at media corporates; Latitude59 side event (Tallinn, May 2023) for investors and scale-ups; Brussels-based "Enabling growth of a thriving media ecosystem in Europe" workshop in September 2023, dedicated to policy makers.

5 formal showcases and 2 informal networking events were also organized within renowned ecosystem events in a wide range of European countries: EBU's Production Technology and Data Technology Seminars 2023, Latitude59, Media City Odense, Future Week, IBC.

In addition to this, **STADIEM participated in 4 workshops** - attached to some of the aforementioned events plus Slush, SXSW and TechChill Milano (which also enticed joint participation with other ICT-44 projects) and **increased its presence at external physical events, counting 28 participations**.

For more details on both events organized and participation to external ones, please refer to Section 2.5 of D5.9 '*Impact creation and outreach activities report v2*'.



5. CONCLUSION

This deliverable presents the impact assessment methodology for STADIEM as an ambitious business scaling project for the mediatech start-ups and was discussed by the consortium members at a General Assembly and implemented in full capacity during the second year of the project. However, the impact assessment is relying on activities that go from the OC1 Match Phase to the OC2 Pilot Phase, covering the whole program. It is a central starting point to understand how each phase entails specific guidance, needs and expectations from the start-ups, and how to target specific issues when inviting experts and organize workshops and webinars to fit each phase's needs. The hub's activities are described as unified and agreed upon during consortium meetings and debated over. They are aligned to fit the lean strategy described in the Impact Assessment and to give comparable and similar data over the program. The data points combined give us a very clear picture of the European media tech start-up landscape and gives us valuable data to develop the program beyond its actual form in the future, to improve and solidify the European ecosystem. The data points that are described here are varied: community mapping, startup performances and feedback from hubs and corporates, hub activities overview and analysis, overall consortium performance overview – gathered from the beginning of the project, dissemination feedback – also gathered continuously - and give an overview of the ecosystem at various time points and show the unified way STADIEM's role in this ecosystem to scale-up companies. This deliverable also breaks down this Impact Assessment by analysing the various activities according to the entire program and how exponential the impact was for both Open Calls, as well as overall on the media tech landscape.

The main initial result discovered in OC1 was that start-ups are at an early and sometimes fragile state. STADIEM, by facilitating an agile approach, allowed the beneficiaries to maximize impact on several levels:

Firstly, on the ecosystem: this report shows how the program is crucial in helping seed-stage start-ups scale-up and managing successful pilots, strengthening the media tech ecosystem; the program counts two exits, which is also attributed to STADIEM's help and collaboration with the beneficiaries. Start-ups and corporate agree that most of the results achieved in their collaborations could not have been made possible without the program. STADIEM not only launches and accelerates the process for start-ups but does so while securing sustainability and long-term activity. STADIEM also generated impacts for beneficiaries in both its cohorts regarding exists, business deals and investment rounds.

Secondly, on the community: STADIEM, with its activities, as developed in WP4 and its corresponding deliverables describing the 2 cycles' activities in depth, helps fuel innovation and co-creation, support beneficiaries as a collaborative group, enable a strong network to engage scale-ups and benefit particularly early-stage start-ups. They highly benefit from being mentored through challenges, identifying, and attracting the necessary resources, leads, and clients.

Lastly, STADIEM's communication and dissemination activities ensure a level of visibility and stakeholders' engagement that would not be possible without the program: events and workshops reached a very high level of satisfaction in the beneficiaries and helped them significantly tackle challenges, de-risk and prepare successful pilots. But they also benefited greatly from presenting their solutions in several high-profile events previously mentioned, learning how to engage stakeholders, improve their strategy and attract new business. STADIEM's dissemination activities for the 2 cycles proved efficient in helping beneficiaries with the promotion of Next Generation Media solutions.



Finally, this deliverable demonstrated how STADIEM created blueprint for further interventions and creation of new EU driven projects, especially by being example of a digital champion on the media sector which managed to catalyse market impact through a unique collaboration between startup innovators and European legacy corporate players.



ANNEX - TABLES

Stage	Impact Action	Output	Frequency	Collection Form	KPI
Ecosystem Impact	Impact to Mediatech community	Stadium community & Ecosystem Map	Twice per project	Community Map in the project's repository at Google Drive, deliverables D1.6 and D.1.7	Twice per project
	Impact to external stakeholders	Engagement calendar & log	Continuous	Engagement Calendar at Airtable	10 net-working meetings per hub and stakeholders per stage
	Impact to Startup Community	Engagement calendar & log	Continuous	Engagement Calendar at Airtable	10 net-working meetings per hub and stakeholders per stage
	Impact to investors/portfolio managers	Investor / Portfolio Manager Study	Once per cohort	Google Forms by the projects repository project's repository at Google Drive	
	Impact assessment from Advisory Board	Feedback to consortium	At least twice per project	Advisory board notes in project's repository at Google Drive	
	Impact to Local Ecosystems	Local Ecosystem reports	Once per Cohort	Engagement Calendar at Airtable	10 net-working meetings per hub and stakeholders per stage



Framework & Program Deployment Impact	Impact to Hubs: Implementation of the Stadiem methodology	Stadiem Framework & Activity Calendar	Continuous	Activity Calendar & Log at Airtable	
	Qualitative Impact to the Hubs	Workshop	Twice per project	Workshop outcomes, Deliverables 2.3 and D2.4 and final report	
	Qualitative feedback from the Startups	Stage Report of Beneficiaries (from Match onwards)	Once per Stage	Stage questionnaire as part of stage performance evaluation	
	Maturation of innovative technologies & business processes	TRL Assessment post cohort	Once per cohort	Cohort assessment report as part of project management deliverables	
	Impact to improved cross border business activities	Cross border networking + pilot report	Once per cohort	Cohort assessment questionnaire at Airtable	
	Pilot quality	Corporate assessment survey	Once per cohort	Corporate assessment questionnaire at Airtable	
	Impact to Open Calls	Open call report	Once per cohort	Open call deliverables	
Communication & Dissemination Impact	Media Dissemination Impact	Dissemination report	Once per reporting period	Dissemination report at notes in project's repository at Google Drive, D5.8, D5.9	D5.8 delivered at M18: D5.9 submitted end of project
	Website impact	Dissemination report	Once per reporting period	Dissemination report at notes in project's repository at Google Drive	>15k since inception
	Publication Impact	Dissemination report	Once per reporting period	Dissemination report at notes in project's repository at Google Drive	10 publications in news outlets
	Social Media Impact	Dissemination report		Dissemination report at notes in project's repository at Google Drive	293 Followers X/Twitter



					699 Followers LinkedIn >1M impressions altogether
	Presentation Impact	Events Report	Once per reporting period	Dissemination report at notes in project's repository at Google Drive	10 Presentations; estimated reach >12k stakeholders
	Event Impact	Events Report	Once per reporting period	Dissemination report at notes in project's repository at Google Drive	61 Events attended; estimated reach around 300k stakeholders

Table 1. Stadiem project impact assessment breakdown

The following table (Table 2) describes the responsibilities of impact data gathering throughout the consortium.

Stage	Impact Action	Output	Collection Form	Main Responsible
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Ecosystem Impact	Impact to Mediatech community	Stadiem community & Ecosystem Map	Community Map in the project's repository at Google Drive	VRT
	Impact to external stakeholders	Engagement calendar & log	Engagement Calendar at Airtable	All partners
	Impact to Startup Community	Engagement calendar & log	Engagement Calendar at Airtable	All partners
	Impact to investors/portfolio managers	Investor / Portfolio Manager Study	Google Forms by the projects repository project's repository at Google Drive	Storytek / Exit Academy
	Impact assessment from Advisory Board	Feedback to consortium	Advisory board notes in project's repository at Google Drive	NMA
	Impact to Local Ecosystems	Local Ecosystem reports	Engagement Calendar at Airtable	All partners
Framework & Program Deployment Impact	Impact to Hubs: Implementation of the Stadiem methodology	Stadiem Framework & Activity Calendar	Activity Calendar & Log at Airtable	All partners
	Qualitative Impact to the Hubs	Workshop	Workshop outcomes, Deliverable 1.3 and final report	Storytek
	Qualitative feedback from the Startups	Stage Report of Beneficiaries (from Match onwards)	Stage questionnaire as part of stage performance evaluation	Stage responsible partners, NMA, VRT, Storytek, MCB
	Maturation of innovative technologies & business processes	TRL Assessment post cohort	Cohort assessment report as part of project management deliverables	VRT
	Impact to improved cross border business activities	Cross border networking + pilot report	Cohort assessment questionnaire at Airtable	Storytek, VRT
	Pilot quality	Corporate assessment survey	Corporate assessment questionnaire at Airtable	Storytek, VRT
	Impact to Open Calls	Open call report	Open call deliverables	F6S



Communication & Dissemination Impact	Media Dissemination Impact	Dissemination report	Dissemination report at notes in project's repository at Google Drive	Martel Innovate
	Website impact	Dissemination report	Dissemination report at notes in project's repository at Google Drive	Martel Innovate
	Publication Impact	Dissemination report	Dissemination report at notes in project's repository at Google Drive	Martel Innovate
	Social Media Impact	Dissemination report	Dissemination report at notes in project's repository at Google Drive	Martel Innovate
	Presentation Impact	Events Report	Dissemination report at notes in project's repository at Google Drive	Martel Innovate
	Event Impact	Events Report	Dissemination report at notes in project's repository at Google Drive	Martel Innovate

Table 2. Stadiem project impact assessment responsibilities allocation

