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Priority areas and general recommendations for the Portuguese sport

Strategy Advisory

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Foreword

In 2021 PwC conducted a study on the challenges faced in the Portuguese sport, analysing its context and the impact of the COVID-19 pandemic. We now present the study “Priority areas and general recommendations for the Portuguese sport”.

In this study, we have focused our analysis on a collection of international initiatives that were considered relevant to the key challenges identified in the Portuguese sector, through an accrual and evolving process intertwining stakeholder consultation, collaborative partnership with Portuguese NOC and our team’s desk research.

Our findings reveal the urgency of prioritising sport and recognizing its role in developing a more sustainable and resilient society, promoting inclusion and human well-being. Thus, we have identified key areas of action for the Portuguese sport’s ecosystem and present correspondent recommendations that we feel that would contribute to a much-needed cultural shift in Portuguese sport.

We sincerely hope that this document will contribute to fostering a strategic debate on the current state and future direction of the sport in Portugal.

Cláudia Rocha
Partner Strategy Advisory
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Paving the way to a new era of sport in Portugal

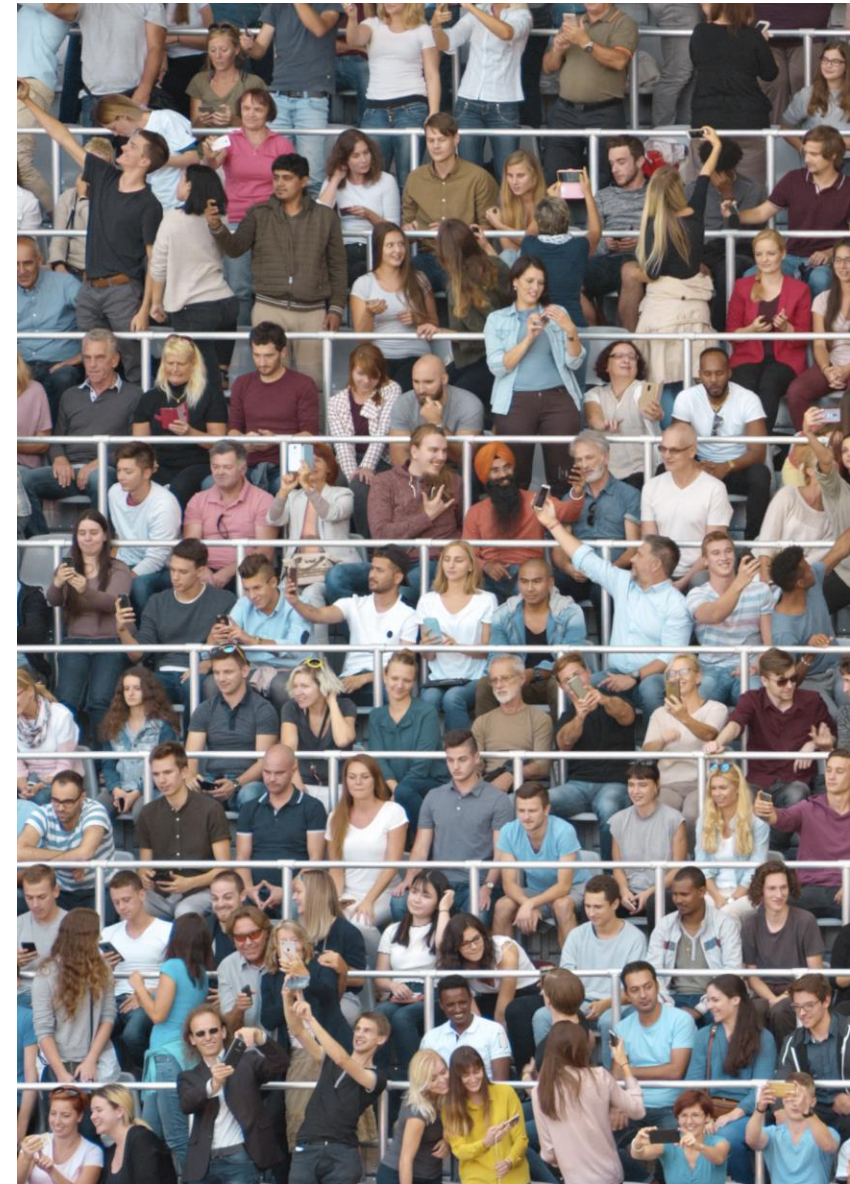
Portugal is facing a long and deep crisis of sustainability of its sports model, as evidenced by the figures of participation, development and sport competitiveness that place the country in the very bottom of Europe, which were worsened throughout the pandemic as seen in the first part of this work undertaken by PwC in 2021.

Before the evidence of the assessment made at the time, involving the national umbrella sport organisations, following the Summits of the Sport Federations, it became clear the pressing need to commission an independent study in order to bring forward strategic priorities and recommendations to tackle this structural issue, halt systemic vulnerabilities and raise Portuguese sport to other levels of development.

The study now made available, gathering evidence from international case studies, exploratory interviews and comprehensive desk research, represents a very earnest commitment to build the foundations for a long overdue and postponed public policy for sport, aligned within an overarching systemic framework with strategic guidelines and tangible goals binding all stakeholders in a game-changing endeavour to empower the sector, enhance its human capital and external competitiveness, while propelling out of the marginal position it currently holds within the country's public policies.

I would like to express my gratitude to the PwC team, the Olympic Solidarity of the International Olympic Committee and to all the entities and personalities consulted for their availability and contributions to accomplish this independent study paving the way to a new era of sport in Portugal.

José Manuel Constantino
President
Olympic Committee of Portugal





Acknowledgements

We would, firstly, like to thank Comité Olímpico de Portugal (Portuguese National Olympic Committee) for having entrusted PwC and providing all the necessary conditions for this study and for their collaboration throughout the process.

Thanks are naturally due to all the members of the project team, who always showed great availability in facilitating access to information relevant to the study, as well as in validating its conclusions.

We also extend our thanks to the entities consulted throughout the development of the study for their valuable inputs, namely:

- European Association of Sport Employers
- Italian National Olympic Committee
- European Platform for Sport Innovation
- Sport Integrity Global Alliance

About the disclosure of this study

The disclosure of part or the entirety of this report depends on the prior and joint authorisation of PwC and the Olympic Committee of Portugal, being duly safeguarded by contract.

This study is of a general nature and merely informative, not intended for any particular entity or situation, and does not replace professional advice appropriate to the specific case. PwC will not be liable for any damages or losses resulting from decisions made based on the information described herein. The work performed by PwC did not cover any audit procedures on the records, information and confirmations that were provided to us and, to that extent, our work does not constitute an audit, so we are not responsible for the reliability of the quantitative and qualitative information presented.

Nevertheless, we consider that the validations and analyses of the reasonableness of the information received are sufficient to support our conclusions.



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Introduction

Introduction

This report is a study requested by Comité Olímpico de Portugal (National Olympic Committee (NOC), “Promoting Entity”) with the support of the Olympic Solidarity of the International Olympic Committee.

The present report is aimed at indicatively identifying the priority areas for action for the Portuguese sport and to provide general recommendations accordingly. To this end, the report begins with an analysis of the sector in the European context and Portugal's positioning in relation to its peers. Subsequently, we reflect on the Portuguese sport constraints. Finally, a systematisation of the lessons learned from international initiatives and best practices is presented, which served as a basis for general recommendations to the Portuguese sport.

Seeking to contribute to a reflection on Portuguese sport, the present study “Priority areas and general recommendations for the Portuguese sport”, outlines general recommendations that aim to contribute to a structured strategic reflection and to the development of a detailed action plan, leading to a more effective strategical alignment.

Methodology

The analyses presented in the report were developed based on publicly available information and statistics and on information collected from stakeholders. Thus, this study includes quantitative data and qualitative information about the sector, namely from:

- Meetings and workshops with the Portuguese NOC
- Interviews to entities identified jointly with the NOC (list of entities interviewed in "Annex A2 - Stakeholders' auscultation")
- Search in databases and other sources of information available for consultation, namely, Eurostat, European Parliament and European Commission

The initiatives reviewed in the study were selected according to its role to address key challenges in the Portuguese sector and started with a country-based research. The relevant countries and related initiatives were targeted based on inputs collected throughout exchanges with the Promoting Entity, during the interviews with stakeholders and through PwC's desk research.

Research regarding initiatives was mainly focused on relevant deliverables for strategic guidance, i.e., strategic plans, reports and sports programmes, and on institutional websites.

The development of the study was followed by a parallel process of collective thought and exchange with the Portuguese NOC. Results, analyses and recommendations were also validated by the Promoting Entity.



Executive summary

Executive summary

Analysis of the European sporting landscape

- Key strategic issues and initiatives at a European level

The European sports model is based on values, voluntary activities and solidarity. However, in the face of new trends, the model has evolved and many have questioned the model's sustainability, calling for the need to reinforce and enhance the principles of a European sports model.

In 2021, the Council of the EU adopted the 3rd EU Work Plan for Sport for 2021-2024. This document establishes key activities and acts as a guiding instrument for sport development, outlining three priority action areas: "Protect integrity and values in sport", "Socio-economic and environmental dimensions of sport" and "Promotion of participation in sport and health-enhancing physical activity".

Nevertheless, despite the efforts to increase EU's role in sport, sport stakeholders are demanding a more holistic and coordinated approach. The sports environment has grown in size and complexity and stakeholders point out the lack of coordination, the need for prioritisation of sport policy sectors and for a more active role of the European Parliament, and the lack of data available to support decision-making.

For that reason, the European Parliament adopted a resolution on EU sport policy calling for a comprehensive assessment and possible ways forward, urging the Commission to develop and present a new communication on the future of sport, outlining strategic objectives and providing orientations – a document which would act as a guiding light towards sport development, replicating the effect of the 2007 White Paper.

- *COVID 19 impact in the European context*

In 2020, the outbreak of the COVID-19 pandemic strongly impacted the sport all around the world. Lockdown measures imposed strong restrictions to sport practice, leaving athletes, sports clubs and organisations vulnerable.

Throughout the pandemic crisis, the European institutions reinforced their appeals for additional financial support, more flexible support instruments, as well as increased intersectoral cooperation. However, the EU acted mainly through short term damage control response mechanisms, such as the CRII and CRII+ measure packages, which are not sector specific. The lack of immediate, tailor-made responses for the sport, left it widely exposed and urged the need for greater political recognition of the importance of sport.

Despite the severity of the pandemic's impacts on the sector, sport stakeholders viewed this situation as an opportunity to rethink the direction of the sector and innovate.

Additionally, the COVID-19 pandemic strengthened the urgency to act on preventive health with sport being a central piece to ensure a healthy society, reducing healthcare expenses and ultimately improving quality of life.

- *Main available indicators in the European context*

Both at national and European levels, the availability of organised and updated data about the sector is scarce, hampering an appropriate comparative analysis. It was nevertheless possible to position Portugal in the European landscape and gather the following main findings:

- In terms of regular sport practice, Portugal is among the countries with lowest activity levels, reflecting a lack of sportive culture among the Portuguese society;
- Concerning elite sport, although Portugal is able to qualify athletes to the Olympics in line with the European average, Portugal is the EU country with the fewest medals per inhabitant, displaying shortcomings to leverage medal winning potential;
- Regarding the level of public expenditure in sport, even though the percentage of public expenditure on recreational and sporting activities is in line with the EU average, public expenditure per capita is 42% lower, displaying evidence of an under-invested sector.

Executive summary

Overview of the Portuguese sport challenges

In the past decades, Portuguese sport system has shown a positive evolution, with a greater deployment of sport practice at national level, due to drivers such as regulatory reforms and the investment in infrastructures. However, compared to the European average, Portuguese sport still displays many aspects of improvement, from regular practice of physical exercise to the level of success in elite sport.

Despite widespread recognition of the importance of sport to society, primarily for its benefits to individual health, the sector has not received its due and deserved prominence at the policy level. As such, Portuguese governments have failed to include sport in the political agenda and to leverage its socio-economic impact, which goes way beyond health benefits.

In 2020, the outbreak of the COVID-19 pandemic imposed strong restrictions on the sector, strongly affecting clubs, sports organisations and athletes, and exposing structural vulnerabilities that have long been ingrained:

- **Poor funding structure** – The Portuguese sector is under-invested and is characterised by a heavy dependency on public funding from local authorities, along with the short funding incoming from Central Government, National Lottery and licensed betting operators and broadcasting deals and the low level of investment from the private sector;
- **Low level of professionalisation** – Sports organisations often rely on volunteer workers which frequently results in the internal management shortcomings due to lack of appropriate skills;
- **Alarming levels of sport participation** – In recent decades levels of physical activity reached minimums and successive governments have failed to address this issue, particularly among women, ethnic minorities, people with disabilities and seniors. In addition, unsettling levels of physical illiteracy among children have been reached and constitute a threat, not only to sport's sustainability, but also to society's health;

- **Poor awareness towards innovation in sport** – Aggravated by the reduced articulation between the sport and the National Scientific and Technological System, sports organisations have low levels of awareness regarding the need to innovate in order to attract new sport participants and audiences;
- **Issues of integrity and social responsibility** – Even though integrity and governance standards have improved, various scandals related to corruption, match fixing, organised violence and money laundering have occurred in the sport, damaging its reputation.

All in all, the structural weaknesses of Portuguese sport reflect a generalised lack of sportive culture among society. The Portuguese sport shows deep structural problems, ultimately reflected in society's perception of sport. Over time, Governments have failed to acknowledge the full extent of sport's socio-economic impact, while, on the other hand, sports organisations have demonstrated limited ability to respond to challenging situations, due to their low level of professionalisation. As a consequence, we have witnessed poor collaborative partnerships to deliver comprehensive action-oriented, evidence-based and reform-driven initiatives between political actors, sport organisations and other key stakeholders, that has limited the development of the sector.

Therefore, in order to lead a cultural change and involve all of society towards acknowledging the importance of sport at all levels, sport stakeholders need to improve their strategic alignment and take concerted action.

To better illustrate challenges and to further analyse the international initiatives selected, the national sport challenges were structured into 6 key areas:



Executive summary

Key takeaways from international initiatives

Having analysed the national landscape, in order to identify strategic priorities and good practices applicable to the Portuguese context, different international initiatives from 8 different countries were studied. After a careful analysis, it was possible to gather the following insights per challenge area:

- **Funding:** The overall goal of funding initiatives is to invest more efficiently and transparently, for example, based on the compliance with integrity or performance criteria. Likewise, other initiatives highlight the importance of investing with both a short and long-term focus, granting support based on the athlete's prospect of future success rather than on past success. Another relevant aspect is the need to improve the level of private funding attracted to the sector, so it becomes less dependent on public financing. Concerning COVID-19, acting quickly and providing sport specific support has proved to be crucial to ensure effective long-term recovery;
 - **Professionalisation and resources:** The overarching objective in the analysed professionalisation initiatives under review is to improve working conditions, ensure labour protection mechanisms and build capacity within sports organisations. The provision of advice, training programmes, and a resource sharing hub, are some key initiatives to professionalise the sector. In parallel, sport must seek to optimise the network of facilities, investing in the modernisation of infrastructure, encouraging the sharing of facilities and improving accessibility in rural and disadvantaged areas;
 - **Participation:** Boosting sport participation is a common concern of all countries analysed. However, considering the breadth of the concept of sport participation, in order to capture the critical aspects of the different approaches to boost participation, initiatives were allocated to four different components: general sport practice, sport in education, inclusive sport and high-performance sport. Most initiatives for sport promotion revolve around leisure and recreational sporting events, awareness campaigns, and close monitoring of activity levels. Concerning sports in education, several countries are demanding physical education to become a core subject in school and are also requiring increased specialisation of physical education teachers.
- In turn, promoting the social dimension of sport includes fostering volunteer engagement and galvanising the participation of less active minorities, through campaigns, adapting infrastructure, and training sport professionals (e.g. specialise in sport for the seniors and for people with disabilities). Finally, high-performance sport is required to develop an athlete-centred approach to deliver high-quality support services that ensure the mental and physical well-being of athletes;
- **Innovation and value creation:** In order to raise awareness towards the need to efficiently invest in research and innovation as a way to address challenges in sport and improve outreach, several countries have established research and innovation hubs. These hubs are typically responsible for setting research priorities, launching debate, fostering collaborative research projects between stakeholders (from sport and other neighbouring sectors) and also working with authorities to make evidence-based decisions;
 - **Integrity and social responsibility:** Sport has struggled to enforce governance and integrity standards. Therefore, several initiatives stress the importance of implementing mechanisms to closely monitor governance of sport organisations. Nevertheless, to ensure impartiality such mechanism must be performed through third party assessments;
 - **Strategic alignment:** In general, the initiatives analysed reflect the overall need to ensure coordination and collaboration between stakeholders, both in sport and in neighbouring sectors. For that reason, several countries and sports institutions have developed strategic documents to structure its actions in time in order to attain tangible outcomes and allocate suitable resources. Similarly, data and information are often described as enablers to strategic alignment and evidence-based decision making. For that reason, stakeholders point out initiatives to improve data availability in the sector, such as the development of sports systems and databases, coordinating information systems and providing data regarding the socio-economic impact of sport and of public investments.

Executive summary

Priority areas and general recommendation

- The Portuguese sport ambitions to drive structural cultural change in Portugal, envisaging a society that acknowledges the social and economic importance of sport and engaged in an active sport practice, leveraging all the benefits of a sportive lifestyle.
- To lead this cultural change and to address the challenges reported, six priority areas were flagged. Strategic alignment boosts a comprehensive crosscutting catalyst laying the groundwork for the other five dimensions. For each dimension, we present general recommendations.

Strategic alignment

Enhance alignment and promote an integrated and long-term vision among stakeholders

1. Design a National Sport Strategy connecting all dimensions of sport, improving coordination among stakeholders and ultimately that strengthens sport's relevance in the political agenda
2. Establish a sustainable sector which takes evidence-based decisions to enhance value for money and efficient resource management

Funding

Manage resources efficiently

3. Increase the level of funding channelled to the sector
4. Establish a link between public funding and sporting success
5. Reduce bureaucracy on performance goals-oriented and project-driven funding system

Professionalisation and resources

Contribute to a more professionalised sector

6. Build capacity of sports organisations
7. Shorten the gap between professional and volunteer-based organisations
8. Embed sustainability in all decisions and actions, including resource optimisation

Participation

Improve conditions for sport practice in an athlete centred approach

9. Increase the level of physical activity
10. Boost sport in the education system
11. Leverage sport as tool for social inclusion
12. Raise high-performance sport participation from the grassroots upwards

Innovation and value creation

Increase the level of innovation and boost digitalisation

13. Improve the level of scientific embeddedness in the sector
14. Develop a research and innovation-friendly environment
15. Raise awareness on sports organisations to the need to adapt to new challenges/opportunities

Integrity and social responsibility

Boost sport's benefits to society, fighting integrity and governance threats

16. Meet the highest integrity and governance standards, keeping sport safe from illegal practices
17. Bring top-level sport closer to communities
18. Safeguard athlete's well-being

Analysis of the European sporting landscape

Sport policy in the context of the EU

3. Analysis of the European sporting landscape

The “EU Work Plan for Sport 2021 – 2024”, published in 2021, sets priorities for Sport. The sector demands a more holistic approach with greater alignment between stakeholders

Overview of sport policy in the context of the EU (1/2)

High-level

A In 2021, the Council of the EU adopted the 3rd EU Work Plan for Sport for 2021-2024. This work plan is a strategic document which outlines the guidelines and objectives of the EU in sport and includes initiatives such as awareness-raising campaigns, studies, conferences and councils, **focusing on the integrity and values in sport, its socio-economic and environmental dimensions and promoting participation** (sports and physical activities). To address these issues, Member States and the Commission have created two additional expert groups on green sport and recovery from COVID-19, and will build up on the work of expert groups from the previous Work Plan

B The Directorate-General for Education, Youth, Sport and Culture (DG EAC) has three main action areas of action: integrity of sport, economic dimension of sport, and sport and society. DG EAC’s Strategic Plan 2020-24 points out as **strategic objectives directly related to sport the increase of international cooperation and the promotion of the Erasmus+ programme in sport**

C Although the EU has seen much improvement in its involvement in sport, **there is still the need to adopt a more holistic approach to sport policy**. The lack of coordination, the need for prioritisation of sport policy sectors and for more parliamentarisation, and the lack of data/ information available to stakeholders, have been indicated as some of the key limitations to sport policy development

D In November 2021, acknowledging the increasing socio-economic importance of sport, especially after the COVID-19 pandemic, **the European Parliament adopted a resolution underlining several calls for action and recommendations on seven thematic strands**: from addressing governance and integrity issues to ensuring a successful recovery or ensuring safe, inclusive and equal sport. Besides, the **EP also calls on to the development of a new document to provide a vision of sport for the next decade**, outlining strategic objectives and guidelines for the sector’s development

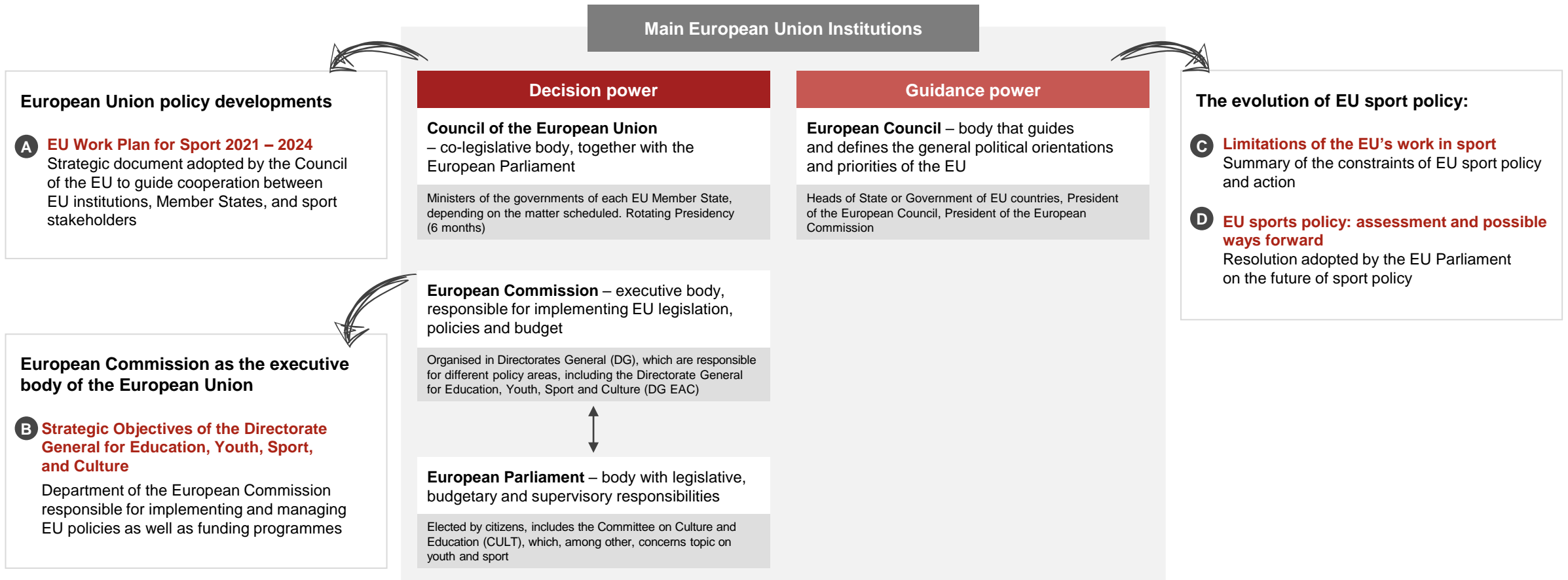


3.1 Key strategic issues and initiatives at a European level

In the current EU sport policy context, the “EU Work Plan for Sport 2021 – 2024” outlines the guidelines and objectives of the EU on sport

Overview of sport policy in the context of the EU (2/2)

High-level



Source: European Commission; European Parliament; Council of the European Union; PwC Analysis

3.1 Key strategic issues and initiatives at a European level

The EU Work Plan for Sport 2021-24 includes actions concerning dual-career of athletes, corruption, sports facilities and funding opportunities

A EU Work Plan for Sport 2021-24: priority areas and key initiatives

- The Council of the European Union has adopted the EU Work Plan for Sport 2021-2024, which **outlines the guidelines and objectives of the European Union for sport** and seeks to: **“Promote and develop cooperation in sport policy between EU institutions, Member States and sport stakeholders”**
- The EU Work Plan was developed in collaboration with sport stakeholders and addresses the following **priority areas**, to which it has outlined a set of objectives and actions:



Protect integrity and values in sport

- Safe environment in sport
- Anti-doping
- Sport and education (including dual-career of athletes)
- Gender equality
- Sports diplomacy in the context of EU external relations
- European model of sport
- Athlete's rights (namely marketing rights, freedom of expression, legal protection, non-discrimination)
- Good governance development and promotion
- Fight against manipulation of sporting competitions



Socio-economic and environmental dimensions of sport

- Innovation and digital transition in all dimensions and at all levels of sport
- Green sport
- Sport facilities
- Major sporting events
- Investments in sport and physical activity (including investment for regional development and EU funding programmes)
- Strengthening the recovery and the resilience of sport during and in the aftermath of the COVID-19 pandemic



Promotion of participation in sport and health-enhancing physical activity

- Creation of adequate opportunities for sport and physical activity for all generations
- Promoting physical activity (including cross-sectoral cooperation with relevant institutions such as schools)

- To address these issues, **Member States and the Commission have created two additional expert groups** on green sport and recovery from COVID-19, and **will build up on the work of expert groups from the previous Work Plan** (previous expert groups: match-fixing, good governance, economic dimension of sport, health enhancing physical activity (HEPA), and human resource development in sport)

3.1 Key strategic issues and initiatives at a European level

DG EAC's Strategic Plan pinpoints as strategic objectives increasing international cooperation and promotion of the Erasmus+ programme in sport

B Strategic Objectives of the Directorate General for Education, Youth, Sport, and Culture

- The Directorate General (DG EAC) is responsible for **developing the European Commission's policies** in the areas of education, youth, sport, and culture
- In 2020, DG EAC published its **strategic plan from 2020 to 2024**, with the aim of guiding the DG's activities over the next five years and ensuring that the strategic objectives are in line with political priorities
- **DG EAC has three main areas of action in the field of sport:**



Integrity of sport

Promoting good governance including the safeguarding of minors, fighting corruption, match fixing, and doping



Economic dimension of sport

Fostering innovation in sport, and the digitalisation of the sport



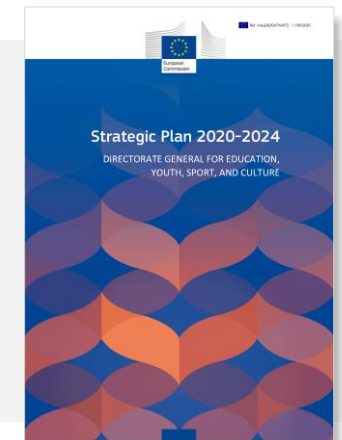
Sport and society

Promoting gender equality, physical activity and social inclusion in and through sport

DG EAC Strategic Plan 2020-24:

The plan outlines **7 strategic objectives**:

1. European Green Deal
2. Europe fit for the **digital** age
3. An economy that works for people
4. A **stronger Europe in the world**
5. Promoting our **European way of life**
6. A new push for **European democracy**
7. **A modern, high-performing and sustainable EC**



It is also possible to map out a set of specific goals directly related to sport:

- **Specific objective 4.1 - Promote and strengthen international cooperation** in the fields of education, training, youth, sport, culture, and research and innovation
- **Specific objective 5.2 - With the support of the Erasmus+ programme**, promote learning mobility of individuals, as well as cooperation, inclusion, excellence, creativity and innovation at the level of organisations and policies in the field of education and training

3.1 Key strategic issues and initiatives at a European level

Although the EU has strengthened political engagement in the field of sport, there is still the need to adopt a more holistic approach to sport policy

© Limitations of the European Union's work in sport

- Although the EU has increased its involvement in sport in the last decade, devising tools such as the EU Work Plan for Sport and Erasmus+, its **sport competencies are still limited to support, coordinate and complement Member States' sport policies and initiatives**
- Thus, **the EU action in sport is centred around soft policy tools, such as guidelines, recommendations and funding opportunities, to support its sport-related objectives**

Main limitations assessed by the European Parliament:

Lack of coordination

The sport landscape has been growing in complexity and number of stakeholders as sport actors pointed out a lack of coordination at a European level

- Lack of monitoring at EU level and fragmentation of the actions of the various actors, creates the need to include sport specific objectives in cross-sectoral agendas
- Poor communication and intra and inter-institutional cooperation
- Lack of clarity regarding the European model of sport

Need for prioritisation of sport policy sectors

Due to the variety of fields encompassed in sports, the lack of a clear prioritisation of policy fields has constrained the adoption of structural measures. Furthermore, the EU sport policy has been addressed as a general recommendation which has proved unsuccessful as more specific policy fields arise requiring particular attention and tangible support

Need for parliamentarisation

Sport stakeholders have demanded a more active and proactive role of the European Parliament and its CULT Committee in sport policy, making stronger efforts to move sport issues higher in the political agenda

- Poor cooperation with other EP standing committees and with national parliaments
- Poor cooperation between the EP and sports federations of organisations

Lack of data and information available to stakeholders

Although research on sport policy has advanced, the lack of a structured overview of information on European sports is still evident, being a barrier to rational decision-making

- Access to data and in-depth knowledge (sectorial data and information, guidelines, etc.) should be more transparent and centralised to facilitate decision-making
- Lack of sectorial data including all Member States is limited (e.g. no sport satellite accounts in all countries)

3.1 Key strategic issues and initiatives at a European level

In November 2021, the European Parliament adopted a resolution on the future of sport policy presenting possible actions across seven thematic strands

D EU sports policy: assessment and possible ways forward

Acknowledging the increasing socio-economic importance of sport, **in November 2021, the European Parliament adopted a resolution on EU sports policy: assessment and possible ways forward, disclosing recommendations on seven thematic strands** (presented below) and **calling on to the development of a new “Communication on the Future of Sport for the next decade, outlining strategic objectives and orientations”**

1 Strengthening visibility, cooperation and the mainstreaming of sport in EU policies

Increased cooperation between institutions and greater dialogue between sport stakeholders are needed to guide decision-making. The EP called on the EU to adopt a more holistic approach to sport policy and increase efforts to mainstream it into other EU policies

2 Enhancing the principles of a European sports model

More efforts should be made to improve specific features of European sport model, highlighting the need for more solidarity and financial redistribution, in order to reduce the financial and high-performance gap between clubs

3 Renewing good governance and integrity

Good governance should be enhanced by combining traditional commitments to integrity with actions towards gender equality and inclusiveness in organisations. The report also acknowledges that sport faces serious integrity threats such as match-fixing and doping

4 Ensuring safe, inclusive and equal sport

So that sport serves as tool for social inclusion, it must be accessible to everyone, especially those more vulnerable. Likewise, the sport environment must be safe from threats like discrimination, harassment and hate speech, issues that need to be effectively targeted

5 Promoting healthy and active lifestyles together with education and development opportunities

Promote initiatives and campaigns to combat decreasing levels of physical activity, particularly among young people, for example by increasing physical activity and extracurricular activities in school. Also, lifelong learning opportunities for athletes and sport staff should be improved

6 Helping sport to ensure a successful recovery

More concrete and dedicated support mechanisms should be developed to ensure a successful recovery, including funds from cohesion programmes and from the new Recovery and Resilience Facility

7 Supporting the transition to a sustainable and innovative future

Sport must work as a vector for ensuring a green transition (e.g. modernisation of sports facilities and the organisation of sustainable sporting events) and the investment in innovation and technology should be prioritised

COVID-19 impact

3. Analysis of the European sporting landscape

The COVID-19 pandemic aggravated some of the existing problems in the sector. Several stakeholders point out the opportunity to innovate, rethink policies and reassess priorities

Overview of the COVID-19 pandemic impacts in the European context

- The **COVID-19 pandemic had a strong impact on the European sport**, especially as lockdown measures strongly curtailed sport activities, competitions and events
- The consequences were deeply felt by athletes, sports clubs, broadcasters, sponsors, retailers, freelancers and sport governing bodies
- The following **main impacts of the pandemic** have been flagged: loss of revenue for sports organisations, difficulties in cash flow, unemployment and precarious work, loss of volunteers, reduction in athletes' income. Additionally, the pandemic affected not only organisations and individuals directly linked to elite sport, but also the entire industrial fabric associated with sport
- Nonetheless, such **impacts have been exacerbated by long-felt fragilities in the sport**, such as a low degree of professionalisation, lack of innovation and infiltration of illegal and unethical behaviour in sport
- Therefore, besides identifying measures to mitigate the consequences of the pandemic, **sport stakeholders point it out as an opportunity to innovate, rethink policies and reassess priorities**



3.2 COVID-19 impact in the European context

In addition to cash flow difficulties due to sport bodies revenue shortfall, athletes also faced income losses

Impacts of the COVID-19 pandemic in the European context

The following main impacts of the pandemic were identified:

- **Loss of revenue for sports organisations** due to the cancellation of training and competitions, and the inability to collect different types of fees, such as sponsorship, membership fees, licenses or subscriptions
- **Cash flow difficulties.** Due to reduced revenue, organisations have struggled to pay fixed costs such as salaries, and other contractual obligations, leading to reductions in staff and, in some cases, bankruptcy
- **Unemployment and precarious work.** This situation of instability increased the feeling of insecurity among sport professionals, particularly to those employees, coaches and athletes that faced serious risks of dismissal, during the pandemic
- **Freelancers.** The pandemic particularly affected self-employed workers who were unable to provide their services or request public assistance
- **Loss of volunteers.** Sports organisations lost a large part of their unpaid workforce due to the lockdown measures taken during the pandemic, deeply affecting its operations
- **Reduction in athletes' income,** due to the lack of events and competitions, as well as the resulting financial fallout reflected in the fall of sponsorship deals, cash prizes and other public and private revenue streams
- **Impact on sport-related industries.** The impacts of the pandemic affected not only organisations and individuals directly linked to sport, but also the entire industrial fabric associated with sport

3.2 COVID-19 impact in the European context

Throughout the crisis, the European institutions reinforced their appeals for financial support, more flexible instruments, as well as more intersectoral cooperation

Main EU milestones in response to COVID-19 in sport

March 2020

The World Health Organization (WHO) on March 11, 2020 **declared the novel coronavirus (COVID-19) outbreak a global pandemic**

October 2020

Ministers renewed their call on EU **countries to promote cross-sectoral cooperation in areas relevant to sport in its various dimensions**, including with the sports movement, the business sector and other relevant stakeholders, in order to effectively address the challenges that sport faces as a result of the COVID-19 pandemic and to strengthen the position of sport in society

February 2021

The European Parliament adopted a resolution **urging Member States to provide financial, strategic and practical support** in order to tackle long-lasting pandemic effects on youth and **sport**

2020

2021

2022

April 2020

In the EU Council, **EU sport ministers stressed that all opportunities to reallocate existing and nationally planned funds should be seized.**

Considering the nature of the pandemic, special emphasis was placed on ensuring the continuity of training for athletes, on preparing and building capacity to improve the physical activity of citizens, while ensuring their safety and preventing the spread of the virus

June 2020

Sport Ministers in the **EU Council called on EU Member States to promote the various support measures implemented through EU programmes, funds and initiatives** such as Erasmus+, the European Solidarity Corps, CRII and CRII+. Furthermore, Member States invited the Commission to report regularly on the possibilities for flexible arrangements in the implementation of Erasmus+ Sport and to provide possibilities in future annual programmes and calls for proposals to support the recovery of the sport. Ministers also invited the Commission to reflect on the possibility and relevance of introducing more flexibility mechanisms in future funding programmes in the field of sport, thus enabling the EU to respond promptly to the consequences of the pandemic and other challenging situations in the future

June 2021

The **Committee on Culture, Science, Education and Media of the Parliamentary Assembly of the Council of Europe** also approved a declaration, in June 2021, which **“urges public authorities to give sport the necessary attention when considering anti-covid measures, and to work with the sports movement to find new ways to mitigate the damaging impacts of the crisis, preserve the sustainability of the European sport and make sure that sport continues to deliver its benefits to individuals and to society”**

3.2 COVID-19 impact in the European context

The EU acted mainly through response mechanisms that cut across various sectors of the economy and not specifically targeted to sport

European Union initiatives for economic recovery

Non-exhaustive

- Currently, the **European Union does not hold direct powers to regulate sport issues**
- However, given the extent of its economic, social and health impacts, the area of sport is covered by a number of EU policy instruments. Accordingly, the EU has intervened mostly indirectly in sport to support its recovery, through **response mechanisms that cut across various sectors of the economy**
- This lack of specific support mechanisms, led to **inefficiencies in access to assistance responses, mainly due to the sector's specificities** such as its heavy reliance on volunteer work

European Commission Initiatives

- In March 2020, the European Commission announced the **Temporary Framework to enable Member States to further support the economy in the COVID-19 outbreak**, which included the following temporary state aid measures which were later extended:
 - ✓ Direct grants, selective tax advantages and advance payments
 - ✓ State guarantees for loans taken by companies from banks
 - ✓ Subsidised public loans to companies
 - ✓ Safeguards for banks that channel State aid to the real economy
 - ✓ Short-term export credit insurance
- In April 2020, the Commission launched two packages of measures: the **Coronavirus Response Investment Initiative (CRII)** and the **Coronavirus Response Investment Initiative Plus (CRII+)**, with the aim of efficiently mobilizing structural funds in order to allow a rapid response to the crisis
- In addition, in May 2020, the Council adopted a **European instrument for temporary support to mitigate unemployment risks in an emergency (SURE)**. The instrument consists of financial assistance, in the form of EU loans to Member States with favourable condition, for a total amount up to €100 billion, to deal with sudden increases in public spending and to preserve employment
- For organisations benefiting from the **Erasmus+ programme**, the Commission sought to **provide maximum flexibility** within the limits of the legal framework, by extending application deadlines, rescheduling activities, authorising them to invoke *force majeure* clauses, among others

3.2 COVID-19 impact in the European context

Besides pinpointing measures to mitigate the consequences of the pandemic, several stakeholders stressed the opportunity to innovate, rethink policies and reassess priorities

Position paper and action plan for sport promotion of a more resilient and sustainable Europe

Position paper

- At the beginning of the pandemic, the EU Office of the European Olympic Committees, along with the sport stakeholders in the framework of the Share Initiative, released a position paper on the impact of COVID-19
- This position paper highlights the importance of sport to the European economy and, in addition to **outlining the main consequences of the pandemic, a set of measures to support the sector is also pushed forward**

SHARE Initiative

- Launched by the European Commission in 2018, the main objective of the SHARE Initiative is to raise awareness of the role of sport and physical activity in the context of regional and local development
- The initiative brings together public authorities, sports organisations, universities, SMEs and business support organisations across Europe

Action plan for sport promotion of a more resilient and sustainable Europe

1. **Ensuring the sport is eligible to funds for the protection of jobs** (employees and self-employed)
2. **Lightening the rules relating to state aid** in order to allow tax breaks for entities and organisations that promote sports activities
3. **Stimulating innovation programmes for sports enterprises** (industrial modernisation)
4. **Providing loans to ensure the liquidity of sports clubs and other associations**
5. **Redirecting certain EU and national funding streams** (e.g. European Structural and Investment Funds) **towards actions promoting the well-being of citizens** such as sports and physical activity
6. **Creating public and private solidarity funds for grassroots sports clubs and associations and their workforce**, without neglecting outsourced coaches and freelancers
7. **Creating new and innovative funding opportunities** to promote sport and physical activity during lockdown
8. **Helping schools and physical education teachers to continue training pupils through digital means that are effective and safe**, i.e., through funding, guidelines, best practice cases, internet price concessions
9. **Promoting a healthy active lifestyle of the working population**, both those working at home and at the office

Such measures should be established quickly and support and stimulate both **public and private dimensions** of sport, **leveraging existing EU instruments as well as newly created funds** in response to the crisis.

Stakeholders also highlight the importance of **taking the opportunity to create innovative ways to promote sport, rethink policies and reassess priorities**

Main available indicators

3.3 Main available indicators in the European context

In comparison with the average EU-27, Portugal evidences room for improvement in terms of regular sport practice as well as in elite sport performance

Portugal vs. European context: main indicators

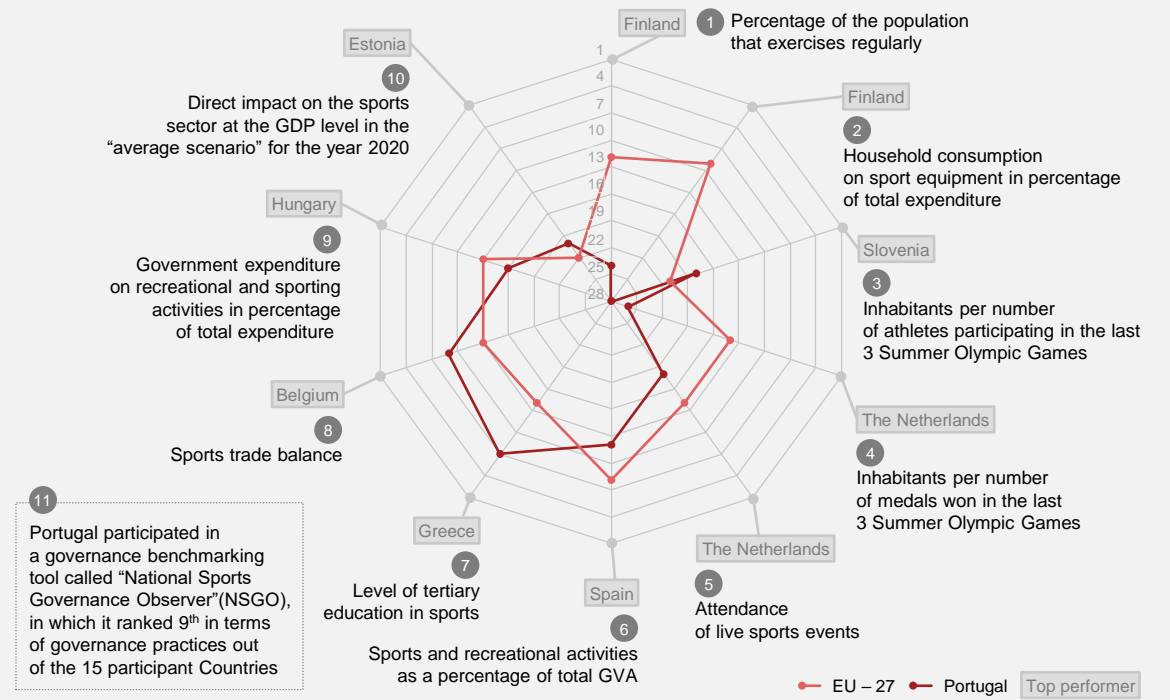
Both in national and in European terms, availability of sports data in an aggregated and comparative way is scarce, turn difficult to analyse the sector's performance between countries in relevant metrics. Even so, it was possible to draw the following conclusions:

Key takeaways

- Portugal is one of the countries where regular sport practice of population is lower compared to the European average and, likewise, Portugal's mean household expenditure in sports equipment was the lowest
- Although Portugal demonstrates an ability in line with the European average to qualify its elite athletes for Summer Olympic Games, Portugal is outperformed in its ratio of inhabitants to medals won, being the country with the lowest number of medals per capita
- Sport in Portugal has a lower weight in the country's total GVA, compared to the European average, despite having a slightly higher percentage of employment in sport and higher level of tertiary education
- The Portuguese trade balance is in line with the European average, which is generally balanced in the EU countries
- Although the percentage of public expenditure on recreational and sporting activities is in line with the EU average, public expenditure per capita is 42% lower
- COVID-19's direct impact on Portuguese sport was in line with the EU
- All of the countries that participated in the NSGO study scored "weak" or "moderate". As such, Portugal scored "weak" with the worst factor being societal responsibility

Portugal's position vis-à-vis the EU-27

(relative positioning in each of the indicators, with 1 being the top performer)¹



Notes: 1 - Positioning from 1 to 28, considering 27 Member States and the EU-27, excluding the United Kingdom from the ranking, although including it the indicators analysis

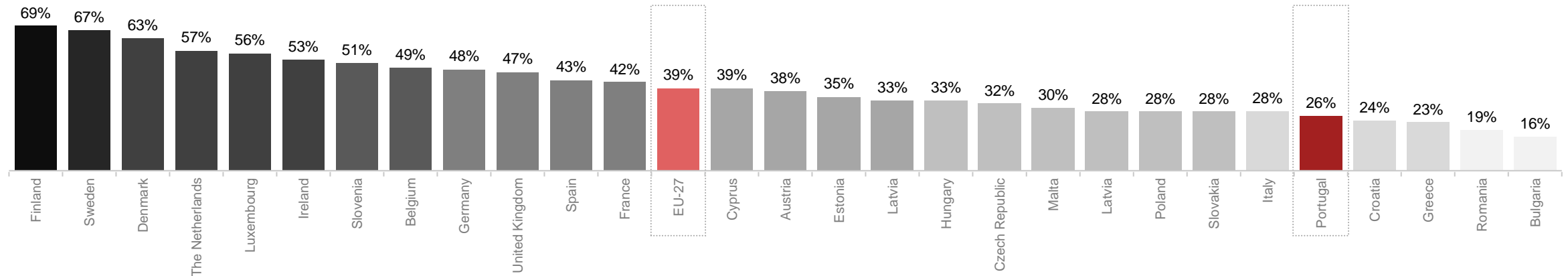
Source: Eurostat; Olympia; European Commission "Mapping Study on measuring the economic impact of COVID-19 on the sport in the EU"; IPDJ; PwC Analysis

3.3 Main available indicators in the European context

Portugal is one of the countries where regular sports practice is lower (26%) than the European average (39%)

1 Regular practice of physical an sports activities

Percentage of the population that regularly engages in physical exercise or sport (2017)



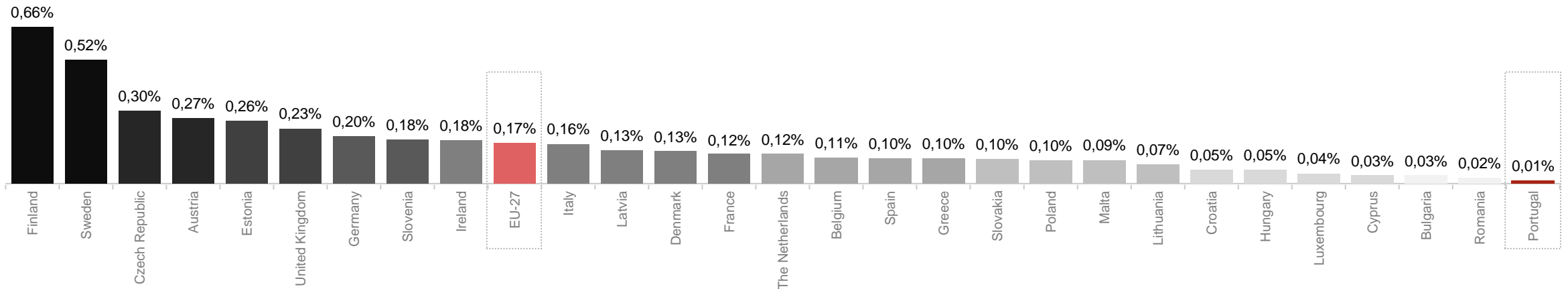
- **Portugal is one of the countries whose population that regularly engages in physical exercise is lower (26%)** compared to the European average (39%)
- Similarly to Europe, for cultural reasons, the level of sedentary lifestyle in Portugal worsens among women and older generations
- Nordic countries score the highest levels of regular physical exercise, with values above 60%
- In Portugal, improving health conditions, relaxing and enhancing fitness are the top reasons for those who engage in regular sports practice and physical activity. On the contrary, **the lack of time, motivation or the fact that it's too expensive are pointed out as the main reasons preventing individuals from practising sport more regularly**

3.3 Main available indicators in the European context

During 2015, Portugal's mean household expenditure on sports equipment was the lowest, both on relative and absolute terms, aligned with low frequency of sports practice

2 Private households expenditure on sport

Mean consumption expenditure of private households on sport equipment in percentage of total expenditure (2015)



- In relation to its total household expenditure, **Finland spent 0.66% on sports equipment** (balls, nets, rackets, bats, game-specific sportswear such as ski suits), which was **the higher value across the EU, followed by Sweden, Czech Republic, Austria and Estonia, countries where expense may be driven by snow sports equipment**
- On the other hand, **Portugal** is the country where households **spent the least** in terms of total expenditure, with only **0.01%**, which is **0.16 percentual points below the EU average**, which is aligned with its low frequency of sport practice
- It is important to note that, in **absolute terms**, during 2015 **Portugal** was the country where mean household **expenditure on sports equipment was the lowest**, sitting at 2 PPS¹ (vs. a 42 PPS average in EU-27)

Notes: 1 - Purchasing Power Standard (PPS): Is an artificial currency unit. Theoretically, one PPS can buy the same amount of goods and services in each country. PPS are derived by dividing any economic aggregate of a country in national currency by its respective purchasing power parities

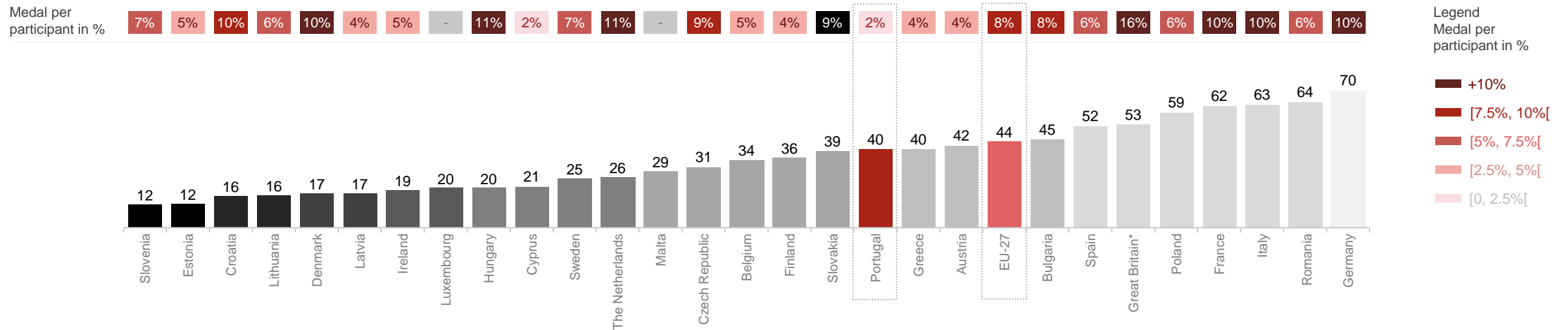
Source: Eurostat; PwC Analysis

3.3 Main available indicators in the European context

Although the ratio of inhabitants per participant in the last Summer Olympic Games is in line with the European average, Portugal has the lowest medal per participant ratio

3 Athletes' participations in the Summer Olympic Games

Thousands of inhabitants per total number of athletes participating in the last three Summer Olympic Games (2020)



- Slovenia, Estonia and Croatia are the countries with the best ratio of inhabitants to number of athletes participating in the Games
- **Portugal has a ratio of thousands of inhabitants to participants in line with the European average.** However, together with Cyprus, it is the country with the lowest medal per participant ratio, displaying shortcomings in medal winning potential
- In contrast, **the United Kingdom and Hungary are the countries with the highest medal to participant ratio** in the last three editions of Summer Olympic Games

Notes: * UK population of 2019 used as proxy, even though athletes from Northern Ireland can choose between the British and the Irish Olympic team

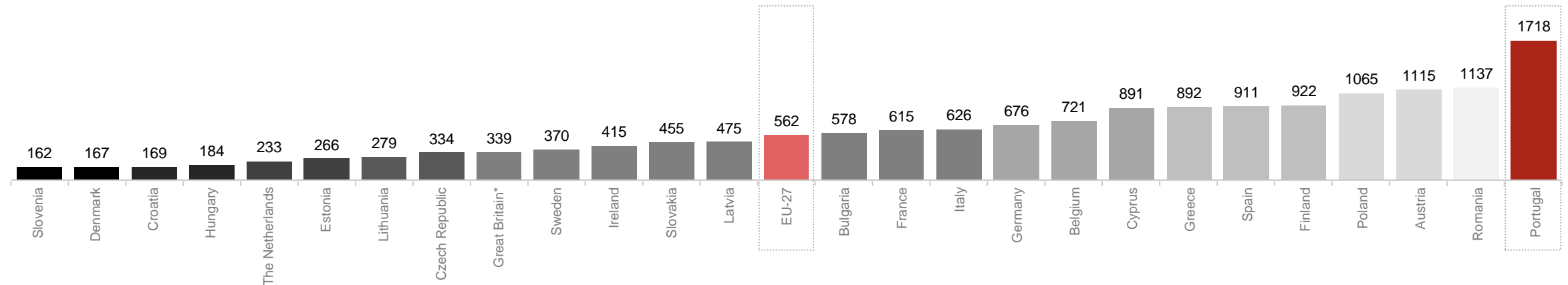
Source: Olympedia, International Olympic Committee; Eurostat, PwC Analysis

3.3 Main available indicators in the European context

In the EU landscape, Portugal comes up with the least medals per inhabitant in the last three editions of Summer Olympic Games

4 Performance in the Summer Olympic Games

Thousands of inhabitants per total medals won in the last three Summer Olympic Games (2020)



- With the exception of Malta and Luxembourg, which did not win any medals, **Portugal is the EU country with the fewest medals per inhabitant**. On average it takes about 2 million Portuguese to obtain a medal, a value almost **11 times higher than Slovenia**, which is the country with the best ratio
- The **EU-27** average is around **562 thousand Europeans per medal** won in the last three Games
- Despite not being top performers in terms of their inhabitant per medal ratio, the **United Kingdom, Germany and France are the top three countries with more medals in the past three Summer Olympic Games** (197, 123, 110 medals, respectively), reflecting its high medal to participant ratio displayed previously

Notes: * UK population of 2019 used as proxy, even though athletes from Northern Ireland can choose between the British and the Irish Olympic team

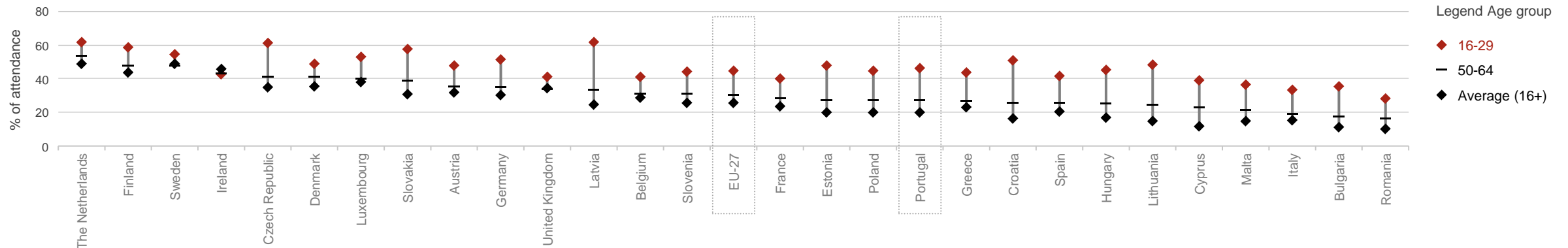
Source: International Olympics Committee; Eurostat; PwC Analysis

3.3 Main available indicators in the European context

In 2015, regarding the attendance of at least a sporting event a year, Portugal's rate sits at 28%, 2 percentage points below EU average

5 Sporting events attendance

Attendance of live sporting events at least once in the previous year in percentage of age group (2015)



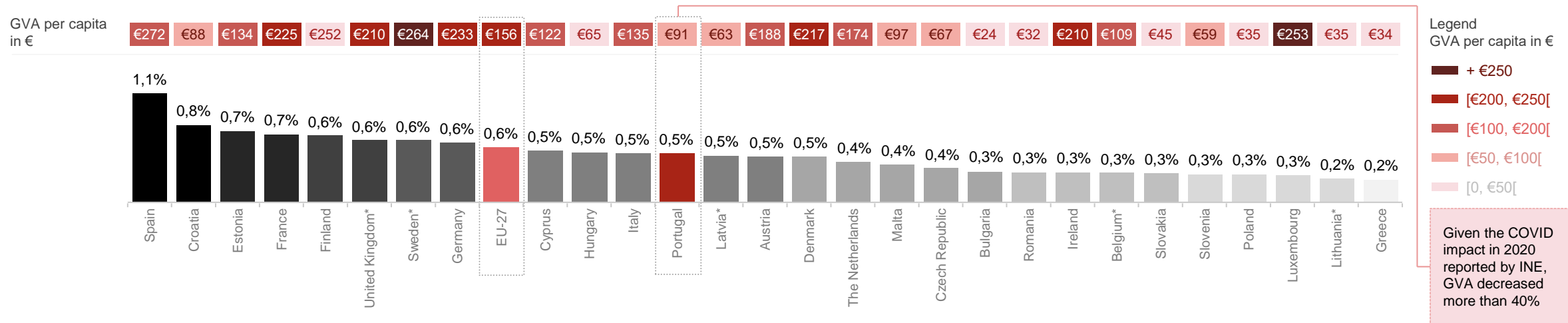
- In general, the **younger the age group the more likely it is to have attended at least once a live sporting event** during the previous 12 months, however, **Ireland's case is the opposite** where the **29-64** age group has a rate of **46%** compared to a **43%** in the **16-29** age group
- In terms of **difference between the age groups**, **Sweden** is the country with **the least difference** (6 percentage points), on the other hand, **Latvia** is the EU country whose **gap is the widest**, in fact, the **younger age group** has the **highest attendance rate** (62%) whereas the **older group has a rate of 25%**
- As regards to Portugal, the **youngest group is in line with the EU's average** (46% vs 45% respectively), however, the **difference between the older group is more significant**, in Portugal the attendance rate of the **29-64 group sits at 20%** whereas the **EU's average is at 26%**
- Considering all adults, the **Netherlands** holds the **highest attendance rate**, with **more than half the adults** having attended at least one live sporting event during the previous 12 months, whereas **Romania only had 16%**

3.3 Main available indicators in the European context

Despite the convergence observed in recent years, Portugal remains behind the European average, both in GVA per capita and in the weight of sporting activities in total GVA

6 Gross Value Added

Sports and recreational activities as a percentage of total GVA¹ (2019)



- **Since 2011**, the per capita GVA of sporting and recreational activities in **Portugal has grown at an annual rate of 6% whereas the EU-27 average has been 4%**, which entails a certain convergence
- Between 2011 and 2019, countries such as **Romania, Estonia and Hungary** were those with the highest annual per capita growth, having registered: **34%, 14%, 12% respectively**
- However, **despite the progress, Portugal remains below the EU average** in terms of the weight of sporting and recreational activities in the total GVA, in a list led by **Spain, Croatia and Estonia**
- In terms of GVA *per capita*, **Portugal ranks 13th**, also staying **below the European average**

Notes: * 2018 figures; 1 - Data on sport GVA correspond to activities with the CAE 93 (Code of Economic Activity)

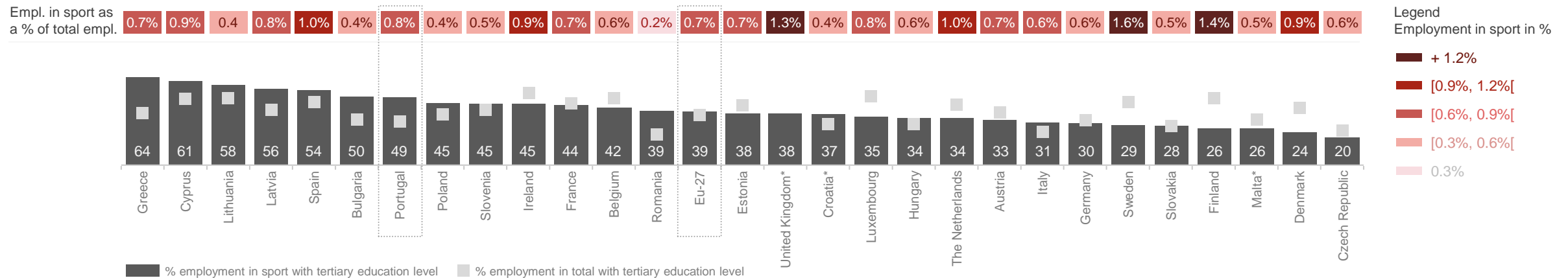
Source: Eurostat; PwC Analysis

3.3 Main available indicators in the European context

Southern and Eastern Europe countries have higher tertiary education level rates in sport than in total, whereas the opposite occurs in Northern European countries

7 Employment in sport and education level

Percentage of employment in sport with tertiary education level vs. percentage of employment in total with tertiary education level (2020)



- The **EU average rate of employment with tertiary education in sport is in line with that of the total employment**, being **39%** and **37%**, respectively
- However, across Europe there are some gaps, **Southern and Eastern European countries have higher rates of education in sport than in total employment**, whereas the opposite occurs in **Northern countries**
- As regards to **Portugal**, it has one of the **highest tertiary education in sport rate of employment with**, with **49%**, **17 percentual points above** the rate of tertiary education in **total**
- Concerning the **level of sport employment in percentage of total employment**, **Sweden (1.6%), Finland (1.4%) and the United Kingdom (1.3%) show the highest percentages**, while Portugal is in line with the European average of 0.7%

Notes: * 2019 figures; 1 - Data on sport employment correspond to activities with the CAE 931 (Code of Economic Activity)

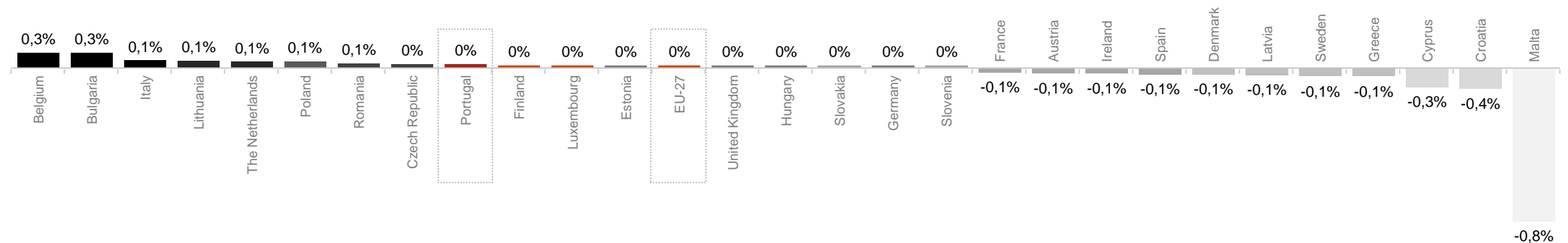
Source: Eurostat; PwC Analysis

3.3 Main available indicators in the European context

In the European landscape, Portugal stands out positively in terms of the balance of trade in sporting goods

8 Sports trade balance

Trade Balance of sporting goods¹ in percentage of GDP (2019)



- With the exception of Malta, **most Member States have a relatively balanced trade** of sporting goods
- **Portugal** has been improving its competitiveness, with a **balance around €1.4 m in 2010 and €95.3 m in 2019**, which means an **annual growth rate near 59%**. As such, **between 2010 and 2019 Portugal** was the EU economy with the **highest annual growth**, followed by Poland (23%) and Belgium (18%)
- In the Portuguese case, this improvement in the balance is due to a **faster growth in exports** than in imports
- Portugal is slightly **above the European average**, with the **9th highest position in terms of trade balance in relation to GDP**, in a list led by **Belgium, Bulgaria and Italy**

Notes: 1 - Sporting goods include all type of equipment and footwear for sport practice

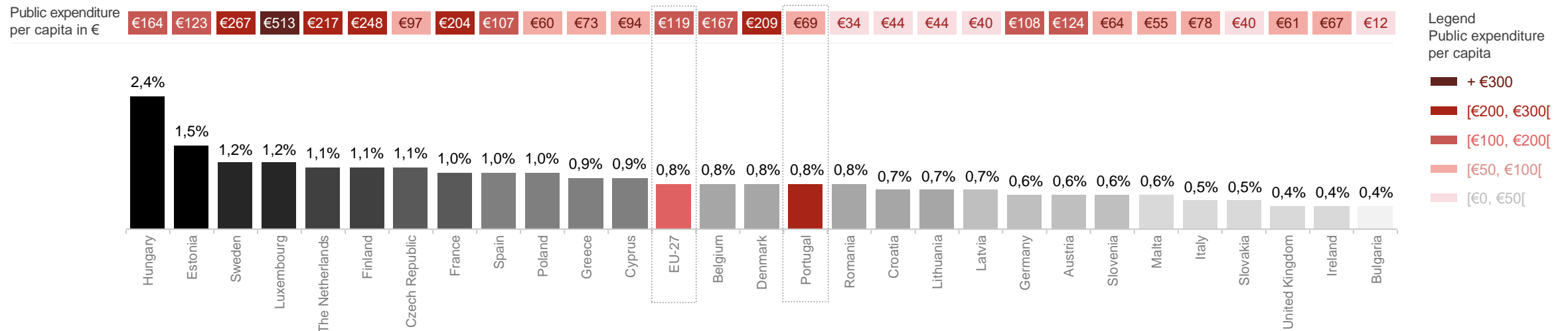
Source: Eurostat; PwC Analysis

3.3 Main available indicators in the European context

Although the percentage of total public expenditure on recreational and sporting activities is in line with the European average, public expenditure per capita is 42% lower

9 Public expenditure on recreational and sporting activities

Government expenditure on recreational and sporting activities in percentage of total Government expenditure (2019)



- **Hungary stands out as the country with the highest percentage of public expenditure in the sport**, with 2.4%, followed by Estonia and Sweden with 1.5% and 1.2%, respectively
- Despite a recovery to pre-crisis levels, Portuguese public expenditure on sport and recreational activities as a **percentage of total public expenditure is still slightly below the EU average (2019)**
- In 2019, in terms of **public expenditure per inhabitant, Portugal was the EU country with the 11th lowest value** (€69 vs. €119 European average)

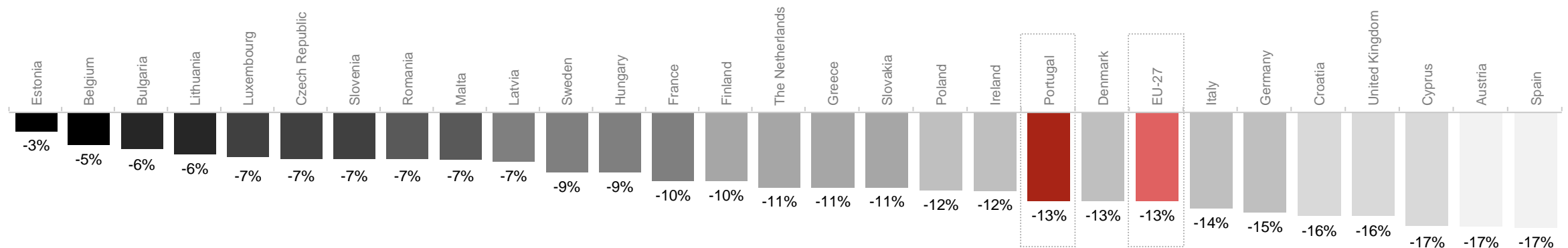
3.3 Main available indicators in the European context

Portugal is one of the EU countries where sport was most affected by the COVID pandemic, showing a decrease around 13% of the sector's GDP

10 COVID-19's direct impact on sport

In 2020, the EU released a study to assess the impact of the pandemic on European sport. To this end, a model for 2020 was developed where was assumed that COVID-19 did not occur ("reference scenario"), which was compared with three model scenarios where the COVID-19 variable was introduced considering three response scenarios ("low scenario", "average scenario" and "high scenario")

Direct impact on the sport at the GDP level in the "average scenario" for the year 2020



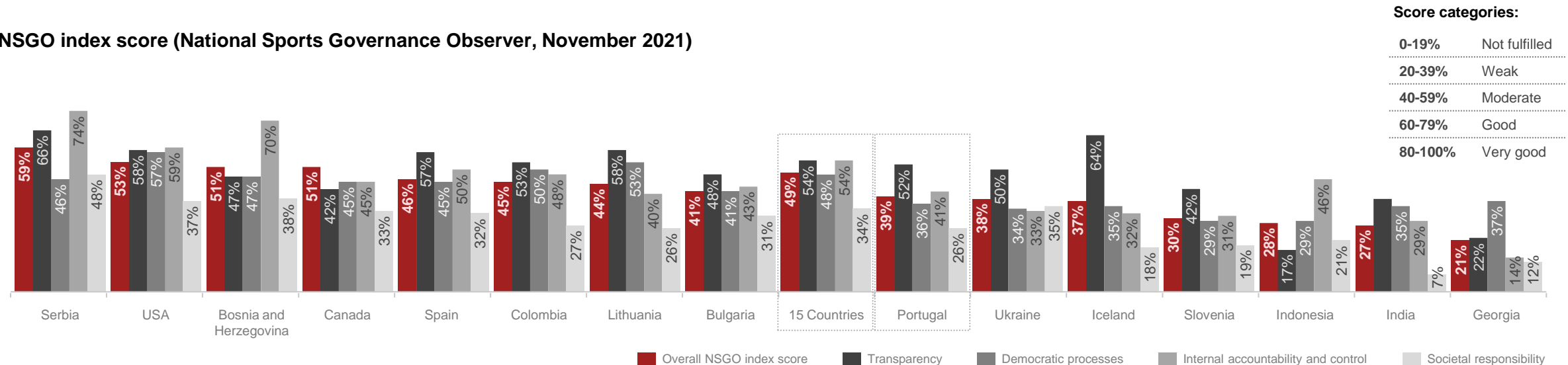
- According to the EU study, **the sport in all EU countries was and will continue to be affected by the pandemic**
- However, countries such as **Estonia, Belgium and Bulgaria** will be the **least affected**, recording, in an average scenario, declines of 3%, 5% and 7% respectively
- On the other hand, it is estimated that countries such as **Spain, Austria and Cyprus** are the **most affected**, recording 17% downturns
- **Portugal**, in turn, **accounted falls around 13%**, in line with the EU-27 countries average

3.3 Main available indicators in the European context

Portugal was assessed in the latest edition of National Sports Governance Observer, scoring “weak” (39%), with its worst score in the societal responsibility factor

11 Governance

NSGO index score (National Sports Governance Observer, November 2021)



- In 2017, Play the Game, an initiative by the Danish Institute for Sports Studies, developed a **governance benchmarking tool at the level of national sports organisations** named “National Sports Governance Observer”. In 2021 published its second edition that included the assessment of the quality of governance of sports federations in 15 countries, including Portugal
- All participant countries were labelled “weak” or “moderate”**, displaying governance weaknesses. The **top performer was Serbia** with a score of 59%, with a good performance in transparency and internal accountability and control factors
- Portugal scored “weak” with the worst factor being societal responsibility**. The same report mentioned that “some of the essential issues in debates about good governance practices in sport, such as gender equality, control and evaluation of board members, or indicators of the societal responsibility dimension, still need to be better developed”. Additionally, it indicates that a **guide of good governance practices for the federations should be developed** jointly by policy-makers, federations and other organisations from the sports system (i.e., clubs and regional associations)

Source: “National Sports Governance Observer 2. Benchmarking governance in national sports organisations. Report November 2021”, Play the Game; PwC Analysis



Overview of the Portuguese sport challenges

4. Overview of the Portuguese sport challenges

Even though the sport has evolved significantly, with greater penetration of sport practice, it is yet far from be considered and addressed as a strategic priority

Systematisation of the Portuguese sport challenges (1/3)

- In the “Characterising study of the sport in Portugal and the impact of COVID-19” conducted in the beginning of 2021, it was found that **sport has not been highlighted at a strategic level**. Regardless seeming broad acknowledgement of the social and economic importance of physical activity and sport, successive Portuguese governments and political forces did not adequately include sport in their political agenda and leverage the success of the sector
- Nevertheless, in recent decades, **national sport has evolved significantly, with greater penetration of sport practice across the territory**. Several political, economic and social factors played a major role in this shift, from the organisation of the sector to the investment in infrastructure. Notwithstanding, when compared to other European countries, **Portugal still has one of the lowest participation rates in physical and sport activities, as well as poor success rates in elite sport**
- In the beginning of 2020, **the COVID-19 pandemic imposed strong restrictions on the sporting activity**, limiting sport practice and cancelling sporting events, with sharp decreases of membership and sport practice engagement



4. Overview of the Portuguese sport challenges

The COVID-19 pandemic exposed longstanding structural vulnerabilities hindering an effective and swift recovery of Portuguese sport

Systematisation of the Portuguese sport challenges (2/3)

- According to data collected from European research, Portugal presents an **imbalance in the funding structure of sport vis-à-vis European peers**. This imbalance is characterised by low funding from the Central Government and a high reliance on Local Authorities' funding. This structure combined with little involvement from the private sector, led to an **under-invested sector with low funding flexibility able to foster institutions to adapt and address challenges effectively**. Additionally, the regional differences in capabilities and resources of local authorities contribute to aggravate geographic gaps in sporting provision across the territory
- On the other hand, **sports institutions rely mostly on low-skilled volunteer work, showing weak professionalisation levels**, entailing lack of competences and skill shortage, for instance, to apply to funding opportunities and to adapt to challenging circumstances
- Additionally, in the past decades, **Portugal has struggled to reach sustainable participation levels, particularly in grassroots sport, and to fight the decreasing levels of physical activity in the society**, a challenge that was clearly demonstrated by the pandemic. Such levels of inactivity are particularly grave among groups, such as women, ethnic minorities, people with disabilities and seniors, where sport should serve its social inclusion purpose. Most importantly, children have reached an **alarming stage of physical/motor illiteracy** due to reduced exposure to physical activity and reduce prioritisation of sport participation, both by school sport and households
- Particularly in the wake of new trends and preferences, **sport has failed to adapt and innovate in order to attract new publics, members and fans**, taking advantage of new technologies and fighting the need for more flexible and customised sportive solutions (e.g. adapt to current family dynamics)
- Lastly, sports organisations have been facing **serious governance and integrity issues**, such as corruption, money laundering or match-fixing, which have infiltrated the sport and have been aggravated by the COVID-19 crisis. These internal governance issues have questioned the ability of organisations to self-regulate and govern themselves, also imposing barriers for policy-makers to rely on sports organisations to become committed partners to deliver national sport policy
- Contrary to some European countries that, faced with the pandemic situation, have swiftly released packages of extraordinary measures to support the sector and/or included sport in their Recovery and Resilience Plans, Portugal has not done either and only in July 2021 opened a call to grant financial support addressed to sport (€65 million managed by IPDJ). Thus, **in a period of great uncertainty, the absence of an immediate government tailored response contributed to the worsening of the sector's vulnerabilities**

4. Overview of the Portuguese sport challenges

Imposing significant constraints to the national sector's sustainability, 6 key challenges were mapped as meaningful and should be addressed in order to foster a sportive culture

Systematisation of the Portuguese sport challenges (3/3)

- In general, we observe a **lack of sportive culture among the Portuguese society**, reflected both in governing bodies and general society. Generally speaking, **Portugal has not yet recognised the full extent of sport's potential to impact positively other economic areas**, such as health care, tourism, education, and others. As such, sport has been blatantly neglected in the political agenda. And, on the other hand, **sports organisations evidence a lack of competencies and alignment needed to assume a central role in this change**
- Additionally, the lack of a culture oriented towards results and long-term sustainability in sports governance and regulation, together with the limited acknowledgement of sport as a social and economic strategic instrument, have led to a **poor relationship between sports organisations and the political power**, which has limited the development of the Portuguese sport
- In addition, the **multiple governance and integrity issues**, which have flourished in sport and generated increasing controversy lately, are **demanding adequate legislation and enforcement by competent authorities**. Otherwise, sports organisations will continue risking the fulfilment of its social purpose and damaging the reputation of sport
- This **lack of a sportive culture is the root of the structural problem observed**, in which all actors involved share responsibilities. Therefore, it is **urgent that all sport stakeholders engage in a cultural change in the approach to sport**, aligning strategies towards a holistic sport model which connects all aspects of sport, from education and grassroots sport to high performance and elite level, and from youth to elderly sport

- To get a better understanding of national sport challenges, we have structured them into **6 key challenges**:



4. Overview of the Portuguese sport challenges

Most challenges are not unique to Portuguese sport but common to many European peers, and revolve around its funding (specially with the COVID-19 impact), ...

6 key challenges for the Portuguese sport (1/3)

Funding (including COVID-19 constraints)

- **Public funding is ex-post**, lacking a performance-driven and result oriented policy strategy
- **Applications for public funding** are lengthy and bureaucratic
- **Funding is not properly linked to sporting success**
- **Differences in the funding sport governing bodies** accentuate the discrepancies between them, i.e. smaller organisations have more difficulties in obtaining funding due to a lack of competencies and resources (vicious cycle)
- **Discrepancies between regions:**
 - Regional differences in municipal financing and infrastructure management
 - Differences in purchasing power
- **Lack of culture towards sport patronage along with a marginal private funding to a wide array of sports**
- The COVID-19 pandemic led to **reduced revenues, affecting the liquidity of sector entities**

Professionalisation and resources

- **Low level of skill development and lack of modern governing structures** in a sector based on low-skilled work, which leads to generational renewal hardships of labour force
- **Lack of adequate competences in sports organisations** enabling them to capture available funding
- Clubs/sport disciplines with different levels of professionalization due to **unbalanced distribution of resources, infrastructures, among others**
- **Absence of geo-referenced map of sport facilities enabling cross-linking with other relevant sporting and non-sporting data** that allows for an efficient share of resources and facilities between sports organisations and other sectors, such as education or tourism

4. Overview of the Portuguese sport challenges

... low level of professionalisation, low participation rates (with upcoming challenges), reduced innovation capacity, integrity vulnerabilities and lack of strategic alignment

6 key challenges for the Portuguese sport (2/3)

Participation

- **Low levels of physical activity** in an ageing population, aggravated by the COVID-19 pandemic
- **Lifestyle changes favour other non-sporting interests** (e.g. e-sports), while a **growing perception of sports as a lifestyle** favours non-traditional sports, such as cross-fit, surf, or skate
- Alarming levels of **physical illiteracy among children**
- **Centralisation of sport practice in urban centres**
- **Low importance given to school sport:**
 - School sport is an under-exploited tool by the sporting system, especially in pre-school and 1st cycle
 - School model incompatible with extracurricular sport
 - Reduced articulation between schools and clubs
- **Little attention and awareness of employers and universities** to the specific needs of athletes and sports actors leading to problems to meet **sports career with work or education** (dual-career)
- Growing concerns with **athletes' well-being**, related to matters such as the management of training and competition environment
- **Poor career planning of sport professionals and athletes**
- **Diversity, equity and inclusion** needs to be improved

Innovation and value creation

- **Low level of innovation and awareness among sports organisations** with regards to:
 - Business model and diversification of revenue sources
 - Different models of interaction/ experience with fans to attract new partners, members and audiences
 - Digital transition and technological evolution, for example the rise in virtual sports
- **Weak connection between Sport and the National Scientific System, research clusters and innovation hubs**
- **Low attractiveness of certain traditional sports** lagging to follow new trends of consuming sport services and activities demanding flexible and customised solutions

4. Overview of the Portuguese sport challenges

... low level of professionalisation, low participation rates (with upcoming challenges), reduced innovation capacity, integrity vulnerabilities and lack of strategic alignment

6 key challenges for the Portuguese sport (33)

Integrity and social responsibility

- **Vulnerabilities in terms of information exchange, compliance and regulatory enforcement** make the sector more exposed to crimes that pose challenges* to its integrity, such as: money laundering, corruption, match-fixing and doping
- **Serious concerns regarding the safety of athletes**, such as sexual harassment and mental health issues, have tarnished the image of sport, globally
- **Funding criteria focused on administrative legal matters**, often overlooking compliance with integrity issues
- **Conflicts of interest** hamper oversight and law enforcement in the sector, undermining independent mandatory verification mechanisms
- **Lack of fans representation** in decision making bodies

* Challenges accentuated mainly in the context of a pandemic in which there were severe revenue shortfalls

Strategic alignment

- **Low visibility and importance given to sport at a political level**
- **Absence of a public policy for national sport**, anchored in a strategic guidance document
- **Lack of long-term planning and a project driven mindset** for the sector
- **Lack of information and data** on sport to enable informed decision-making and monitoring of implemented initiatives
- **Low proximity of sports federations with local sports organisations** operating in grassroots sport
- **Absence of a holistic sports programme** which connect basic levels of sport to high-performance, including the education
- **Weak coordination between sport and private leisure and fitness sector**



Lessons from international cases studied

5. Lessons from international initiatives studied

The collection of case studies was built upon an accrual and evolving process intertwining stakeholder consultation, collaborative partnership with Portugal NOC and desk research

Used criteria for selection of studied initiatives¹

Detail on international initiatives can be found in Annex A1

- 1 Cases were selected given its **relevancy to the key challenges identified in the Portuguese sector**

Six big challenges of the national sport

Strategic alignment

Funding
(including COVID-19 constraints)

Professionalisation and resources










Participation

Innovation and value creation

Integrity and social responsibility

- 2 Our **selection started in a country-based research**. The relevant countries and corresponding cases identification was then based on **inputs collected throughout exchanges with the Portuguese NOC**, during the **interviews conducted with relevant stakeholders and PwC's desk research, regarding relevant deliverables, i.e., strategic plans, reports, programmes or institutions**

Studied initiatives¹:

Country	Distinguishing insights	Source
 United Kingdom	Presented a national strategy for sport	NOC
 Spain	Recently published mapping studies of Spanish sector with some strategic guidelines	NOC and PwC
 Germany	Restructured the elite sport system and its funding	PwC
 Italy	Changed the public funding structure and overperformed in terms of capture of Erasmus+ funds	NOC and PwC
 Hungary	Presented a national strategy for sport	PwC
 Ireland	Presented a national strategy for sport	PwC
 Slovenia	Presented a national strategy for sport	PwC
 France	Implemented relevant initiatives related to the promotion of employment in the sport as well as sectorial related tax incentives	NOC
 Other	Other initiatives relevant for the challenges under analysis were mentioned during interviews: EPSI (innovation), SIGA (integrity), National Recovery and Resilience Plans (COVID-19 recovery), and other national recovery initiatives	Interviewed stakeholders, NOC and PwC

Notes: 1 - The initiatives under analysis were selected based on contributes collected during discussions with the Portuguese NOC and during the interviews conducted with relevant stakeholders
Given the short period available for research, the analysis is not exhaustive
Source: PwC international initiatives analysis (detail on Annex A1)

5. Lessons from international initiatives studied

Main insights for each initiative are presented per focus of analysis

Overview of the international initiatives¹ analysed (1/2)

Detail on international initiatives can be found in Annex A1

Country	Initiative	Focus of analysis					Detail on page	
		Strategic alignment	Funding	Professionalisation and resources	Participation	Innovation and value creation		Integrity and social responsibility
United Kingdom	House of Lords: National Plan for Sport and Recreation	☑	☑	☑	☑	-	☑	122
	UK Sport and its Strategic Plan 2021-2031	☑	-	-	☑	-	☑	124
	English Institute of Sport: actuation and “Mission 2025”	☑	-	-	☑	☑	-	128
	Sport England: Uniting the Movement	☑	-	-	☑	-	-	130
	Sport Survival Package	-	☑	-	-	-	-	132
	Independent Fan Led Review of Football Governance	-	-	-	-	-	☑	133
Spain	Supreme Council for Sport	-	☑	-	☑	-	-	137
	Observatorio de Investigación Fundación España Activa	☑	-	-	-	☑	-	139
	Spain Sports Global	☑	-	☑	-	☑	-	141
	Preliminary draft of the new Sport Law	☑	-	☑	-	-	☑	142
	Observatorio del Deporte en España Palco 23	-	-	-	-	☑	-	143
Germany	Restructuring of high-performance sport and elite sport’s funding	☑	☑	☑	☑	-	-	147
	Federal Institute of Sport Science	☑	-	-	-	☑	-	151
	National Strategy for Major Sporting Events	☑	-	☑	-	-	-	153
Italy	Italian National Olympic Committee	-	-	-	☑	-	-	157
	Sport e Salute	-	☑	-	-	-	-	158
	Istituto per il Credito Sportivo	-	☑	-	-	-	-	160
	Erasmus+: the Italian case	-	☑	-	-	-	-	162
	G20 Presidency and the fight against corruption priority	-	-	-	-	-	☑	163

Notes: 1 - The initiatives under analysis were selected based on contributes collected during discussions with the Portuguese NOC and during the interviews conducted with relevant stakeholders

Given the short period available for research, the analysis is not exhaustive

Source: PwC international initiatives analysis (detail on Annex A1)






Label: ☑ Main focus of study ☑ Presents contributes

5. Lessons from international initiatives studied

Detail for each initiative may be found in the indicated pages (Additional detail)

Overview of the international initiatives¹ analysed (2/2)

Detail on international initiatives can be found in Annex A1

Country	Initiative	Focus of analysis					Detail on page	
		Strategic alignment	Funding	Professionalisation and resources	Participation	Innovation and value creation		Integrity and social responsibility
 Hungary	Sport XXI National Sport Strategy 2007-2020	☑	☑	☑	☑	☑	-	167
 Ireland	National Sports Policy 2018-2027	☑	-	☑	-	-	☑	173
	High Performance Strategy 2021-2032	☑	☑	☑	☑	☑	-	174
 Slovenia	National Programme of Sport 2014-2023	☑	-	☑	☑	☑	☑	177
 France	Ministry delegate for Sport	-	☑	☑	☑	-	☑	183
	Measures of the Sport Recovery Plan	-	☑	☑	-	☑	-	184
	Tax incentives to sports patronage	-	☑	-	-	-	-	186
	National Federation <i>Profession Sport et Loisirs</i>	-	-	☑	-	-	-	187
 Other EU or global	European Platform for Sport Innovation	-	-	-	-	☑	-	191
	Sport Integrity Global Alliance and the SIRVS	-	-	-	-	-	☑	192
	EU countries' recovery and resilience plans	-	☑	-	-	-	-	193
	Other national recovery initiatives	-	☑	-	-	-	-	198

Label: ☑ Main focus of study ☑ Presents contributes

Notes: 1 - The initiatives under analysis were selected based on contributes collected during discussions with the Portuguese NOC and during the interviews conducted with relevant stakeholders

Given the short period available for research, the analysis is not exhaustive

Source: PwC international initiatives analysis (detail on Annex A1)

Strategic alignment

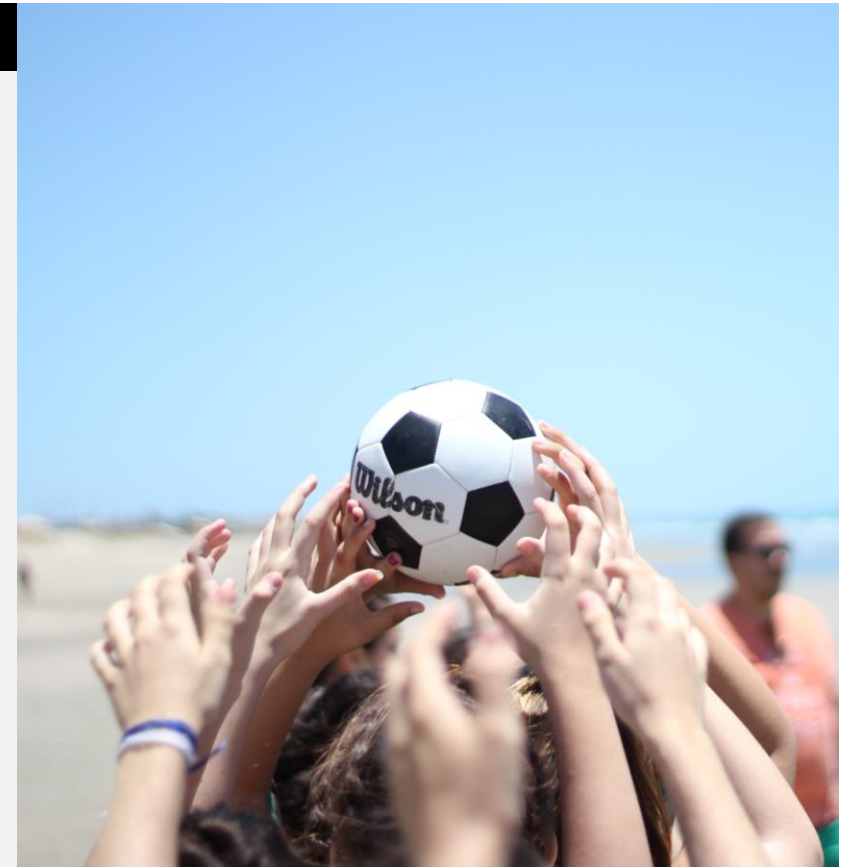
5.6 Strategic alignment

Developing a strategic document to drive a direction of travel for the future establishing clear objectives, metrics, and responsibilities is key to promote alignment between stakeholders

Strategic alignment: Lessons from international initiatives studied¹

Strategic alignment


- Several countries and sports institutions have **developed strategic documents framework of action**. Such documents typically **establish clear objectives, define KPIs to monitor the execution of the strategy and assign responsibilities among stakeholders**, promoting an effective alignment between them
- Furthermore, many sports actors mention that the **recognition of sport's importance in society and its interconnections with other sectors** is crucial for its performance. Not only sports programmes must be developed together with public authorities and other stakeholders from the various sport's neighbouring sectors (i.e. health, education, tourism), as many countries highlight the importance of sport to be leveraged as a strategic tool to its neighbouring sectors
- Besides a general strategic document (e.g. government's National Sport Plan), some countries or institutions also opt by **developing other more specific strategic plans that should then be aligned with the general strategy**. Such documents include: local sport development plans, strategies for hosting sporting events, high-performance development strategies, and infrastructure development plans
- Countries such as Ireland and Hungary also indicate the importance of defining **consistent communication strategies** to promote sport participation and address target groups more effectively
- Additionally, multiple countries pinpoint the **improvement collection and access to sport-related data** as one of the priority actions to monitor the impact of the initiatives implemented, improve the quality of operations and support the decision making process. Initiatives in the matter include the development of systems/databases able to cross and centralise sports data, coordinating information systems and feed tangible evidence regarding the impact of public investments/initiatives
- Topics like social inclusion, recovery from the pandemic effects and strengthening the international dimension of Portuguese sport are also mentioned



5.6 Strategic alignment

In response to the high levels of physical inactivity, the House of Lords released a report calling on the Government to establish a national plan for sport, health and wellbeing

Strategic alignment: Main insights (1/7)

Country of analysis	Scope	Insights
 <p>United Kingdom</p>	<p>House of Lords: National Plan for Sport and Recreation</p> <p>In response to the high levels of physical inactivity aggravated by the COVID-19 pandemic, in December 2021, the House of Lords Committee on a National Plan for Sport and Recreation released a report calling on the Government to establish a national plan for sport, health and well-being, as well as a new architecture</p> <p>In the report, the Committee defines a set of guiding principles of the National Plan and provides general recommendations</p>	<ul style="list-style-type: none"> The House of Lords identified several shortcomings in sport policy delivery, such as inefficient cross-departmental coordination, fragmented policy delivery, complex access to financing and excess bureaucracy, that have kept governments from succeeding at addressing physical inactivity To address these issues, the Committee proposed designing a cross-sectorial plan and called for a new implementation architecture. The new architecture would consist of renaming a new office to become the Office for Health Promotion and support cross-departmental approach to sport, health and wellbeing. Secondly, a new Minister, the Minister for Sport, Health and Wellbeing, sitting under the Department of Health and Social Care (moving it from the Department of Culture, Media and Sport) would be created The new Minister would work jointly with the Office for Health Promotion in developing, overseeing and delivering the national plan and a regular Strategic Forum with key sport stakeholders and delivery bodies would be held to help design the national plan and get buy-in from stakeholders Physical literacy, a welcoming and inclusive setting, behaviour change and motivation sciences, addressing health inequalities and social cohesion through sport are guiding principles of the National Plan The report also provides a set of general recommendations and initiatives in four crucial areas identified: “Instilling a life-long habit of sport and physical activity”, “Enabling active lifestyles”, “Duty of care and safeguarding” and “The workforce”

5.6 Strategic alignment

The UK sport environment has a strong focus towards high-performance sport and acknowledges the impact sporting success has on individuals and on the society

Strategic alignment: Main insights (2/7)

Country of analysis	Scope	Insights
 <p>United Kingdom</p>	<p>UK Sport and its Strategic Plan 2021-2031</p> <p>UK Sport is the government entity responsible for investing in Olympic and Paralympic sport in the UK. In May 2021, UK Sport released its strategic sport plan for the next decade, defining a set of ambitions and some specific targets</p>	<ul style="list-style-type: none"> • As a government entity responsible for investing in Olympic and Paralympic sport in the UK, in addition to focusing on high-performance sport, UK Sport is also responsible for promoting the highest standards of governance, sporting conduct, ethics and diversity, among others • UK Sport defined its ambition to the Post-Tokyo Strategy: to pursue extraordinary success, to be achieved by more athletes and sports, whilst maintaining the UK's leading position. UK Sport's approach to future investment will fundamentally be focused on Olympic and Paralympic sport and prioritised towards athletes that demonstrate the greatest potential. It resulted in a three tiers of funding approach that will channel investment into different stages of the performance pathway to support medal success, while enabling more communities to be engaged and impacted • In its Strategic Plan 2021-2031, UK Sport reinforces its strategic commitment to elite sport and the role of sport as a driver of positive social change. Specifically, it identifies ambitions "Keep winning and win well", "Grow a thriving sporting system" and "Inspire positive change" and also sets ambitious medal targets as well the number of sporting events to capture

5.6 Strategic alignment

Sport England's long-term strategy focuses on helping grassroots sport and physical activity recover from the COVID-19 effects and tackling the key challenges of the next decade


Strategic alignment: Main insights (3/7)

Country of analysis	Scope	Insights
 <p>United Kingdom</p>	<p>Sport England: Uniting the Movement</p> <p>Helping grassroots sport and physical activity recover from the social and economic effects of the coronavirus pandemic and investing time and resources into tackling the key challenges of the next decade are the cornerstones of Sport England's new long-term strategy "Uniting the Movement"</p>	<ul style="list-style-type: none"> • Sport England recognises its broader responsibility: to advocate for the transformational impact sport and activity can have on the nation's health and well-being • It claims the need to join forces, namely, to address 5 big issues: (1) Recovering from the biggest crisis in a generation and reinventing as a vibrant, relevant and sustainable network of organisations providing sport and physical activity opportunities that meet the needs of different people, (2) Focusing on sport and physical activity's ability to make better places to live and bring people together, (3) Unrelenting focus on positive experiences for all children and young people as the foundations for a long and healthy life, (4) Strengthening the connections between sport, physical activity, health and well-being, (5) Creating and protecting the places and spaces that make it easier for people to be active • It is necessary to create conditions for change (across the people, organisations and partnerships) regarding specific capabilities, information, approaches and relationships: (1) Effective investment models, (2) Realising the power of people and leadership, (3) Applying innovation and digital, (4) High-quality data, insight and learning, (5) Good governance

5.6 Strategic alignment

Hungary designed a strategy to undertake priority action areas in order to sustain the country's performance in elite sport, while engaging a greater share of the population

Strategic alignment: Main insights (4/7)

Country of analysis	Scope	Insights
 <p>Hungary</p>	<p>Sport XXI National Sport Strategy 2007-2020</p> <p>In 2007, Hungary developed its National Sport Strategy 2007-2020 assessing the sport and, accordingly, setting out a vision for the future of Hungarian sport, where key challenges, strategic goals and action plans are aligned to drive a comprehensive reforming agenda</p>	<ul style="list-style-type: none"> • Despite its good elite sport's performance, sports activity in Hungary was hindered by the degree of access to infrastructures, shortcomings of the financial system and the complex organisational structure of sport • The vision was set to maintain the country's performance in elite sport, while involving a greater share of the population in sport. In this strategy three priority areas were outlined: <ul style="list-style-type: none"> ✓ "Physical education and school sport": Improving the quality and access to physical education in schools through improving infrastructure as well as professional conditions (improving the content of classes and the qualification of teachers) ✓ "Recreational sport": Fostering a sporting culture, through a system of financial incentives and improving conditions and access to recreational sports facilities ✓ "high-performance sport in youth": Maintain the level of performance traditionally achieved in elite sport and improve performance in team sports by increasing the number of certified athletes and improving the system of training, detection and selection of young talents • In addition, ensuring an economic and legal environment enabler to sport practice, promoting a lean organisational structure, establishing a National Sports Information System and implementing a consistent and direct communication strategy, were also some of the priority tasks highlighted towards improving the overall conditions for sport practice

5.6 Strategic alignment

Ireland released a National Sports Policy but also a High Performance Strategy. The first aims to increase participation and excellence in elite sport. The latter points out coaching as key


Strategic alignment: Main insights (5/7)

Country of analysis	Scope	Insights
 <p>Ireland</p>	<p>National Sports Policy 2018-2027 In 2018, the Department of Transport, Tourism and Sport of Ireland published the National Sports Policy 2018-2027, a strategic document which sets out the vision for Irish sport in 2027, providing 57 actions to transform the sporting landscape</p> <hr/> <p>High Performance Strategy 2021-2032 Following the National Sports Policy 2018-2027, in 2021, Sport Ireland (the government agency for sport) launched the High Performance Strategy 2021-2032, outlining strategic priorities and a long-term plan for the Irish high-performance system</p>	<ul style="list-style-type: none"> Increasing public engagement in sport is at the heart of Ireland's National Sports Policy 2018-2027 The strategic actions planned in this policy framework focus primarily on increasing participation, improving sports facilities and maximising the performance of Irish elite athletes. For each of these strategic objectives, a set of targets were rolled out: <ul style="list-style-type: none"> ✓ Increase participation: improve the share of population who participate regularly in sport (children and adults) and bridge the participation gap between men and women, for example ✓ More excellence: improve the number of medals won at the Olympic and Paralympic Games, as well as the country ranking ✓ Improved capacity: improve the quality of sports infrastructures, increase labour capacity in the sport, among others This strategy has 7 strategic pillars: investment focused on performance, athlete performance and holistic support, top-quality training and support services, business structures and planning, partnerships, top-quality infrastructures and equipment, and research and innovation This strategy highlights investment in training (coaching) as key to the development of the high-performance environment and plans a set of initiatives for each pillar

5.6 Strategic alignment

Slovenia's National Programme of Sport recognises the cross-sectorial nature of sport and, thereby, boosting strategic actions tailored to a wide range of development areas


Strategic alignment: Main insights (6/7)

Country of analysis	Scope	Insights
 <p>Slovenia</p>	<p>National Programme of Sport 2014-2023</p> <p>The National Programme of Sport 2014-2023 was designed by the Ministry of Education, Science and Sport of the Republic of Slovenia following the National Programme of Sport 2000-2010 which paved the way for Slovenian sport growth</p>	<ul style="list-style-type: none"> • This Programme recognises the transversal nature of the sport and, as such, identifies strategic actions that cover multiple areas of society addressed mainly to public institutions (national and local) and not only to sports organisations and local and national authorities in charge of sport • The main objective of the strategic actions under this programme is to provide conditions for the practice of quality sport by improving access to sport for all citizens, along with enhancing delivery of sports programmes. • To achieve such objectives the Government outlined 7 sections of policy measures: “Sports programmes”, “Sports facilities and areas for sport in nature”, “Development activities in sport”, “Organisation in sport”, “Sports events and sport promotion”, “Social and environmental responsibility in sport” and “Sport support mechanism” • The National Programme mapped out 10 relevant sports programmes, run by different organisations, but assuring content alignment and connection through networking, spaces used and financial commitments • This National Programme shows a holistic approach to sport with its sports programmes working as connectors in the national sporting system, linking education to high performance sport, without disregarding people with disabilities and senior citizens

5.6 Strategic alignment

Both Spain and Germany have specific bodies dedicated to attract large sporting events by promoting stakeholders' involvement and increasing the country's visibility abroad

Strategic alignment: Main insights (7/7)

Country of analysis	Scope	Insights
 Spain	<p>Spain Sports Global</p> <p>Spain Sports Global is a private project that aims to support the Federations to attract large international sporting events and strengthen the international influence of Spanish sport</p>	<ul style="list-style-type: none"> • Even though Spain Sports is a private initiative launched by the Spanish Sport Association, it has a strong endorsement, support and funding of LaLiga and the permanent collaboration and coordination of the Secretary of State for Sport, together with the engagement of the Supreme Council for Sport (CSD) • It's strategic objectives focus on: providing a new dimension to the development of sporting events; increasing Spain's international presence and influence; assisting sponsoring seeking and prospection for national federations for the internationalisation of their leaders; promoting European sport policies
 Germany	<p>National Strategy for Major Sporting Events</p> <p>The main goals set out within this strategy were:</p> <ol style="list-style-type: none"> 1. Focus on major sporting events with a long-term and positive impact 2. Increase enthusiasm and support for major sporting events 3. Increase transparency, competence and coordination in order to use resources efficiently and effectively 4. Increase the international competitiveness of German bids for major sporting events 	<ul style="list-style-type: none"> • The National Strategy for Major Sporting Events in Germany aims to address the population's rising expectations of sporting, social and economic added value of major sporting events • It intends to intensify the professional cooperation of all stakeholders involved • The strategy provides the framework for making major sporting events in Germany a positive experience for everyone and thus one that will be remembered • It is also intended to open up the prospect of a successful bid for hosting Olympic and Paralympic Games in Germany and, for that matter, a standardised process for developing future sporting events in Germany will be developed while centralised support services shall be made available

5.6 Strategic alignment

Acknowledging the importance of sport to society, the volume of valuable connections with other sectors, and the stakeholder alignment are pivotal for the development of the sector

Main initiatives identified: Strategic alignment

Main initiatives	Reference case
• Develop a National Sport Strategy , setting out frequent action programmes and defining a set of measurable KPIs	UK; Hungary; Ireland ¹ ; EU recommendations ² ; Slovenia ³
• Develop local sport plans , together with local authorities in order to increase participation at a local level	Ireland ¹
• Develop sports programmes aligned with the objectives of the National Sport Strategy and in collaboration with public authorities, sports organisations, specialists in sport for people with disabilities, healthcare services, education services, among others	UK; Germany; Hungary; Ireland ¹
• Establish a high-performance working group to develop a high-performance strategy/ reform high performance and elite sport	UK; Germany; Ireland ¹
• Develop a national plan for the development, modernisation and operation of sports facilities , aligned with the objectives of the national strategy	Hungary; Ireland ¹ ; EU recommendations ²
• Promote the national sport internationally , strengthening the country's participation in international networks and representative bodies	UK; Spain; Ireland ¹ ; Slovenia ³ ; EU recommendations ²
• Implement a consistent and direct communication strategy to communicate the key messages of the sport strategies to target groups	Hungary; Ireland ¹
• Encourage closer coordination and cooperation of sports federations with authorities and all relevant stakeholders	UK; Spain; Germany; Hungary; Ireland ¹ ; EU recommendations ² ; Slovenia ³
• Encourage collaboration between sport and other sectors , including the integration of the National Sport Strategy in other sectors	UK; Ireland ¹ ; Slovenia ³ ; EPSI
• Strengthen and spread the strategic importance of sport for the economy, for women, for people with disabilities, education and youth development, and fight issues such as discrimination and racism	UK; Spain; Italy; Hungary; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²
• Develop a national strategy for hosting and organising major sporting events	Germany
• Support organisations to attract and organise sporting events, including rational decision-making in granting approvals for sporting events and promote the organisation of sporting events considering sustainability criteria	UK; Germany; Hungary; Ireland ¹ ; Slovenia ³
• Improve collection and access to sport-related information/ data to monitor the impact of the initiatives implemented, improve the quality of operations as well as the decision making process	UK; Spain; Germany; Hungary; Ireland ¹ ; Slovenia ³ ; EU recommendations ²
• Create a legal environment to leverage sport practice adapting the legal framework to emerging trends and new challenges of sports development	Spain; Italy; Hungary; EU recommendations ²

Notes: 1 - Detail and specific initiatives available in Government of Ireland "National Sports Policy 2018-2027"; 2 - EU Recommendations refer to several EU documents such as the Motion pertaining on the report on "EU sports policy: assessment and possible ways forward" (2021/2058(INI)); 3 - Detail and specific initiatives available in Republic of Slovenia Ministry of Education Science and Sport "National programme of sport in Republic of Slovenia 2014-2023"

Source: PwC international initiatives analysis (detail on Annex A1)

Funding

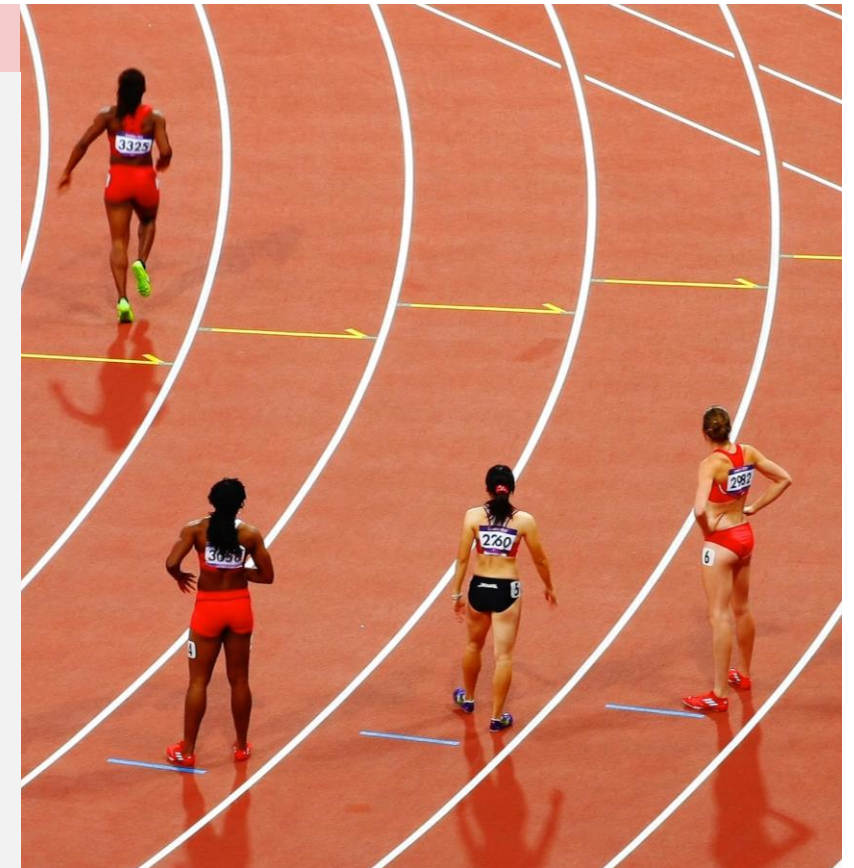
5.1 Funding

Providing funds based on the fulfilment of certain criteria, such as integrity or performance, is outlined as a way to ensure a transparent and efficient resource allocation

Funding: Lessons from international initiatives studied¹

Funding (including COVID-19 constraints)



- Several countries stress the importance of **providing funding upon the fulfilment of certain criteria**, such as integrity or performance criteria, in order to **guarantee a transparent and efficient allocation of funds, aligned with the sector's strategy**
- Germany and Italy recently **restructured their funding structure**: Germany reviewed the elite sport's funding system and Italy set a new entity responsible for managing sport's public funding. The new German funding scheme (PotAS) **focuses more on the athlete's prospect of future success rather than on past achievements** and emphasises the importance of sustaining long-term success and accounting for it in funding planning
- Italy stands out for its **use of alternative sources of funding specific to sports institutions**, including: the provision of sport and culture specific financial instruments provided by state-controlled bank (Istituto per il Credito Sportivo) and the high utilisation of Erasmus+ funds, together with increasing capacity of sports organisations for fund raising
- Given that the sport should aim to be less dependant on public funding, several countries have developed **initiatives to attract private resources**, such as tax incentives to "*mécénat*" (in the case of France) and the promotion of "Events of Exceptional Public Interest" which allow significant tax benefits for the companies that collaborate with event promotion and organisation (in the Spanish government case)
- The **provision of funding to communities and people most in need** is another common point to many initiatives, which includes funding opportunities to access training programmes, funding the development and modernisation of facilities, and funding the operation of sports organisations working in more vulnerable areas, for example
- Concerning the **COVID-19 pandemic**, the UK and France **provided specific funds to support sporting entities' survival and long-term recovery**, which were adapted as the pandemic evolved, highlighting the importance of a flexible funding structure. Moreover, although to a limited extent, some EU countries **included sport-related initiatives in their Recovery and Resilience plans** mainly covering investments in infrastructures



5.1 Funding

Germany and Italy restructured their funding frameworks: Germany reviewed the elite sport's funding system and Italy set a new structure responsible for public financing

Funding: Main insights (1/4)

Country of analysis	Scope	Insights
 Germany	Restructuring of high-performance and elite sport's funding After continuous decrease or stabilisation in medal tally since 2008, Germany decided to reform its elite sport's funding structure. Given that, a realignment in the promotion of elite sport cannot happen without corresponding adjustments in the promotion of performance sport, the reform also considered part of performance sport (part that is oriented towards elite sport in the long term). This process started at the beginning of 2015 and started to be implemented in 2017	<ul style="list-style-type: none"> This reform leveraged a paradigm shift towards potential-oriented federal funding and it focused on several sport-specific priorities The new funding scheme focused more on the athletes long-term development ("4-8 years to the podium") rather than their previous track record, which is assessed by a newly created specific system (PotAS) PotAS is an attribute system developed by the PotAS Commission and is based on objective, transparent, sport-scientific and sport-technical evaluation criteria ("attributes") which enable the assessment of the potential of Olympic sports and subsequent prioritisation
 Italy	Sport e Salute Sport e Salute acts as the operational arm of the Government Authority in the field of sporting activities	<ul style="list-style-type: none"> In 2019, the Italian sport's financing structure changed, when a new entity was created and became responsible for managing a new framework for sport's public funding Sport e Salute S.p.A. was assigned the task of financing national sports federations, associated sports disciplines, as well as sports promotion bodies, meritorious associations, military sports groups and civilian bodies of the State, previously ensured by CONI itself

5.1 Funding

Italy and France introduced alternative funding sources, addressed to the sports institutions, namely: sport specific funds, Erasmus+ and tax incentives

Funding: Main insights (2/4)



Country of analysis	Scope	Insights
 Italy	Istituto per il Credito Sportivo Istituto per il Credito Sportivo (ICS) is an Italian majority state-owned bank aimed at supporting the sport and culture sector	<ul style="list-style-type: none"> ICS collaborates with public and private entities to support the implementation of sport development projects by granting subsidised loans Thanks to Special Funds held by the Government and managed separately by ICS, the institute finances at subsidised rates and up to 80% coverage of the guarantees provided on those loans. From the outset, ICS has financed more than 34 000 sports facilities
	Erasmus+: the Italian case In the context of the European Union Erasmus+ funding Programme for Sport, Italy has been consistently performing the highest demand (in terms of number of submissions and contracted projects) for financing	<ul style="list-style-type: none"> Between 2015 and 2019, Italy received EU funding for 183 Erasmus+ projects, with a total amount of €28 million (€150 thousand per project, on average). For instance, in 2019, Italy captured 18% of the total funds awarded The main driver of this success could be the existence of a team in CONI dedicated to attracting international projects, working closely with sports organisations in the preparation of funding applications and developing capabilities. Another factor which may have been contributing positively for this performance is the broad communication of the programme in Italy
 France	Tax incentives to sport patronage France set out the Aillagon Law in 2003 which harmonises donations' legal framework, enforcing a package of tax incentives to cultural " <i>mécénat</i> ", including sport	<ul style="list-style-type: none"> The Law enables taxable income deductions to those donating to sports bodies designated by ministerial order. There are two types of tax benefits: income or corporate tax reductions and reductions of solidarity tax on wealth The Aillagon Law marked a turning point in French "mécénat" and nowadays, patronage is increasingly being considered a relevant corporate instrument. Also, the existence of an association for the promotion of "mécénat" – Admical –, conducting studies, supporting organisations looking for funding and patrons, and assisting legislation development, may be a distinguishing factor

The Spanish government has also labelled that several sports programmes as "Events of Exceptional Public Interest", allowing those companies that collaborate with the dissemination of the event and make a contribution as a donation to these programme to obtaining significant tax benefits

5.1 Funding

UK and France developed tailor-made funding mechanisms to tackle immediate survival and recovery of sport after the COVID-19 pandemic


Funding: Main insights (3/4)

Country of analysis	Scope	Insights
 <p>United Kingdom</p>	<p>Sport Survival Package</p> <p>On top of existing Government's business support schemes, the UK government launched in November 2020 a "Sport Survival Package" aimed to support a high number of sports organisations under threat due to participation restrictions, as well as the impact of major attendance falls. The programme has been delivered in two phases, responding directly to the Government's roadmap for reopening</p>	<ul style="list-style-type: none"> The Sport Survival Package provided financial support necessary to enable survival of eligible sports organisations impacted by restrictions to spectator readmission at live sporting events The support totalled £600 million (mostly loans but also grant funding) divided into two phases, demonstrating adaptability and flexibility in the provision of funding for the sector: phase 1 from 1 October 2020 to 31 March 2021 and phase 2 from 1 April 2021 to 31 March 2022 Programme objectives: (1) ensure as many sports or sports clubs survive the period of coronavirus restrictions which prevent spectators from attending professional sporting competitions, (2) minimise the long-term damage to participation through safeguarding investment into grassroots community activity and women's sport
 <p>France</p>	<p>Measures of the Sport Recovery Plan</p> <p>Following the health crisis, the French Ministry delegate for Sport worked on a set of recovery measures for the sector (part of the <i>Plan France Relance</i>) under the responsibility of multiple institutions and with various beneficiaries, including sports associations, companies, federations and public institutions</p>	<ul style="list-style-type: none"> The Ministry presented a set of recovery measures for the sector focused on sports associations, including initiatives to fund a membership to promote young people membership to sports associations, increase training and capacity, while improving sports facilities in deprived areas Additionally, measures to support federations, public institutions and enterprises were also developed, which include funding to support the digital transformation, grants for thermal renovation of sports facilities, and also tax exemptions

5.1 Funding

Some EU countries included sport-related initiatives in their Recovery and Resilience plans mainly covering investments in infrastructures

Funding: Main insights (4/4)

Country of analysis	Scope	Insights
 <p>EU countries</p>	<p>EU countries' recovery and resilience plans – sport-related initiatives</p> <p>The Recovery and Resilience Facility is the EU's key instrument for the recovery from the COVID-19 pandemic. EU Member States were asked to submit their national recovery and resilience plans (RRP) of which some directly address sports to some extent</p>	<ul style="list-style-type: none"> • Out of the Recovery and Resilience Plan's checked, Croatia, Spain, France, Italy and Romania stand out, as they give considerable weight to the sport in their plans • Infrastructure development appears to be the most frequent topic in RRP, but investment related to digitalisation, inclusion and initiatives to increase participation were also included, specially in the Spanish case
	<p>Other national recovery initiatives</p> <p>Multiple countries implemented a number of initiatives to mitigate the effects of the pandemic in the sport</p>	<ul style="list-style-type: none"> • Initiatives to mitigate the effects of the pandemic in the short term include: support funds, exemption or deferral of taxes, rents and social security payments, adjustments to TV broadcasting deals, introduction of vouchers instead of cash refunds when returning tickets, provision of vouchers to children to purchase sports equipment, anticipated government grants and adoption of specific regime to support freelancers

5.1 Funding

Most initiatives reviewed aim to allocate funds more efficiently and transparently catering for specific needs of the sector, underpinned by an overarching sport strategy

Funding: Main initiatives identified

Main initiatives	Reference cases
• Increase government's funding to sport	Hungary; Ireland ¹
• Provide timely sector specific aids in response to COVID-19	UK; France; RRP; EU recommendations ²
• Promote and encourage sector entities to invest in attracting EU cohesion funds, as well as other EU initiatives , such as Erasmus+	Hungary; EU recommendations ²
• Explore opportunities to attract the private sector to invest in sport and decrease dependency from public funding , by developing incentives to patronage and involving the private sector in facility development and partnership funding	UK; Spain; Ireland ¹ ; Slovenia ³ ; France
• Categorise sports and prioritise funding accordingly	Hungary; Ireland ¹
• Focus investment and resources on communities most in need	UK; France; EU recommendations ²
• Invest in athletes demonstrating medal potential in early stages of their careers, sustaining long-term success	UK; Germany
• Ensure adequate funding for amateur and grassroots sport	EU recommendations ²
• Provide funding for high-performance programmes in a multiple-year approach (reviewed periodically)	UK; Germany; Ireland ¹
• Create financing mechanisms to support youth employment in sport	France
• Create financing mechanisms to support training participants depending on their situation, including youth and people with disabilities	France
• Create financing mechanisms to support innovation and information/ digital transition in sports organisations	France
• Ensure financing mechanisms to enable children from socially disadvantaged backgrounds to access sport in affordable conditions	EU recommendations ²
• Ensure financing to the development, operation and modernisation of sports infrastructures , especially in remote regions and disadvantaged areas	Ireland ¹ ; France
• Establish a tangible, transparent, result-driven, and accountable funding system , matching national strategic objectives	UK; Hungary; Ireland ¹
• Ensure financing to sports organisations including funding to the development of sports associations operating in priority districts (more vulnerable) helping young people in their education and social inclusion	Ireland ¹ ; Slovenia ³ ; France;
• Develop a funding mechanism specific to sport and its needs	Italy

Notes: 1 - Detail and specific initiatives available in Government of Ireland "National Sports Policy 2018-2027"; 2 - EU Recommendations refer to several EU documents such as the Motion pertaining on the report on "EU sports policy: assessment and possible ways forward" (2021/2058(INI)); 3 - Detail and specific initiatives available in Republic of Slovenia Ministry of Education Science and Sport "National programme of sport in Republic of Slovenia 2014-2023"

Source: PwC international initiatives analysis (detail on Annex A1)



Professionalisation and resources

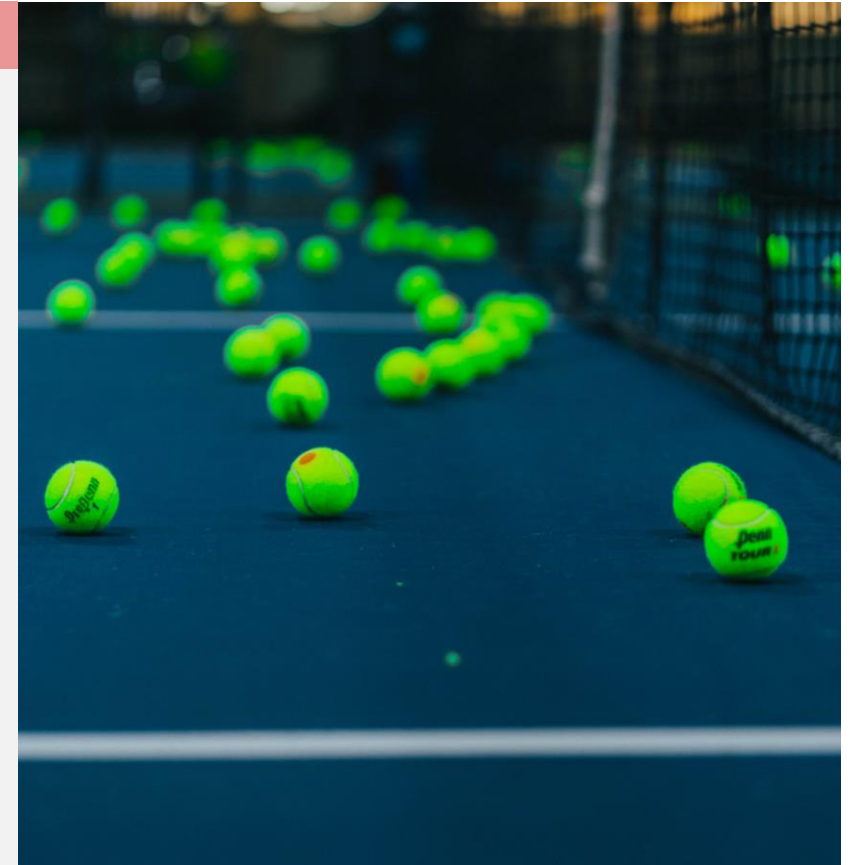
5.2 Professionalisation and resources

There is a high focus on increasing the level of professionalisation of sports organisations so that they become more efficient and athletes are provided with higher quality services

Professionalisation and resources: Lessons from international initiatives studied¹

Professionalisation and resources



- The development of **training programmes and initiatives that contribute to expertise of sport professionals** is one of the key motivations among the initiatives analysed
- On the other hand, **initiatives that promote the generalised professionalisation of sports organisations** are also common to many countries and share a common goal, which is to promote a more efficient functioning of sports organisations in its internal management (e.g. legal, financial, human resources, and marketing matters). Some of the initiatives regarding this include the provision of advice, training sessions, and a resource centre
- Some countries go beyond the need to professionalise the sector, claiming a need to **simplify organisational structure and to de-bureaucratise sport**
- Initiatives to **ensure social and labour protection mechanisms to all sport professionals** as well as **initiatives to support dual-careers of athletes** are also common measures. For instance, Spain is developing a new sport law where it includes new safety measures to protect athletes' rights and Germany, in its restructuring of high-performance and elite sport's funding, claims the need to optimise the compatibility of a sporting career with education
- All in all, there is a high focus on **ensuring high-quality services are provided to athletes**, and this includes providing **support services to athletes during and after their professional and active career**
- France stands out for its innovative way to provide job security in the sector: *Profession Sport et Loisirs* is an **association that supports the management and promotion of sport and leisure professions** and includes in its portfolio a **"job sharing" service and a job exchange**
- Regarding sports facilities related initiatives, the end goal is to **optimise the infrastructure network improving overall accessibility**. Specific initiatives include, the modernisation of facilities, encouraging the sharing of facilities, and eliminating existing disproportions of existent sports facilities in rural and disadvantaged areas



5.2 Professionalisation and resources

Spain is setting out a new Sport Law with provisions to enforce athletes' rights. Also, France brings forward innovative ways to promote job security in the sector

Professionalisation and resources: Main insights

Country of analysis	Scope	Insights
 <p>Spain</p>	<p>Preliminary draft of the new Sport Law</p> <p>A preliminary draft of the new Sport Law has been published by the Government in 2019. A new version of this draft was published in 2021, following stakeholders' inputs</p>	<ul style="list-style-type: none"> Spain has been updating sport's legal basis and regulatory framework, bridging gaps in order to galvanise a sustainable growth and tackle the main challenges of modern sport The legislator notes that dimensions such as social inclusion, ecological transition and innovation through digitisation are essential to adapt sport to the upcoming socio-economic reality An athlete-centred approach is foreseen through a wide range of provisions establishing a comprehensive array of rights and duties in order to protect and provide legal certainty throughout the athlete's career
 <p>France</p>	<p>National Federation <i>Profession Sport et Loisirs</i></p> <p>The National Federation <i>Profession Sport et Loisirs</i> (PSL) is an association with the aim of supporting the management and promotion of sport and leisure professions</p>	<ul style="list-style-type: none"> PSL services include the provision of a "job sharing" service, training courses, support of sports associations in the administrative and salary management procedures and a free job exchange service, with the purpose of contributing to a more professionalised sector Its "job sharing" service matches a pool of employers to employees, in which PSL functions as the employer, building the bridge between employers and employees, taking ownership over administrative procedures (contracts between parties). This mechanism facilitates the contractual process for both parties, enabling multiple "part-time contracts" at once while, promoting a more secure labour market

5.2 Professionalisation and resources

Most professionalisation initiatives envisage to improve working conditions, ensure job security and build capacity. Regarding sports facilities the goal is to optimise the network

Professionalisation and resources: Main initiatives identified

Main initiatives	Reference case
• Develop a sport workforce strategy	Ireland ¹
• Promote programmes for the education, training and capacity building of expert professionals in sport	UK; Hungary; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²
• Develop initiatives that contribute towards the professionalisation of sports organisations , such as provision of legal and financial advice, as well as support in funding applications	UK; Germany; Italy; Hungary; France
• Ensure that all professional athletes and coaches have equal access to social and labour protection mechanisms , during and after their professional and active career	Germany; Slovenia ³ ; France; EU recommendations ²
• Develop initiatives to support athletes' dual-career and promote athletes' education by offering and improving incentives to education in sports (e.g. scholarships)	Germany; Ireland ¹ ; Slovenia ³ ; EU recommendations ² ;
• Promote initiatives which facilitate job search in sport , such as, offering a "job sharing" service or establishing a job exchange in the sport	France
• Ensure high quality support services are provided to athletes : financial support, training and competition aid, aid for professional integration, retirement system and accident/ illness coverage	UK; Spain; Germany; Italy; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²
• Promote a simplified organisational structure , less conditioned by administrative processes	Hungary; Slovenia ³
• Optimise and develop a network of sports facilities , especially in remote regions and disadvantaged areas	UK; Italy; Hungary; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²
• Increase the scope of assessment mechanisms activities and conduct more frequent audits and certifications to sports facilities	Ireland ¹ ; Slovenia ³
• Optimise and create a network of sports centres , for specific sports, at different levels, to enable high-performance sport development	UK; Germany; Ireland ¹ ; Slovenia ³

Notes: 1 - Detail and specific initiatives available in Government of Ireland "National Sports Policy 2018-2027"; 2 - EU Recommendations refer to several EU documents such as the Motion pertaining on the report on "EU sports policy: assessment and possible ways forward" (2021/2058(INI)); 3 - Detail and specific initiatives available in Republic of Slovenia Ministry of Education Science and Sport "National programme of sport in Republic of Slovenia 2014-2023"

Source: PwC international initiatives analysis (detail on Annex A1)

Participation

5.3 Participation

An underlying strategy to base sport promotion initiatives enables the connection of all sport's dimensions, from education to high performance sport, and from youth to elderly sport

Participation: Lessons from international initiatives studied¹

Participation



- Initiatives to boost sport's engagement are often focused on **four dimensions: general participation** to address high-levels of inactivity among the overall population, **sport in education** to induce an early sportive lifestyle, **inclusive sport** to promote and improve conditions for people with disabilities among other groups with lower participation levels and **high-performance sport** to improve elite sport conditions and performance
- Most sport promotion initiatives consist of organising sport and leisure events, education and information campaigns, activity levels close monitoring, and engaging stakeholders in the design of initiatives/ sports programmes
- Most sports governing bodies present the general objective of boosting sport participation and some **design and structure initiatives based on a structured supporting strategy** (e.g. United Kingdom and Spain). Having an underlying strategy enables the **connection of all sport's dimensions**, from recreational and leisure sport, to education and high-performance sport, as well as all social inclusion aspects of sport
- Also, there are some **initiatives targeting specific groups and promoting physical activity**, such as the French programme "*Savoir rouler à vélo*" to generalise the learning of cycling among children
- In terms of **inclusive sport**, besides awareness campaigns, encouraging sport participation typically involves **adapting sports facilities and specialising sport professionals**
- **Sport participation can also be leveraged through the promotion of social participation in sport**, by promoting volunteering in sport and fostering the involvement of communities in sport-based organisations
- Concerning high-performance and elite sport, the development of **initiatives for talent identification** is indicated as a central point to a sustainable sport's performance (e.g. Spanish Programme "*Apoyo al Deporte Base*")
- Finally, improving conditions for elite sport, **prioritising athlete's physical and mental well-being** is also key. The English Institute of Sport stands out for its **athlete-centred approach** in the provision of support services to elite athletes



5.3 Participation

Most public bodies for sport present a comprehensive set of action plans to boost sport participation underpinned by an overarching, goal-oriented and time-framed strategy



Participation: Main insights (1/2)

Country of analysis	Scope	Insights
 <p>United Kingdom</p>	<p>English Institute of Sport: actuation and “Mission 2025”</p> <p>The English Institute of Sport (EIS) is a government agency which works with British Olympic and Paralympic sports and provides elite athletes and coaches with sport science and medical support services, through a pool of experts</p> <p>In 2021, EIS released the new strategy: “Mission 2025”, defining a set of objectives and strategies that allow the institution to fulfil its mission of delivering high-quality support services to athletes and sports</p>	<ul style="list-style-type: none"> The EIS’s “Mission 2025” puts the athlete at the centre and sets five objectives related to improving the competencies of its human resources, to guaranteeing athlete’s mental and physical health, to boosting performance of sports and athletes and, finally, to achieving high ethical and governance standards. To reach this objectives “Mission 2025” is supported by seven sport-related strategies and four enablers which wield a transversal influence across the environment. The sport-related strategies are focused on: “Enabling People”, “Elite Training Centres”, “Performance Planning”, “Athlete Health”, “Human Performance”, “Performance Innovation” and “Performance Data”. The enablers are, in turn, “Data Governance”, “Valuable Partnerships”, “Core Functions” and “Organisational Health”
 <p>Spain</p>	<p>Supreme Council for Sport</p> <p>The Supreme Council for Sport (CSD) is a Spanish government agency responsible for the promotion, planning and development of physical culture and sports activities of any kind, the coordination and support to social entities dedicated to sport, as well as the relations between the Government, sports governing bodies, and the Spanish Olympic Committee. CSD is also responsible for the management and promotion of centres and services intended for sport practice, sports education in schools and oversight sports activities</p>	<ul style="list-style-type: none"> The Supreme Council for Sport promotes a set of initiatives encompassing social and gender inclusion, grassroots sport, training, support athletes' career transition, and promotion of business start-up The Government of Spain has ruled that several programmes of the CSD are considered Events of Exceptional Public Interest. This allows significant tax benefits for those companies that collaborate with the dissemination of the event and make a contribution (donation) to these programmes Regarding sport development, CSD defined the ADB (“Apoyo al Deporte Base”) strategy that tries to generate innovative actions to engage more and better athletes, through talent identification, and to promote the practice of physical activity

5.3 Participation

Some initiatives targeting specific groups from grassroots to elite sport or specific disciplines (e.g. “*Savoir rouler à vélo*” French programme)

Participation: Main insights (2/2)

Country of analysis	Scope	Insights
 <p>Italy</p>	<p>Italian National Olympic Committee</p> <p>The Italian National Olympic Committee (CONI) is responsible for discipline, regulation and management of national sports activities in Italy</p>	<ul style="list-style-type: none"> • CONI is the public entity responsible for the organisation and strengthening of national sports and the promotion of maximum proliferation of sport • CONI also provides training and medical and research services through Scuola dello Sport and the Institute of Medicine and Sport Science, in order to increase scientific incorporation in the sector • To fight high levels of inactivity, throughout the years, CONI has been endorsing a set of initiatives to promote physical activity and particularly amongst young people. Such initiatives include sport camps, multi-sports events for children, a National Sports Day, and social projects to keep schools open during holidays • Besides, CONI also developed a programme to guide and support athletes at the end of their high-performance career and other initiatives regarding migrants social inclusion and social cohesion through sport
 <p>France</p>	<p>Ministry Delegate for Sport</p> <p>The Ministry Delegate for Sport is attached to the Minister of National Education, Youth and Sport and is responsible to uphold the main objectives of the national sport policy and setting the legal framework through the sport code</p>	<ul style="list-style-type: none"> • The Ministry of Sport develops several actions in three primary areas: “Sport practice”, “Ethics and integrity”, and “Jobs and careers” • Besides awareness campaigns, the Ministry develops specific initiatives, namely: developed the programme “<i>Savoir rouler à vélo</i>” to generalise the learning of cycling among children, created an automated information system for checking the integrity of sport staff, created a platform to fight against the manipulation of competitions and provides certified training courses and support mechanisms for associative employment and to support its professionalisation

5.3 Participation

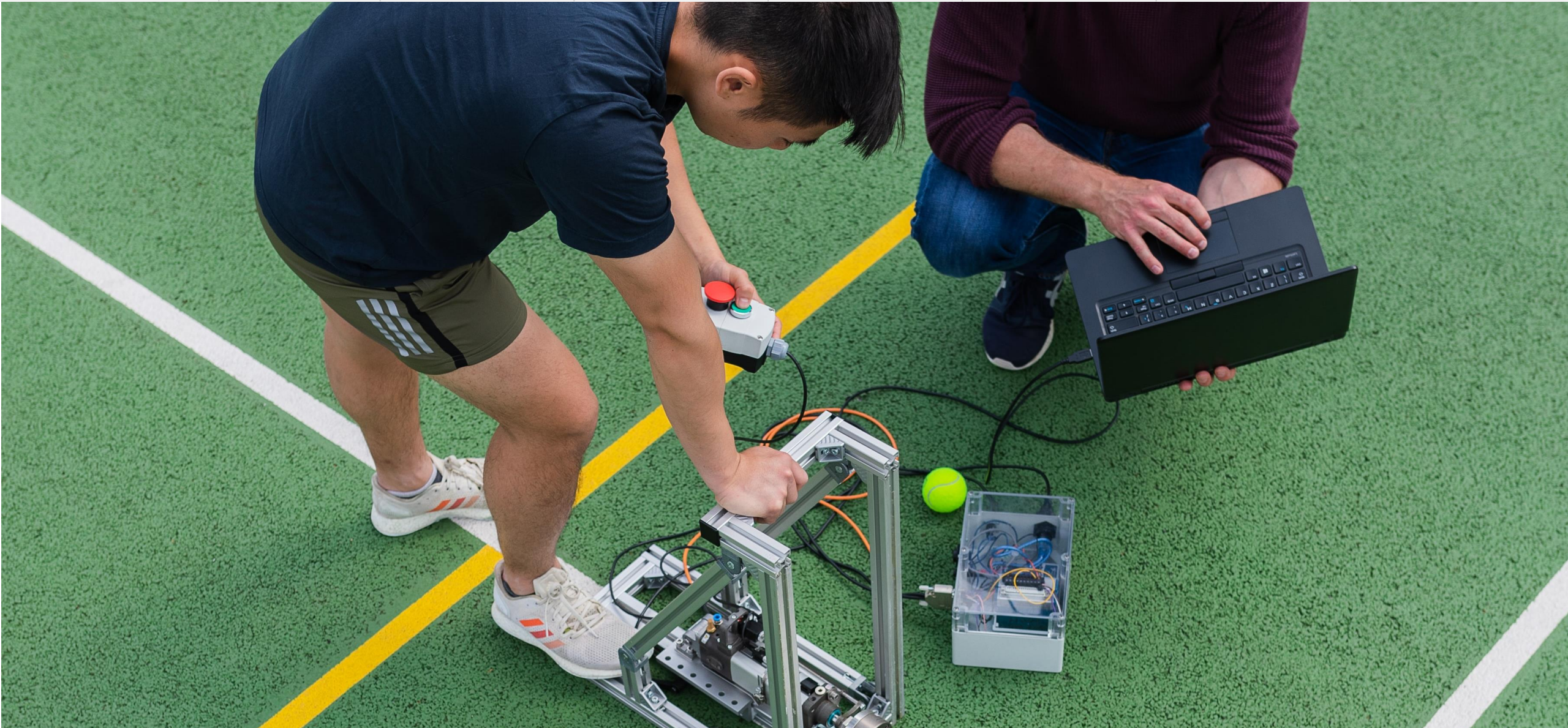
Initiatives to boost sport's engagement are often focused on four components: general participation, sport in education, inclusive sport and elite sport

Participation: Main initiatives identified

	Main initiatives	Reference case
General sport practice	<ul style="list-style-type: none"> • Galvanise sport and physical activity to the general population, including children, through sporting competitions, events and awareness campaigns and embedding sport in all aspects of day-to-day life (workplace, leisure, health and travel) 	UK; Spain; Italy; Germany; Hungary; Ireland; Slovenia ³ ; France
	<ul style="list-style-type: none"> • Incentivise recreational sport, including nature sport and sport in the workplace 	Hungary; Ireland ¹ ; Slovenia ³
	<ul style="list-style-type: none"> • Monitor population's physical activity levels, as well as levels of participation gradients among women, people with disabilities, ethnic minorities, etc. 	Hungary; Ireland
	<ul style="list-style-type: none"> • Leverage a favourable economic environment to sport development, considering the implementation of several benefits to participants 	Hungary; Ireland ¹ ; France
Sport in education	<ul style="list-style-type: none"> • Boost leisure and extracurricular sport for children, by bridging the gap between schools and sports organisations and improving conditions and prices of sports activities, aligned with families' needs and affordability 	UK; Italy; Ireland ¹ ; Slovenia ³ ; France
	<ul style="list-style-type: none"> • Promote and improve the quality of physical education provided in schools, increasing the number of hours allocated to physical education, revising the content and methodologies of the discipline, and providing continuous training opportunities to physical education teachers 	UK; Spain; Hungary; Slovenia ³ ; EU recommendations ²
	<ul style="list-style-type: none"> • Stimulate university sport by conducting awareness campaign and encouraging university sporting competitions 	Spain; Hungary
Inclusive sport	<ul style="list-style-type: none"> • Encourage women participation in sport through awareness campaigns 	Spain
	<ul style="list-style-type: none"> • Set up initiatives to promote sports activities in prisons 	Italy
	<ul style="list-style-type: none"> • Promote sport for people with disabilities, through increasing science and sport health incorporation and by providing specialised training to sport professionals, adapting sports facilities and encouraging inclusive sport competitions 	Spain; Hungary; Ireland ¹ ; Slovenia ³ ; EU recommendations ²
	<ul style="list-style-type: none"> • Promote sport for senior people in cooperation with senior and health-care institutions, by providing specialised training to sport professionals and adapting sports facilities and equipment to the elderly 	Slovenia ³
	<ul style="list-style-type: none"> • Endorse social participation in sport, encouraging community-based sports organisations, promoting volunteering and memberships to sports clubs 	Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²
Performance sport	<ul style="list-style-type: none"> • Develop a unified youth education concept aligned with elite sport's objectives, ensuring the link between education and high-performance sport 	Hungary; Slovenia ³
	<ul style="list-style-type: none"> • Set up nationwide programmes for talent identification 	UK; Germany; Spain; Ireland ¹
	<ul style="list-style-type: none"> • Improve conditions for elite sport, prioritising athlete's physical and mental well-being, by providing athlete centred support services, managing competition calendars, ensuring an attractive career, among others 	UK; Spain; Germany; Italy; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²

Notes: 1 - Detail and specific initiatives available in Government of Ireland "National Sports Policy 2018-2027"; 2 - EU Recommendations refer to several EU documents such as the Motion pertaining on the report on "EU sports policy: assessment and possible ways forward" (2021/2058(INI)); 3 - Detail and specific initiatives available in Republic of Slovenia Ministry of Education Science and Sport "National programme of sport in Republic of Slovenia 2014-2023"

Source: PwC international initiatives analysis (detail on Annex A1)



Innovation and value creation

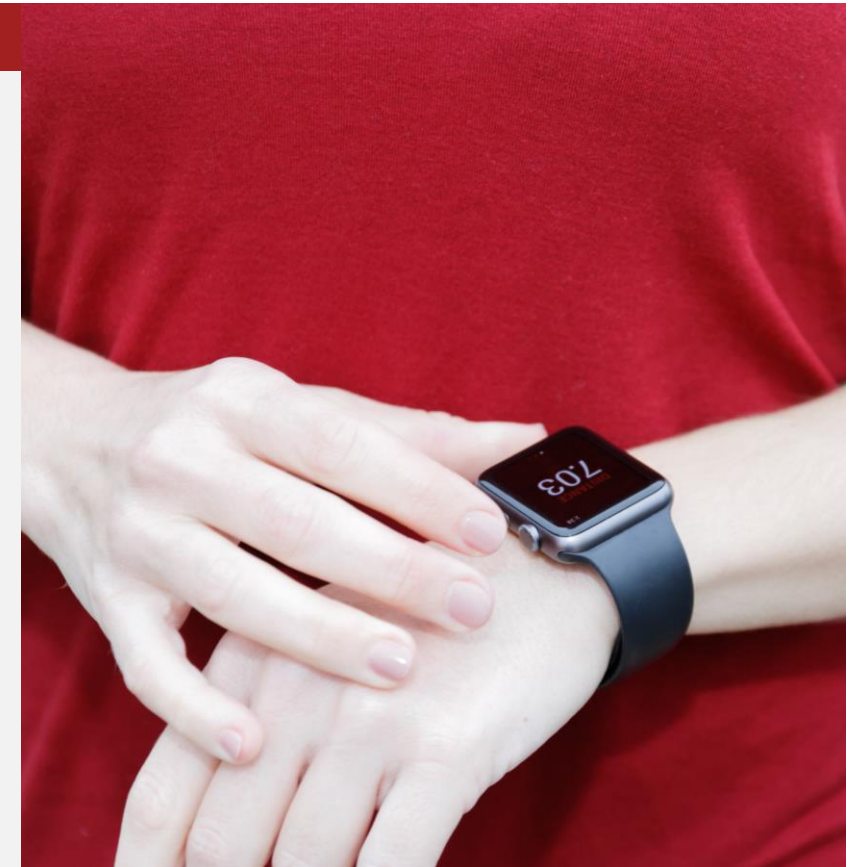
5.4 Innovation and value creation

Many countries develop innovation and research focused sport to increase performance and results often assured by the creation of a hub

Innovation and value creation: Lessons from international initiatives studied¹

Innovation and value creation


- The importance of innovation and research directed to sport is often assured by the **creation of a hub, with clear research priorities, which promotes the connection between different stakeholders and increases the chance of application of its results together with knowledge transfer within the system, increasing its performance**
- In the Spanish case two observatories were created in order to **develop relevant information**: one with a more scientific focus which has been producing relevant information about the sector (economic value, social value, COVID-19 impact) and a second focused on discussing relevant trends and challenges that impact sport, promoted by a private institution
- Germany presents a structured approach to R&D, by having an institution (BISp) that assures the **connection between the sport, science and policy dimensions and establishes research priorities for which it targets funding accordingly**
- At an European level, European Platform for Sport Innovation (EPSI) is a non-for-profit European association, based in Brussels, which consists of a membership-based networking organisation focusing on innovation in sport and many other areas. **EPSI stimulates the cooperation among the entire sport's ecosystem, as well as, with entities from neighbouring sectors, to foster innovation in its broad sense**
- The **promotion of forums for debate among the most varied sport stakeholders** is broadly referred to as an **important measure to launch debate on the sector's future opportunities and challenges and share best-practices**. Such forums are an opportunity to ensure exchange in skills and know-how, especially between professional and grassroots sport, as recommended by the EU



5.4 Innovation and value creation

Spain set up two observatories: one has a scientific background to gather and analyse relevant data and the other aimed to focus in-depth dialogue about trends and the future of sport



Innovation and value creation: Main insights (1/2)

Country of analysis	Scope	Insights
 Spain	<p>Observatorio de Investigación de la Fundación España Activa Launched by Fundacion España Activa and Centre of Sports Studies, Observatorio de Investigación aims to promote activities related to research, education and dissemination of information related to physical activity and healthy lifestyle</p>	<ul style="list-style-type: none"> Aiming to raise and transfer cutting-edge knowledge for the Spanish sport, the Observatory has been developing studies in partnership with other entities to promote a physically active and healthy lifestyle, including specific analysis regarding the Spanish sport's ecosystem Highlighting, in particular, two reports addressing the Spanish sport's ecosystem: <ul style="list-style-type: none"> ✓ Study of the Impact of COVID-19 on the Spanish sport's ecosystem: it aims to identify the current perceptions of the different actors of the Spanish sport's ecosystem regarding the key aspects of its recovery in the short, medium and long term ✓ Thermometer of the Sport's Ecosystem in Spain: aiming to boost structural changes in the way policy makers and the public perceive the value and contribution of the sport's ecosystem to social and economic outcomes. It points out four pillars on which the sector should work to transform and develop the perception the policymakers have on sport: (1) Economic Value, (2) Sustainable Development, (3) Social Return on Investment, (4) Influencing the World, reinforcing the need to gather information that supports the true value of sport
	<p>Observatorio del Deporte en España Palco 23 This Observatory is an initiative developed by a sports business newspaper, that aims to create a permanent forum for debate between relevant stakeholders in the sector</p>	<ul style="list-style-type: none"> Forums have covered a number of different topics mainly related to the key challenges faced by the sector, such as: e-sports, fitness sector, audience capture, monetisation of social media, among others

5.4 Innovation and value creation

Germany presents a structured R&D, building bridges between sport, science and policy dimensions. Also EPSI strives for a more innovation-friendly environment

Innovation and value creation: Main insights (2/2)

Country of analysis	Scope	Insights
 Germany	Federal Institute of Sport Science Federal Institute of Sport Science (BISp), a subordinate authority of the Federal Ministry of the Interior, Building and Home Affairs (BMI, "Bundesministerium des Innern, für Bau und Heimat"), aims to identify research needs and to initiate, promote and coordinate research projects in a wide array of sport issues and evaluate findings	<ul style="list-style-type: none"> • BISp sets research priorities and acts as coordinator of the country's R&D efforts in sport and acts as a connector to articulate the sport, science and policy dimensions • BISp regularly releases publications and working documents within a wide range of topics (sport integrity, grassroots sport, economics of the sector, R&D funding, among others), such as the "Sport Development Report" that is published annually (a nationwide survey of sports clubs in Germany and aims to provide leaders in organised sport with knowledge to nurture decision-making and evidence-based action to strengthen its competitiveness)
 Other	European Platform for Sport Innovation The European Platform for Sport Innovation (EPSI) is a non-for-profit European association based in Brussels operating as a membership-based networking organisation focusing on innovation in sport and many other areas	<ul style="list-style-type: none"> • EPSI believes that to foster innovation in sport, the sport must reach other neighbouring sectors. Innovation in sport should be interpreted in its broad sense, including product, process, and business models, therefore, EPSI involves the entire sport's ecosystem and works on a quadruple helix system, bringing together business, academia, public authorities and end-users • Besides organising conferences, EPSI provides services to accelerate innovation in three pillars: 1. Lobbying & education (influence policy makers to increase political awareness towards the importance of sport), 2. Fundraising (support funding canvassing to innovative projects) and 3. Business creation (Increase capacity and empower its members turning ideas into businesses)

5.4 Innovation and value creation

Research and innovation related to sport becomes pivotal and is often assured through hubs connecting multiple stakeholders

Innovation and value creation: Main initiatives identified

Main initiatives	Reference case
<ul style="list-style-type: none"> • Boost sport-related industries 	Spain; Slovenia ³
<ul style="list-style-type: none"> • Accelerate innovation and digitalisation in sport, leveraging the use of new technologies and approaches to attract sport participants and spectators and in organising sporting events 	UK; EPSI; EU recommendations ²
<ul style="list-style-type: none"> • Establish an innovation and research hub, responsible for setting research priorities according to the sector's needs 	Germany; Spain; Italy; Ireland ¹ ; EPSI; EU recommendations ²
<ul style="list-style-type: none"> • Galvanise scientific and research work in sport, encouraging collaborative research projects in various areas such as data analytics, sports medicine and performance analysis 	Germany; Hungary; Ireland ¹ ; Slovenia ³
<ul style="list-style-type: none"> • Foster forums for discussion and sharing of best-practices among relevant sport stakeholders 	UK; Spain; Germany; Ireland ¹ ; EU recommendations ²

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Source: PwC international initiatives analysis (detail on Annex A1)



Integrity and social responsibility

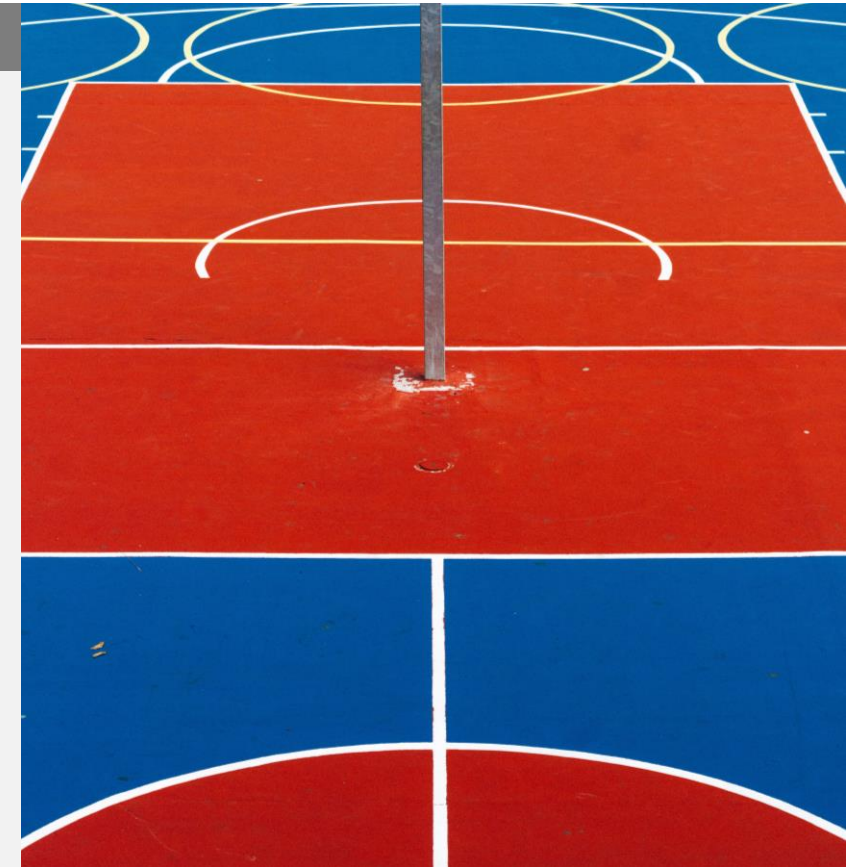
5.5 Integrity and social responsibility

Recommendations and standards regarding integrity and social responsibility have been developed by international organisations but the enforcement still lingers

Integrity and social responsibility: Lessons from international initiatives studied¹

Integrity and social responsibility


- Under the Italian Presidency, the G20 Anti Corruption Working Group reached a consensus on the high level Principles on Tackling Corruption in Sport
- SIGA aims to free sport from governance and integrity issues promoting independent third-party assessments of sports associations' compliance with SIGA Universal Standards
- Nevertheless, even though **integrity and social responsibility recommendations and standards have been developed by international organisations an effective implementation is yet to be done**
- To address the lack of monitoring and enforcement, the UK's Independent Fan Led Review of Football Governance proposed establishing a new regulator for football to oversee financial regulation and to conduct new owners' and directors' tests of governance and integrity
- Overall, all initiatives analysed stress the importance of **adopting a holistic approach**, as the implementation of sporadic and independent initiatives is not effective to have long-term sustainable effects in sport



5.5 Integrity and social responsibility

In the face of increasing financial vulnerability of football clubs, a Review conducted in the UK recommends creation of a new independent regulator for English football



Integrity and social responsibility: Main insights (1/2)

Country of analysis	Scope	Insights
 <p>United Kingdom</p>	<p>Independent Fan Led Review of Football Governance</p> <p>In 2021, an Independent Fan Led Review of Football Governance was published in response to the increasing concerns over the financial vulnerability of football clubs. The Review followed a long period of consultation to football stakeholders, including representatives of supporters of over 130 football clubs</p>	<ul style="list-style-type: none"> The Review identifies three structural challenges in English football: <ul style="list-style-type: none"> Fragile finances football clubs further aggravated by COVID-19 Poor management of clubs and loss of fan representation in club's lead Regulation, monitoring and enforcement are weak and unable to address current challenges of national The creation of a new independent regulator for English football is the core recommendation of the Review. Nonetheless, the Review presents a set of recommendations that must be considered holistically to guarantee long-term sustainability General recommendations presented in the Review include: establish a new regulator for football (IREF) to oversee financial regulation and to conduct new owners' and directors' tests of governance and integrity; develop a new approach to corporate governance (new Code for Football Governance); design Equality, Diversity and Inclusion Action Plans assessed by IREF; involve supporters in the decision-making process by means of a Shadow Board; ensure fair distributions in the football pyramid, leveraging the power of the Premier League; and protect the welfare of athletes, particularly at a young age

5.5 Integrity and social responsibility

Under the Italian Presidency, the G20 Anti-Corruption Working Group reached a consensus on the high-level Principles on Tackling Corruption in Sport

Integrity and social responsibility: Main insights (2/2)

Country of analysis	Scope	Insights
 Italy	<p>The Italian G20 Presidency and the fight against corruption priority</p> <p>In 2021, under the Italian Presidency, the G20 Anti-Corruption Working Group reached a consensus on the high-level Principles on Tackling Corruption in Sport</p>	<ul style="list-style-type: none"> The G20, in 2021 under Italian presidency, has selected Anti-Corruption in Sport as one of its priorities The “G20 High-Level Principles on Tackling Corruption in Sport” defines the key principles of action in the fight against corruption in professional and amateur sport, namely: (1) Gather and analyse information to develop understanding of corruption in sport and raise awareness, (2) Strengthen legal and regulatory frameworks, (3) Ensure effective law enforcement, (4) Strengthen international cooperation, (5) Tackle the exploitation of sport by criminal groups, (6) Support international and national sports organisations to enhance governance, transparency and accountability and ensure the integrity of major sporting events
 Other	<p>Sport Integrity Global Alliance and the SIRVS</p> <p>SIGA is an organisation that aims to work towards a vision of sport played and governed under the highest integrity standards, free from any form of unethical, illicit and criminal activity, to safeguard sports values and ensure its positive impact and benefits to all citizens, issues that have been aggravated by the COVID-19 pandemic</p>	<ul style="list-style-type: none"> SIGA created Universal Standards as a living framework that mirrors the concerns and circumstances faced in sport in matters of integrity: “Good governance”, “Financial integrity”, “Sport betting integrity” and “Youth development and Child protection” and is underpinned by guiding concepts and best practices sports organisations should implement SIGA also developed the SIGA Independent Rating and Verification System (SIRVS), as a tool to evaluate the sports organisation’s level of implementation of compliance with the SIGA Universal Standards through third party assessments. SIRVS was developed in accordance with what investors are demanding from sports organisations to assure that their investments are protected from unethical, illicit and criminal activities

5.5 Integrity and social responsibility

Monitoring sports organisation's health in matters of governance and integrity through third party assessments is one of the key initiatives to promote sport integrity

Integrity and social responsibility: Main initiatives identified

Main initiatives	Reference case
<ul style="list-style-type: none"> • Create a new independent regulator for sport, established by the Government 	UK
<ul style="list-style-type: none"> • Uphold human rights and democratic principles 	EU recommendations ²
<ul style="list-style-type: none"> • Promote and protect the fundamental rights of athletes by providing guides and helplines and conducting awareness campaigns to prevent harmful situations, paying particular attention to situations of child abuse 	UK; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ²
<ul style="list-style-type: none"> • Move towards equalising performance payments for female and male athletes, as well as to Olympic and Paralympic athlete 	EU recommendations ²
<ul style="list-style-type: none"> • Develop and meet high integrity and governance standards 	UK; Italy; Hungary; Ireland ¹ ; Slovenia ³ ; France; SIGA; EU recommendations ²
<ul style="list-style-type: none"> • Devise assessment tools to regularly monitor sports organisations governance and integrity, namely, financial stability and management practices, for example, through third-party assessments 	UK; Ireland ¹ ; SIGA; EU recommendations ²
<ul style="list-style-type: none"> • Leverage sport's social impact by strengthening ties and networking between the high-performance system and the community 	UK; EU recommendations ²
<ul style="list-style-type: none"> • Promote sustainability through infrastructure renewal and organisation of sustainable events 	Slovenia ³ ; EU recommendations ²
<ul style="list-style-type: none"> • Fight illegal sports betting, violence and racism in sport, match-fixing, corruption, among other unethical and illegal behaviours, through awareness campaigns, training, providing guides on how to report these situations and adopting effective sanctions 	UK; Italy; Hungary; Slovenia ³ ; France; SIGA; EU recommendations ²
<ul style="list-style-type: none"> • Fight doping in both recreational and high-performance sport through testing, awareness campaigns, education and training programmes for sport professionals, in close collaboration with law enforcement agencies 	Hungary; Ireland ¹ ; Slovenia ³ ; France; EU recommendations ² ;
<ul style="list-style-type: none"> • Encourage inclusion and integration in and through sport, to meet relevant and tangible standards of inclusive sport participation, including gender and ethnic diversity in leadership positions of sports organisations 	UK; Italy; Ireland ¹ ; EU recommendations ²
<ul style="list-style-type: none"> • Involve fans in governance and decision-making bodies, for example, through means of a "shadow board" in sports clubs 	UK; France; Hungary; EU recommendations ²
<ul style="list-style-type: none"> • Improve the perception of people on sport through media by focusing on the benefits of sport and giving more coverage to a wider range of sports in the media, as well as to women sport, youth sport and sport for people with disabilities 	Slovenia ³ ; EU recommendations ²

Notes: 1 - Detail and specific initiatives available in Government of Ireland "National Sports Policy 2018-2027"; 2 - EU Recommendations refer to several EU documents such as the Motion pertaining on the report on "EU sports policy: assessment and possible ways forward" (2021/2058(INI)); 3 - Detail and specific initiatives available in Republic of Slovenia Ministry of Education Science and Sport "National programme of sport in Republic of Slovenia 2014-2023"

Source: PwC international initiatives analysis (detail on Annex A1)



Priority areas and general recommendations

6. Priority areas and general recommendations

In line with the sector's challenges, six priority areas were flagged. Strategic alignment provides a structural framework to drive cultural shift in Portuguese sport

Priority areas and general recommendations

Ambition

Drive structural **cultural change** in Portugal, envisaging a society that acknowledges the social and economic importance of sport and engaged in an active sport practice, **leveraging all the benefits of a sportive lifestyle**

Strategic alignment

Enhance alignment and promote an integrated and long-term vision among stakeholders

1. Design a National Sport Strategy connecting all dimensions of sport, improving coordination among stakeholders that ultimately that strengthens sport's relevance in the political agenda
2. Establish a sustainable sector which takes evidence-based decisions to enhance value for money and efficient resource management

Funding	Professionalisation and resources	Participation	Innovation and value creation	Integrity and social responsibility
<p>Manage resources efficiently</p> <ol style="list-style-type: none"> 3. Increase the level of funding channelled to the sector 4. Establish a link between public funding and sporting success 5. Reduce bureaucracy on performance goals-oriented and project-driven funding system 	<p>Contribute to a more professionalised sector</p> <ol style="list-style-type: none"> 6. Build capacity of sports organisations 7. Shorten the gap between professional and volunteer-based organisations 8. Embed sustainability in all decisions and actions, including resource optimisation 	<p>Improve conditions for sport practice in an athlete centred approach</p> <ol style="list-style-type: none"> 9. Increase the level of physical activity 10. Boost sport in the education system 11. Leverage sport as a tool for social inclusion 12. Raise high-performance sport participation from grassroots upwards 	<p>Increase the level of innovation and boost digitalisation</p> <ol style="list-style-type: none"> 13. Improve the level of scientific embeddedness in the sector 14. Develop a research and innovation-friendly environment 15. Raise awareness on sports organisations to the need to adapt to new challenges/opportunities 	<p>Boost sport's benefits to society, fighting integrity and governance threats</p> <ol style="list-style-type: none"> 16. Meet the highest integrity and governance standards, keeping sport safe from illegal practices 17. Bring top-level sport closer to communities 18. Safeguard athlete's well-being

6. Priority areas and general recommendations

Portuguese sport requires an holistic approach, grounded on a strategic document (National Sport Strategy) to galvanise multi-stakeholder concerted action

Detail on general recommendations: Strategic alignment (1/2)



General recommendation

Rationale

1



Design a National Sport Strategy connecting all dimensions of sport, improving coordination among stakeholders and ultimately strengthens sport's relevance in the political agenda

- The Portuguese sport demands an encompassing approach that sets out clear objectives and fosters greater alignment between authorities and stakeholders. First and foremost, it is of the utmost importance to **promote a more effective space for debate around the sector**, gathering all relevant stakeholders. Nevertheless, more than bringing together sporting institutions, it is crucial that this dialogue also **involves the Government and competent authorities, producing tangible results, so that sport gains relevance in the political agenda**
- As a result, sport stakeholders should work on **developing a National Sport Strategy, outlining a clear implementation plan (roadmap), and defining a set of clear and accountable KPIs** to take concerted action to address key challenges and priority areas
- The **National Sport Strategy must be comprehensive in the way that it covers and connects all sport's dimensions and that all initiatives/ investments are aligned with strategic goals**. For instance, it is crucial to ensure that school sport is linked to the high-performance system and that inclusive aspects of sports are not overlooked
- Therefore, the National Strategy should be **developed by multi-stakeholders working groups per relevant theme**, including competent authorities, sports organisations, experts, education system bodies, among others. Besides ensuring maximum resource and investment efficiency, this collaborative environment should be echoed outside the National Strategy as sports organisations should seek to **include relevant stakeholders in the design of sports programmes and initiatives**
- Alongside, sport must also aim to **improve collaboration with neighbouring sectors**, such as Health, Tourism and Education, in order to boost its socio-economic impact. Government plays a key role in this cross-sectorial cooperation, in order to **include sport and connect the National Sport Strategy with other sectorial strategic documents**
- Regarding the implementation process, close monitoring should be in place and should be undertaken by an assigned **task force that assesses the impact of initiatives and adjusts implementation plans on a regular basis**. This regular oversight and ongoing flexibility contributes to **better resource efficiency and enhances the achievement of long-term goals**

[Continues]

6. Priority areas and general recommendations

Ensuring organised and accessible data is paramount for evidence-based decision making

Detail on general recommendations: Strategic alignment (2/2)



Quick-win

General recommendation

Rationale

1

Design a National Sport Strategy connecting all dimensions of sport, improving coordination among stakeholders and ultimately strengthens sport's relevance in the political agenda

[Continuation]

- Furthermore, aligned with the design and implementation of a national strategy, organisations should **adopt change management practices** to foster further engagement with a wide array of stakeholders leveling up new managerial skills on that regard
- Finally, in order to spur such engagement, it is important to **implement a consistent and direct communication strategy capable of efficiently convey key messages to target groups**. This communication strategy must serve as a vehicle to strengthen and spread the socio-economic importance of sport and, therefore, organisations must coordinate their efforts and develop data-rich communications. Moreover, organisations should focus on promoting sports added value to society, the impact of implemented initiatives and sporting events, as well as the progress of the sector

2

Establish a sustainable sector which takes evidence-based decisions to enhance value for money and efficient resource management



- One of the main shortcomings of Portuguese and European sport is the **lack of organised sectorial data**. Besides not covering many important dimensions, **information is not centralised and is often outdated**. As such, it is of the utmost importance to improve data collection and access to sport-related information. A solid database is essential to measure the sector's socio-economic value, monitor the impact of public investments, and to base the decision-making process of competent authorities and sports organisations. In this regard, Portuguese sport should aim to **establish a sports observatory in collaboration with INE (National Institute for Statistics) or other public or private institutions** and should also seek to **resume the Sport Satellite Account on regular basis**

6. Priority areas and general recommendations

Organisations must further explore opportunities to attract more investment from EU, private funds and other relevant sources

Detail on general recommendations: Funding (1/2)



Bold Step



Quick-win

General recommendation

Rationale

3



Increase the level of funding channelled

- Portuguese sport is still missing sport-specific funding mechanisms, therefore, sport stakeholders should **seek new avenues and explore opportunities to attract more funding: both public and private**
- At first, the Portuguese sport could **direct European cohesion funds and other initiatives, such as Recovery and Resilience Program, Multiannual Financial Framework 2021-2027 and the Erasmus+ Programme, for sport**. Efforts should be made by leading organisations to **align EU funds with the sector's strategic priorities** (infrastructure, employment, and others) and to **promote funding opportunities next to sports organisations and support their application**. This would include wide disclosure of the open Call for Proposals, for example, through newsletters, webinars and/or local promotion and working together with sports organisations in the process of preparing a drafting and submit applications
- Moreover, considering that Portuguese sport is **highly dependent on public funding** from Government and most notably local authorities, **sports organisations must explore opportunities to attract the private sector**. Initiatives to this end may include working with competent authorities to improve tax incentives to patronage, involving the private sector in facility development projects and exploring partnerships between sports organisations and companies when designing sports programmes and initiatives
- In addition, sport may also explore and seek to increase funding streams, such as the National Lottery games and licensed sports betting that generate millions every year. In Portugal, **sport is responsible for generating a large stake of National Lottery games revenues** through Placard and Totobola, **as well as for fostering online sports betting products**. However, only a small fraction of revenues distributed to beneficiaries of the Social Games and from the special online gambling tax (IEJO) are in fact earmarked to sport. As such, **sports should advocate to competent authorities and study mechanisms to capture a larger portion of these funds** such as the creation of a Special Support Fund for Sport made up of revenues generated by bets on sports competitions (to illustrate, such Special Support Fund for Sport could generate **flexibility in the sector's funding model**, which would enable crises such as the COVID-19 pandemic to be addressed more swiftly and efficiently)

6. Priority areas and general recommendations

Portuguese sport should seek to link public funding to sports performance and explore ways to de-bureaucratise the financing system, enabling an efficient resource allocation

Detail on general recommendations: Funding (2/2)

General recommendation

Rationale

4

Establish a link between public funding and sporting success

- **Public funding allocated to sport development must be performance-driven** and aligned with the sector's strategic priorities. In Portugal, there's few strategic alignment between public funding and sporting success. Therefore, authorities should develop avenues to condition public funding to sporting success (both short and long term), such as **developing a system to rank sports according to a set of sporting goals and performance metrics and subsequently increase or decrease public funding**
- Although funding should be linked to success, **authorities must also assure a certain degree of predictability**, in a manner that allows organisations to plan and adapt their operations
- Furthermore, investing in long-term success is also key to a sustainable sport ecosystem. **Funding assigned to sports organisations must be allocated according to performance future prospects, and so does financing granted directly to athletes.** For instance, investment should be made in **athletes displaying medal potential on early stages of their career**, in order to sustain long-term success while ensuring the future of some sports is not undermined due to poor results at the moment

5

Reduce bureaucracy on performance goals-oriented and project-driven funding system

- **Sports organisations must work together with the authorities in order to make easier and less bureaucratic the access to financing.** For instance, **a multi-year single public contract encapsulating every field of action and object of agreement**, instead of multiple contracts for each different purpose, should enable sports organisations to better manage their funds and to plan medium- to long-term more effectively

6. Priority areas and general recommendations

To counter the reduced level of professionalisation, education, training and capacity building mechanisms should provide cutting-edge supporting services

Detail on general recommendations: Professionalisation and resources (1/3)



Bold Step

General recommendation

Rationale

6



Build capacity of sports organisations

- The low degree of professionalisation leads sports organisations to **face ineffective internal management** processes, and demands additional support to the organisations from focusing efforts on improving their core activities. Therefore, **sport stakeholders must explore initiatives to build capacity and increase support to the organisations**
- For instance, the sector could work on the **development of a sport resource pool that works side by side with organisations to build the needed competences for an efficient internal management**. In addition to a **directory of important sectorial support documents**, the resource pool could include the **provision of advisory services regarding management issues** (e.g. legal, marketing, financial), providing **trainings, support organisations in funding applications**, and **promote initiatives that facilitate job search**, such as a "job sharing" or job exchange service
- Nonetheless, to ensure proper adoption of good management practices meeting higher standards of services providing, **sport could develop standards for operation, and even consider the possibility of conditioning access for public funding to compliance with such standards**. For instance, obligatory skilled staff as legal experts and integrity officers along with qualified coaches are examples of minimum operational requirements in the activity of sports organisations. In addition, compliance with such guiding principles would be driven by a capacity building programme, enabling to flag and tackle weaknesses, hence, improving organisational performance
- Another angle to enhance capacity of sports organisations is investing in the retention of knowledge. Often, as athletes and other professionals leave high-performance sport and organisations, so do the skills they take with them. For a sustainable success, sports organisations **should seek to internalise the knowledge developed over time**. To counter this poor level of skill retention, organisations are called on to **boost knowledge transfer within the organisations, fostering an ongoing learning environment**. Additionally, organisations must aim to retain athletes within the sports movement (even after abandoning high-competition), investing in **exploring opportunities for career development together with athletes**, which entails bolstering career counselling and athlete-coach comprehensive capacity building programmes, for example

6. Priority areas and general recommendations

Portuguese sport needs to develop measures to empower qualified employment and volunteering, hence contributing to the professionalisation of the workforce

Detail on general recommendations: Professionalisation and resources (2/3)

General recommendation

Rationale

7

Shorten the gap between professional and volunteer-based organisations

- A **large portion of Portuguese sports organisations are run by volunteers**, especially small and local organisations. This low level of professionalisation and generation renewal leads to an overall lack of competences widening the gap between amateur and professionally driven organisations. To counter this trend and increase capacity is paramount to **invest and develop programmes for the education, training and specialisation of qualified personnel in sport**, including volunteers. Specific initiatives to improve competences of sport labour force typically seek to provide sport-oriented certified trainings including sports management and coaching areas and working collaboratively with other stakeholders to share knowledge and best-practices
- Alongside heavy dependency on volunteering, Portuguese sport struggles with **generational renewal of its managerial staff**. As such, it is important to set in motion tangible policies to **support and encourage qualified employment in sport, especially focusing youth employment while providing increasing job security for workers**. Measures in this area encompass customised legislation to the specificities of sport, creating more job security, and developing a framework of tax incentives for youth employment
- Nonetheless, considering that particularly grassroots sports are heavily reliable on volunteers, **it is crucial to enforce meaningful actions to sustain and renew sustain sports' volunteer base**. For instance, initiatives for recognition and maximizing sports' volunteer time for the purpose of counting as work periods for retirement effects and to develop tax incentives accordingly should be harnessed on this regard

6. Priority areas and general recommendations

Sport must embed sustainability in all decisions, addressing the green transition while ensuring an efficient use and resource management (economic and human)

Detail on general recommendations: Professionalisation and resources (3/3)



Quick-win

General recommendation

Rationale

8

Embed sustainability in all decisions and actions, including resource optimisation

- Sustainable development in sport is not solely about talent management and ensuring a sustainable high-performance performance, it is also concerning social, economic and environmental choices. As such, **sport must embed sustainability in all decisions**
- Particularly regarding green transition, it is paramount investment **in infrastructure renewal** and **sustainable sport events to meet higher and public standards on this regard**. On another hand, an **efficient use and management of resources** becomes increasingly pivotal for long-term development, live up to integrity and good governance standards
- Concerning the management of sports facilities, nowadays, it is not possible to get an accurate and geo-referenced cadastral monitoring of sports infrastructure in the Portuguese territory. This **lack of mechanisms mapping sports facilities prevents authorities and organisations from optimising the network and matching it with the population's needs**, undermining the process of taking evidence-based funding decisions. For example, to address this issue, governing authorities should work on **implementing a mapping of sports facilities**, in order to identify specific needs, channel funds accordingly and promote the sharing of facilities. In addition, **more frequent audits and assessments to facilities should be performed** to ensure the proper maintenance of infrastructures. Particularly in high-performance centres, it is crucial to guarantee the services available cater for the needs of elite athletes
- Moreover, **safeguarding, mental well-being, athlete's protection and safe sport environment are also key sustainability drivers**. The Portuguese sport must, not only seek to improve skills of staff, management and volunteers, but also ensure proper protection mechanisms, confidential reporting platforms, legal compliance and independent regulatory assessment of these matters

6. Priority areas and general recommendations

With the ultimate goal of boosting long-term engagement, strengthening synergies between school and clubs through physical education and school sport is critical for paradigm shift

Detail on general recommendations: Participation (1/2)


Bold Step
General recommendation
Rationale

9


Increase the level of physical activity

- Acknowledging the socioeconomic importance of sport, boosting levels of physical activity is the central goal of most countries. To this end, and given the under performance regarding physical activity, Portugal needs to **develop initiatives to encourage physical activity**. Furthermore, it is crucial to **establish measurable sport participation targets of the general population and among groups where participation gradients are more concerning** (women, ethnic minorities, people with disabilities, the senior population, and others). Besides supporting evidence-based decisions, a close monitoring of sport participation levels, increases commitment and allows stakeholders to hold accountable and evaluate the success of the initiatives implemented

10

Boost sport in the education system

- Physical education is, for many students, the first and only contact with sport. With high levels of physical inactivity among children leading to **alarming levels of physical illiteracy**, it is of the utmost importance to **prioritise and improve physical education in schools, orienting towards the development of motor skills, inclusive sport and high-performance sport initiation**. Increasing the number and time of mandatory physical education, revising the content and methodologies and investing in specialised training to physical education teachers are some of the ways to improve physical education
- Nowadays, strategic cooperation between schools and sports is low. Leverage greater connection between schools and sports organisations is key to create a holistic sports environment fostering a prevailing sporting education spanning from early years to adulthood. Besides the potential to **boost leisure and extracurricular sports activities among children**, a close relationship between schools and sports clubs allows for an **effective talent identification**, which ultimately greatly benefits high-performance sport
- As such, the process of **developing and redesigning school sports programmes must be delivered in straight collaboration with sport stakeholders** to ensure alignment with sports' strategic objectives. Furthermore, schools should also explore opportunities to **share sports facilities**, contributing to an efficient and shared use of resources

6. Priority areas and general recommendations

Sport is a catalyst for social inclusion and has the duty of care for athlete's physical and psychological well-being

Detail on general recommendations: Participation (2/2)

General recommendation

Rationale

11

Leverage sport as tool for social inclusion

- **Sport must be leveraged as a vehicle for social cohesion**, driving a positive change in society. In that sense, **sports programmes and initiatives should be designed carefully, without neglecting inclusive aspects of sport**. Sport participation levels in groups such as women, people with disabilities, ethnic minorities and the elderly call for immediate action and initiatives in this area revolve around **involving specialised stakeholders** (e.g. healthcare institutions, sport for people with disabilities specialists, NGOs for refugees) in the development of programmes and initiatives, conducting **awareness campaigns**, providing **specialised training, adapting sports facilities** and **increasing number of competitions**

12

Raise high-performance sport participation from the grassroots upwards

- Sports clubs are the backbone of sport, as drivers of sport's social purpose, as well as feed the high-performance system with new talent. Therefore, it is of the highest importance to **incentivise individuals and especially children to engage with sports clubs**, for example, by providing vouchers to fund memberships or for equipment purchasing
- Moreover, ensuring continuity of athletes in high-performance sport as well as the fulfilment of sport's social purpose relies on providing a safe environment for athletes' physical and mental well-being throughout all stages of their career development. Over the past decades, this topic has gained relevance particularly in elite sport, where performance has taken over well-being jeopardizing athletes' health in face of physical injuries and emotional distress. To prevent these situations, **athlete's welfare should be prioritised and organisations should seek to ensure the provision of athlete centred support services that balance well-being and performance**, manage competition and training schedules to tackle exhaustion and ensure an attractive career in the high-performance system
- **Sport stakeholders should better communicate sporting success and life stories to lure new comers**, for example, by developing initiatives using role models and ambassadors athletes and using storytelling for fan engagement, sponsoring activation, media campaigns and awareness raising

6. Priority areas and general recommendations

Sport is demanding higher incorporation of research and innovation outcomes, which could be promoted by establishing a research, development and innovation hub

Detail on general recommendations: Innovation and value creation (1/2)



General recommendation

Rationale

13 

Improve the level of scientific embeddedness in the sector

- As the world changes and sport evolves, research and innovation become relevant drivers in a complex environment. To face new challenges, **sport is demanding higher incorporation of science and research** and, typically, this process is assured by a specific entity to steer collaboration. Overall, it is responsible for defining research priorities and lead initiatives to galvanise research work in the sector. Hence, Portuguese sport should aim to **establish** a similar body – **a research, development and innovation hub that fosters collaborative research projects, acts as a knowledge centre in sport, promotes partnerships with higher education institutions and the private sector, and, finally, provides policy decision-makers with research-based advice**
- On top of that, to reach an appropriate level of scientific incorporation and to have the necessary tools to overcome adversities, Portuguese **sport requires effective knowledge transfer among stakeholders, especially between grassroots and professional sports' organisation** in which the competence gap is more accentuated. For this purpose, sport has to set in motion initiatives such as **promoting a forum for discussion and sharing of best-practices among sport stakeholders**, creating a space for debate of new opportunities and threats for the future ahead

14

Develop a research and innovation-friendly environment

- Innovation is a broad term, as it involves product, process or business innovation. Therefore, guaranteeing the **involvement of all stakeholders**, from business, academia, public authorities and end users, for example, is essential to develop a innovation-friendly environment
- Consequently, this begs the pressing need to set up observatories seek to **establish observatories or forums that meet all sport stakeholders, as well as neighbouring sectors**. These observatories should serve two missions: **create awareness to the importance of sport innovation**, through the organisation of events and campaigns involving sports organisations, for example, and also **serve as a platform to debate opportunities and threats and to foster business development**

6. Priority areas and general recommendations

Moreover, organisations must be aware of challenges and opportunities improving digitalisation levels and exploring ways to attract participants and spectators

Detail on general recommendations: Innovation and value creation (2/2)

General recommendation

Rationale

15

Raise awareness of sports organisations to the need to adapt to new challenges and opportunities

- The sport's environment is growing in complexity and both athletes and spectators are becoming more and more demanding, **requiring sports organisations to adapt**
- On the one hand, sport is required to keep pace with digital transition. As such, its organisations should seek to **improve their information technology and digitalisation levels in order to meet current and future needs of the sector**. Improving the digital infrastructure of organisations would support the development of new services, enable the collection and analysis of data (e.g. participation and performance data) and improve the efficiency of administrative procedures
- On the other hand, in the past years, as new trends and preferences arise, **sport has struggled to attract both sport participants and spectators**. For that reason, sports bodies could leverage the use of technologies and explore new ways to engage with more people using apps and social networks to enrich fan experience, for example
- Similarly, today's society requires customisable and flexible solutions, as opposed to traditional sports which often demand rigid time schedules. As a consequence, **sport has lost ground to more flexible activities**, such as the fitness and wellness industries. To address this issue, **sports organisations must rethink their offer in a service logic, adapted to the consumer's needs**. Consequently, in order to attract children, sports clubs may complement sports provision to complementary services that add value to the members. For example, services like picking up children from school, tutoring activities, summer camps, and other free-time/ leisure activities, that improve the convenience for the families

6. Priority areas and general recommendations

To ensure effective enforcement of integrity and governance standards, sport should be open to implement assessment mechanisms conducted by independent third-parties

Detail on general recommendations: Integrity and social responsibility (1/2)



Bold Step

General recommendation

Rationale

16



Meet the highest integrity and governance standards, keeping sport safe from illegal practices

- **Sport has been facing serious governance and integrity issues**, such as illegal sport betting, violence and racism, doping, match-fixing, and corruption. Such issues have been soaring throughout the pandemic and, therefore, it is paramount to guarantee that organisations and sport practice meet the highest integrity and governance standards
- To this end, multiple entities have developed and agreed on governance and integrity standards, codes of conduct in sport, among other guidance frameworks. However, proper enforcement is still to be verified. To ensure the established standards are being met, the sector is called to **develop and implement extensive verification systems that pay particular attention to the financial stability and management practices of its stakeholders**. To ensure full rigour, neutrality and transparency and prevent potential conflicts of interest such **assessment mechanisms should be conducted by independent third-parties**
- Furthermore, besides implementing verification systems, sport stakeholders have suggested **public financing to be made available upon compliance with governance and integrity criteria**. Nowadays, criteria for accessing public financing mainly focuses on administrative criteria and, **by incorporating integrity and governance standards, dissemination of best-practices would be improved**
- Ultimately, the **sector should also seek to work collaboratively, in national and international networks, sharing incidents and the best ways to be addressed**. Only this way, will it be possible to liberate sport from such unethical and illegal practices and focus on prevention

6. Priority areas and general recommendations

Furthermore, sports is called to inspire positive change in disadvantaged and marginalised communities and to protect athlete's rights and interests above all

Detail on general recommendations: Integrity and social responsibility (1/2)

General recommendation

Rationale

16

Bring top-level sport closer to communities

- Sport takes a central role in the development of individuals and has the power to inspire a positive change in communities. By bringing sport closer to disadvantaged and marginalised communities, **it can be used as a tool to disrupt a vicious cycle empowering individuals, by passing on values such as resilience, team-work, cooperation, tolerance and self-confidence, and by fostering the creation of social networks as catalysts for inclusion.** Therefore, sports organisations must look for opportunities to increase the number of interactions between the society and elite athletes in events, for example, and promote activities with NGOs working with those communities
- On the other hand, sport must seek to improve connection and experiences with fans. Fans are a central part of sporting experience, especially in team sports and, unfortunately, over time, as sport moved towards a "business" model, highly focusing commercial interests, **fan engagement has decreased.** In order to improve fan engagement levels, **sports clubs should enhance fans representation and transparency,** for example, **by involving fans in governance and decision-making bodies,** through the implementation of a "shadow board"

16

Safeguard athlete's well-being

- It is of prime importance to **guarantee that athletes are safe from harassment and abuse, especially minors.** To ensure athletes are safe and protected from such threats, besides **conducting awareness campaigns,** sports organisations and authorities must **develop mechanisms such as guidelines, training programmes, assessment tools, independent certification systems and helplines for athletes to report these cases**
- Finally, stakeholders should also **ensure effective law enforcement** and compliance to tackle these issues

6. Priority areas and general recommendations

From the 18 general recommendations for Portuguese sport, 6 core recommendations (Bold Steps) and 3 quick-wins were flagged

Bold moves and quick-wins

Priority areas for action

Strategic alignment

Funding

Professionalisation and resources

Participation

Innovation and value creation

Integrity and social responsibility

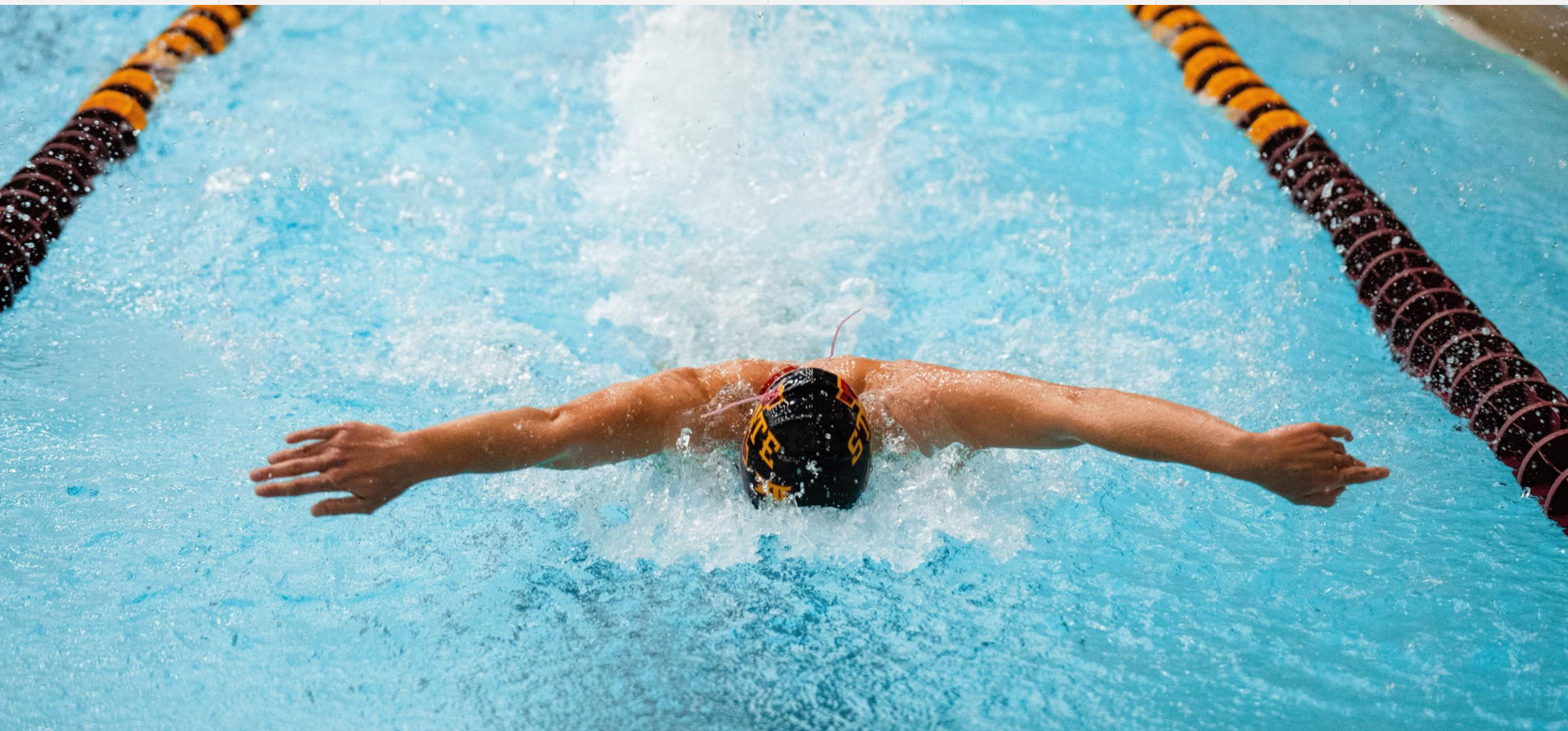
★ Bold Step

- 1 Design a National Sport Strategy connecting all dimensions of sport, fostering convergence among stakeholders through the guiding principles of a shared roadmap
- 3 Increase the level of funding channelled to the sector
- 6 Build capacity of sports organisations
- 9 Increase the level of physical activity
- 13 Improve the level of scientific embeddedness
- 16 Meet the highest integrity and governance standards, keeping sport free from illegal practices

These are the six general recommendations, covering and connecting all six priority areas, which are considered **fundamental to drive cultural shift** in medium to long term - the **6 Bold Steps**

✓ Quick-win (examples):

- 2 Establish a sports observatory and resume sports satellite account to collect and develop relevant information/ data
- 3 Promote and channel EU funds directly to sport, according to the sector's strategic priorities, promote funding opportunities next to sports organisations
- 8 Optimise the network of sports facilities through geo-referencing mapping and close monitoring and assessment



A1

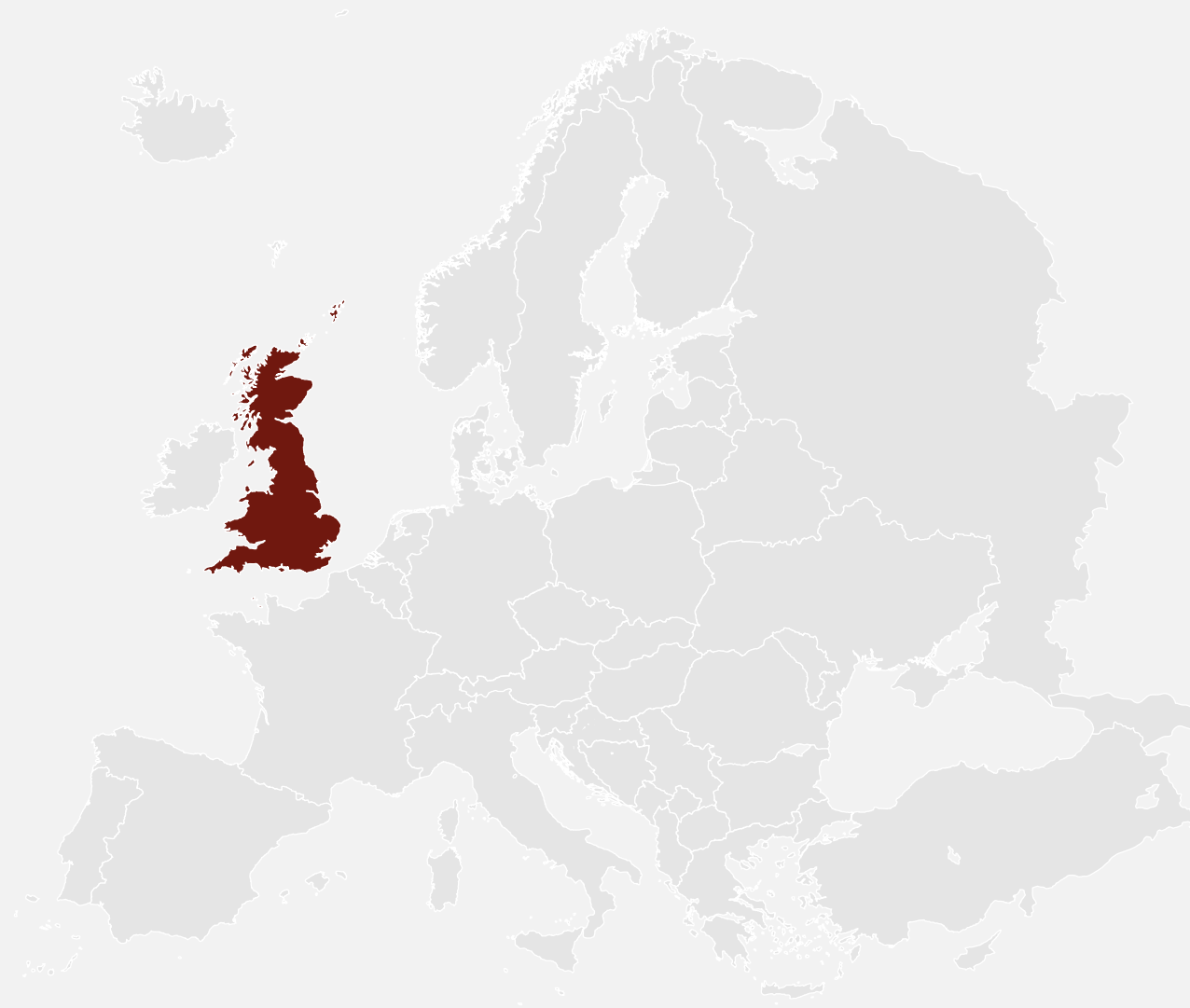
Additional detail

Detailed international initiatives



A1.1 United Kingdom

United Kingdom



A1.1 United Kingdom

United Kingdom: initiatives overview

Main focus of analysis	Scope
Strategic alignment	<p>House of Lords: National Plan for Sport and Recreation</p> <p>In response to the high levels of physical inactivity aggravated by the COVID-19 pandemic, in December 2021, the House of Lords Committee on a National Plan for Sport and Recreation published a report calling on the Government to establish a national plan for sport, health and well-being, as well as a new architecture. In the report, the Committee defines a set of guiding principles of the National Plan and provides general recommendations.</p>
Strategic alignment	<p>UK Sport and its Strategic Plan 2021-2031</p> <p>UK Sport is the government entity responsible for investing in Olympic and Paralympic sport in the UK. In May 2021, UK Sport released its strategic sport plan for the next decade, defining a set of ambitions and some specific targets.</p>
Participation	<p>English Institute of Sport: actuation and “Mission 2025”</p> <p>The English Institute of Sport (EIS) is a government agency which works with British Olympic and Paralympic sports and provides elite athletes and coaches with sport science and medical support services, through a pool of experts. In 2021, EIS released the new strategy: “Mission 2025”, defining a set of objectives and strategies that allow the institution to fulfil its mission of delivering high-quality support services to athletes and sports.</p>
Strategic alignment	<p>Sport England: Uniting the Movement</p> <p>Helping grassroots sport and physical activity recover from the social and economic effects of the coronavirus pandemic and investing time and resources into tackling the key challenges of the next decade are the cornerstones of Sport England’s new long-term strategy “Uniting the Movement”.</p>
Funding	<p>Sport Survival Package</p> <p>On top of existing Government’s business support schemes, the UK government launched in November 2020 a “Sport Survival Package” aimed to support a high number of sports organisations under threat due to participation restrictions, as well as the impact of major attendance falls. The programme has been delivered in two phases, responding directly to the Government’s roadmap for reopening.</p>
Integrity and social responsibility	<p>Independent Fan Led Review of Football Governance</p> <p>In 2021, an Independent Fan Led Review of Football Governance was published in response to the increasing concerns over the financial vulnerability of football clubs. The Review followed a long period of consultation to football stakeholders, including representatives of supporters of over 130 football clubs.</p>

A1.1 United Kingdom

The UK Government is responsible for setting high-level policy, however it is the non-departmental public agencies, UK Sport and Sport England, that define funding priorities

UK's sport and recreation organisational structure

Non-exhaustive


Sport and recreation organisational structure

The UK sport's landscape is **complex with many actors involved**. The **Government is responsible for setting high-level policy for sport, however it does not define funding priorities**

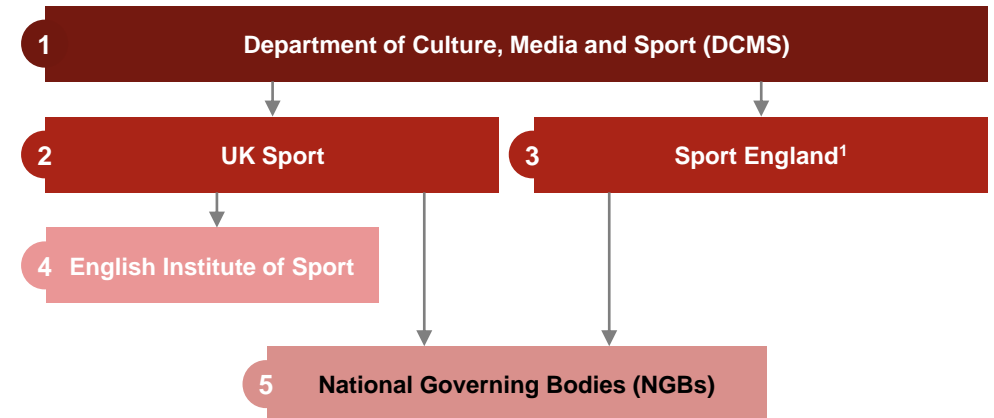
- 1 DCMS is a department of the UK government and is the leading department for culture and sport policy in England
- 2 UK Sport is non-departmental public body accountable to the DCMS and is responsible for investing in Olympic and Paralympic sports and is the lead agency for organising sporting events
- 3 Similarly, Sport England is also accountable to the DCMS and is charged with building the foundations of community sport by promoting physical activity and grassroots sport in England
- 4 The English Institute of Sport is a fully-owned subsidiary of UK Sport and is its science, medicine and technology arm, being responsible for providing high quality support services to elite athletes
- 5 NGBs of sport are typically non-profit, non-governmental organisations responsible for promoting and developing a particular sport (e.g. England Athletics and The Football Association). NGBs work closely and receive funding from UK Sport and Sport England

The **National Lottery plays a crucial role in funding UK sports and its funds are distributed by Home Country Sports Councils¹ and UK Sport** who define funding priorities. This includes distributing funding to NGBs and other sports organisations with a total of £300 million awarded for the year ended in 31 March 2021

In December 2021, the House of Lords Committee on a National Plan for Sport and Recreation called for **the creation of a new ministerial role responsible for sport, health and well-being in the DHSC**. This way **sport policy would move from the DCMS to DHSC** to better reflect the vital role of sport and physical activity in health

 [Detail on the following page](#)

Sport policy leader department



Other departments dealing with physical activity

Department for Education - Responsible for sport and physical activity in schools and after-school activities, jointly with the DCMS and the DHSC

Department of Health and Social Care (DHSC) - Deals with physical activity in its health related components

Department for Transport - In charge of active travel including walking and cycling infrastructure and programmes

Notes: 1 - Sport Wales, Sport England, Sport Northern Ireland and Sport Scotland are the four Home Country Sports Councils

Source: UK Sport; Sport England; English Institute of Sport; Department for Digital, Culture, Media & Sport; House of Lords "A national plan for sport, health and wellbeing"; PwC Analysis

A1.1 United Kingdom

The House of Lords urged the need of designing a National Plan for Sport and Recreation to fight high-levels of physical inactivity among population

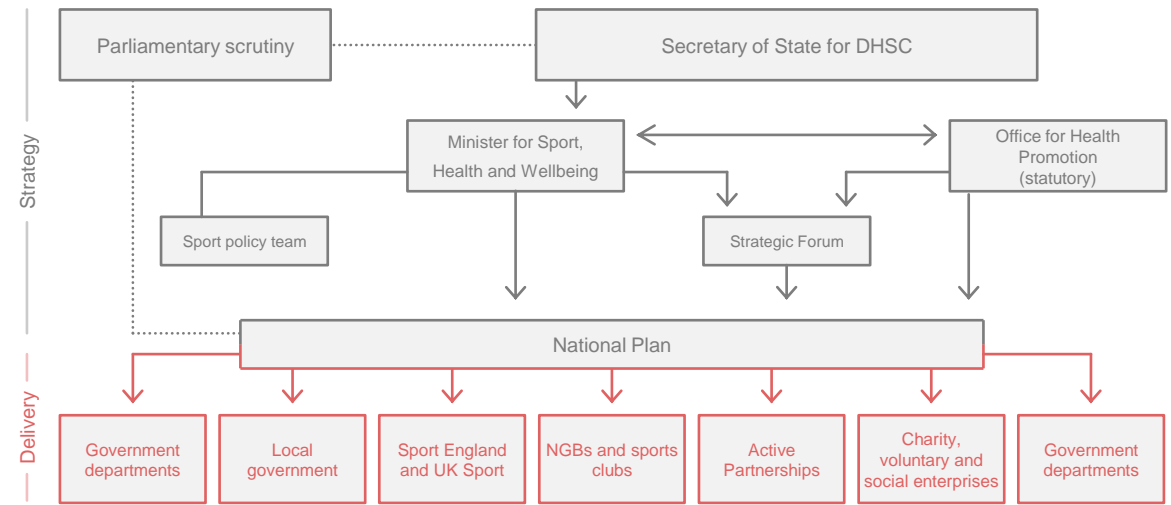
House of Lords: National Plan for Sport and Recreation (1/2)

National Plan for Sport and Recreation – new delivery and funding architecture

- In response to the high levels of physical inactivity aggravated by the COVID-19 pandemic, in December 2021, the House of Lords Committee on a National Plan for Sport and Recreation published a report **calling on the Government to establish a national plan for sport, health and wellbeing**, as well as a **new implementation approach**
- In the past decades, **governments have failed to increase the levels of physical activity**, particularly among women, ethnic minorities, people with disabilities, and others
- After a period of consultation, the **House of Lords identified several shortcomings in sport policy development**, such as inefficient cross-departmental coordination, fragmented policy delivery, complex access to financing and excess bureaucracy
- To address these issues, the Committee highlights **the importance of designing a cross-sectorial plan** and calls for a **new architecture**
- Firstly, the Committee recommends that the new Office for Health Improvement and Disparities is renamed the **Office for Health Promotion** (statutory change) and that it is given the responsibility of **supporting the cross-departmental approach to sport, health and wellbeing**
- Secondly, the Committee endorses the **creation of a new Minister responsible for sport policy sitting under the Department of Health and Social Care** (instead of the Department of Culture, Media and Sport) - Minister for Sport, Health and Wellbeing
- Finally, **public sport's funding must be matched with the objectives of the new national plan** and, on the other hand, the Committee calls on the Government to **develop a favourable tax regime** that encourages self-sufficiency of sports organisations and reduces dependency on public funding

New structure – Minister for Sport, Health and Wellbeing¹

- The new Minister would **work jointly with the Office for Health Promotion in developing, overseeing and delivering the national plan**
- Additionally, **a regular Strategic Forum with key sport stakeholders and delivery bodies would be held** by the new Minister to help design the national plan and increase de sense of ownership and accountability among stakeholders



Notes: 1 - Figure retrieved from pages 26 of House of Lords "National Plan for Sport and Recreation Committee"

Source: UK Parliament; House of Lords "A national plan for sport, health and wellbeing"; PwC Analysis

A1.1 United Kingdom

Physical literacy, a welcoming and inclusive setting, behaviour change and motivation sciences, health inequalities and social cohesion are guiding principles of the National Plan

House of Lords: National Plan for Sport and Recreation (2/2)

Non-exhaustive

Guiding principles of the National Plan

- Underpinning the recommendations by the Committee, five key principles guiding the National Plan were identified:
 1. Develop **physical literacy**, particularly from a young age
 2. Deliver sport and recreation in a **welcoming and inclusive environment**
 3. Apply **sciences of behaviour change and motivation**
 4. Tackle **health inequalities** through sport and recreations
 5. Contribute to **individual development and social cohesion**

General recommendations and initiatives in four crucial areas identified

Instilling a life-long habit of sport and physical activity

- **Turn physical education a core subject**, focusing on physical literacy, *“making physical education and school sport a fun, enjoyable and inclusive experience”*
- **Provide continuous training opportunities for teachers**
- **Develop closer links between schools, colleges, local grassroots sports clubs and communities** to maintain activity levels during adulthood, for example, by opening school facilities for use by local clubs and groups

Duty of care and safeguarding

- **Establish an independent sports ombudsman**
- Work with Sport England and UK Sport to **monitor publicly funded organisations** and guarantee that these are *“are dedicating sufficient resources and attention to uphold duty of care and safeguarding standards”*
- **Create mandatory reporting** in sport and recreation settings, for greater enforcement
- **Adopt financial sanctions** to organisation that fail to meet care and safeguarding standards

Enabling active lifestyles

- **Design a whole system**, so that sport is ingrained in all aspects of day-to-day life (work, leisure time, health and travel)
- **Create active travel and active environments** by investing in infrastructure, modernising buildings and designing public spaces in a way that fosters physical activity
- Foster the **use of technology to boost sport practice**
- **Improve access to sports facilities** (easy booking)

The workforce

- Recognise the importance of the sport and recreation workforces by **reviewing apprenticeships and national qualifications in sport**
- **Develop a national register of coaches** to enhance qualification assurance
- **Improve diversity across sport professionals and volunteers** by setting ambitious targets for diversity of publicly-funded leading positions

A1.1 United Kingdom

In addition to investing in sports and sporting events, UK Sport also has a World Class Programme to support athletes with high medal potential

UK Sport: Action areas

As a government **body responsible for investing in Olympic and Paralympic sports in the UK**, in addition to **focusing on high-performance sport**, UK Sport is also responsible for promoting the highest standards of governance, sporting conduct, ethics and diversity in society, among others



Investing in sports

Investments are made through Performance Bonuses (which are paid directly to the athlete and contribute to their living and sporting costs) and through central funding to the National Governing Bodies (to invest in coaches, facilities, among others)



Investing in events

Work with the sports network and regional partners across the UK to develop strong funding partnerships to host major international sporting events in the UK.

At the same time, a comprehensive range of services to support the organization of major sporting events is also provided.



Talent identification

'From Home 2 The Games' is a campaign by UK Sport in partnership with the English Institute of Sport that aims to engage young athletes with Olympic and Paralympic sports and provide opportunities for athletes to reach their potential and experience other sports



World Class Programme

The programme covers all Olympic and Paralympic sports and aims to support athletes with palpable potential to win medals at the next Games. A range of services (training, medical services, etc.) is provided through the English Institute of Sport, as well as directly financing athletes' expenses



Coaching

Coaching is a key element of high-performance sport and UK Sport has four programmes to ensure quality coaching is provided: Elite Programme, Elite Coaching Apprenticeship Programme, Athlete to Coach Programme and Female Coaches Leadership Programme



International relations

Through the International Partnerships Programme and the International Leadership Programme, UK Sports aims to consolidate relations with International Federations and their members. In addition, the International Inspiration Programme intends to involve young people from around the world in sport



Leadership development & governance

Initiatives in this regard include working with athletes, sports directors and managers and key partners to promote the highest standards of conduct and fair play on and off the field, ensuring that publicly funded sports organisations respect standards of integrity

A1.1 United Kingdom

UK Sport defined its ambition to the Post-Tokyo Strategy: to pursue extraordinary success, to be achieved by more athletes and sports whilst maintaining the UK's leading position

UK Sport: Strategic Plan 2021-2031 – prior work (1/2)

- Before defining its 2021-31 strategic plan, **UK Sport carried out extensive work to review the future strategy and underpinning investment approach of the UK high-performance system** and to establish the **high-level principles of the Post-Tokyo Strategy**
- This process included an independent Public Consultation and a series of evidence sessions with key stakeholders

High-level principles of the Post-Tokyo Strategy:

Topic	High-level principles
Olympic and Paralympic Success	Future investment will be fundamentally focused on Olympic and Paralympic sports, with funding prioritised for athletes who demonstrate the greatest potential to win medals at the Games
New talent	The organisation is committed to investing more in long-term success by securing funding for more athletes and for earlier identified athletes who are at lower stages of development
Sports knowledge	UK Sport intends to leverage its knowledge in elite sport to maximise the success of national teams in the Commonwealth Games, for example
Social impact	By creating more opportunities for interaction between the high-performance system and the community , the organisation intends to promote its social impact
Integrity	Future strategy will focus on winning with sporting excellence but also integrity
Athlete	The strategy will focus on the athlete's physical and mental needs and well-being , ensuring their support during and after their athlete career
Alignment of the sports system	UK Sport intends to improve the level of collaboration and alignment between entities of the sports system , to ensure maximum efficiency of resources/investment
Partnerships	Sport UK is committed to studying the possibility of adapting its infrastructure network to form High Performance Centres , dynamic environments that will boost the potential of athletes and increase the collaborative spirit

A1.1 United Kingdom

The approach means future investment will fundamentally be focused on Olympic and Paralympic sports and prioritised towards athletes that demonstrate the greatest potential

UK Sport: Strategic Plan 2021-2031 – prior work (2/2)

- This work resulted in a new approach with **three tiers of funding that will channel investment into different stages of the performance pathway** to support medal success while enabling more communities to be engaged and impacted

Three tiers of funding:

Podium

Investment to athletes and teams with a realistic chance of an Olympic or Paralympic podium position within **four years**

Podium Potential

Investment to athletes and teams with a realistic chance of an Olympic or Paralympic podium position within **four to eight years**

Progression

Investment for teams and athletes targeting the podium within **12 years**

- By separately assessing Podium and Podium Potential investment streams, **funding long-term potential is not dependent on short term success** while the development of a complete and coherent performance pathway will enable a stronger connection between funded programmes
- Meanwhile Progression Funding, a third tier of funding, **will extend UK Sport support to provide athletes with an even greater chance of succeeding** at the Games over a longer timeframe

A1.1 United Kingdom

UK Sport's Strategic Plan reinforces its strategic commitment to elite sport and the role of sport as a driver of positive social change

UK Sport: Strategic Plan 2021-2031 – purpose, mission, ambition and focus

- After the strategic reflection process, in May 2021, UK Sport released its strategic sport plan for the next decade

Purpose:

“Lead high-performance sport to enable extraordinary moments that enrich lives”

Mission:

“Create the greatest decade of extraordinary sporting moments, reaching, inspiring and uniting the nation”

Ambitions and focus:

1. *Keep winning and win well*

Leverage national talent to reach the largest range of champions and medals ever, winning with integrity

- **Provide a wider range of champions and medallists**, investing in a holistic and long-term vision of success
- **Winning with integrity**, upholding the highest standards of ethics, integrity and athlete well-being
- **Foster a more diverse and inclusive team**, involving the sport community in attracting national talent

2. *Grow a thriving sporting system*

Support the sport community so that it is more collaborative, focusing on a diverse, ethical and sustainable agenda

- **Support sports partners** working collaboratively to improve organisational health across the sport
- **Boost sustainable success**, making continuous investment for high-performance in sport
- **Setting the future agenda** to ensure the UK maintains its leadership and influence in sport worldwide

3. *Inspire positive change*

Contribute to a happier, prouder and more connected society, using sport to inspire positive change

- **Providing front-row access to sporting moments**, hosting events with a global reach that reach new audiences, elevate communities and unite the nation
- **To inspire and unite society**, reinforcing the importance of the Olympic and Paralympic sport, creating a fanbase for the future
- **Driving positive change for people and the environment** through sport

- Besides **ambitious medal targets** in the next Games, UK Sports also set the following **objectives** for 2025:
 - ✓ Secure 10 world championships
 - ✓ Host over 30 European and world series events in over 25 sport
- The organisation estimates the generation of **£70 million of economic impact**

A1.1 United Kingdom

The English Institute of Sport is described as “the science and medicine technology arm of UK Sport” and provides athletes and coaches with services to improve high-performance

English Institute of Sport: strategy “Mission 2025”

- The **English Institute of Sport** (EIS) is a government agency founded in 2002 and is described as “**the science and medicine technology arm of UK Sport**”. The EIS works with British Olympic and Paralympic sports and **provides elite athletes and coaches with sport science and medical support services**, through a network experts
- The EIS provides three types of services:
 - ✓ **Athlete services** which include services regarding biomechanics, nutrition, performance analysis, performance lifestyle, physiology, physiotherapy and soft tissue therapy, psychology, sports medicine, strength and conditioning
 - ✓ **Support services** concerning athlete health, performance data, performance innovation, performance pathways, performance support
 - ✓ **Operational services** in which it manages a network of 8 high-performance centres across England, which are then operated in conjunction with a multiple partners, including Sport England¹, local authorities and Universities
- In 2021, EIS launched its **new strategy: “Mission 2025”**


“Mission 2025” objectives

- **People:** “World class people enabled to be the best version of themselves”
- **Environment:** “Centres of excellence where people can excel & drive a hyperconnected system”
- **Health:** “Enable athletes to be physically & mentally well by reducing the risk of injury & illness”
- **Performance:** “A culture of excellence, in planning, innovation and support which shapes the future of human performance”
- **Governance:** “Professional & ethical standards for performance & health support”

“Mission 2025” strategies

Objectives will be delivered by **7 sport-facing strategies**:

1. **Enabling People:** Ensure a highly motivated and skilled workforce
2. **Elite Training Centres:** Develop a world class environment, optimising the services provided
3. **Performance Planning:** Support sports in their development of effective performance planning² in order to achieve a high performing team
4. **Athlete Health:** Support sports in managing their athletes’ physical and mental health
5. **Human Performance:** Deliver and develop high quality athlete services
6. **Performance Innovation:** Deliver innovative performance enhancing solutions
7. **Performance Data:** Enable the creation of performance insights from data analysis

 [Detail on the following page](#)

These will be **enabled by the following 4 strategies**:

1. **Data Governance:** Allow data to be captured, analysed and shared securely with stakeholders
2. **Valuable Partnerships:** Develop a partnership strategy and
3. **Core Functions:** Support the organisation in the delivery of effective systems and processes in core functions teams (Finance, IT, Legal, Data Protection, Communications and HR)
4. **Organisational Health:** Monitor organisational health continuously

Notes: 1 - Sport England is a public body responsible for growing and developing grassroots sport and getting more people active across England; 2 - Performance planning is differs from training programmes and individual athlete plan in the way that it outlines the strategy of the overall performance plan for a sport, team or group, to ensure priority areas are well defined and investment is channelled accordingly

Source: UK England; English Sport Institute; English Institute of Sport “Mission 2025”; PwC Analysis

A1.1 United Kingdom

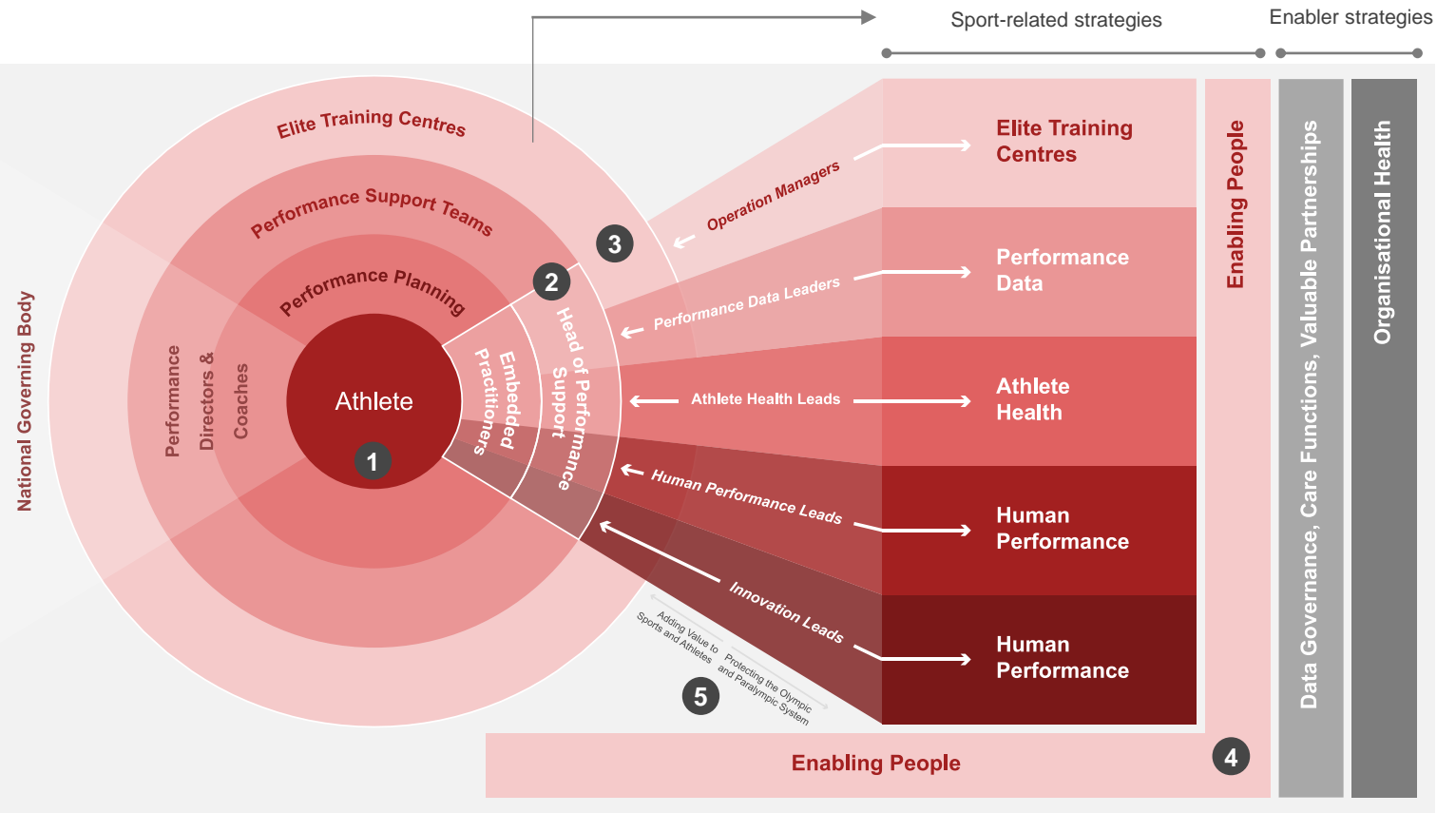
“Mission 2025” puts the athlete in the centre and is supported by seven sport-related strategies and four enablers which wield a transversal influence across the environment

English Institute of Sport: strategy “Mission 2025” implementation structure

“Mission 2025” implementation structure¹

In order to achieve the objectives outlined, “Mission 2025” is supported by the seven sport-related strategies and four enabler strategies which wield a transversal influence across the whole environment

- 1 The designed structure puts the **athlete in the core of the EIS strategy**, while each athlete is inserted in the broader context of his sport’s performance plan
- 2 In turn, **performance support teams and their vast areas of expertise** (e.g. physiology, medicine, performance lifestyle) are placed as the Head of Performance Support in the development of each performance plan
- 3 **Elite Training Centres** are the last piece of the environment and comprise **all operational services according to the designed strategies**
- 4 Nevertheless, considering the extent of the impact of the strategy **Enabling People**, such strategy is also **perceived as an enabler**
- 5 All in all, the strategy implemented should **add value to sports and athletes** and guarantee the **protection of Olympic and Paralympic Systems**



Notes: 1 - Figure retrieved from pages 28 and 29 of English Institute of Sport "MISSION 2025: DELIVERING OUTSTANDING SUPPORT THAT ENABLES SPORTS AND ATHLETES TO EXCEL"

Source: English Institute of Sport "Mission 2025"; PwC Analysis

A1.1 United Kingdom

Sport England's long-term strategy focus on helping grassroots sport and physical activity recover from the COVID-19 effects and tackling the key challenges of the next decade

Sport England: Uniting the Movement

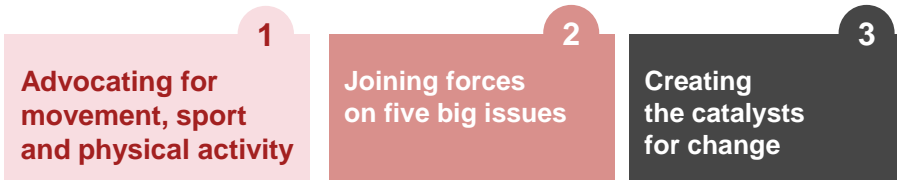
- Sport England is an arm's length body of government established by Royal Charter in 1996. It is responsible for **growing and developing grassroots sport and helping** more people get active across England
- Sport England receives funding from the government and the National Lottery that is channelled for **projects and programmes that help people get active and play sport**
- Sport England developed a **new strategy that puts sport and physical activity at the heart of nation's recovery called "Uniting the Movement"**
- Sport England **recognised the need to invest in sport and physical activity** through National Governing Bodies, other sports bodies and local sports clubs, organisations and community groups to **increase engagement for different groups** as part of its core purpose

"Uniting the Movement" context:

- The strategy runs through to 2031 but is **most immediately focused on helping** the people and organisations who deliver grassroots sport and physical activity **to cope with the massive pressures brought by the COVID-19 pandemic**
- The strategy also identifies the **longer-term challenges of the next decade**
- At the centre it seeks to tackle the **long-standing inequalities** that have existed within the sport and been reinforced by the recent disruption The strategy identifies that for certain people – like people with disabilities, people from lower socio-economic groups and people from Black and Asian backgrounds, there is a clear pattern of low levels of activity
- There is also a **clear picture of the importance of different types of investment and support**, with an emphasis on looking for **new and innovative ways to increase participation, such as better use of technology and data**

"Uniting the Movement" key objectives

 [Detail on the following page](#)



Implementation plan – Years 2-4:

Main actions identified for 2022-25:

- Expand partnerships to focus investment and resources on communities most in need
- Continue to deliver COVID-19 recovery and reinvention package, including the Government's Sport Survival Package
- Work with national and local partners to target the Government's investment into community football, tennis and multi-sports facilities in places with greatest need
- Invest around the Birmingham 2022 Commonwealth Games to improve facilities and level up access to community sport
- Create simplified access to open funding with a single point of entry
- Convene and collaborate with the sport to join up and advocate around the big issues
- Develop the sector's presence across Government to embed sport and activity as a key contributor to local and national policy priorities
- Ensure good governance, safeguarding, integrity and inclusion is embedded in everything, including through the revised Code for Sports Governance

A1.1 United Kingdom

Specifically, over the next decade Sport England will focus its time and resources on three key areas

Sport England: Uniting the Movement key objectives

1 Advocating for movement, sport and physical activity

Sport England recognises its broader role besides its funding role: to advocate for the transformational impact sport and activity can have on the nation's health and well-being

2 Joining forces on five big issues

1. **Recover and reinvent:** Recovering from the biggest crisis in a generation and reinventing as a vibrant, relevant and sustainable network of organisations providing sport and physical activity opportunities that meet the needs of different people
2. **Connecting communities:** Focusing on sport and physical activity's ability to make better places to live and bring people together
3. **Positive experiences for children and young people:** Unrelenting focus on positive experiences for all children and young people as the foundations for a long and healthy life
4. **Connecting with health and well-being:** Strengthening the connections between sport, physical activity, health and well-being, so more people can feel the benefits of, and advocate for, an active life
5. **Active environments:** Creating and protecting the places and spaces that make it easier for people to be active

3 Creating the catalysts for change

Sport England identifies specific capabilities, information, approaches and relationships that will make progress possible. These are:

- **Effective investment models:** The right kinds of investment, timed well and delivered skilfully can stimulate demand, provide opportunities to get active, enable innovation, encourage collaboration, reduce inequalities and enable greater sustainability
- **Realising the power of people and leadership:** The people who spend their time helping others to be active are our most precious resource and their potential is limitless. They're the key to adopting and achieving the ambitions in this strategy
- **Applying innovation and digital:** Times are changing, and so are people's expectations. In the face of significant opportunity and change, it's critical innovation, including digital, is applied to the big issues that are holding many more people back from being active
- **High-quality data, insight and learning:** Key to collaborative action is a shared understanding of the opportunities and the challenges that we face together
- **Good governance:** Good governance, and a commitment to positive, effective, safe delivery of opportunities at every level is how intentions and ambitions are enshrined into ways of working

A1.1 United Kingdom

Additional to existing sports' COVID-19 protecting measures and overall economic package, the UK government provided rescue packages that largely consist of loans to multiple sports

Sport England: Sport Survival Package

- The delay in readmission of spectators to live sporting events, caused by COVID-19 restrictions in the UK, has put sports organisations in jeopardy
- On top of existing government's business support schemes, the Sport Survival Package supports a high number of sports organisations under threat due to complete spectator restrictions, as well as the impact of reduced spectator numbers
- The programme's been delivered in two phases, responding directly to the government's roadmap for reopening, providing the financial support necessary to enable survival of eligible sports organisations aligned with the Government's roadmap



Detail of the Sport Survival Package per phase:

Phase 1: Winter Survival Package

Providing support for organisations impacted by restrictions to spectator readmission at live sporting events in England, applied from 1 October 2020 to 31 March 2021, mainly **loans worth £300 million were made available to 11 sports:**

- Rugby: £135 million (Premiership clubs - £59 million; Rugby Football Union - £44 million; Championship - £9 million; £23 million - clubs below the second tier)
- Horse Racing £40 million towards the costs of maintaining the venues
- Football: semi-professional National League - £11 million (having already received £10 million from the National Lottery in order to secure the division's future); Women's Super League and Championship - £3 million
- Motorsport: Motorsport circuits - £6 million
- Tennis and netball: Lawn Tennis Association and England Netball - £2 million
- Basketball, ice hockey, badminton and greyhound: combined chunk of £11 million

In March 2021, a last tranche of funding from the 'Winter Survival Package' was made available with further £50 million to sports clubs and organisations across the country

Phase 2: Summer Survival Package

- On February 2021, the Government announced their roadmap for easing coronavirus restrictions, with an expected staged return of spectators to live events. In response, in March 2021, the Government announced a **further £300 million investment to continue support into the summer period and as needed while restrictions ease**, during 1 April 2021-31 March 2022
- For the summer period this includes sports such as, but not limited to, cricket, tennis and horse racing

Other government measures:

- £25 million for UK grassroots community sports facilities, supporting the future of grassroots football
- £1.2 million to mitigate the financial effects of coronavirus on the UEFA Women's Euro football competition and deliver a successful tournament in England in 2022, supporting the sport to grow and thrive
- £150 million Community Ownership Fund that will allow communities across the UK to invest to protect assets, including local sports clubs
- £2.8 million towards a joint bid to host the 2030 FIFA Football World Cup
- £100 million National Leisure Recovery Fund for local authority leisure facilities

A1.1 United Kingdom

The Fan Led Review of Football Governance concluded that the Government should create a new independent regulator for English football, to ensure the sustainability of football

Independent Fan Led Review of Football Governance

- In 2021, an Independent Fan Led Review of Football Governance was **published in response to the increasing concerns over the financial vulnerability of football clubs** and, ultimately, in reaction to the failed attempt to launch a European Super League. The Review was conducted following **a long period of consultation to football stakeholders, including representatives of supporters** of over 130 football clubs
- The work begins by identifying three structural challenges present in English football:
 1. **Fragile finances football clubs** further aggravated by COVID-19
 2. **Poor management of clubs and loss of fan representation** in club's lead
 3. **Regulation, monitoring and enforcement are weak** and unable to address current challenges of national

General strategic recommendations

The creation of a new independent regulator for English football is the core recommendation of the Review. Nevertheless, **recommendations must be considered holistically to ensure long-term sustainability of football**

Although, more detailed recommendations are provided in the report, the overall strategic recommendations are:

- A. To ensure the long-term sustainability of football, the Government should **create a new independent regulator for English football** (IREF)
- B. To ensure financial sustainability of the professional game, **IREF should oversee financial regulation in football**
- C. **New owners' and directors' tests for clubs should be established by IREF** replacing the three existing tests and ensuring that only good custodians and qualified directors can run these vital assets
- D. Football needs a **new approach to corporate governance** to support a long-term sustainable future of the game (Code for Football Governance)
- E. Football needs to **improve equality, diversity and inclusion in clubs with committed Equality, Diversity and Inclusion Action Plans** regularly assessed by IREF
- F. As a uniquely important stakeholder, **supporters should be properly consulted by their clubs** in taking key decisions by means of a Shadow Board
- G. Football clubs are a vital part of their local communities, in recognition of this there should be additional **protection for key items of club heritage**
- H. Fair distributions are vital to the long-term health of football. The **Premier League should guarantee its support to the pyramid** and make additional, proportionate contributions to further support football
- I. **Women's football should be treated with parity and given its own dedicated review**
- J. As an urgent matter, **the welfare of players exiting the game needs to be better protected** – particularly at a young age



Spain



A1.2 Spain

Spain: initiatives overview

Main focus of analysis	Scope
Participation	<p>Supreme Council for Sport</p> <p>The Supreme Council for Sport (CSD) is a Spanish government agency responsible for the promotion, planning and development of physical culture and sports activities of any kind, the coordination and support to social entities dedicated to sport, as well as the relations between the Government, sports governing bodies, and the Spanish Olympic Committee. CSD is also responsible for the management and promotion of centres and services intended for sport practice, the sports education in schools and the inspection of the sports activities</p>
Innovation and value creation	<p>Observatorio de Investigación de la Fundación España Activa</p> <p>Launched by Fundación España Activa and Centre of Sports Studies, Observatorio de Investigación aims to promote activities related to research, education and dissemination of information related to physical activity and healthy lifestyle</p>
Strategic alignment	<p>Spain Sports Global</p> <p>Spain Sports Global is a private project that aims to support the Federations to attract large international sporting events and strengthen the international influence of Spanish sport</p>
Professionalisation and resources	<p>Preliminary draft of the new Sport Law</p> <p>A preliminary draft of the new Sport Law has been published by the Government in 2019. A new version of this draft was published in 2021, following stakeholders' inputs</p>
Innovation and value creation	<p>Observatorio del Deporte en España Palco 23</p> <p>This Observatory is an initiative developed by a sports business newspaper, that aims to create a permanent forum for debate between relevant stakeholders in the sector</p>

A1.2 Spain

The Supreme Council for Sport promotes a set of initiatives addressing social and gender inclusion, grassroots sport, training, support athletes' career transition, and promotion of business

Supreme Council for Sport (CSD): highlighted initiatives

Initiatives of the CSD are considered Events of Exceptional Public Interest (AEIP). This allows obtaining significant tax benefits for those companies that collaborate with the dissemination of the event and make a contribution as a donation to this programme

- The **Supreme Council for Sport** is a Spanish government agency **responsible for the promotion, planning and development of physical culture and sports activities** of any kind, the **coordination and support to social entities** dedicated to sport as well as the **relations between the Government and the Spanish Olympic Committee**
- It is also responsible for the **management and promotion of centres and services** intended for sport practice, the **sports education in schools** and the **inspection of the sports activities**



ADB 2020 II

- It is a **support plan for grassroots sport** that aims to **increase the number of players** and create conditions to **detect and train the talented ones**
- The plan is **developed around three major programmes: Support to School Sport; Support to University Sport; Promoting physical activity and fighting sedentary lifestyles**

[Detail on the following page](#)



Deporte Inklusivo

- It is a programme that seeks to **encourage the practice of sport by people with disabilities** in order to promote **their social inclusion**
- The **main actions** would be: promotion of physical activity in inclusive environments; specialised training; accessibility to sport; sports plan for promoting inclusive competitions; communication and dissemination of the value of inclusive sport



Nuevas Metas

- It is a programme designed to **support high-level athletes' career transition**
- It operates in the following stages: **Employability; Training; Personal development; communication**



National Training Programme

- The program, launched in 2002 by the CSD, has become the **real foundation of top-level sport**
- It is a plan whose aim is: **To identify, select and follow new athletes** that allow the **generational replacement of current athletes**



España Compite

- It is a programme developed by Fundación Deporte Joven in collaboration with CSD, which aims to: **promote Spanish companies at home and abroad**, value sport and **promote entrepreneurs**



Universo Mujer

- It is a programme that aims to **encourage women participation**
- It is built upon **5 pillars: training** as an element of excellence; **sport development plan**: from the grassroots to the elite; **visibility and promotion of women** in sport and society; **leadership; women, health and sport**

A1.2 Spain

CSD set out a strategy aiming to leverage innovative actions to engage more and better athletes, and to promote the practice of physical activity

Supreme Council for Sport (CSD): 🔍 ADB 2020 II

- CSD fosters modernisation and innovation in all areas related to the Spanish sports system. For this, it aims to **design a coordinated strategy on all the mechanisms involved in sport development, from grassroots to elite level**
- **ADB 2020 II (“Apoyo al Deporte Base”)** is a plan to support grassroot sport aimed to **increase the number of active sportspeople and create optimal conditions for the detection of sports talents** and their comprehensive training, both in sport and academics
- In addition, in this second edition, ADB 2020 II wants to **influence the general population, to encourage the practice of sport and physical activity as a key component of a healthy lifestyle**
- The projects and activities of the ADB 2020 Plan are developed around three major programmes

Main goals of ADB:

- Increase physical and sports activity in the school and university population
- Improve and innovate detection and technical programmes for young athletes
- Achieve optimal motivation and progression of athletes at all stages of their career, both sporting and academic: from the grassroots to the elite
- Promote the practice of physical activity and sport as a fundamental element of a healthy lifestyle throughout life.



Three main programmes and priority lines of action:

1. ADE - *Apoyo al deporte escolar*

- Specific campaigns to promote sport in the school-age population, mainly in schools, as well as in clubs, sports associations, etc.
- Final phases of the Spanish School Age Championships. Modernisation and enhancement
- Participation of national teams in international events of these categories
- National Programme for Sports Technification, through the Spanish Sports Federations, High Performance Centres and Sports Technification Centres. Effective integration in a Network of Sports Technification Centres

2. ADU - *Apoyo al deporte universitario*

- Specific campaigns to promote sport in universities
- Spanish University Championships. Modernisation and visibility
- National university teams in international competitions: integration into the high-performance plans of the Spanish Sports Federations

3. ADB+ - *Promoción de la actividad física y lucha contra el sedentarismo*

- Communication or training campaigns on the benefits of AFD and the need for regular physical exercise
- Preparation of protocols and tests to assess healthy physical condition for each age group
- Projects that promote access to physical exercise for the sedentary population
- Creation of specific health enhancing physical activity programmes

A1.2 Spain

The Observatory aims to promote activities related to research, education and dissemination of information related to physical activity and healthy lifestyle

Observatorio de Investigación de la Fundación España Activa: overview

- Fundación España Activa is a non-profit organisation that aims to enhance the practice of physical activity in society by promoting research, fiscal and promotional policies
- In 2016, Fundación España Activa and the Centro de Estudios del Deporte (CED)¹, **launched an Observatory of Research**. The Observatory was created with the aim of **promoting all kinds of activities related to research, education and outreach in the field of promoting a physically active and healthy lifestyle**
- It provides support for doctoral and postdoctoral researchers, as well as for the joint development of training activities and other targeted activities
- The Rey Juan Carlos University (URJC) provides a multidisciplinary task force from different expert departments coordinated by CED. The URJC also provides physical space and research resources (CED URJC headquarters, access to the Library, databases, IT, virtual learning environments, classrooms and auditoriums, etc.)
- Fundación España Activa contributed with €106.5 thousand to finance the activities during the three-year term of the Agreement



Some recent publications released by the Observatory:

Study of the Impact of COVID-19 on the Spanish sport's ecosystem (June 2020)

- The report aimed to identify the current perceptions (understood as state of mind) of the different stakeholders of the Spanish sport's ecosystem on specific aspects of its recovery in the short, medium and long term. It also intended to guide and inform the process of quantitative analysis of future needs, considering different strategic lines of priority action
- It ends with a request for the consideration of the sport's ecosystem as a key driver to Spain's post-pandemic recovery

Thermometer of the Sport's Ecosystem in Spain (November 2020)

- This report is the outcome of an analysis of the reality of the Spanish sport's ecosystem that intends to become a baseline that regularly evaluates its development and evolution over time
- It also indicates 4 pillars on which the sector should work to transform and develop the perception the policymakers have on sport

 [Detail on the following page](#)

Other promoted studies:

- COVID-19 cases reported in sports facilities
- Manifiesto for sports centres to continue contributing to the fight against COVID-19
- The positive impact of physical activity and exercise on immune function
- Changes in sedentary behaviour in adults in the European Union between 2002 and 2017
- The economic and social impact of promoting active life after the COVID-19 crisis
- Young Women and Physical Activity
- Guide of Good Practices AF Young Woman
- The Thermometer of Sedentarism

Notes: 1 - Rey Juan Carlos University's (URJC) own centre created in collaboration with the Higher Council for Scientific Research (CSIC)

Source: Fundación España Activa Website; CED Website; PwC Analysis

A1.2 Spain

The “Thermometer of the Sport’s Ecosystem in Spain” indicates 4 pillars, crucial to the transformation of the sector’s political perception

Observatorio de Investigación de la Fundación España Activa: 🔍 Thermometer of the Sport’s Ecosystem in Spain

- The “Thermometer of the Sport’s Ecosystem in Spain” was developed by PwC Spain and The Observatory of Research of Fundación España Activa to **help addressing and developing all the value and potential of the sector**
- The study mentions that **the main players in the sector are rarely taken into consideration in the Government’s physical activity promotion strategy or campaigns**
- Part of the problem, the study indicates, relates to the fact the sector **fails to invest sufficient resources in the development of the evidence-base knowledge to support its capacity to deliver meaningful and sustainable public health outcomes**. Moreover, **rarely are the wider economic and social impacts of sport explored or reported**
- As a deliverable, the report proposes a **4-pillar approach to change the public and political perception of the sector’s impact**

Pillars for the transformation of the sector:

Pillar 1. Economic Value

- A **more ambitious and rigorous analysis** of the **sector’s economic value**
- This should consider current baseline models (i.e. EU Sport Satellite Accounts) but potentially **develop a specific framework** for the sector
- The model should incorporate: GDP; employment; sport’s retail sector; construction and suppliers’ sectors; taxes and tributes, supporting core social services

Pillar 2. Social Return on Investment

- Analysis of the **social and economic value**, focusing on **health-care savings** by assessing cost-effectiveness of interventions delivered
- This model should incorporate the sector’s contribution to: reductions in annual healthcare costs; reductions in absenteeism costs; disability-adjusted life years avoided, and increases in life expectancy and subjective well-being; increases in overall work productivity; impact on academic achievement

Pillar 3. Sustainable Development

- Evidence-based analysis of the contribution to the **Sustainable Development Global Agenda**
- It should consider: development of sustainable behaviours (i.e. active transport, etc.); recognition of the value of active citizens to reduce health services attendance
- **In essence, a more generous society willing to better share existing resources** to protect the environment

Pillar 4. Influencing the World

- A programme of advocacy where **efforts to rebuild the Spanish economy** are driven through a **focus on well-being, and the beneficial impact to public health**

A1.2 Spain

Spain Sports Global is a project that aims to support the Federations in attracting large international sporting events and strengthen the international influence of Spanish sports

Spanish Sport Association: Spain Sports Global

- **Spain Sports Global (SSG)** is a project **launched** in November 2018 by the Spanish Sport Association, with the support and funding of LaLiga and the permanent collaboration and coordination of the Secretary of State for Sport. It also counts with a strong support of the Supreme Council for Sport (CSD)
- It consists of an Office for the International Development of Spanish Sports, providing support and collaboration to the Federations in attracting large international sporting events, which generate important economic, social, sporting and cultural benefits for the country
- SSG also works to **improve external institutional relations at an international level**, leading to a better reputation and a privileged position of Spain in the decision-making groups/institutions in global sport



Spain Sports Global lines of action:

- Create added value within the scope of the organisation of international events
- Galvanise synergies with other industries
- Development of commercial, employment, tourism and business opportunities
- Strengthen the international brand of Spain and Spanish sports
- Increase the presence of Spanish leaders in international sports institutions and governing bodies
- Build up a legacy in the social sphere and in the Spanish Sports Federations

Spain Sports Global Strategic Goals:

- **Position of the Office:** Provide a new dimension to the development of sporting events, create jobs, businesses, social and environmental responsibility
- **Increase international presence:** The number of Spanish leaders in international Federations and Institutions is expected to decrease, hence it is necessary to look for replacements
- **Increase the international influence of Spain:** The approach should have two fronts - the positioning of Spaniards in positions of relevance in international sports governing bodies, and the attraction of international sporting events or sports management to Spain
- **Support to Federations:** Support Spanish National Federations to engage sponsors, disseminate campaigns for the internationalisation of their leaders, bidding procedures to attract events, among others
- **Promote European sport policies:** The European Commission carries out projects to encourage participation in sport, physical activity and volunteering. SSG considers these proposals of great interest to Spanish sports federations

A1.2 Spain

Spain has been working on a new Sport Law that, by updating the legal and regulatory environment of the sector, aims to eliminate inequalities and sustain growth

Preliminary draft of the new Sport Law

Non-exhaustive

- Recognising the cross-sectorial change in all areas linked to sport, the Spanish government is adapting the sport's regulation. The legislator notes that dimensions such as social inclusion, ecological transition and innovation through digital entrenchment are essential to adapt sport to the future socio-economic reality
- In this context, a preliminary draft of the Sport Law has been published by the Government in 2019. A new version of this draft was published in 2021, after introducing stakeholders' inputs
- The text of the new Law contains the following:

- Expressly recognises the **right to physical activity and sport**, both the **right of professional athletes** to carry out their work activities and also the promotion of sports practiced by citizens
- The legal definition of the athlete, listing its rights and obligations, a true athlete status and a wide catalogue **providing legal security to athletes**
- The update of the draft of the new Sport Law foresees the **reduction from 15% to 7% in the taxation of payments on account for prizes** in disciplines such as tennis, cycling or athletics
- Establishes a **clear distribution of powers**, ring-fencing the duties of the Supreme Council for Sport (CSD), increasing its oversight role
- The **powers delegated to the Spanish sports federations and other entities will be redrawn**, taking into account the need for transparency, good governance and social responsibility of sports governing bodies
- The text also contains **principles to ensure effective equality between men and women in sport**. On the other hand, it will **fight against any type of discrimination** that affects the rights of the LGBTI, as an express recognition of the public powers to a diverse and plural society
- **Eliminate the obligation of organisations to be Sociedad Anónima Deportiva (SAD)** to participate in official professional competitions at national level
- Establish that "**professional leagues can only be organisers of a professional competition**", however "**by agreement with the respective federation**, they may be **organisers of more than one official competition** of the same sport"
- Recognise that the **ownership of television rights** refers only to the clubs and sports entities concerned

A1.2 Spain

The Observatorio del Deporte en España is an initiative that aims to create a permanent forum for debate between relevant stakeholders in the sector

Observatorio del Deporte en España | Palco23

- The **Observatory is an initiative of Palco23**, a newspaper focused on the **business world sport**, sponsored by Mediapro, that aims to create a **permanent forum for debate between relevant stakeholders**
- Up until now, the forums have covered a **number of different topics**, such as: **e-sports**, the **fitness sector**, **audience capture**, **monetisation of social media**, among others
- **These meetings and forums**, connecting different stakeholders across the value-chain, can **generate useful insights**

Examples of some forums and their conclusions:

How to surprise the fan who has seen it all (Dec. 2019)

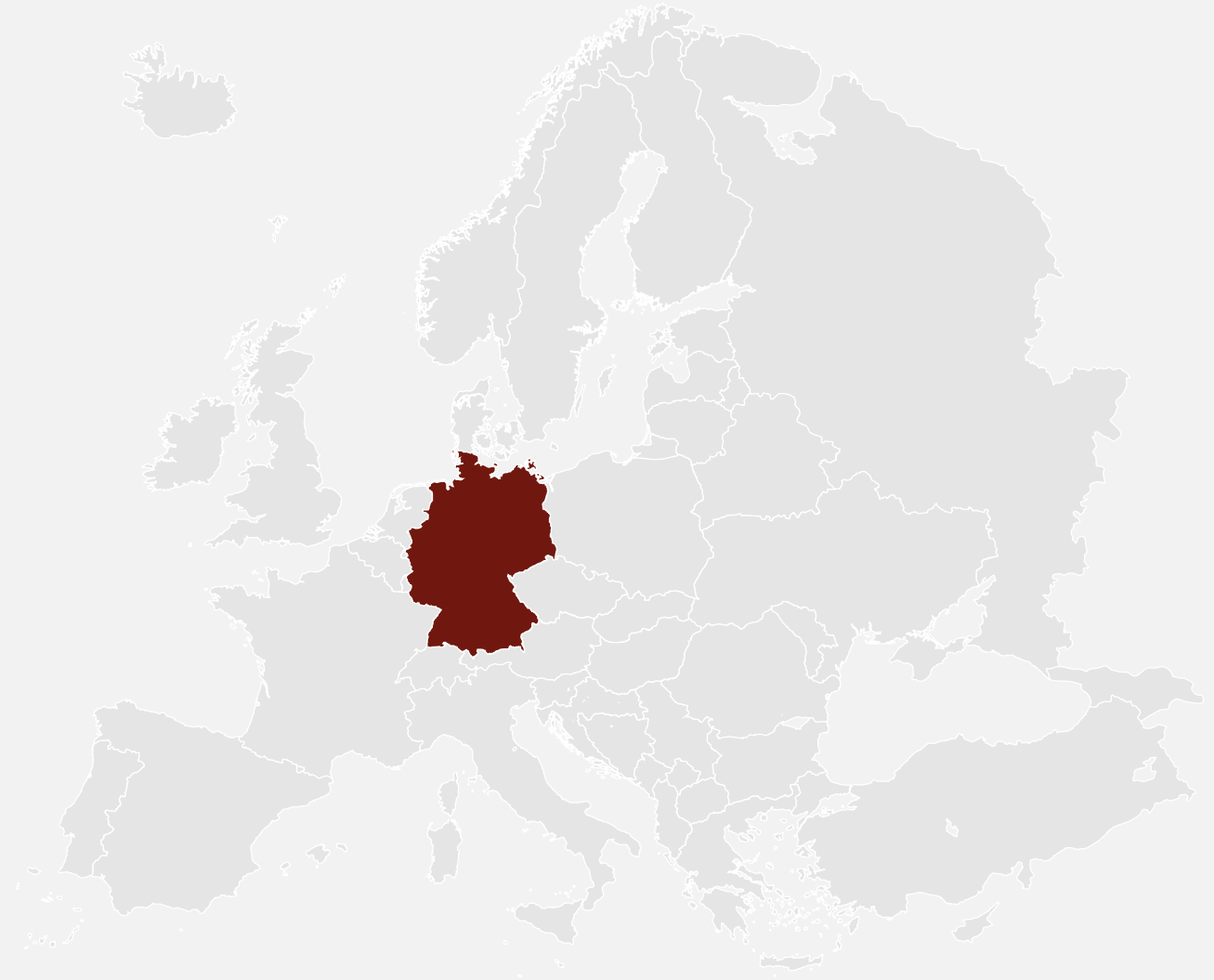
- **Fans** are getting increasingly **demanding** regarding the **content** they have access to, **hence it becomes crucial to offer something beyond the game**
- **The industry should seek to capitalise on technology**, not only in broadening the range of experiences, **but also creating a connection through communication**
- More than having a wide range of options, **socialisation and habit** are also key
- There is a great **lack of interest from young people** from 15 years of age onwards, so these stimulus should be **worked on from the bottom up**

From TV to mobility, the frontier of social media monetisation (Feb. 2020)

- There is **room for improvement in monetisation**, either through **advertisement** or **converting free content into premium**
- Permanent contact with **fans**, who must be at the **heart of the communication strategy**, is **one of the main assets of online channels**, and is especially **important during those times when there is no competition**, and to have **more visibility in markets where live broadcasting is affected by the time zone**
- Content must be **adapted to the target audience**
- **Social media**, despite not generating revenue yet, is **important to attract an audience for the respective platforms**



Germany



A1.3 Germany

Germany: initiatives overview

Main focus of analysis	Scope
Funding	<p>Restructuring of high-performance sport and elite sport's funding</p> <p>After a continuous decrease or stabilisation the number of medals since 2008, Germany decided to reform its elite sport's funding structure. Given that, a realignment in the promotion of elite sport cannot happen without corresponding adjustments in the promotion of high-performance sport (part that is oriented towards elite sport in the long term). This process started at the beginning of 2015 and started to be implemented in 2017</p>
Innovation and value creation	<p>Federal Institute of Sport Science (BISp)</p> <p>Federal Institute of Sport Science (BISp), a subordinate authority of the Federal Ministry of the Interior, Building and Home Affairs (BMI, "Bundesministerium des Innern, für Bau und Heimat"), aims to identify research needs and to initiate, promote and coordinate research projects in a wide array of sport issues and evaluate findings</p>
Strategic alignment	<p>National Strategy for Major Sporting Events</p> <p>The main goals set out within this strategy were:</p> <ol style="list-style-type: none"> 1. Focus on major sporting events with a long-term and positive impact 2. Increase enthusiasm and support for major sporting events 3. Increase transparency, competence and coordination in order to use resources efficiently and effectively 4. Increase the international competitiveness of German bids for major sporting events

A1.3 Germany

The disappointing results from the previous Olympics urged the General Assembly of the DOSB restructure the German elite sport system and its funding

Restructuring of high-performance sport and elite sport's funding (1/3)

- The **disappointing haul of 42 medals** won by Germany at the Rio Olympics **motivated a reaction**: the Federal Minister of the Interior and the President of the German Olympic Sports Confederation (DOSB) **made the joint decision to reform top-level sport's funding**
- The scope of the reform was the **restructuring of high-performance sport and the promotion of top-level sport in Germany**
- This process involved the Federal Ministry of the Interior (BMI) as the permanent sports ministry and main funding body, and representatives of the Conference of Sports Ministers (SMK)
- **8 working groups were formed, focusing on the various areas of sport promotion**, with representatives from Sports Institutions, Federal Sports Associations, State Sports Federations, (former) athletes, the German Sports Aid Foundation, the Institute for Applied Training Science, the Conference of Ministers of Education, sports scientists and a representative of the Scientific Council. An advisory board was created by the Federal Minister of the Interior and the President of the DOSB
- However, the reform also considered part of high-performance sport (oriented towards elite sport in the long term) taking into account that it **cannot be a realignment in the promotion of elite sport without consequent adjustments in the promotion of high-performance sport, particularly in the area of youth development**



The reform of the new funding structure was built around 10 sport-specific priorities:


- 0 Funding
- 1 Realignment and concentration of the squad structure
- 2 Improved dual-career, athlete development and protection
- 3 Targeted promotion of young talent
- 4 Improving coach status
- 5 Centralised sports control and quality management
- 6 Professionalisation of personnel structures in the central associations
- 7 More efficient support structure
- 8 Restructuring of the Olympic Training Centres
- 9 Expansion and optimisation of scientific support
- 10 Paralympic and Deaflympic sports

A1.3 Germany

The reform focuses on sport-specific priorities in the areas of squad structure, athlete support and consequent, youth development, coach status, sport-specific control...

Restructuring of high-performance sport and elite sport's funding (2/3)

Priority	Objective	Proposed solutions
0 Funding	Establish a new funding scheme, based on potential-success rather than the track record. The funding scheme is key to develop the remaining priorities	<ul style="list-style-type: none"> Establishment of a new system with an expert commission (PotAS) Performance classification (clustering) by PotAS Structural discussions to achieve a homogeneous funding structure Establishment of a funding commission
1 Realignment and concentration of the squad structure	Review of the current squad structure and its criteria to reduce/concentrate squads	<ul style="list-style-type: none"> The divisions of A, B, C and D-DC squads would be converted, with the creation of Olympic, prospective Olympic and junior squads
2 Improved dual-career, athlete development and protection	Optimise the compatibility of a sporting career and school/ vocational (training) education	<ul style="list-style-type: none"> Introduction of a long-term, individual planning of the dual-career Expansion of flexible training programmes for top athletes at schools and in companies Improve state support agencies' effectiveness Facilitate recruitment for former top athletes
3 Targeted promotion of young talent	Identify, select and prepare individual for international success	<ul style="list-style-type: none"> Implementation of nationwide programmes from talent scouting to talent retention Develop sport-specific general training concepts according to a standardised procedure, regularly analysed and evaluated externally Coordinate sports promotion in the federal/state interface area
4 Optimisation of the coaching conditions	Improve general conditions and create long-term opportunities	<ul style="list-style-type: none"> Develop favourable general conditions of employment Transparent remuneration system Provide training and further education opportunities
5 Central sports control and quality management	Ensuring quality through centralised sports management	<ul style="list-style-type: none"> Create, update and lead the implementation of a high-performance sport concept for DOSB's associations, with consistent quality management
6 Professionalisation of personnel structures in central associations	Ensuring quality through professionalisation of the structures	<ul style="list-style-type: none"> Develop a framework that should be embedded in a full-time professional structure with clear hierarchies and decision-making powers, supplemented by a full-time high-performance sports management

 Detail regarding PotAS on page 150

A1.3 Germany

... professionalisation of personnel structures, service and scientific support as well as Paralympic and Deaflympic sport

Restructuring of high-performance sport and elite sport's funding (3/3)

Priority	Objective	Proposed solutions
7 More efficient support structure	Optimise infrastructure conditions through integrated supply. The aim is to provide the best training and environmental conditions for the most promising athletes, concentrated at the locations agreed with the top sports associations in the structural plan	<ul style="list-style-type: none"> Reduce the number of Olympic facilities from 204 to 165 Concentrate the 3 different athletes groups in an uniform designation of Federal Bases. In the future, there will no longer be a distinction in the designation of federal bases and federal bases for junior athletes. Federal bases with a high prioritization within the Federal Associations will be focused on the training of top athletes (Olympic and perspective squads or A to B squads) and/or junior athletes (junior squads or C squads and selected D/C squads) in order to ensure a concentrated, sustainable development or the development of top performances in the sense of long-term performance building The determination of the state bases will be made in accordance with the guidelines of the national federation. The aim is to develop sports and disciplines in the youth sector that will only be able to catch up with the international level of performance at a later point in time. The association centres will be integrated into the existing bases to which they are already assigned. In the future, there will no longer be any association centres Achieve a stronger integration between Paralympic sports and the overall structure of the federal bases Concentrate certain Federal Training Centres
8 Restructuring of the Olympic Training Centres	Redesign the Organisational Structure of the Olympic Training Centres	<ul style="list-style-type: none"> Establish one legal entity per federal state for the Olympic Training Centre(s) in the respective federal state, which implies a reduction from 19 to 13 Create a uniform regulatory framework with the respective legal entity for all Olympic bases
9 Expansion and optimisation of scientific support	Improve the coordination, knowledge transfer management and exchange of information in high-performance sport	<ul style="list-style-type: none"> Create a new, uniform federal organisational structure where key players, including the IAT, FES, TA and the experts from the Olympic Training Centres (OSP), are optimally integrated under the leadership of the DOSB Establish a system that harmonises the intended potential-oriented funding system
10 Paralympic and deaflympic sports	Integrate top-level sport for people with disabilities in the elite sport structural reforms	<ul style="list-style-type: none"> Develop existing systems to keep up with the growing demand

A1.3 Germany

The new scheme focuses more on the athlete's prospect of future success rather than their previous track record

Restructuring of high-performance sport's funding: 🔍 "PotAS" (Potential Analysis System)

PotAS Commission

- The most significant change from the existing system is that an **athlete's prospect of future success** - rather than just their previous track record - **would form the basis on which sports associations would be funded**
- The **PotAS Commission** was created in May 2017 by the then Minister of the Interior. It **is formed by five experts and four deputy members**
- The start-up operational funding was €162.5 m
- The commission's tasks are the development, application and ongoing adaptation of a **Potential Analysis System (PotAS)** for the discipline - and discipline group - specific assessment of top associations with **regard to their potential for success**
- The **PotAS Commission evaluates performance elements (so-called attributes)** in the respective disciplines/ discipline groups according to tangible, transparent, sport-scientific and sport-technical evaluation criteria **that are relevant for a medium/long-term performance** ("4-8 years to the podium")
- However, there were **some concerns regarding the new scheme**, given **some athletes considered it could overlook athletes that tend to lately trigger their performance**



The focus is placed on the evaluation of the three content pillars:

1

Success: The sporting successes achieved at European, World Championships and the Olympic Games not only represent seasonal highlights, but also performance developments. They can be meaningful breakthroughs to be expected in the future

2

Potential: The squad potential of the top associations. Without talented young athletes, there will be no sporting achievements in the future. Especially for a country like Germany with a limited talent pool in international comparison, targeted talent development measures are key to train the available talents in the best possible way and to inspire them to thrive in high-performance sport

3

Structure: The third pillar deals with the structure conditions within the association. These have a significant influence on the daily work of coaches as well as on the environment of athletes and thus represent a necessary condition for sporting success. Another focus of this pillar is to ensure humane, value-oriented high-performance sport in order to enable a sustainable and healthy development of performance, from talent to top elite levels. Improved conditions do not immediately lead to sporting success by themselves, but the probability of achieving sporting success can be increased in the long term through improved framework conditions

A1.3 Germany

BISp sees itself as a hub between sport, science and policy

Federal Institute of Sport Science (BISp): overview and key areas

BISp is a subordinate authority of the Federal Ministry of the Interior (BMI)

This institute takes on a **unique role through its networking in the fields of sport, science and policy.**

It is a federal department **research institution dedicated to promoting high-performance sport.**

BISp also provides **administrative support** to the **PotAS commission**

BISP's mission is:

- To flag research needs and to initiate, promote and coordinate projects in elite sport assessing and following-up research main findings and takeaways
- This applies in particular to areas of elite sport including promotion, searching and talent detection, sports facilities, sports equipment and doping prevention
- In addition, BISp addresses issues related to sport development that are important to the country as a whole

Main areas of activity:



Knowledge managers

The goal is to promote knowledge of sport science and transfer it to specific target groups, science and policies in topics playing a meaningful role in high-performance sport. In addition to events, BISp uses other knowledge dissemination layouts such as publications and databases



Consultants

BISp advises both the BMI and other sport policy decision-makers. In this way, it also provides the baseline for sport policy making. BISp assists university and non-university project participants as well as the elite sports associations, both technically and administratively on all aspects of its funding portfolio (BISp supports with content-related questions as well as with the search for the right funding scheme)



Research sponsors

BISp pinpoints scientific topics driving German athletes performance. To this end, BISp is in close contact with all relevant institutions and stakeholders of high-performance sport in its scientific network. Additionally, it uses modern funding mechanisms to address the needs of the associations in the best possible way and to take into account the tight schedules in high-performance sport



Thought leaders

Besides building and transfer knowledge, BISp acts as a co-operator of an innovation network for German high-performance sport, BISp delves into the future and strives to find both upcoming research needs and innovative solutions based on evidence findings



Networking

From politics to associations to industry and science, everyone aims to provide athletes with the best possible support, BISp acts precisely at these interfaces, cooperating with many stakeholders. BISp brings together all key players inside and outside the sports system, as well as key success. The aim is to pool resources and shorten response times.

A1.3 Germany

Based on deep knowledge and dialogue with the sector, BISp establishes R&D priorities and directs funds towards these priorities. It also contributes with relevant publications

Federal Institute of Sport Science (BISp): specific initiatives

Key initiatives delivered by BISp:

Initiative	Overview
Project funding areas	<ul style="list-style-type: none"> The research projects funded by BISp relate to the areas of elite sport, including the young talents detection and development, sports equipment, sports facilities, the fight against doping, integration, racism, right-wing extremism, discrimination and issues relating to the development of sport that are important for Germany as a nation and underfunded at federal level.
R&D priorities	<ul style="list-style-type: none"> To establish R&D priorities, BISp undertakes research and priority programmes as well as the systematic inquiry of stakeholders from science and sport BISp determines the status of current research needs in order to be able to focus its research funding on major topics The kind of projects funded by BISp are: application projects (scientific substantiation and implementation of practical knowledge in training and competition practice); service research projects; innovation projects; transfer projects (implementation of findings)
Knowledge Centre	<ul style="list-style-type: none"> A central goal of the BISp is to build and manage knowledge tailored for specific target groups BISp focus on knowledge generation (initiating and promoting its numerous R&D projects), knowledge documentation (databases SPOLIT, SPOFOR, SPOMEDIA operated by BISp and the specialist information guide for sport), knowledge transfer (information collected in the databases is prepared and made available to users via the sports information portal SURF and knowledge organisation (around the scientific network system of high-performance sport fit for the future)

Initiative	Overview
Challenges in and for (high-performance) sport and COVID-19	<ul style="list-style-type: none"> In response to the pandemic and as part of its research funding, BISp called for more project applications to be submitted for research into corona-related consequences for sport As part of this initiative, 5 new project proposals were funded in 2020 and 5 other ongoing projects were upgraded to include corona-related consequences. At the time there are 10 ongoing BISp projects focused on COVID-19 and over 240 publications
BISp publications	<ul style="list-style-type: none"> BISp publications focus on a wide range of topics, such as: sport integrity; grassroots sport, economics of the sector, R&D funding, among others Worth mentioning the Sport Development Report that is published annually. Consists in a nationwide survey of sports clubs in Germany and aims to provide decision-makers in organised sport with evidence to take action and to strengthen the competitiveness of organised sport

A1.3 Germany

The National Strategy for hosting and organising major sporting events in Germany aims to address the population's rising expectations of sporting, social and economic added value of major events

National Strategy for Major Sporting Events: main objectives

- In 2020 the German government set out a **high level national strategy for hosting and organising major sporting events**, realising that the **expectations of the population regarding sporting, social and economic added value of events have risen** and with them the **demand to further increase the benefits**
- The **main goals within these strategy were:**

1. Focus on major sporting events with a long-term and positive impact

In particular, Germany wants to support bids for major sporting events that can achieve a long-term and positive impact for Germany. This **impact should encompass the areas of sport, society, environment and economy**

2. Increase enthusiasm and support for major sporting events

Germany wants to **increase and better harness the potential of major sporting events**. Visible positive impact is necessary to inspire people and gain their support for major sporting events. It is necessary to **enter into dialogue with society and also find new formats to involve the population**. In doing so, Germany wants to take up criticism of the formats and requirements of international sports federations and bring them into the international discussion and ongoing reform processes

3. Bolster transparency, competence and coordination in order to use resources efficiently and effectively

A successful strategy involves all stakeholders bound by **common goals and a coordinated approach**. This avoids additional expenses and friction losses due to uncoordinated or parallel procedures, and expert knowledge is bundled and used in a targeted manner. **Professionalisation includes defined processes and clear criteria and responsibilities**. This **transparency builds trust and strengthens the approach**

4. Increasing the international competitiveness of German bids for major sporting events

Germany wants to ensure the nation continues to successfully host major sporting events in the coming years, providing **greater support to key players in bidding and staging such events in Germany**. In addition, intends to **increase the presence of German representatives in international decision-making bodies** to leverage support to German bids

A1.3 Germany

Germany started the process of developing this national strategy during 2020 and flagged seven key topics to build up

National Strategy for Major Sporting Events: thematic fields

- BMI and DOSB are the entities responsible for devising the strategy
- In order to achieve the action goals, **seven key areas were set out**, that cover the focal points of the strategy and form the **framework for the content of the strategy to be developed during 2020**



Strategic goals and criteria

The definition and clear communication of objectives for major sporting events in Germany are the basis for transparent and comprehensible priority-setting to support decision-making



Dialogue and participation

In order to communicate the holistic vision of the objectives and the added value associated with major sporting events more clearly and widely, there should be clear guidelines to set the best way to involve the population and other stakeholders



Coordination and organisation

There must be greater coordination between the different stakeholders in order to avoid constraints (such as parallel applications). Hence, there should be a definition of the procedures to harmonise applications and host the events



Funding

Applications should be simpler and less burdensome for all the stakeholders



International networking

Support German candidates for positions in international sports federations. This will enable Germany to play a more active role in international federations and thus in the allocation of major sporting events in the future



Ongoing assessment of the events

Define uniform criteria in order to enable a systematic evaluation of major sporting events



Structure optimisation

Study the different organisational models in order to reach optimisation of resources and process efficiency

Italy



A1.4 Italy

Italy: initiatives overview

Main focus of analysis	Scope
Participation	<p>Italian National Olympic Committee</p> <p>The Italian National Olympic Committee (CONI) is responsible for discipline, regulation and management of national sports activities in Italy</p>
Funding	<p>Sport e Salute</p> <p>Sport e Salute acts as the operational arm of the Government Authority in the field of sporting activities</p>
Funding	<p>Istituto per il Credito Sportivo</p> <p>Istituto per il Credito Sportivo (ICS) is an Italian majority state-owned bank aimed at supporting the sport and culture sector</p>
Funding	<p>Erasmus+ Sport: the Italian case</p> <p>In the context of the European Union Erasmus+ funding Programme for Sport, Italy has been consistently performing the highest demand (in terms of number of submissions and contracted projects) for financing</p>
Integrity and social responsibility	<p>The Italian G20 Presidency and the fight against corruption priority</p> <p>In 2021, under the Italian Presidency, the G20 Anti-Corruption Working Group reached a consensus on the high-level Principles on Tackling Corruption in Sport</p>

A1.4 Italy

The Italian National Olympic Committee is the public body in charge of sport development and enforcement of sport policies

Italian National Olympic Committee (CONI): overview and examples of initiatives

- CONI was founded in 1914 and is a member of the International Olympic Committee (IOC)
- CONI is responsible for **national oversight, regulation and management of sports activities in Italy**
- CONI is a **public entity** responsible for the **management and development of national sports** and the promotion of **maximum proliferation of sport in Italy**
- CONI has a presence in 107 Provinces and 19 Regions. It endorses 44 national sports federations, 19 associated disciplines, 15 national sports promotional bodies, and 19 meritorious associations
- CONI also provides **training, medical and research services** through *Scuola dello Sport* (School of Sport), and the Institute of Medicine and Sport Science
- Throughout the years, CONI has been endorsing a set of **initiatives to promote physical activity amongst youngsters**



Examples of initiatives promoted by CONI:



CONI Centre and Educamps

CONI promotes youth sports activities for 5-14 age group widening the participation of children in sports activities while improving motor skills, detecting and scouting talents to nurture elite sport pathways



National Sports Day

The National Sports day takes place on the 1st Sunday of June across many Italian municipalities comprising a wide array of activities and events



La Nuova Stagione

A project delivered with the Ministry of Labour and Social Policies, to guide and support athletes post career and career transition



Sport in Prison

Developed in partnership with the Ministry of Justice, aimed at improving the living conditions of inmates, through sport



CONI Kinder Joy of Moving Trophy

A multi-sports event for children under 14 carried out with CONI Sports Bodies to enhance sporting activity, enabling thousands of children experience competition



Asylum, Migration and Integration Fund (AMIF)

Together with the Ministry of the Interior FAMI boosts social inclusion through sport of young migrants and asylum seekers hosted in the national reception system



Luoghi di sport

Aiming to leverage sports in areas with few sport associations through an informal framework of multidisciplinary, recreational and playful sports activities



Sport: A right for everyone

A social blueprint to keep schools open during summer enabling young people to play sport during holiday season

A1.4 Italy

In 2019, the Italian sport's funding model has changed, when a new entity was created to manage government funding for sport

Italian National Olympic Committee (CONI): Coni Servizi and the creation of Sport e Salute

This was a sensitive reform as it leaves CONI with a budget earmarked solely for its mission of representing Italian sport abroad, allegedly undermining CONI's autonomy



2002

Entirely owned by the Ministry of Economy and Finance, supports CONI's activity



2019

Company emanating from the Government, entrusted with the distribution of funds for sport

- Coni Servizi was founded in 2002 to deliver programmatic objectives of CONI, increasing value for money and efficient resources management becoming a benchmark in sports services provision
- Within Coni Servizi S.p.A., the Sports Facilities Consultancy Management Department, through the Consulting and Training Office, provides a full range of services to National Sports Federations, Sports Clubs, sport participants and individuals
- Coni Servizi had the ownership of all CONI assets, and it was responsible for taking care of this portfolio
- Since 2010, the company has been under assessment towards an eventual privatisation

- With the Budget Law 2019, Sport e Salute set up to pave the way of reforming the state's funding framework to sport - assigning to Sport e salute S.p.A. the task of financing national sports federations, associated sports disciplines, as well as sports promotion bodies, meritorious associations, military sports groups and civilian bodies of the State, previously ensured by CONI itself
- As of 2019 resources are earmarked to CONI solely for financing internal management and institutional activities, as well as to cover costs relating to Olympic preparation and support Italian Olympic missions
- For the financing of sports organisations, Sport e salute was called upon to set up a separate management structure and to allocate resources on the basis of the general guidelines on sports adopted by CONI pursuant with the principles of international sports order

A1.4 Italy

Sport e Salute acts as the operational branch of Government in the field of sport and physical activity

Sport e Salute: overview

According to its Official Statute, Sport e Salute is entrusted with a wide scope of competencies as follows:

- **Provides services to CONI** to deliver the institutional assignments legally required
- On the basis of specific agreements, it **provides services to support the activities** of the National Sports Federations, the Associated Sports Disciplines, the Sports Promotion Bodies, the Military Sports Groups, the civilian bodies of the State and merit associations
- Promotion and organisation of events, management of sports centres and facilities, in favour of public or private entities operating in the field of sport and health and develop and support sport practice, projects and other initiatives aimed at carrying out activities in favour of sport, health and the development of a sports culture
- Implement sport policies and allocating funds for national sports federations and other sports bodies

Currently active projects:

Project	Overview
Più Sport, Più Vita	• Designed to promote healthy lifestyles through sport . Insights by high-profile experts to seek new avenues on how sport practice and healthy habits can improve everyone's life
Quaderni di Sport di Classe	• Set in motion with the Ministry of Education, in agreement with the Undersecretariat of Sport and CIP collaboration, aims to ensure ongoing sports education for primary school students compliant with safety and well-being standards
Foro Italico Camp	• The Summer Centre of Sport e Salute is a qualified place to receive children and adolescents, during the closing period of schools (as required by the current National Collective Labour Agreement in Article 72 "Benefits of a welfare and social nature")
SPORT DI TUTTI QUARTIERI	• Streamlines the establishment of sports and educational centres , managed by Amateur Sports Associations and Societies, to serve the community, with special focus on children, women and people over 65
We Sport Up	• The first accelerator & innovation hub, part of the national network of CDP Venture Capital accelerators, dedicated to sport and wellness , working as an open ecosystem reaching out the most important companies, institutions and investors in research pitch in with the best Italian and international start-ups and scale-ups for the economic and social development of the sector

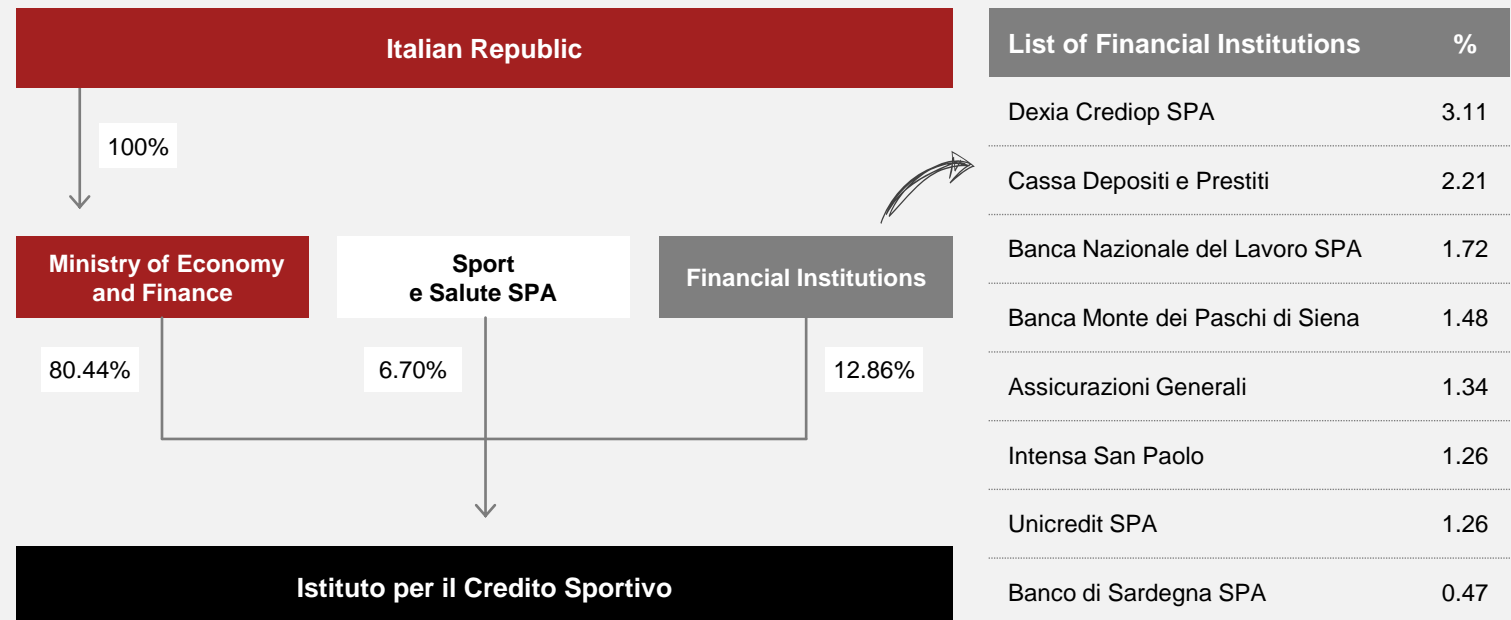
A1.4 Italy

Istituto per il Credito Sportivo is an Italian majority state-controlled bank aimed at supporting the sport and culture sectors

Istituto per il Credito Sportivo (ICS): overview and shareholder's structure

- **Istituto per il Credito Sportivo (ICS)** is a social public bank, established in **1957**, dedicated to the sustainable development of **sport and culture**, leading financing of sports facilities
- Partners with public and private bodies to **implement development projects by granting support loans**
- Thanks to **Special Funds** (Interest Rate Subsidy Fund, Guarantee Fund and the Fund for the Protection and Enhancement of Cultural Heritage) held by the State autonomously, the institute finances **at subsidised rates and up to 80% coverage of the guarantees** provided on those loans
- Since inception, it has **financed more than 34 000 sports facilities**

ICS shareholder's Structure:



A1.4 Italy

ICS provides a range of products to 5 major group of stakeholders that, according to their purposes, can have distinct limits, maturities and interest rates associated

Istituto per il Credito Sportivo (ICS): portfolio of products

Istituto per il Credito Sportivo offers a **wide range of products designed to finance the development of sport and culture**, each with its **own maturity, limit, interest rate and purpose**

Each product targets a specific **goal** related to:

- **Building and renovating infrastructure and purchase of equipment for cultural and/or sports activities**
- Transition to more **sustainable energy sources/ Increase energy efficiency**
- Refurbishing sports facilities to **comply with regulations and technical guidelines in place**
- **Reconstruction** of damaged sports facilities located in calamity areas
- Develop **specific sports**
- **Infrastructural development** within the scope of the **Winter Olympic Games 2026**

ICS' key stakeholders and products available:



Local and public authorities

- Green Sport Municipality loan
- Ordinary loan
- Standardisation loan
- Natural Disaster loan
- Loans specific to culture
- Advance loans
- Loans specific to certain sports
- Loans specific to Cortina 2026
- Art Bonus loan



Amateur sports associations, sports clubs and companies

- Ordinary mortgages
- Green mortgages
- Natural Disaster loan
- Advance loans
- Standardisation loan
- Loans specific to certain sports
- Loans specific to Cortina 2026
- National Amateur League loan



CONI, CIP and sporting bodies

- Ordinary Sport loans
- Interest free loans for Federal or Olympic preparation centres and top equipment



Parishes and religious entities

- Interest free loans specific to sports
- Loans specific to culture



Cultural associations and bodies, universities centres

- Loans specific to culture
- Advance loan
- Concessions for reuse, recovery and enhancement of public buildings
- Mortgages on sports facilities

A1.4 Italy

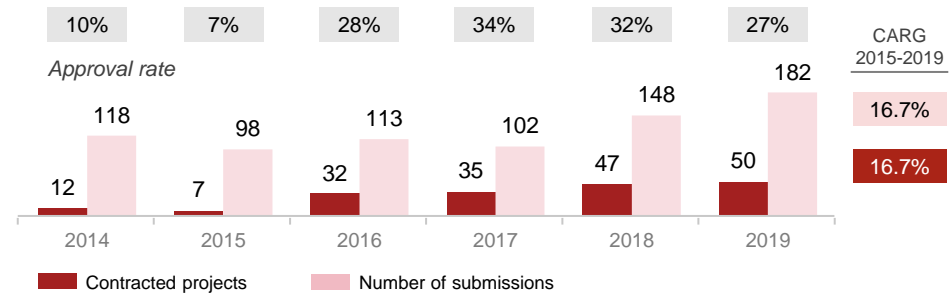
In 2019, Italy was the EU Member State with most projects (50) and the highest amount allocated in ERASMUS+ Sport (€8.6 million)

ERASMUS+ Sport: the Italian case

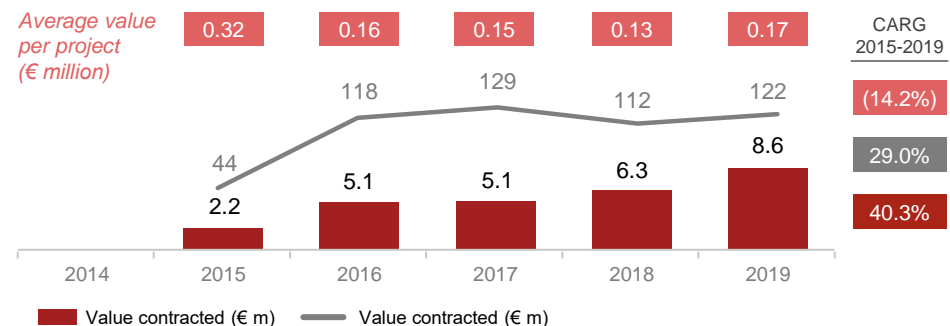
- Under the European Commission funding programme for sport ERASMUS+ Sport, **Italy has been consistently the country with the highest demand** (in terms of number of submissions and projects assigned) for financing
- Overall, there is **growth in the number of projects, total value and number of applicant partners, between 2015 and 2019**. In this period, Italy secured funding for 183 projects, amounting to ~€28 million. The average amount per project are around ~€150 thousand (exception 2015)
- For instance, in 2019, **Italy captured around 18% of the total funds** awarded by this EU programme:
 - 30 small collaborative partnerships (€ 1.7 million)
 - 18 collaborative partnerships (€ 6.3 million)
 - 2 non-profit events (€ 0.6 million)
- As an **example of best practice**, an Italian project promoted by the Municipality of Ancona was proposed: the Games on the Adriatic and Ionian Sea for social inclusion which involved several cross-border regions and benefited from funding of €495 thousand
- One of the main reasons given for Italy's success in the Erasmus+ Sport programme could be the existence of a **team in CONI dedicated to attracting international projects, working closely with sports organisations in the preparation of funding applications and development of capabilities**, through training, for example. Additionally, another factor which may have been contributing positively for this performance is the **broad communication of the programme in Italy, together with increased capacity and expertise to apply and run European projects**

Erasmus + funding for the Italian sport main KPIs:

Number of projects submitted vs. contracted



Total and average value per project (€ million) and number of promotor entities



A1.4 Italy

In 2021, under the Italian Presidency, the G20 Anti-Corruption Working Group reached a consensus on the high-level Principles on Tackling Corruption in Sport

Anti-corruption: the Italian G20 Presidency and the fight against corruption priority

- In 2021 the G20 Anti-Corruption Working Group reached a consensus on the **high-level Principles on Tackling Corruption in Sport**
- The G20, in 2021 under Italian presidency, has selected **Anti-Corruption in Sport as one of its priorities**
- In the G20 Summit held in Rome in October 2021, it were defined the priority areas of anti-corruption work from 2022 to 2024 (2022-2024 Anti-Corruption Action Plan) and adopted a number of guiding principles concerning the **fight against corruption in specific spheres, including tackling corruption in sport**
- The G20 High-Level Principles on Tackling Corruption in Sport is seen as a **pivotal moment for all those advocating increased powers to act on sports corruption and law enforcement**
- The Sport Integrity Global Alliance's (SIGA) inaugural World Congress on Global Leadership and Anti-Corruption in Sport held in Rome in February 2020 played a major role in contributing to this important decision

G20 High-Level Principles on Tackling Corruption in Sport:

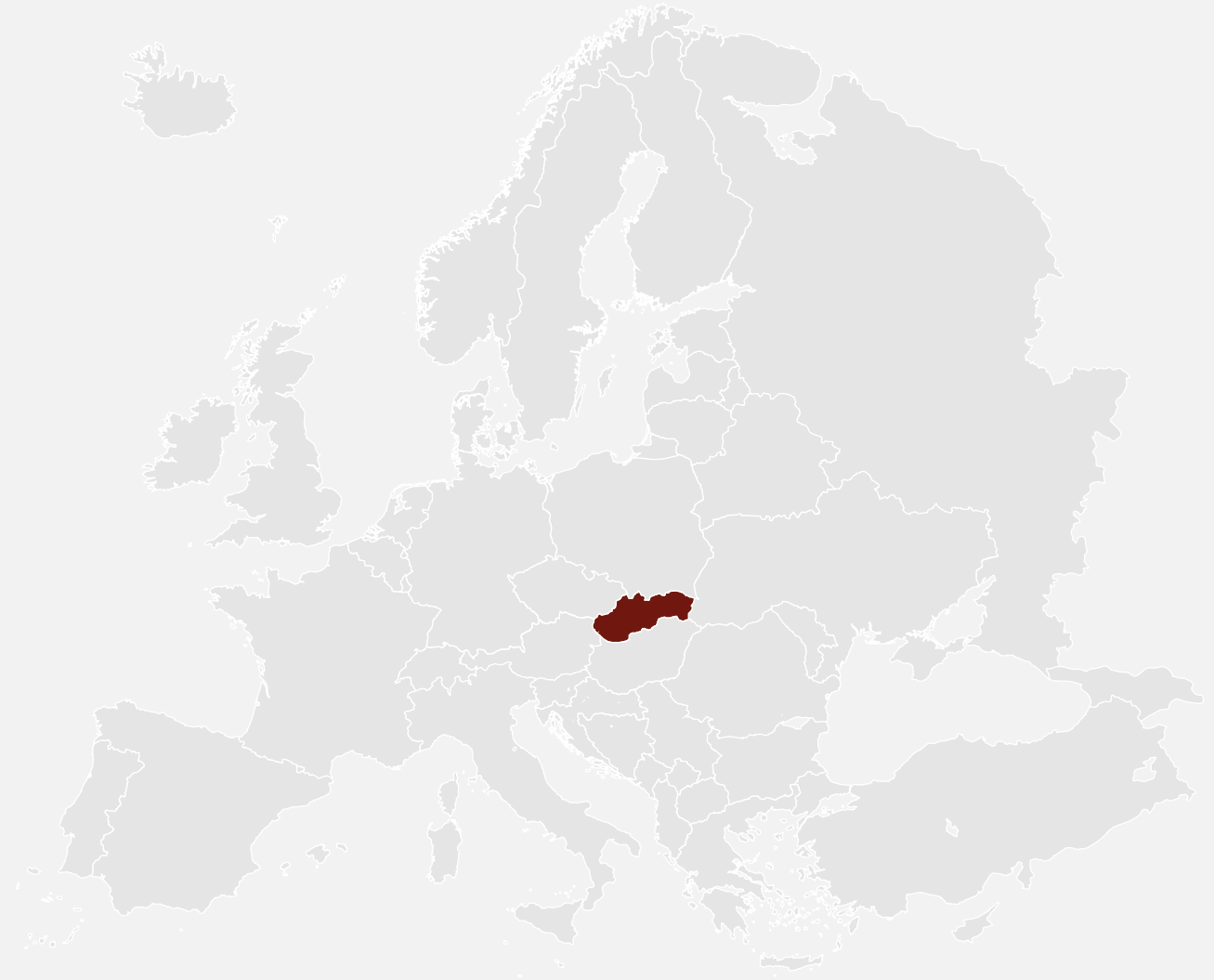
The paper outlines the **key principles of action in one of the most acute areas of the recent years – the fight against corruption in professional and amateur sport**, whose importance is underscored by resolutions of the Conference of the States Parties to the UNCAC and the initiation of a UNODC global report on safeguarding sport from corruption

The principles include:

1. **Gather and analyse information** to develop a comprehensive, **evidence-based understanding** of the nature, scale, scope and risks of corruption in sport and raise awareness of this phenomenon
2. **Strengthen legal and regulatory frameworks** to address corruption in sport
3. Ensure **effective law enforcement** against corruption in sport, also by developing specific competencies and expertise of competent officers and developing and implementing detection and reporting mechanisms
4. Strengthen **international cooperation** among law enforcement, criminal justice and corruption prevention authorities, as well as lawmakers and policymakers
5. **Tackle the exploitation of sport by criminal groups** that use it for money-laundering and other illicit gains and other illegal acts related to corruption
6. Support international and national sports organisations to **enhance governance, transparency and accountability and ensure the integrity of major sporting events**, including associated procurement



Hungary



A1.5 Hungary

Hungary: initiatives overview

Main focus of analysis	Scope
Strategic alignment	<p>Sport XXI National Sport Strategy 2007-2020</p> <p>In 2007, Hungary developed its National Sport Strategy 2007-2020 assessing the sport and, accordingly, setting out a vision for the future of Hungarian sport, where key challenges, strategic goals and action plans are aligned to drive a comprehensive reforming agenda</p>

A1.5 Hungary

Regardless of high performance sport achievements, Hungarian sport development was facing key challenges

Hungary's Sport XXI National Sport Strategy 2007-2020: baseline work performed in 2007

- Even though Hungary stands out as a high performing sporting nation, it was evidencing the same sedentary trend as the remaining Western world
- To combat this trend, **Hungary developed baseline work during 2007 towards a root-to-branch National Sport Strategy 2017-2020**, outlining three areas of utmost importance for the national sport's landscape and a set of factors shaping community engagement with sport

Key areas in sport:



Physical education and school sport

Physical activity in childhood has a positive impact on the propensity to practice sport in adulthood. However, only 25% of children practised sport in addition to physical education classes, while young people have shown decreasing levels of physical activity



Recreational sport

Although organised leisure activities have a long tradition in Europe, sport has been less and less associated with a leisure activity. On the other hand, most recreational sports sport participants stayed away from structured sports organisations



high-performance sport in youth

Sport in Hungary is known by its focus on the Olympic Games. The country has multiple programmes to boost high-performance sport (e.g. Sport XXI for Youth Education, Hercules Star, Hercules Championship), along with a long-standing rewarding system for sport performance

Factors influencing sport participation:

- **Facilities availability** - The majority of municipalities and sports displayed major problems, both in terms of the amount of facilities and their maintenance status. The lack of adequate sports premises allied to the scarcity of school gyms, beefed up the relevance of this issue
- **Financing system** - The funding framework relied on resources from Central and Local Governments, in equal shares. Due to the degree of development of the sector, the level of private revenues (e.g. television rights) and corporate models with private investment could not yet reach a greater share of total investment in sport
- **The organisational structure of sport** - Sport was over-structured. Despite being centralised sport administration was fragmented, with one public body in each area (recreational, high-performance, Olympic and Paralympic). There was also inefficient communication and low cooperation at all levels, turning it difficult to monitor the use of resources. This top-down structure entailed a heavy reliance of lower levels from the top

A1.5 Hungary

Creating an active society while maintaining the level of performance in elite sport was the main objective of the Hungarian strategy, developed in 2007

Hungary's Sport XXI National Sport Strategy 2007-2020: strategic objectives

Vision:

"Maintain Hungary' sporting nature, involving a greater portion of the society in sport"

Overall strategic objectives:

- 1 Mobilise people towards a sporty lifestyle and thus improving the quality of life of Hungarian citizens
- 2 Develop the sport's environment, acknowledging its cross-sectoral impact
- 3 Improve public health
- 4 Link sport and the knowledge society, so that young people do not have to choose between sport and studies
- 5 Contribute to a harmonious society, fostering the development of territorial cohesion
- 6 Consolidate sport as an innovative factor, increasing the competitiveness and productivity of the workforce
- 7 Strengthening national and community identity
- 8 Reducing inequalities, thus contributing to the integration of disadvantaged social groups

Strategic goal in key areas:

The main purpose of this strategy is to foster a healthy and sporty society. On this regard, efforts should be made in three key areas, where sport for people with disabilities should be addressed transversely:

Physical education and school sport

- Ensure access to physical education and training for higher education students in order to prevent unhealthy behaviours, providing the necessary facilities and professional conditions

Recreational sport

- Leveraging a sports culture, through a system of financial incentives envisaging the adoption of a healthy lifestyle. Therefore, it is necessary to improve conditions and access to sports facilities
- Increase the number of people with disabilities participating in recreational sport

high-performance sport in youth

- Sustaining the level of performance traditionally achieved in elite sport, in particular at the Olympic Games, and improve performance in ball sports. As such, it is necessary to increase the number of federate athletes and improve the system of training and management of young talent

A1.5 Hungary

Priority guidelines designed in the Hungarian Sport Strategy include the development of infrastructure, increasing and concentrating the level of financing of recreational sport, ...

Hungary's Sport XXI National Sport Strategy 2007-2020: Priority tasks (1/2)

Priority tasks to the development of the key areas of sports:



Physical education and school sport

- **Develop and modernise sports infrastructures** through public tenders in close cooperation with the Ministry in charge of education and its programmes, and by establishing baselines expected for each type of facility (with special attention to deprived areas and municipalities)
- Develop a grant scheme to **encourage extra-curricular sports activities**
- **Support university-college sport** with due resources
- **Renovate the content and methodologies of physical education in schools** (more diverse syllabus) and **modernise professional training of specialised teachers**
- Reform the **Student Olympics encompassing all primary and secondary schools in the country**, providing opportunities mainly for students not engaged in sports federations



The Student Olympics is a sporting competition system¹ among students arranged by the Hungarian Student Sports Association. All students enrolled in any public education institution are eligible to participate in the Student Olympics competition



Recreational sport

- Make mandatory a licence to provide sports activities and services together with a trademark programme to **ensure quality** (e.g. provision of qualified professionals, fight against doping in recreational sport)
- **Encourage increasing engagement of participants in recreational sport**, spurring the number of organised and registered recreational sportspeople
- **Develop a system of benefits and incentives** in cooperation with public authorities
- **Level up financing to recreational sport**, focusing on programme funding rather than operational funding
- **Develop infrastructures** tailored for recreational sport
- Develop **indirect financial incentives** to sport employers for the **provision of sporting facilities and sporting activities**
- Conduct **awareness campaigns** to advocate and encourage recreational sport
- **Monitoring the physical condition and fitness of registered recreational sportspeople**, particularly children, young people, women and pensioners, at regular intervals through a "**National Fitness Test**"

Notes: 1 – Sporting competition with team and individual sports, organised in a bottom-up system, starting at a local level and then at a national level

Source: Hungary National Assembly "Sport XXI National Sport Strategy 2007-2020"; PwC Analysis

A1.5 Hungary

... as well as, designing sport development plans to cater for targeted support and setting up a National Sports Information System

Hungary's Sport XXI National Sport Strategy 2007-2020: Priority tasks (2/2)

Priority tasks to the development of the key areas of sport:



high-performance sport in youth

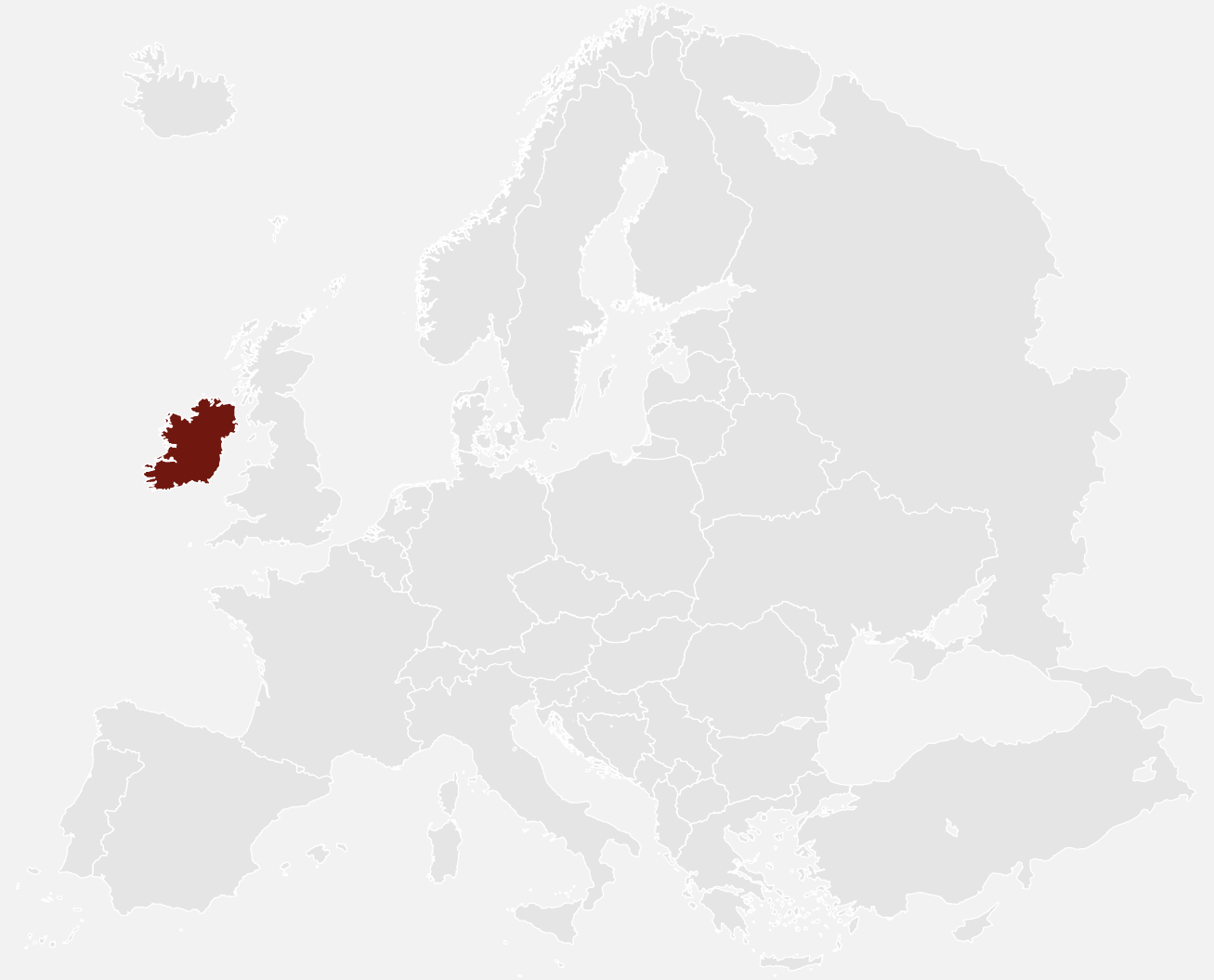
- **Prepare, regularly review and deepen sport development plans** as baselines for funding plans
- **Provide customised support driven by specific development plans underpinned by specific goals and tangible indicators.** Priority should be given to sports that meet certain criteria, such as tradition, number of participants, national coverage, fan and spectator's outreach, media impact, development dynamics, among others
- **Develop sports facilities ready to stage international sporting events**
- Devise a **harmonised youth education concept** aligning high-performance sport goals with a broad spectrum of children sport practice together with a framework for talent identification, selection and development
- Setting **role model athletes** by rewarding the results achieved with honesty and integrity
- **Fight doping focusing on prevention** (education and information) and on the **involvement of all stakeholders** (training professionals, health and science professions, research institutes, etc.)
- **Engage fans and supporters in prevention and regulatory compliance oversight**, notably on spectators' violence



Sports conditions

- **Foster an economic and legal environment catalyst for sport practice**, establishing a regulatory framework in line with this strategy
- Design and implement a **strategy for sports infrastructure development**
- Establish an **agile and simplified organisational structure** for Hungarian sport
- **Develop a reliable, transparent and verifiable funding system**
- **Mainstreaming applications to EU sport funding programmes**
- Drive the **reform of the vocational training system**
- **Support applied research** on key topics for society as a whole and sport in particular, based on a coordinated strategy for the development of sport science
- Establishment of a **National Sports Information System** to support evidence-based decision making, policy impact assessment, data management and harmonised procurement procedures, the management of data providers' own data, the central electronic management of tenders, among others
- Implement a **consistent and direct communication strategy** to inform key messages of the sport strategy and to promote individual projects
- **Organise world competitions** through **rational decision-making**, taking into account the interests and aspects of the state, municipalities and specific sports

Ireland



A1.6 Ireland

Ireland: initiatives overview

Main focus of analysis	Scope
Strategic alignment	<p>National Sports Policy 2018-2027</p> <p>In 2018, the Department of Transport, Tourism and Sport of Ireland published the National Sports Policy 2018-2027, a strategic document which sets out the vision for Irish sport in 2027, providing 57 actions to transform the sporting landscape</p>
Participation	<p>High Performance Strategy 2021-2032</p> <p>Following the National Sports Policy 2018-2027, in 2021, Sport Ireland (the government agency for sport) launched the High Performance Strategy 2021-2032, outlining strategic priorities and a long-term plan for the Irish high-performance system</p>

A1.6 Ireland

Increasing public engagement in sport is at the heart of Ireland's National Sports Policy 2018-2027

Irish National Sports Policy 2018-2027

National Sports Policy 2018-2027

- In 2018, the Department of Transport, Tourism and Sport of Ireland published the National Sports Policy 2018-2027
- This strategic document sets out the vision for Irish Sport in 2027, **setting out 57 actions** to transform the sporting landscape, with **increasing participation in sport at the heart of this policy**
- The strategic actions planned in this policy focus primarily on **increasing participation, improving sports infrastructure and maximising the performance of Irish elite athletes**
- The National Sports Policy...
 1. Is evidence-oriented and focused on results
 2. Is based on an accountability framework
 3. Promotes inclusion
 4. Fosters collaboration
 5. Emphasises high ethical standards
 6. Adopts a life-course perspective around participation
 7. Encourages innovation

Objectives

Increase participation:

Increase the share of Irish population, from children to adults from all sectors of society, involved in sporting activities on a regular basis

More excellence:

Increase the number of Irish athletes and teams who consistently and fairly achieve top results at international competition level

Improved capacity:

Improve sports organisations with strong leadership, ethics and governance at all levels, with properly trained and developed professionals and volunteers, along with modernised working methods and systems. Increase levels of cooperation in sport

Targets

- Increase the number of adults who participate regularly in sport
- Bridge the gap between women and men sport participation
- Decrease the level of sedentary adults
- Level up regular sport practice among children
- Bolster the number of adults regularly involved in sport through volunteering, club membership and/or attendance
- Increase the number of medals won in successive Olympic and Paralympic Games
- Improve the country ranking in the Olympic and Paralympic Medals Table
- Ramp up junior and senior medals won at international level
- Widen the institutions adopting the Code of Governance for the community and voluntary sector
- Progress towards gender balance in the composition of sports organisations' boards
- Enhance sport work capacity
- Improve the quality of facility infrastructure

A1.6 Ireland

The High Performance Strategy defines 7 strategic pillars and identifies investment in coaching as key to the development of high-performance sport

High Performance Strategy 2021-2032

- Following the National Sports Policy 2018-2027, in 2021, Sport Ireland (the government agency for sport) launched the High Performance Strategy 2021-2032
- This strategy has **7 strategic pillars** and sets out the long-term plan for the high-performance system **outlining investment in training (coaching) as key to its development**



Investment focused on performance

- Prioritise investment in sports according to a set of criteria, periodically reviewed
- Support medal-winning potential athletes to leverage their performance



Athlete performance and holistic support

- Provide support to athletes in areas such as: training, dual career management, career transition and post-career, scholarships and direct athlete funding
- Improve athlete's well-being through the management of the competition calendar, for example



Top-quality training and support services

- Pave the way for the professionalisation of the coaching career
- Set a work plan in motion to improve high-performance coaching capacity
- Provide quality services to athletes through regional hubs and collaborative networks



Business structures and planning

- Meet good governance standards in high performance sport as mandatory condition to fund release
- Support National Governing Bodies to entrench their international position



Partnerships

- Level up collaboration and alignment across the system involving Government, Sport Ireland, Sport Northern Ireland, government bodies, the Olympic Federation of Ireland, Paralympics Ireland and educational institutions



Top-quality infrastructures and equipment

- [Sport Ireland] Work together with the Government in the management and definition of sports infrastructure policies
- Collaborate with higher education to leverage existing infrastructures
- Engage the private sector in infrastructure development



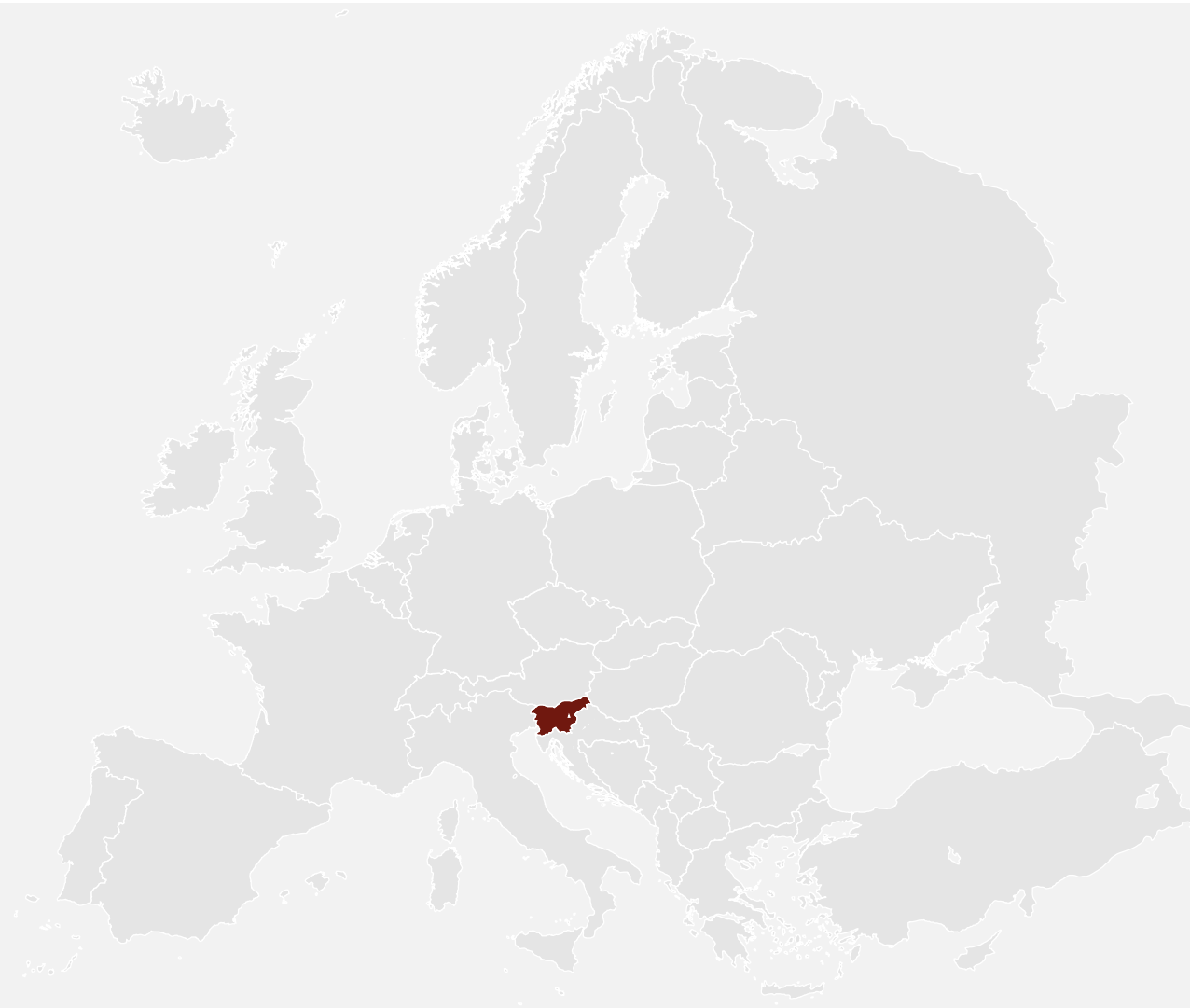
Research and innovation

- Create partnerships to conduct applied research and development projects
- Develop a long-term plan for data science in high-performance sport
- Create a research and innovation hub at the Sport Ireland Campus

Notes: 1 – National Governing Bodies (NGBs) of sport are typically non-profit, non-governmental organisations responsible for promoting and developing a particular sport

Source: Sport Ireland "High Performance Strategy 2021-2032", PwC Analysis

Slovenia



A1.7 Slovenia

Slovenia: initiatives overview

Main focus of analysis	Scope
Strategic alignment	National Programme of Sport 2014-2023 The National Programme of Sport 2014-2023 was designed by the Ministry of Education, Science and Sport of the Republic of Slovenia following the National Programme of Sport 2000-2010 which paved the way for Slovenian sport growth

A1.7 Slovenia

The National Programme of Sport of the Republic of Slovenia 2014-2023 builds upon the previous programme from 2000-2010, which led to a great development of the sector

National Programme of Sport 2014-2023: overview

- The National Programme of Sport 2014-2023 was developed by the Ministry of Education, Science and Sport of the Republic of Slovenia and is a **continuation of the National Programme of Sport 2000-2010, which led to a great development of the sport in the country, both at the quantifiable level** (number of regular sports sport participants, number of federated athletes, number of sports organisations, etc.) **and at the level of the quality of sport** (reflected in the number of elite athletes, the number of medals obtained internationally and the number of qualified sport staff, etc.)
- This programme acknowledges the **cross sectoral nature of sport** and, as such, **identifies strategic actions encompassing multiple areas of society**. Hence, it is **mainly aimed at public institutions** (national and local) besides sports organisations and local and national authorities responsible for sport

Mission

The State intends to “*create conditions for the development of sport as an important element of the development each individual and society and contributes to the reduction of inequality regarding access to sports exercise.*”. Therefore, it will:

- Provide every individual with opportunities for active participation in sport
- Ensure young people's participation in extra-curricular sport (together with physical education)
- Provide conditions for each individual to improve their sporting achievements
- Safeguard and encourage adoption and compliance with moral and ethical values in sport
- Create a sustainable environment encouraging the development of sports activities
- Strengthen the role of sports organisations

Vision

“*Sport shall remain an important part of our nation's culture, and each individual sport shall become or remain an indispensable part of healthy lifestyle and positive life attitudes.*”

Fundamental objectives

In line with the Programme's mission and vision, the fundamental strategic objectives for 2023 are the following:


- 1 Improve the **proportion of adults who play sport** to 70%.
- 2 Enhance the **proportion of the adult population who participate in sport regularly** by 5 percentage points
- 3 Increase by 3 percentage points the **proportion of the active population in sport in professionally-run programmes**
- 4 Increase the **number of athletes in high-performance systems** by 3%
- 5 Maintain the **number of elite athletes**
- 6 Foster the **visibility of sport as an important sub-system of society**

A1.7 Slovenia

To achieve the programme's objectives, the Government has presented measures in 7 sections of strategic actions

National Programme of Sport 2014-2023: Main areas of activity

The main objective of the strategic actions under this programme is to provide conditions for the practice of quality sport by **improving access to sport for all citizens and improving sports programmes**

 [Detail on the following page](#)

1

Sports programmes (basis of sport)

The Programme includes 10 sports programmes covering: sport in education, physical education in leisure time, physical education for children and young people with disabilities, extracurricular sport, quality sport, elite sport, sport for persons with disabilities, recreational sport and senior sport

2

Sports facilities and areas for sport in nature (material basis for sport practice)

Contribute to a network of accessible, affordable and quality sports venues (including in nature) by improving the management of the network, ensuring the maintenance and modernisation of existing facilities

3

Development activities in sport (support for the implementation of individual sports activities)

Including initiatives on education, training and capacity building of sport professionals, athlete's rights, coaches and other professionals, contributions to scientific literature and research in sport, as well as digital transition of sport

4

Organisation in sport (ensuring high-performance and transparent management of sports organisations)

Improve the operations of relevant non-profit organisations, promote and improve conditions for volunteering, encourage the professionalisation of the sector through a favourable tax environment and support international cooperation

5

Sports events and sport promotion (strengthening sport promotion and creating social and economic benefits)

Promote sustainable sports events, foster sports tourism in Slovenia, widen public information and data on sport together with safeguarding and disclosing sports heritage

6

Social and environmental responsibility in sport (ensuring a sustainable environment for the development of sport)

Address issues such as the promotion of sportsmanship, the prevention of doping, the creation of an Athletes' Ombudsman to protect their rights and the development of sport in a sustainable way (events, infrastructures, etc.)

7

Sport support mechanism (strengthening the promotion of sport and provide social and economic benefits)

Some state aid actions to sport include de-bureaucratisation of the sector (e.g. simplifying legislation), initiatives to prevent sport betting abuses, and increasing the volume and scope of oversight of sports activities

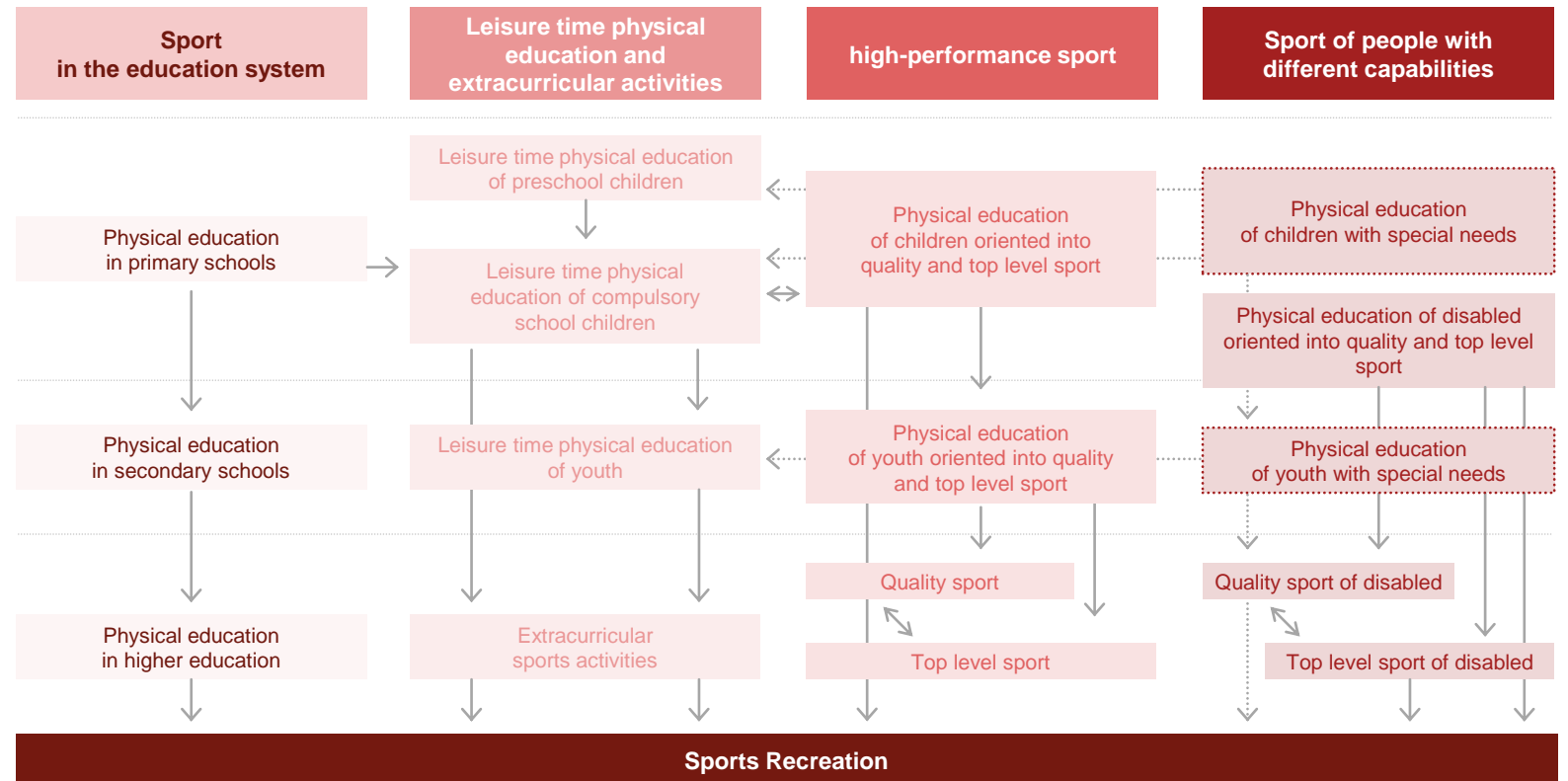
A1.7 Slovenia

Slovenia considers recreational and senior sport as a legacy of compulsory and leisure sport practice all over childhood and youth

National Programme of Sport 2014-2023: Q Relations between sports programmes

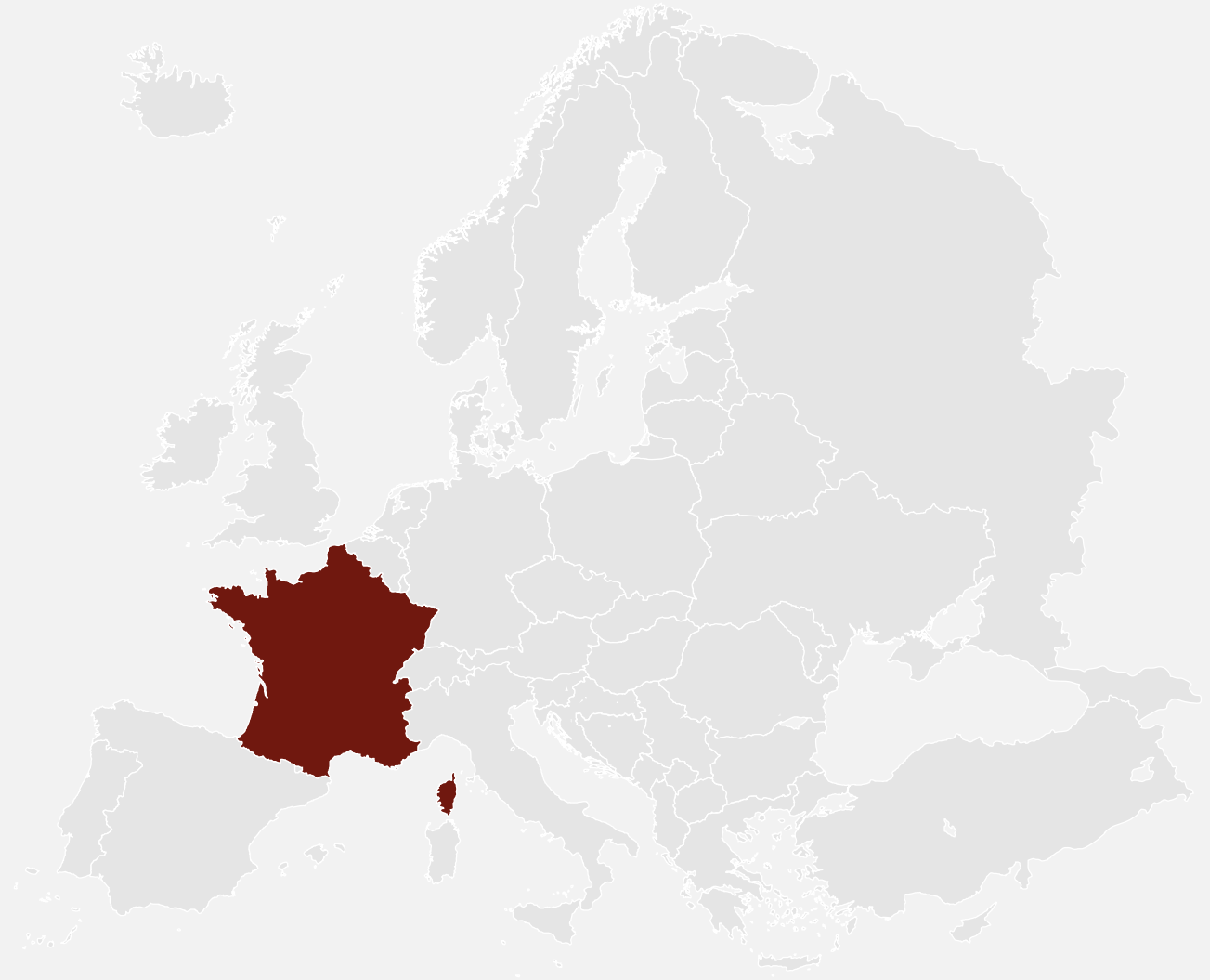
- **Sports programmes are the basis of sport** and represent, in general, a form of organised and professional sport
- The National Programme of Sport 2014-2023 defines a set of sports programmes in their **different dimensions** and as such they will be **delivered by different organisations**
- To ensure the alignment between programmes, the National Programme of Sport reinforces the importance of **connecting the programmes through networking, spaces used and financial commitments**
- **Recreational sport is seen as the logical follow up of sport during childhood and youth**, for people with and without disabilities and at high-performance or non-competitive level
- Similarly, **senior sport is also seen as the continuation of recreational sport during adulthood**

Sports programmes and interdependencies:





France



A1.8 France

France: initiatives overview

Main focus of analysis	Scope
Participation	<p>Ministry delegate for Sport</p> <p>The Ministry Delegate for Sport is attached to the Minister of National Education, Youth and Sport and is responsible to uphold the main objectives of the national sport policy and setting the legal framework through the sport code</p>
Funding	<p>Measures of the Sport Recovery Plan</p> <p>Following the health crisis, the French Ministry delegate for Sport worked on a set of recovery measures for the sector (part of the <i>Plan France Relance</i>) under the responsibility of multiple institutions and with various beneficiaries, including sports associations, companies, federations and public institutions</p>
Funding	<p>Tax incentives to sports patronage</p> <p>France set out the Aillagon Law in 2003 which harmonises donations' legal framework, enforcing a package of tax incentives to cultural “<i>mécénat</i>”, including sport</p>
Professionalisation and resources	<p>National Federation <i>Profession Sport et Loisirs</i></p> <p>The National Federation <i>Profession Sport et Loisirs</i> (PSL) is an association with the aim of supporting the management and promotion of sports and leisure professions</p>

Additionally, it should also be highlighted that in early 2022, **France adopted a new Sports Law** that aimed to democratise sport in France. The law intends to be a new model for sport, its practice and its governance. It covers a wide range of issues, including health, parity in institutions, education, the economic model of professional sport, and the security of sport. Some of the measures adopted are the inclusion in the law of sport-health centres, the opening of school sports facilities to sports associations, the limitation of the number of terms of office of federation presidents to three, the obligation to give clubs 50% of the votes in the general assembly of federations and the possibility of offering a first professional contract of five years instead of three.

A1.8 France

Besides doing awareness campaigns, the French Ministry delegate for Sport also offers of training courses, provides funding, develops national strategies, among others

Ministry delegate for Sport: priorities and action areas

Non-exhaustive

The Ministry delegate for Sport (or Ministry of Sport) is attached to the Minister of National Education, Youth and Sport and is **responsible for defining the main objectives of the national sport policy** and setting the legal framework through the sport code

The national sport policy is structured around **four priorities**:

1. Promotion of sport for all
2. Organisation of elite sport to maintain France's performance
3. Prevention through sport, including the protection of athletes and the fight against intolerable abuses (doping, violence, racism, cheating, etc.)
4. Promotion of sports professions and the development of sports labour sector

Main action areas and initiatives:

Sport practice

- Provide sectorial aids in response to COVID-19 and develop the recovery plan for sport
- Development and implementation of the **National Sport Health Strategy 2019-2024** (not focused on elite sport)
- Development of the programme “*Savoir rouler à vélo*” which aims to generalise the learning to cycle among children
- Launch **several awareness campaigns in favour of sport practice** for women, for people with disabilities, in school, etc,
- Offer **support to high-performance athletes**: financial support, training and competition aid, aid for professional integration, retirement system and accident/illness coverage
- **Allocate equipment subsidies to sports associations or local authorities** through the National Centre for the Development of Sport (Ministry of Sports' public body)

Ethics and integrity

- Provide **guides and helplines, and conduct multiple awareness campaigns** with athletes to support athletes against hazing, harassment and sexual violence, as well as to prevent discrimination
- Development of the **National Plan for the Prevention of Doping and Doping Conduct 2020-2024**
- Creation of an **automated information system for checking the integrity** of educators and licensed voluntary operators of federations
- Provide **guides on how to report** and act against illegal online betting, corruption and doping traffic, for instance
- Strengthen the **dialogue with supporters** and fight against hooliganism, through a body created for this matter
- Creation of a **national platform for the fight against the manipulation of sporting competitions** (composed by representatives of several ministries)

Jobs and careers

- **Offer of training courses for the State professional diplomas** of the animation and sport professions, such professions include, for example: Assistant Facilitator, Sports Facilitator and Educator, Coordinator/Trainer, Sports Director
- **Offer financing schemes** to training participants depending on their situation (age, employment status, need for specific qualifications, membership to a sports association and high-performance athlete)
- **Provide support mechanisms for associative employment to support its professionalisation**, including funding options and other support activities, as well as resource centre (website) with materials to support the restructuring of sports associations
- Creation of the *Dispositif* SÉSAME which aims to **support young people towards training** as a sports educator or facilitator, and to promote their integration

 Detail on the following page

A1.8 France

The French Ministry of Sport has presented a set of recovery measures for the sector, focused on supporting sports associations...

Ministry delegate for Sport: Measures of the Sport Recovery Plan - November 8 version (1/2)

After the burst of the pandemic, the Ministry of Sport worked on a set of recovery measures for the sector included in the *Plan France Relance*. The developed measures fall under the responsibility of multiple institutions and have various beneficiaries, including sports associations, companies, federations and public institutions

Beneficiary	Measures
Associations	Pass'sport: €100 million to fund a membership to a sports association for young people aged between 6 and 18 who receive the allowance for returning to school in 2021 or who receive the education allowance for children with disabilities, and for young people aged between 16 and 18 who receive the allowance for adults with disabilities. The measure is aimed at 5.4 million young people who will receive a grant of €50 for this purpose
Associations	Plan “#1jeune1solution”: €40 million to create 2 500 additional jobs for young people under 30 years old, mainly from deprived areas, within local sports associations in 2021 and 2022. A creation of a total of 7 500 jobs is estimated
Associations	Community service: Creation of 100 000 additional missions in 2020-2021, including 5 000 dedicated to sport. It benefits young people between 16 and 25 years old, and up to 30 if they are disabled. These civic service missions comprise voluntary engagement for a period of 6 to 12 months, at least 24 hours a week, in France or abroad
Associations	Dispositif SÉSAME: €12 million in 2021 to support an additional 3 000 disadvantaged young people, mainly living in priority neighbourhoods selected in the city's policies (QPV) or in rural revitalisation areas (ZRR), for careers in sport and entertainment. This initiative will affect around 6 000 young people aged from 16 to 25 by 2022
Associations	ESS (Social and Solidarity Economy) Associations Fund: €30 million for ESS associations. The amount is €5 000 for associations with 1 to 3 employees and €8 000 for associations with 4 to 10 employees
Associations	Associative life development fund (FDVA): This fund is managed at departmental level and targets small and medium-sized associations. “FDVA 2”, in its “operation-innovation” component, has existed since 2018 and covers all types of associations, including sports institutions. The “FDVA 2” budget for 2021 amasses €30 million plus an additional amount during the year from dormant association funds

A1.8 France

... as well as companies and federations, by funding infrastructure construction/ renovation, youth recruitment, digital transition of institutions, among others

Ministry of Sports: Measures of the Sport Recovery Plan - November 8 version (2/2)

Beneficiary	Measures
Associations in QPV	<p>Inter-Ministerial Committee of Cities measure: €36 million over two years to intervene in priority neighbourhoods defined in the city's policies (QPV):</p> <ul style="list-style-type: none"> • € 30 million to compensate for the lack of sports facilities and thus develop infrastructures at local level • €6 million to support and expand the activities of city centre sports associations, which support young people in their studies, training and integration
Associations & enterprises	<p>Support to encourage recruitment on apprenticeship and vocational training contracts: For companies and associations with less than 250 employees - €5 000 for under-18 years old and €8 000 for over-18 years old during the first year of the contract. This aid is also available for institutions with more than 250 employees (subject to certain conditions)</p>
Associations & federations	<p>Support to sports clubs and associations: €11 million in 2021 to support sports clubs and associations in serious difficulties</p>
Federations	<p>Digital transformation of sports federations: €8 million (€4 million per year in 2021 and 2022) to support the digital transformation of sports federations to develop new services, diversify financial resources and contribute to environmental issues</p>
Public institutions	<p>Support for the thermal renovation of sports facilities: €50 million to support local authorities wanting to modernise their facilities, with the aim of reducing their energy consumption by 30%</p>
Enterprises	<p>Support for information systems and digital sport projects: €1 million to contribute to the digitisation of sport and encourage innovation</p>
Enterprises	<p>State-backed bonds or equity loans: State financing service that generates between €10 and €20 billion of quasi-equity for investment projects by French companies, enabling companies to invest, hire and develop their activity</p>
Enterprises	<p>Exemption of contributions related to the promotion of sport in companies: Allows employers who offer sports facilities and/or activities to their employees to be exempted from part of the contributions paid to social security, with an annual ceiling equal to 5% of the monthly social security ceiling multiplied by the number of effective employees of the company</p>

A1.8 France

France enacted the Aillagon Law in 2003 which harmonises the legal framework of donations, laying down tax incentives to “*mécénat*”, including sport

Tax incentives to sports patronage

The Aillagon law and sports patronage:

- **Patronage (“*mécénat*”) is the support given by private individuals and companies to activities of general interest** such as culture, solidarity and sport, whilst not requiring any direct compensation from the beneficiary
- Recognising the **public utility of patronage** and based on the British, German and Spanish models, **France created the Aillagon Law in 2003 which harmonises the legal framework applicable to donations.**
- The law allows deductions in the **taxable income of individuals and corporations that donate sports associations to officially acknowledged and entitled (by ministerial act)**
- For many, the Aillagon Law marked a major turning point in French patronage and, nowadays, patronage has been increasingly considered a **strategic instrument for companies** given that, together with social responsibility commitments, companies can also enjoy tax reductions
- In 1979, Admical, **a French association for the development of “*mécénat*”,** was created. The association promotes patronage, conducts extensive studies on the topic, and supports organisations looking for funding as well patrons. Additionally, Admical has also contributed to the development of specific legislation on “*mécénat*”, including the Aillagon Law
- According to Admical’s latest report, patronage grew by over 122% between 2010 and 2019, reaching €2.1 billion and 104,000 companies in 2019. It is currently aimed mainly at the social sector (22%), culture and heritage (19%) and education (15%), with sport also accounting for 15%
- The main sub-domains of sports patronage are:
 1. The promotion of sport as a **vehicle for of social cohesion**
 2. The promotion of sport as a **vehicle for socio-professional integration**
 3. Sport practice development at national level

Tax reductions available:

- 1 **Income or corporate tax reductions** – The company subject to income or corporate tax can benefit from a tax reduction at two levels. The tax reduction may not exceed €20 000 or 5 % of before-tax turnover and is subtracted from the amount of corporate tax or income tax owed by the donor company in the year of the payments

Donation: ≤ €2 millions
Tax relief: 60% of the total amount

Donation: ≥ €2 millions
Tax relief: 40% of the total amount

The Aillagon Law differs from Portuguese laws in the limits of deduction, surcharges and other legal/fiscal constraints, that limit the attractiveness of the Portuguese patronage

- 2 **Reduction of solidarity tax on wealth** – The General Tax Code also provides for a reduction in solidarity tax on wealth of 75% of the amount of the donation. The donations concerned in this case are those in cash or full ownership of shares in listed companies. The tax reduction may not exceed €50 000 per year

A1.8 France

The association *Profession Sport et Loisirs* matches its pool of employers to employees, facilitating the contractual process and enabling multiple “part-time contracts” at once

National Federation *Profession Sport et Loisirs*

Profession Sport et Loisirs

- The National Federation *Profession Sport et Loisirs* (PSL) is an association established in 1990, at the request of the Ministry of Youth and Sport, tasked with **supporting the management and promotion of sport and leisure professions**, to fight against the specific constraints of the sector and to contribute to its professionalisation
- Covering all French territory, **the PSL network supports local actors in the implementation of public employment/ training and local development policies**

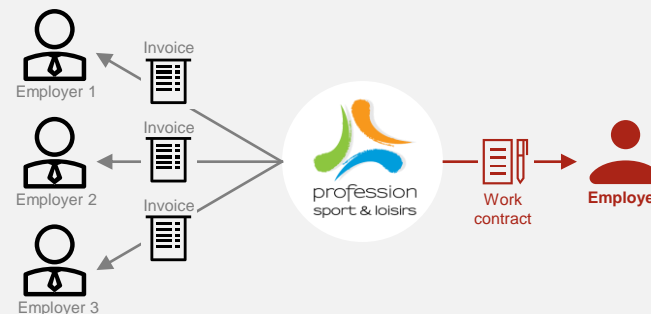
PSL network in numbers:

25 000	350
Jobs managed	Jobs counsellors
10 000	14 000
Centralised employment offers	Clubs, associations and communities

Main service areas¹

Employment – “job sharing”

- **Staff provision service** that offers associations with part-time or full-time sport professionals according to their needs
- **The Association works as the employer, relieving employers from administrative procedures.** For employees, the service provides access to an employment contract, a single pay slip, social security coverage, training rights and personalised professional support



Training

The PSL training body **offers various training courses for sport professionals**: educators (graduates or needing to obtain a diploma or certification), facilitators, development agents, managers, etc

Management

Provision of administrative and salary management procedures for sports associations, supporting the development of the structures by sharing expertise

Support for associative employers

Provision of legal and financial advice to association employers: technical and financial assessment, preparation of financing files.

Job exchange

A free service to find a job or a professional in the sport and leisure sectors. More than 10,000 job offers are centralised each year by PSL Associations

Notes: 1 - Each PSL Association may offer a different and wide range of services which may include tourism related activities and the management of educational camps for children, for example. Besides the PSL,

Sources: Fédération Nationale Profession Sport et Loisirs; PwC Analysis



Other initiatives



A1.9 Other initiatives

Other: initiatives overview

Main focus of analysis	Scope
Innovation and value creation	<p>European Platform for Sport Innovation</p> <p>The European Platform for Sport Innovation (EPSI) is a non-for profit European association based in Brussels operating as a membership-based networking organisation focusing on innovation in sport and many other areas</p>
Integrity and social responsibility	<p>Sport Integrity Global Alliance and the SIRVS</p> <p>SIGA is an organisation that aims to work towards a vision of sport played and governed under the highest integrity standards, free from any form of unethical, illicit and criminal activity, to safeguard sports values and ensure its positive impact and benefits to all citizens, issues that have been aggravated by the COVID-19 pandemic</p>
Funding	<p>EU countries' recovery and resilience plans – sport-related initiatives</p> <p>The Recovery and Resilience Facility is the EU's key instrument for the recovery from the COVID 19 pandemic. EU Member States were asked to submit their national recovery and resilience plans (RRP) of which some directly address sport to some extent</p>
Funding	<p>Other national recovery initiatives</p> <p>Multiple countries implemented a number of initiatives to mitigate the effects of the pandemic in the sport</p>

A1.9 Other initiatives

EPSI strives for a more innovation-friendly environment and believes through fostering innovation in sports as a pivotal tool to build bridges with other sectors

European Platform for Sport Innovation

- The European Platform for Sport Innovation (EPSI) is a non-for-profit European association based in Brussels which consists of a **membership-based networking organisation focusing on innovation in sport and many other areas**
- EPSI strives for a more innovation-friendly environment to stimulate **businesses development** and believes that to foster innovation in sport, the **sport must reach other neighbouring sectors** such as health, tourism, leisure, etc.
- Therefore, the organisation involves the entire sport's ecosystem and works on a **quadruple helix system**, bringing together business, academia, public authorities and end-users
- In October 2021, EPSI reached a total of **122 members from over 20 European countries** including: sports associations, federations, industry companies, clusters, research centres, universities, public authorities, and others
- EPSI's new strategic agenda until 2027, identifies the need to **strengthen the connection of sport with tourism, health and green sustainability**
- Besides organising conferences, EPSI **provides services to accelerate innovation in three pillars**

EPSI service pillars:

Lobbying & education

Through its activities, EPSI aims to increase **political awareness regarding the importance of sport** and physical activity, as well as, **increase public investment in sport**. For example, EPSI is partner of the Commission in the promotion of the EWoS

Fundraising

EPSI intends to **raise funding to innovative projects** both public and private using two distinct approaches:

- **Top-down approach** - EPSI circulates a list of all relevant European Call for Proposals for the sport, asking members to:
 1. Select the call for proposal
 2. Elaborate their innovation project concept
 3. Identify the partners they would like to work with
- **Bottom-up approach** - EPSI requests members to submit their innovative project ideas through a concept note format (summary description of the idea) to find the match with available calls, funding opportunities, and partners

To develop ideas and involve partners, EPSI periodically organises "**Brokerage Events**", in which EPSI and its consultancy partners **work on the ideas and support the preparation of fundraising applications**

Business creation

EPSI supports its member **turning ideas into business/ commercial realities**.

EPSI facilitates match-making in several ways: electronically and through face to face meetings

A1.9 Other initiatives

SIGA created an Independent Rating and Verification System to assess and rate sports organisation's level of implementation and compliance with the SIGA Universal Standards

Sport Integrity Global Alliance and the SIRVS

- SIGA works towards a vision of sport played and governed under the highest integrity standards, free from unethical and illicit behaviours such as corruption, money laundering, tax evasion, bribery, fraud in sport betting and match-fixing, issues that have been intensified by the pandemic
- SIGA was formally established in 2017 and is currently supported by over 100 members and partners from many industries, including Governments, academia, international organisations, sponsors, enterprises, NGOs and more
- As a result of significant research and expert consultation, SIGA created **Universal Standards** which is a living framework that mirrors the concerns and circumstances faced in sport in matters of integrity:
 - ✓ Good governance
 - ✓ Financial integrity
 - ✓ Sport betting integrity
 - ✓ Youth development and child protection
- This tool seeks to drive positive change in sports governance and integrity and is underpinned by guiding concepts and best practices and, as such, organisations will be encouraged to adopt and implement the **Universal Standards** following three-phased implementation process – Bronze, Silver and Gold – reflecting good, better and best practice
- Following a period of consultation and adoption of the standards, the level of compliance with the Universal Standards of participating organisations should be assessed. For this assessment SIGA developed a tool called **SIRVS**

SIRVS: SIGA Independent Rating & Verification System

- The **SIGA Independent Rating and Verification System (SIRVS)** is a central tool to contribute to “a new era of enhanced governance, integrity, transparency, and accountability”
- The purpose of SIRVS is to **assess and rate sports organisation's implementation and compliance with the SIGA Universal Standards**
- The **system was developed to meet the highest integrity standards and what investors expect from sports organisations** on this regard, ensuring their investments are protected from unethical, illicit and criminal activities
- After an independent tender process, the **British Standards Institution was awarded the bid to develop, audit and operate SIRVS** on behalf of SIGA
- After undergoing a deep evaluation process, a report is prepared and delivered to SIGA, who then awards the organisation with a Bronze, Silver or Gold rating. The certificate is valid for 3 years and every year the organisation is monitored to guarantee that best practices are maintained

European Rugby League, the first SIRVS rating (November 2021)

- The European Rugby League (ERL) was the first sports organisation to undergo the SIRVS and has become the first sporting organisation to receive the SIRVS certificate
- ERL was awarded with the Silver SIRVS rating and two areas of non-conformance were identified: directors having unlimited terms and the need to see how ERL's diversity policy will be executed

A1.9 Other initiatives


From the Recovery and Resilience Plans analysed, the cases of Croatia, Spain, France, Italy and Romania stand out, as they give considerable weight to the sport in their plans

EU countries' recovery and resilience plans: sport related initiatives overview (1/2)

Non-exhaustive

- The Recovery and Resilience Facility is the largest component of Next Generation EU and is the EU's key instrument for the recovery from the COVID-19 pandemic
- EU countries were asked to submit their national recovery and resilience plans which describe the reforms and public investment projects they plan to implement

Country	Level of emphasis on sport	Actuation type
Germany	Inexistent	
Austria	Inexistent	
Belgium	Low	Infrastructure renovation
Bulgaria	Inexistent	N/A
Cyprus	Low	Infrastructure development
Croatia	Medium	Infrastructure development; Improvement of information systems
Denmark	Inexistent	N/A
Slovakia	Inexistent	N/A
Slovenia	Low	Improvement of information systems
① Spain	High	Promoting business meetings; Organising events; Promoting sports tourism; Developing infrastructures; Digital transformation; Promoting research
Estonia	Inexistent	N/A
Finland	Inexistent	N/A

 Detail on page 195


A1.9 Other initiatives


Infrastructure development is highlighted in 5 cases, although with low to medium emphasis on sport

EU countries' recovery and resilience plans: sport related initiatives overview (2/2)

Non-exhaustive

Country	Level of emphasis on sport	Actuation type
② France	High	Job creation; Increasing the number of people benefiting from SESAME
Greece	Inexistent	
Hungary	Low	Mentioned its importance in the context of social inclusion
Ireland	Inexistent	
③ Italy	Medium	Infrastructure development
Latvia	Inexistent	
Lithuania	Low	Promotion of sport practice; Infrastructure development
Luxembourg	Inexistent	
Malta	Inexistent	
Poland	Low	Promotion of sport practice
Portugal	Low	Boosting social inclusion through sport
Czech Republic	Inexistent	
Romania	Medium	Infrastructure development; Literacy programmes for athletes; Support youth access to recreational and sports centres
Sweden	Inexistent	

 Detail on page 196

 Detail on page 197

A1.9 Other initiatives

The Spanish plan includes 10 different areas of action, including sport, considering a wide array of policies to promote cultural and sports industries

🔍 1 Spanish Recovery and Resilience Plan

Non-exhaustive

The Spanish RRP is structured around **10 areas**:

- I. Urban and rural agenda and combating depopulation
- II. Infrastructure and resilient ecosystems
- III. Fair and inclusive energy transition
- IV. Administration for the 21st Century
- V. Modernisation and digitalisation of the industrial fabric and SMEs, recovery of tourism and promotion of an Entrepreneurial Nation
- VI. Pact for science and innovation; strengthening the capacity of the Single Health System
- VII. Education and knowledge, continuous training and capacity building
- VIII. New care economy and employment policies
- IX. **Promotion of the cultural and sport industry**
- X. Modernisation of the tax system for sustainable and inclusive growth



IX. Promotion of the culture and sport industry

- Under the **IX axis**, **3 sets of policies/ action lines** with different focuses are mentioned: culture industry, Spain's audio-visual hub and **the sport**.
- In the scope of the promotion of sport, one should highlight:
 - ✓ Potentiating **business meetings**
 - ✓ Organisation of **major sporting events**
 - ✓ Promotion of **sports tourism**
 - ✓ Development of **sustainable infrastructures**
 - ✓ **Digital transformation** of sports organisations
 - ✓ Promotion of **research on health enhancing sports activities**
 - ✓ Plan for the **modernisation of sports infrastructures**, high-performance centres and sports equipment

The Spanish Government has allocated **€315 million** for the sport in 2022, **“acknowledging sport as an economic and social engine, and not just as pure competition”**

This **record high figure of public investment in sport** was only possible thanks to the European funds of the Recovery and Resilience Facility

A1.9 Other initiatives

The French government plans to invest through “France Relance” nearly €40 million in the professionalisation of sport, targeting young people

🔍 2 French Recovery and Resilience Plan

Non-exhaustive

- The plan “France Relance” targets three main areas of action: Ecology, Competitiveness and Cohesion
- Under the Cohesion area, the plan mentions two measures with action in the sport:
 - ✓ **Doubling the number of young people supported** in sport and entertainment professions
 - ✓ **Create jobs for young people** in sport

	Double the number of disadvantaged young people supported in sport and entertainment professions	Jobs for young people in sport
Current problem	SESAME is a programme directed to support the training of young people in the sport and to finance courses to professional qualification. Currently it is unable to meet all the requests	High weight of voluntary work vs employees with contracts
Initiative description	Supporting over 3 000 young people by 2023	Financing 2 500 new jobs for young people by 2022
Impacts	<ul style="list-style-type: none"> • Improving youth training and promotion of professional integration 	<ul style="list-style-type: none"> • Development of youth employment in sport • Development of sport in France • Evolution and innovation in the provision of sporting practices; Increased management capacity and professionalisation of French sport
Indicators	<ul style="list-style-type: none"> • Number of beneficiaries • Graduation success rate (target: 70%) • Percentage of permanent contracts at the end of training 	<ul style="list-style-type: none"> • Numbers of jobs for young people • Sustainability rate of subsidised jobs • Heighten the amount of professionals
Territory	All territory	All territory
Cost	€ 12 million	€ 25 million
Timeline	1 500 young people in 2021 and 1 500 in 2022	2020 and 2021

Source: Plan France Relance; PwC Analysis

A1.9 Other initiatives

The Italian recovery plan includes the renovation/ construction of sports facilities as pivotal to enhance education services and social inclusion

3 Italian Recovery and Resilience Plan

Non-exhaustive

- The Italian recovery plan is built around **6 Missions**. In the scope of **Mission 4 "Education and Research"**, one of the components is the **"Enhancing the service offer in education"**, where one of the main investments is the **renovation/construction of sports infrastructures in schools**
- Additionally, in **Mission 5 "Inclusion and Social Cohesion"**, under the scope of the component **"Social Infrastructure, families, communities and tertiary sector"**, sport is mentioned as one of the investments

Strengthening the infrastructure for sport at schools

- The Government commits to invest **€300 million to renovate/ build 400 sports facilities by 2026**
- The implementation of sports facilities attached to schools makes it possible to achieve a **double objective**:
 - ✓ **promoting sport and physical activity in schools**
 - ✓ **making the facilities available to the whole local community**, outside school hours, through agreements with the same schools, local authorities and sports and amateur associations
- It encourages a **greater openness of schools and facilities** for the benefit of the whole local community

Sport and social inclusion

- The investment aims to **recover urban areas with a focus on sports equipment and the creation of equipped urban parks**, in order to promote social inclusion and integration, especially in the most disadvantaged areas and with particular attention to disadvantaged people
- The project is divided into **three phases of implementation**:
 - I. **preliminary analyses and actions** necessary to improve public procurement, such as identification and basic analysis;
 - II. **start-up phase and implementation** of the selected projects;
 - III. **monitoring and verification** of project's implementation

A1.9 Other initiatives

Financial support, tax and rent exemptions and advance payments were some of the initiatives implemented to mitigate the pandemic's hazards

Other national recovery initiatives

Non-exhaustive


The Irish government has granted a €70 million fund to **support federations, sports organisations, clubs, etc.** Also the Swedish government and the Swedish Sports Confederation have launched a €96 million fund to **alleviate the loss of income for organisations**



Most initiatives granting **exemption or deferral of taxes, rents and social security payments** have been implemented by governments. For example: France - exemption from social security payments for SMEs, Netherlands - compensation mechanism covering rent expenses and Lithuania - rent, property tax waivers, etc.



Some countries have **changed TV broadcasting agreements and rights**, such as extending fee payment deadlines (Germany) and renegotiating match broadcasting fees (France)



Specific measures in Germany, Italy and Poland have allowed the **introduction of vouchers instead of cash refunding of sporting events tickets**



The Romanian government has granted a **voucher of €100 to purchase sports equipment for children who maintain their membership in the sports club for more than a year.** This measure supports grassroots sports clubs and organisations with sports retailers



Several governments and international sports bodies have proposed advance payments. For example, the National Sports Agency in France has brought forward the payment of subsidies to sports associations and the Higher Sports Council in Spain has anticipated the payment of grants to federations



The Romanian government has created a **specific regime to support freelancers** and those working under "sports activity contracts", so that they benefit from the same conditions as workers under individual employment contracts



Additional detail

Stakeholders' auscultation

A2. Stakeholders' auscultation

During the development of the study, four interviews were conducted with sport stakeholders, addressing topics such as the sport labour market, innovation and integrity

Interviews conducted

Stakeholder interviews

Throughout this project, a **collaborative approach was developed with the promoting entity**, Comité Olímpico de Portugal, in order to share information and knowledge about the sector

In addition, in parallel with contributions from the Portuguese NOC, **four additional relevant international sport stakeholders were selected and interviewed**, allowing the collection of insights on related themes:

- Main sport trends and challenges
- European sport labour market
- Innovation in sport

Date	Entities	Interviewees	Topics addressed in the meeting
10 th November	EASE - European Association of Sport Employers	Stanislas Breuil Project Officer Hugo Petit Jean Project Manager	<ul style="list-style-type: none"> • Understanding key trends in the European labour market in sport • Understand the main challenges with sport employment • Identification of best performing countries in sport employment practices and initiatives
15 th November	CONI - Italian National Olympic Committee	Pastore Giampiero Sports Science Manager	<ul style="list-style-type: none"> • Understanding of key changes in high-performance sport • Brief clarification on CONI Servizi and Istituto per il Credito Sportivo operations • Presentation of CONI initiatives
18 th November	EPSI - European Platform for Sport Innovation	Alberto Bichi Executive Director	<ul style="list-style-type: none"> • Clarification of the concept of innovation in sport • Presentation of EPSI's operation model to foster innovation • Identification of relevant innovation topics related to sport
29 th November	SIGA - Sport Integrity Global Alliance	Emanuel Macedo de Medeiros Global CEO	<ul style="list-style-type: none"> • Identification of main trends in sport • Presentation of key integrity threats to sport • Identification of possible ways to address integrity issues in sport and specific initiatives marking progress in this matter (G20 and SIRVS)



Additional detail

List of abbreviations

A3. List of abbreviations

List of abbreviations (1/3)

Acronym	Denotation
ADB	Support Plan for grass-root sport; ADB - Apoyo al Deporte Base
AEIP	Events of Exceptional Public Interest; AEIP - Acontecimientos de Excepcional Interés Público
BISp	Federal Institute of Sport Science; BISp - Bundesinstitut für Sportwissenschaft
BMI	Federal Ministry of the Interior; BMI - Bundesministerium des Innern und für Heimat
CAGR	Compound annual growth rate
CED	Centre for Sport Studies; CED - Centro de Estudios del Deporte
CIP	Italian Paralympic Committee; CIP - Comitato Italiano Paralimpico
CONI	Italian National Olympic Committee; CONI - Comitato Olimpico Nazionale Italiano
COVID-19	Coronavirus Disease 2019 is an infectious disease caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2)
CRII	Coronavirus Response Investment Initiative
CRII+	Coronavirus Response Investment Initiative Plus
CSD	Supreme Council for Sport; CSD - Consejo Superior de Deportes
CULT	Committee on Culture and Education
DCMS	Department of Culture, Media and Sport
DG EAC	Directorate-General for Education, Youth, Sport and Culture
DHSC	Department of Health and Social Care

Acronym	Denotation
DOSB	German Olympic Sports Confederation; DOSB - Deutscher Olympischer Sportbund
EC	European Commission
EIS	English Institute of Sport
EP	European Parliament
EPSI	European Platform for Sport Innovation
Erasmus+	European Union programme for education, training, youth and sport
ERL	European Rugby League
ESS	Social and Solidarity Economy; ESS - Économie sociale et solidaire
ESSD	European School Sport Day
EU	European Union
EWoS	European Week of Sport
FAMI	Asylum, Migration and Integration Fund
FDVA	Associative life development fund; FDVA - Fonds pour le développement de la vie associative
FES	Institute for Research and Development of Sports Equipment; FES - Institut für Forschung und Entwicklung von Sportgeräten
FIFA	International Federation of Association Football; FIFA - Fédération Internationale de Football Association
G20	Group of Twenty

A3. List of abbreviations

List of abbreviations (2/3)

Acronym	Denotation
GDP	Gross domestic product
GVA	Gross value added
HEPA	Health enhancing physical activity
HR	Human resources
IAT	Institute for Applied Training Science; IAT - Institut für Angewandte Trainingswissenschaft
ICS	Istituto per il Credito Sportivo
IEJO	Special online gambling tax; IEJO - Imposto especial sobre o jogo online
IOC	International Olympic Committee
IPDJ	Portuguese Institute of Sport and Youth; IPDJ - Instituto Português do Desporto e Juventude
IREF	Independent regulator for English football
IT	Information technology
KPIs	Key performance indicators
LGBTI	Lesbian, gay, bisexual, transgender and intersex
N/A	Not applicable
NGBs	National Governing Bodies
NGOs	Non-governmental organisations
NGSO	National Sports Governance Observer
NOC	National Olympic Committee

Acronym	Denotation
OSPs	Olympic Training Centres; OSP - Olympiastützpunkte
PotAS	Potential Analysis System; PotAS - Potenzialanalyse-System
PPS	Purchasing power standard
PSL	Profession Sport & Loisirs
PwC	PricewaterhouseCoopers – Assessoria de Gestão, Lda.
QPV	Priority neighbourhoods defined in the city's policies; QPV - Quartiers prioritaires de la politique de la ville
R&D	Research and development
RRP	Recovery and Resilience Plan
SAD	Public limited sports company; SAD - Sociedad Anónima Deportiva
SHARE	SportHub: Alliance for Regional Development in Europe
SIGA	Sport Integrity Global Alliance
SIRVS	SIGA Independent Rating & Verification System
SMEs	Small and midium-sized enterprises
SMK	Conference of Sports Ministers; SMK - Sport Minister Konferenz
SSG	Spain Sports Global
SURE	European instrument for temporary support to mitigate unemployment risks in an emergency
SURF	Sport information portal SURF; SURF - Sport und Recherche im Fokus
TA	Trainer Academy; TA - Trainerakademie

A3. List of abbreviations

List of abbreviations (3/3)

Acronym	Denotation
UEFA	Union of European Football Associations
UK	United Kingdom
URJC	Rey Juan Carlos University
ZRR	Rural revitalisation areas; ZRR - Zones de revitalisation rurale



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