

# GSIC

Global Sports Innovation Center

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## SPORT & INNOVATION: GLOBAL SOCIAL ACCELERATORS IN THE POST-COVID WORLD

Maps, Data and the Future of Our Multilateral  
Eco-System



Mitigating the Impact of the Pandemic on the Sport Eco-System: the role of public/private innovation

IN COLLABORATION WITH

**Sport**  
SINGAPORE

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## **1. WORKING GROUP PHILOSOPHY – AND OUR GSIC APPROACH**

The world is facing an unprecedented challenge and its consequences. The world of sport is not an island, isolated from global socio-economic phenomena, and it has been heavily impacted by COVID-19. While governments have tried to find a formula between prudence and policy activism in mitigating the impact of the Pandemic on the Sport Eco-System, international organizations, governments and sport bodies have always encouraged the citizens of the world to remain active and to adopt a healthy life-style.

What kind of future do we wish to design? What kind of societal and economic adaptation strategies can we imagine? How do we wish to create the solutions for the next generation of leaders in the Sport Eco-System?

The world is accelerating in its path towards the future in terms of innovation, societal transformation and technological adaptation. "The spread of COVID-19 has shaken people's lives around the globe in an extraordinary way, threatening health, disrupting economic activity, and hurting wellbeing and jobs" – wrote Laurence Boone (OECD Chief Economist[1]). But she continued: "Governments must seize this opportunity to engineer a fairer and more sustainable economy".

But are we – as Sport Eco-System – on the radar?

The Global Sport Innovation Centre powered by Microsoft – as a non-profit organization connecting different players in the sport industry, as a unique hub with over 350 members from all over the world and as the global reference point at a global level on digital transformation in the sport eco-system – wishes to contribute to identify a sustainable and long-term path towards the future. We do this by offering a "space for reflection" and a "space for action" to stakeholders of our Global Sport Community.

### **A call for Multilateralism: Creating an inter-disciplinary reflection**

We are walking on a tightrope and – at first sight – we might say that we are missing a conceptual map for the future. This GSIC Inter-Governmental Working Group want to reverse this approach. We are not born in a vacuum and we want to articulate a call for multilateralism in our future society: we need to create an inter-disciplinary reflection and the world of sport needs to be part of this new social understanding.

With this initiative, we aim to **monitor, explore and innovate** the status quo, by providing to governments and non-governmental organizations a platform to **share, exchange and update their future strategies for the Sport Eco-System**.

With the help of enlightening leaders from the world of practice, we kick-started this global reflection and this report – we hope – deepens our inter-national understanding on the multifaceted challenges facing our society and the Sport Eco-System.

The title of this report articulates a dual vision, a balancing act between sport and innovation for the post-COVID world. We strongly believe that sport should be included in the reflection for post-COVID recovery and sport could be a global social accelerator. In order to achieve this Weltanschauung, we need conceptual maps guiding us, data supporting our ideas and a strong belief in the future of our multilateral eco-system. Only with these instruments we will be able to mitigate the impact of the pandemic on the Sport Eco-System and only with innovation (both public and private) we will remain relevant in tomorrow's society.

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[1] L. Boone, "Editorial: After the lockdown, a tightrope walk toward recovery" in OECD Economic Outlook, Volume 2020 Issue 1.



## FURTHER DEEPENING AN INCLUSIVE CONVERSATION ON SPORT, INNOVATION AND OUR GLOBAL SOCIETY

We believe that this is an extra-ordinary moment and, as Pope Francis recently wrote, it is a time to "get into the game and get involved"[2]. For this reason, we need to deepen an inclusive conversation on sport, innovation and our Global Society. The Sport Eco-System needs to champion sport and its practice, its social dimension and its potential environmental (role-model) impact in the future. We believe that governments and policy-makers are striking a delicate balance between prudence and policy activism, but **we want to avoid that the "COVID gap" becomes a "generational gap"**. For this reason, we need pragmatism, creativity and "thinking outside the box" – also with the help of innovation.



GSIC and the GSIC Community[3] have established, coordinated and finalized the **"Inter-Governmental Working Group"**. Our objectives were:

1. Enabling a global reflection on Innovation and Sport in the post-COVID landscape, using a methodology of "open innovation";
2. Placing Sport (and Innovation) at the forefront of post-pandemic recoveries;
3. Exploring new social formulae for mitigating the impact of pandemics on the Sport Eco-System via "digital transformation".

## RAISE AWARENESS: MAKE VISIBLE THE "INVISIBLE HAND" OF THE SPORT ECOSYSTEM/INNOVATION

Whereas the health and socio-economic impact of COVID-19 on the sport eco-system is being monitored by different institutions and organizations[4], we will promote and empower a global reflection on innovation and sport, future trends and new opportunities in the post-COVID landscape.

The unintended consequence of a crisis is to unleash new opportunities for the future. As Satya Nadella, CEO of Microsoft, stated "We've seen two years' worth of digital transformation in two months"[5] during the crisis, as COVID-19 impacted every aspect of work, life and sport globally.

Innovation can provide a technological and a social response to our challenges. **Innovation can be an enabler for new ways of life. Innovation can transform and mitigate the impact of COVID-19 also on the Sport Eco-system.**

[2] Pope Francis, "Mettersi in gioco. Pensieri sullo sport", Libreria Editrice Vaticana, 2020.

[3] GSIC has published a catalogue of solutions that can help mitigate COVID impact on the sports industry and it can be downloaded here: <https://sport-gsic.com/reports/>

[4] [https://www.eurooffice.eurolympic.org/files/position\\_paper\\_COVID-19%20final\\_revision.pdf](https://www.eurooffice.eurolympic.org/files/position_paper_COVID-19%20final_revision.pdf)

See the consultation promoted by European Commission <https://www.umfragen.spea.at/index.php/555739?lang-en>

[5] [www.microsoft.com/en-us/microsoft-365/blog/2020/04/30/2-years-digital-transformation-2-months/](https://www.microsoft.com/en-us/microsoft-365/blog/2020/04/30/2-years-digital-transformation-2-months/)

## 2. THE SPORT ECO-SYSTEM: DO WE HAVE A MAP?

With intellectual honesty we have to ask radical questions for the future in order to clarify our understanding and in order to enlighten the way forward. The first question we would like to ask is: do we have a map? Or – alternatively – are we as Sport Eco-System on the radar of governments and international organizations?

### WHERE DOES SPORT STAND IN THE PRIORITY LIST OF OUR SOCIETY?

If we look at major international summits, sport is nowhere to be seen: the IMF/World Bank Spring Meetings do not have a session dedicated to sport[6], their focuses on Policy Responses to COVID-19 does not address sport[7] and while the IMF Managing Director calls for strong G20 policies to counter “dangerous divergence” in the world economy[8], the G20 does not have a track dedicated to sport.

This is a universal observation which applies also to other international organization[9], international commissions[10] or international media attention[11].

However, it is fundamental to stress how sport – also in its economic dimension (without considering health or social benefits) – is strategic for the future of our society. According to calculation by the European Union[12], in 2020 the overall sport sector accounted for 2.15% of the EU global GDP (EUR 363,3 billion euros) and the total employment generated by sport activities amounted to 6,46 million people 2.84% of the total EU employment). Convergingly, also in the United States, according to an NBER paper by Justin Wolfers (then at Stanford), “the Sports industry is the 11th largest, reflecting around \$152 billion of output, or just over 2% of GDP” [13].

### THE PANDEMIC IMPACTED AND REINFORCED THE STRATEGIC SIGNIFICANCE OF SPORT/HEALTHY LIFESTYLES

Furthermore, as the International Olympic Committee (IOC) President Thomas Bach recalled in his New Year’s video-message, the role of sport in different aspects of society has been strengthened during the COVID-19 pandemic: “The role of sport for physical and mental health, the role of sport for our social life, the role of sport for our economic life has been recognized widely”[15].

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[6] <https://meetings.imf.org/en/2021/Spring/Schedule>

[7] <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19>

[8] <https://www.imf.org/en/News/Articles/2021/02/26/pr2147-g20-imf-md-kristalina-georgieva-calls-strong-g20-policies-counter-dangerous-divergence>

[9] Pope Francis, “Mettersi in gioco. Pensieri sullo sport”, Libreria Editrice Vaticana, 2020.

[10] GSIC has published a catalogue of solutions that can help mitigate COVID impact on the sports industry and it can be downloaded here: <https://sport-gsic.com/reports/>

[11] [https://www.euoffice.euolympic.org/files/position\\_paper\\_COVID-19%20final\\_revision.pdf](https://www.euoffice.euolympic.org/files/position_paper_COVID-19%20final_revision.pdf) See the consultation promoted by European Commission

<https://www.umfragen.spea.at/index.php/555739?lang=en>

[12] [www.microsoft.com/en-us/microsoft-365/blog/2020/04/30/2-years-digital-transformation-2-months/](https://www.microsoft.com/en-us/microsoft-365/blog/2020/04/30/2-years-digital-transformation-2-months/)

[13] <http://users.nber.org/~jwolfers/Papers/Comments/The%20Business%20of%20Sports.pdf>

[14] <https://www.olympic.org/news/sport-and-physical-activity-should-be-part-of-post-covid-19-recovery-plans-say-governments> ; <https://www.olympic.org/news/ioc-president-thomas-bach-stresses-power-of-sport-in-post-coronavirus-world-recovery-calls-for-solidarity-and-non-discrimination> ; <https://www.olympic.org/news/the-ioc-joins-global-un-dialogue-reiterates-role-of-sport-in-post-covid-world>

[15] <https://www.olympic.org/news/ioc-president-highlights-increased-role-of-sport-and-solidarity-in-new-year-s-message>

This has been achieved through a number of initiatives, including the “#StayStrong #StayActive #StayHealthy” campaign, a new cooperation agreement with the World Health Organisation (WHO) and the “Healthy Together” campaign in partnership with the United Nations (UN) and WHO.

The WHO has demonstrated its leadership in publishing "Guidelines on physical activity and sedentary behaviours"[16] and teamed up also with FIFA to "Pass the message to kick off the Coronavirus"[17]. While this campaign has adopted in the early phase of the new COVID-19 world, we believe sport is also beneficial as an element of well-being and innovation could play a crucial role also in the post-COVID-19 strategies of recovery – also in the sport eco-system campaign has been adopted in the early phase of the new COVID-19 world, we believe **sport is also beneficial as an element of well-being and innovation could play a crucial role** also in the post-COVID-19 strategies of recovery – also in the sport eco-system.

The United Nations[1] focused specifically on "The impact of COVID-19 on sport, physical activity and well-being and its effects on social development", underlining that "the WHO recommends 150 minutes of moderate-intensity or 75 minutes of vigorous-intensity physical activity per week"[19].

As the Member States of the **European Union** recognized, "Citizens' daily life had to be adjusted as well. Staying and working from home, social distancing and limited opportunities for regular physical activity can be very detrimental to the overall wellbeing of citizens. The full and partial lockdowns have shown that offering opportunities to practice sport and maintain physical activity in these unprecedented circumstances, while staying or working from home, is important for the physical and mental health".

Still, they underline that "further efforts at local, national, regional and EU levels can be necessary to protect and support the sport sector and maintain sport's contribution to the physical and mental health of our citizens[20] and the development of our society in the current pandemic situation as well as in the context of exit and post-pandemic resumption strategies"[21].

Finally, in this direction, inspiring works have been published also by the Commonwealth[22], the World Federation of the Sporting Goods Industry[6] and Philippe Furrer[7]. They all go in the direction of articulating a vision on sport and on the role of sport in the future of our society – and in our economy.

## MULTIPLE AGENDAS – AND THE CONSEQUENCES OF THE PANDEMIC ON SPORT/INNOVATION

**However, the world of sport has also demonstrated an extra-ordinary leadership, resilient innovation and multiple silent revolutions:** growing **digital** initiatives, strengthening the governmental encouragement to "**stay active**" (while respecting the limitations of anti-COVID measures) and untapping the potential of **innovation** – both social as well as technological – in sports.

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[16] <https://www.who.int/publications/i/item/9789240015128>

[17] <https://www.who.int/campaigns/connecting-the-world-to-combat-coronavirus/pass-the-message-to-kick-out-coronavirus>

[18] "The impact of COVID-19 on sport, physical activity and well-being and its effects on social development", United Nations Department of Economic and Social Affairs – Policy Brief 73, 15 May 2020. <https://www.un.org/development/desa/dspd/2020/05/covid-19-sport/>

[19] <https://www.who.int/news-room/fact-sheets/detail/physical-activity>

[20] Council Recommendation on promoting health-enhancing physical activity across sectors 2013/C 354/01. See the role of the "Tartu Call for a Healthy Life-Style" [https://ec.europa.eu/sport/sites/sport/files/ewos-tartu-call\\_en.pdf](https://ec.europa.eu/sport/sites/sport/files/ewos-tartu-call_en.pdf)

[21] "Conclusions of the Council and the Representatives of the Governments of the Member States meeting within the Council on the impact of the COVID-19 pandemic and the recovery of the sport sector", June 2020. <https://www.consilium.europa.eu/media/44622/sto8926-en20.pdf>

[22] Commonwealth, "The Implications of COVID-19 for Community Sport and Sport for Development", Commonwealth Moves – A special focus on Sport, Physical Activity and Covid-19, 2020/01. <https://thecommonwealth.org/our-work/society-young-people/commonwealth-moves>

[23] McKinsey & World Federation of the Sporting Goods Industry, "Sporting Goods 2021: The Next Normal for an Industry in Flux", January 2021. <https://wfsqi.org/2021/01/sporting-goods-2021-the-next-normal-for-an-industry-in-flux-sabine-becker-and-alexander-thiel/>

[24] Philippe Furrer et al., "Sport & Finance for Development (SF4D) – Transforming young people's lives through sport, physical activity and active play", June 2020 <http://inspoweredby.ch/sf4d/>

While the OECD – like all multilateral governance institutions – is calibrating and calculating the impact and the recovery strategies[25], its Chief Economist concludes: **“Extraordinary policies will be required to walk the tightrope towards recovery (...). Governments must seize this opportunity to engineer a fairer and more sustainable economy”**[26].

**We believe this is also true for the Sport Eco-System and its Stakeholders – and we believe sport and innovation can act as global social accelerator in the post-COVID recovery)**

Innovation is a “window of opportunity” – also for the Sport Eco-System. We have discovered that in dark times, the spirit of innovation can thrive and vaccines for COVID-19 were developed with dexterity and scientific collaboration. Now, we are facing a new decade, described by The Economist as “The Roaring 20s? Towards a new era of innovation”.



“For much of the past decade the pace of innovation underwhelmed many people—especially those miserable economists. Productivity growth was lackluster and the most popular new inventions, the smartphone and social media, did not seem to help much. Their malign side-effects, such as the creation of powerful monopolies and the pollution of the public square, became painfully apparent. Promising technologies stalled, including self-driving cars, making Silicon Valley’s evangelists look naive. Security hawks warned that authoritarian China was racing past the West and some gloomy folk warned that the world was finally running out of useful ideas.

Today a dawn of technological optimism is breaking. The speed at which covid-19 vaccines have been produced has made scientists household names. Prominent breakthroughs, a tech investment boom and the adoption of digital technologies during the pandemic are combining to raise hopes of a new era of progress: optimists giddily predict a “roaring Twenties”. Just as the pessimism of the 2010s was overdone—the decade saw many advances, such as in cancer treatment—so predictions of technological Utopia are overblown. But there is a realistic possibility of a new era of innovation that could lift living standards, especially if governments help new technologies to flourish.”

[25] <http://www.oecd.org/coronavirus/en/#data>

[26] [https://read.oecd-ilibrary.org/view/?ref=134\\_134050-v19v5n2kkt&title=Editorial-After-the-lockdown-a-tightrope-walk-toward-recovery/](https://read.oecd-ilibrary.org/view/?ref=134_134050-v19v5n2kkt&title=Editorial-After-the-lockdown-a-tightrope-walk-toward-recovery/)

[27] <https://www.economist.com/leaders/2021/01/16/why-a-dawn-of-technological-optimism-is-breaking>

## THE WISDOM AND THE PERSPECTIVE OF PROF. MICHAEL SPENCE – NOBEL PRIZE LAUREATE IN ECONOMICS.

In this GSIC Working Group, we were convinced that we had to broaden the reflection. For this reason, we have asked for intellectual enlightenment to a series of external mentors: some of them work in the sport eco-system, some of them do not – as we wanted to open the field to external views, to deepen our understanding through inter-disciplinary thinking and to challenge the conventional wisdom.

"On the economic side, the responses have been largely the right ones: very large fiscal programs (to the extent that the fiscal space permitted) in order to protect vulnerable people and trying to prevent unnecessary business failures: it's obviously an imperfect instrument with implementation problems, but it represented the right idea. At a macro level, the net consequence of that is an enormous increase in debt (mostly sovereign debt)[28] and we will witness a very slow normalization pattern. And this does have effect in the long term".

"Leaders are trying to find the right balance between economic openness and containment of the virus itself"[29].

A big problem in terms of the impact of the pandemic is whether we will move towards de-globalisation. There is chaos (generally speaking), little consensus and a Trust Deficit (in Institutions), as Prof. Spence captured brilliantly in a piece:

"The problem, as we warned back in 2012, is that we are living in an era of policymaking paralysis. "Government, business, financial, and academic elites are not trusted," we wrote. "Lack of trust in elites is probably healthy at some level, but numerous polls indicate that it is in rapid decline, which surely increases citizens' reluctance to delegate authority to navigate an uncertain global economic environment." Change those last words to "navigate a highly chaotic public-health and economic shock," and the statement loses none of its relevance today[30].

"The relationship between the pandemic and innovation is a double-edged sword. An important way to think about the pandemic is that it has accelerated a number of trends that were already underway. When I look at it the two most striking things are an astonishing acceleration of digital transformation/adoption (you might think of it as the continuation of a trend that was already underway, but it's an incredible acceleration in multiple dimensions – healthcare, ecommerce, fintech/mobile payments...this is associated with inclusive growth pattern, commerce, growth patterns of mobile payments) and - this is a bit more speculative – the renewed commitment, especially in Europe, to the sustainability agenda. I think it's serious, I have listened to the President of the European Commission giving a speech[31]. at the Inauguration of the Academic Year at Bocconi and President von der Leyen is very impressive and sustainability was a major theme.

We have been wrestling with inequality issues for a long period of time but the pandemic has been a catastrophe from a distributional point of view – both domestically and internationally" [32].

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[28] Draghi on subsidies and the hope for the next generation...towards a new sustainable, fair and inclusive model of development?

[https://www.corriere.it/economia/finanza/20\\_agosto\\_18/meeting-2020-l-intervento-integrale-mario-draghi-592e01aa-e131-11ea-b799-96c89e260eb4.shtml](https://www.corriere.it/economia/finanza/20_agosto_18/meeting-2020-l-intervento-integrale-mario-draghi-592e01aa-e131-11ea-b799-96c89e260eb4.shtml)

For the consequences of debt in the post-COVID world: see the G30 Report – co-chaired by Prof. Mario Draghi and Prof. Raghuram Rajan, "Reviving and Restructuring the Corporate Sector Post-Covid: Designing Public Policy Interventions" <https://group30.org/publications/detail/4820>

[29] [www.luohanacademy.com/PET](http://www.luohanacademy.com/PET); [www.luohanacademy.com/indices/covid19/overview](http://www.luohanacademy.com/indices/covid19/overview); <https://voxeu.org/article/five-lessons-tracking-global-pandemic-economy>

[30] [www.project-syndicate.org/onpoint/covid-19-and-the-trust-deficit-by-david-w-brady-and-michael-spence-2020-04](http://www.project-syndicate.org/onpoint/covid-19-and-the-trust-deficit-by-david-w-brady-and-michael-spence-2020-04)

[31] [https://ec.europa.eu/commission/presscorner/detail/en/speech\\_20\\_2237](https://ec.europa.eu/commission/presscorner/detail/en/speech_20_2237)

[32] For a deeper analysis on the relationship between innovation and the pandemic: <https://www.ineteconomics.org/perspectives/podcasts/how-digital-technology-and-the-pandemic-will-accelerate-transformations> and <https://www.ineteconomics.org/events/pandemics-and-innovation> (Festival of Economics, Trento/Italy, June 2020)



"On the positive side there is a renewed appreciation I would hope that international cooperation is essential (living within planetary boundary, maintaining relatively open global economy, climate change) - because we saw that it is highly necessary. There is a reasonable chance in selected areas to have more effective international cooperation in the future".

In order to navigate difficult and challenging times, we asked Prof. Spence for advice on the way forward and on conceptual maps for practitioners: "I think this is not something you can do overnight but there is a renewed appreciation of the importance of resilience in all of our systems (from business to national systems - in terms of more attention and more investments) - it is not a single agenda, but a collection of things and perspective for the future. I would elevate this importance on everybody's agenda and I would be elevating the importance of investing in digital, inclusiveness/growth patterns and sustainability. The challenge is implementation".

"I do not know how to deal with the question asking which organization and which processes will lead a successful restructuring of global institutional governance, with realistic and pragmatic attention to fundamental differences/constraints in the value system. Do we have the institutional structures to conduct a high-level international conversation on how to undertake this restructuring? There are lots of good ideas emerging, but we still cannot see the end of the tunnel".

Gabriela Ramos (UNESCO) stated: "It's always fascinating to listen to Mike: He has all the knowledge and the humble attitude to recognize we are living in uncertain times - and uncertainty is the most difficult thing to deal with. We are starting to look at the end of the tunnel with the vaccine, but we still have many doubts. The next pandemic is climate and we need to build a resilient system".

"I think the first order of business is to get it on the agenda (and the pandemic would have helped us to do that) and to identify why (at least the academic contribution is to justify why) we are on autopilot: we tend to underinvest in normal circumstances. This takes you to give concrete reasons for public sector intervention with appropriate leadership - networks too efficient, and lack resilience because decentralization, no incentive to public goods/network for individual players to invest..Bill Gates after the Ebola crisis warned us - in many governments, the bureaucracy took seriously, but the politics side-tracked it...it's going to be a struggle on the challenge, but I am consciously optimistic we are heading in the right direction...".

For a wider perspective on COVID-19 and the transformation of the global economy, please refer to the general work of the Commission on Global Economic Transformation, chaired by Prof. Michael Spence and Prof. Joseph Stiglitz [www.ineteconomics.org/research/programs/global-commission](http://www.ineteconomics.org/research/programs/global-commission) and in particular to "Technological Disruption in the Global Economy" [www.ineteconomics.org/uploads/papers/INET\\_CGET\\_Technology\\_Meeting-Report\\_4-22-19.pdf](http://www.ineteconomics.org/uploads/papers/INET_CGET_Technology_Meeting-Report_4-22-19.pdf) and "The Pandemic and the Economic Crisis: A Global Agenda for Urgent Action" [www.ineteconomics.org/uploads/papers/INET-Commission-Interim-Report.pdf](http://www.ineteconomics.org/uploads/papers/INET-Commission-Interim-Report.pdf)

### **3. IF WE DO, THE MAP IS "PATCHY" ...**

We were reminded just one year ago COVID-19 changed our world. We need to think what an extraordinary year it has been in our own experience and in terms of the impact on countries/community/globally. But the collective communication emerged into our world just on December 31st 2019 (when the China WHO Office had been alerted by correspondents within China to be precise).

This triggered us and reminded us that the local to the global and back to the local, is absolutely a story of COVID and the unfolding response. And that's the challenge we have to work locally and to coordinate globally in the sport eco-system.

The big question is whether we are doing enough or well-enough in terms of Sport and the COVID-19 responses. Is the map patchy for the Sport Eco-System? Is the Sport Eco-System fragmented?

Because if we think of the role of WHO and multinational coordination at the centre of WHO agenda, we find a timeline both fascinating and informative.

<https://www.who.int/emergencies/diseases/novel-coronavirus-2019/interactive-timeline#!>

It is a fascinating and informative timeline because it specifies the different events according to different category of activity and challenges of global commitment (leadership; scientific endeavor; specific responses; financing; information and communication)

### **THE TRIPLE QUESTION BY FIONA BULL (WHO): HAVE WE DONE ENOUGH? HAVE WE COORDINATED ENOUGH? HAVE WE BEEN EFFECTIVE?**

The Sport Eco-System has been – ça va sans dire – taken by surprise by COVID and it has impacted on the system in terms of health and physical activity. But the big question is: have we done enough? Have we coordinated enough? Have we been effective?

Compared to the WHO timeline, the other question is how would it look like in the sport eco-system? The response is probably that it would be "patchy, less coordinated and with gaps".

We might also ask: "Where is the coordination and the convening of the sport ecosystem? Is it inclusive?" (and we leave this specific question open to the following chapters of this Report).

These are legitimate questions, but it's hard to find definite answers.

Sport Ministers – UNESCO suggests – have been working, have been rapid in advancing financial schemes (in particular the Commonwealth, the EU and other individual Ministers for Sports are doing a lot). But we might not have been as noticeable as the cultural sector (we have been a silent sector; we have not been seen as having a major stake in building back better).

The bigger questions are whether this could be sustained; whether this is sustainable in terms of Sport for All; and whether the stakeholders could survive the current disruption at a systemic level.

## NOT ENOUGH DATA, NOT CONSOLIDATING EFFECTIVELY

As a **Deloitte** report in April 2020 underlines, "the effects of COVID-19 continue to ripple through the world's health, educational, financial, and commercial institutions, and the sports ecosystem is no different!"<sup>[33]</sup>. It is not simply a matter of business, however, but also a **social challenge** for the future generations of our society.

Wikipedia updates regularly its page on the impact of the COVID-19 pandemics on sports<sup>[34]</sup>. Statista is offering a "Statista dossier on the effect of the coronavirus disease (COVID-19) on sports"<sup>[35]</sup>. The World Economic Forum<sup>[36]</sup>, KPGM<sup>[37]</sup> and The Economist<sup>[38]</sup> - inter alia - have offered some reflections on the matter.

A simple answer to Fiona's questions is that we do not have enough data, we are not consolidating them effectively and the cumulativeness/consolidation/comparability of the studies is an issue (knowledge is scattered in different places, reports, people<sup>[39]</sup> - and also for this reason, we - as Sport Eco-System - have not been effective in uniting our voice vis-à-vis the external world).

## 4. "THE MAP IS NOT THE TERRITORY"

Yet "the map is not the territory". The fact that there is not - at first sight - a clearly defined map with a unified vision and a unifying picture, does not mean that the territory of sport is not rich, vital and complex. There is a differentiation to be made between professional sport and (grassroots) sport in general.

## THE PROFESSIONAL MAP IS (A BIT) MORE PRECISE - BUT STILL BLURRED AND NOT UNITED

Looking at the top of the Sport Eco-System, at the professional level and at the market sentiment, we relied on the analysis of PwC and in particular to "Sports industry: system rebooting - PwC's Sports Survey 2020"<sup>[1]</sup>, the annual publication which is taking a picture and being a barometer of the Sport Industry.

David Dellea (Head of Sports Business Advisory at PwC) exemplified the work and focused - primarily - on the tip of the iceberg, on professional sport (and not on the societal role or on grassroots), and on "difficult environment going forward". COVID-19 has clearly "caught the sport industry off-guard", it represented a "wind of change" and there will be a long period of consolidation before normalization.

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[33] [www2.deloitte.com/global/en/pages/about-deloitte/articles/covid-19/understanding-COVID-19-s-impact-on-the-sports-sector.html](https://www2.deloitte.com/global/en/pages/about-deloitte/articles/covid-19/understanding-COVID-19-s-impact-on-the-sports-sector.html)

[34] [https://en.wikipedia.org/wiki/Impact\\_of\\_the\\_COVID-19\\_pandemic\\_on\\_sports](https://en.wikipedia.org/wiki/Impact_of_the_COVID-19_pandemic_on_sports)

[35] <https://www.statista.com/study/71572/the-sports-industry-impact-of-the-covid-19-pandemic-2020/>

[36] <https://www.weforum.org/agenda/2020/04/sports-covid19-coronavirus-exercise-spectators-media-coverage/>; <https://www.weforum.org/agenda/2021/01/uniting-the-world-through-sport-what-can-we-learn-from-sport-in-enabling-social-cohesion/>; <https://www.weforum.org/agenda/2020/12/physical-activity-who-exercise-health/>

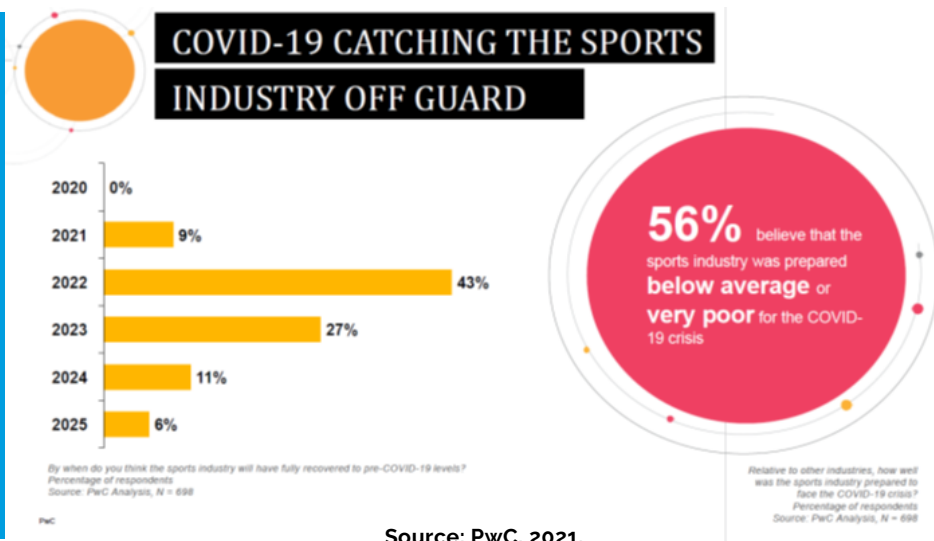
[37] <https://home.kpmg/uk/en/home/insights/2020/06/what-does-covid-19-mean-for-sports-and-entertainment-sponsorship.html>

[38] <https://www.economist.com/leaders/2020/03/21/as-covid-19-causes-sports-cancellations-what-can-be-done>

[39] Take for instance an EPSI Report quoting: Europeactive (2020) Thoughts on Covid-19 "BC versus AC"; Europeactive (2020) "After Corona: How the sector may be different and never be the same again - and why this may not be all bad news"; <https://epsi.eu/wp-content/uploads/2020/05/Webinar-10th-May-Haake.pdf>; Federation of the European Sporting Goods Industries (2020) "RESULTS: FESI Survey on COVID-19"; International Labour Organisation (2020) "COVID-19 and advocates: Labour and Human rights in sports. a priority"; International Labour Organisation (2020) "COVID-19 and the world of work: Impact and policy responses"; <https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/07/WHO.pdf>; [https://www.europarl.europa.eu/doceo/document/P-9-2020-002411\\_EN.html](https://www.europarl.europa.eu/doceo/document/P-9-2020-002411_EN.html);

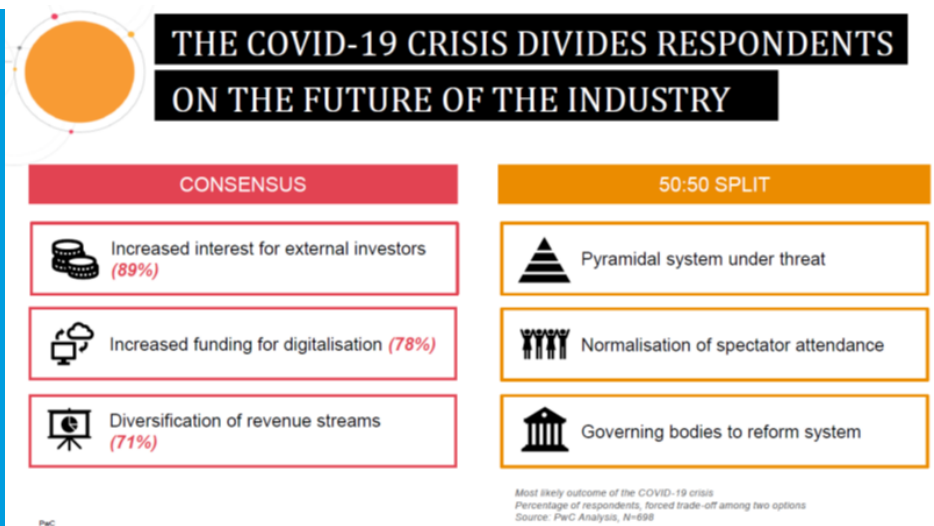
<https://www.sportetcitoyennete.com/en/articles-en/summer-2020-update-on-european-sport-affairs>

[40] <https://www.pwc.ch/en/insights/sport/sports-survey-2020.html>



Source: PwC, 2021.

"Innovation is playing a fundamental role. Sport has been at the forefront of certain innovation. The adoption of innovation might have been faster but there is an acceleration going forward and a lot of transformation that was started before COVID-19 is doubling or tripling in terms of speed. Here we are talking about diversification of revenues, reforms around the sustainability of some of the sectors. I continue to be very positive about it – provided that now a lot of the shifts are happening quick. I think sports remain highly relevant within the entertainment environment: we see increase in sport live consumption and on demand. We need to shift the business model but we need to look at long term consumption. I firmly believe that sport will continue to remain relevant, and it will continue to accelerate through new technological advancement. In the short term, we need to bridge the gap".



Source: PwC, 2021.

It's a matter of concern to see the experts of the Sport Eco-System divided over the reform capacity of the sport system (i.e. governing bodies are expected to reform the system) and over the pyramidal system (the traditional pyramidal system is considered under threat – i.e. from elite to grassroots, we consider "the fundamentals of, at least, the European Model of Sport at large, must be preserved and looked after. Governments have a role to play in both at a grassroots and at an elite level...").



The analyses, however, are still sectoral and do not provide a unified – or unifying – picture over the sport sector. PwC, for instance, has been measuring the impact of COVID-19 on global football<sup>[41]</sup> and also David suggests that “it needs to be done. It’s not rocket-science to look at the financial impact and at the revenue dimension of sport. Another thing is to be more holistic, to look at to societal impact and at the long-term impact of the pandemics on sport”. But to our knowledge, no one specifically has done a study of this magnitude – with one partial exception (which will be illustrated later).

## **WE’VE GOT TO STEP UP, TEAM UP AND CONNECT THE DOTS...BECAUSE WE ARE “STRONGER TOGETHER”!**

But where is the voice of the sport sector? It is not so surprising that sport has a collective action problem and suffers from information asymmetries. The multiplicity of stakeholders in the Sport Eco-System are also the perfect design for structural weakness. Mostly looking at grassroots sport and for the “silent majority” of global citizens, we must connect the dots of a fragmented system, but we must also be able to step up and team up in order to be “stronger together”.

It is also astonishing the lack of knowledge of the existing international consensus on a set of frameworks pointing to the future – and this is an admission of culpability on the side of the sport sector. For this reason, we feel the need to reaffirm (intellectual and institutional) unity over a multifaceted landscape, which often does not reach high-politics, its summits and their declarations.

In order to offset this deficiency, we need to be able to articulate a voice, to be present in the public debate asking big/bold questions<sup>[42]</sup> and to unite the post-COVID landscape in order to let a new scientific/evidence-based story-telling on sport and its values emerge.

## **5. DUAL TRANSITION: FROM THE GLOBAL CRISIS TO THE SPORT ECO-SYSTEM – AND BACK**

It is fundamental to keep an eye on the Global Crisis produced by the pandemic of COVID-19, but also not to forget the implications to the Sport Eco-System. In order to have this dual perspective we have asked Gabriela Ramos (Assistant Director-General for Social and Human Sciences, UNESCO) for instructions on how to navigate these challenges. Previously, Prof. Ramos served as the Chief of Staff and Sherpa to the G20/G7/APEC in the OECD, contributing to the global agenda as well as leading the OECD’s New Approaches to Economic Challenges, Inclusive Growth Initiative, Gender Strategy and the work on well-being and children. Having worked at the institutional apex of some of the most important international organization, being a triathlete and working now specifically on sport with an UNESCO perspective<sup>[43]</sup>, we believe she could be an intellectual bridge-builder between the Sport Eco-System and the wider Global Multilateral Society.

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[41] In its analysis on global football, PwC calculated the impact of COVID-19 over a 2-season period up to 30% (and this significant hit on the financials, mostly of Leagues/Clubs).

[42] We were impressed by the debate: “How Much is Your Health Worth? The Human and Economic Value of Health in the Era of COVID-19”

<https://www.lse.ac.uk/Events/2021/03/202103171200/health> - but sport was absent from the conversation.

[43] For an overview on UNESCO’s role on sport: <https://en.unesco.org/themes/sport-and-anti-doping>.



### **PROF. GABRIELA RAMOS (UNESCO): BUILDING BRIDGES BETWEEN SPORT AND THE WORLD**

Prof. Gabriela Ramos converged her intervention on the strategic significance of sport in society, for society and for a better, more equitable and more sustainable post-COVID society. She has always been promoting inclusive growth, focused on the vulnerability of the social/economic model and on the asymmetric impact of the COVID-19 crisis, fought and is fighting for promoting a more balanced growth model which puts people's wellbeing at the center (and not exclusively the efficiency of markets)

"This is where our conversation starts: A more equal and a more sustainable world and we must elaborate this notion" – she recognizes.

"GDP is an important economic indicator, but what really matters is the wellbeing of people. This should be defined as multi-dimensional and it should include, for example, the quality of health (and the COVID-19 crisis revealed this in a paradigmatic way), social cohesion, environment, good jobs, expectations of people...etc...we should follow the SDGs approach in terms of multidimensionality".

Prof. Gabriela Ramos is not only an intellectual bridge-builder, but also a coalition-builder. This is again an important step for the world of sport.

"Sports needs visibility, more evidence and a common narrative on the impact it is having on society in terms of its tangible and its intangible dimension. Sport should be seen as a source of progress. We should be benchmarking where we are and where we want to go. This is something you are doing [with this GSIC initiative]. This is something we are also doing at UNESCO – mostly with the Kazan Action Plan<sup>[1]</sup>. This is just the starting point. We need to become Champion for the Sport Sector and its Practice".

Sport and the negative consequences of confinement are not as visible as other sectors (compare the invisibility of sport with the visible measurement of the tourism industry or of the airline industry – with calculation which reaches -80%). Sport as a sector needs to be better investigated: "We need to be better promoter of sports. We need to be a voice of the sector – not only economically...but we also need to understand the importance of global figures for sports".

Prof. Gabriela Ramos illustrates the UN Women projects on "Generation Equality in Sports", the UNESCO projects on Quality of physical education, underlines that we need to capture better also the intangible dimension of sport (the educational dimension taught via sports - merit, team playing and being open minded) and anticipates the future "Fit for Life Initiative" and MINEPS 7 (a Ministerial Conference) as a stock-taking exercise in 2021.

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[144] We will define the Kazan Action Plan in the next chapter of this Report. Suffice to say that UNESCO focuses on common definitions of sport and physical activity and the Kazan Action Plan aims at better evidence and indicators for sport in its 6 pillars (including the creation of an Observatory on Gender and Sport with the support of the Swiss Government).  
<https://en.unesco.org/mineps6/kazan-action-plan>

But Prof. Gabriela Ramos also opens the door to diplomatic coalitions: UNESCO just joined the coalition "Sport for Development"[45] at the Paris Peace Forum in November 2020 but she said she would also support an initiative in the G20 with the words "I am worried about culture. But sport needs to be at the same level in terms of visibility and reference. Sport provides nourishment for the soul and it brings us together as humans. We need to be vocal. We would be so happy to support you in the G20".

Prof. Gabriela Ramos concludes by tackling the very issue of the crisis: "COVID-19 represents a terrible shock in terms of human sufferings that we are all experiencing...but it could also be an opportunity: let's take this opportunity – because I believe sport is one of the strong low-hanging fruits. It is sport, the practice of sport. We must convey that investing in sport is strategic for sport as industry/entertainment but also as a tool for health, education, development, human capital and social cohesion for our post-COVID Recovery Plans. **Building forward better – means investing more in sport.** It is one of our conundrums: we need to advocate for fiscal packages for sport, we need to call for more investment in general but also in sport. This means building resilience into our eco-system: we must understand there is no better insurance to any pandemic/shocks than being healthy bodies and minds and sport brings that together".

## 6. LET'S CONSIDER SPORT (AND INNOVATION) AS GLOBAL SOCIAL ACCELERATORS IN THE POST-COVID<sub>19</sub> WORLD: DATA, MAPS AND THE FUTURE

We have to find new directions in a fragmented world. For this reason, we propose to consider sport (and innovation) as global social accelerators in the post-COVID-19 world. In order to undertake this re-calibration of the international agenda, we need to have solid foundations and new impetus in terms of convergence, coordination and coherence between these two vectors of our society. A lot of emphasis has been given to innovation elsewhere, so we will only sketch it here. In the search for data, maps and the future, we believe it is of the utmost importance to connect the dots, to re-value the international consensus (where there is international consensus) and to fast-track this consensus towards a more sustainable formula.

### THE EPICENTER OF THE UNITED NATIONS – "SPORT: GLOBAL ACCELERATOR FOR PEACE AND SUSTAINABLE DEVELOPMENT FOR ALL" (2020)

Although the WHO published very early the "WHO MANIFESTO FOR A HEALTHY RECOVERY FROM COVID-19: Prescriptions and Actionables for a Healthy and Green Recovery"[46] in May 2020, the word "innovation" and "sport" are nowhere to be seen in the document and the "physical activity" dimension is focused primarily on the issue of smart cities.

It was UN DESA (United Nations' Department for Economic and Social Affairs) which paved the way to a global reflection on sport and COVID with the document "**The impact of COVID-19 on sport, physical activity and well-being and its effects on social development**"[47], a policy brief of May 2020. UN DESA in fact has a global mandate on Sport for Sustainable Development and Peace within the UN System.

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[45] <https://financeincommon.org/sites/default/files/2020-11/FICs%20-%20Declaration%20-%20Sport%20for%20Development%20-%20Coalition%20of%20PDBs%20and%20Partners.pdf>

[46] [https://www.who.int/docs/default-source/climate-change/who-manifesto-for-a-healthy-and-green-post-covid-recovery.pdf?sfvrsn=f32ecfa7\\_8](https://www.who.int/docs/default-source/climate-change/who-manifesto-for-a-healthy-and-green-post-covid-recovery.pdf?sfvrsn=f32ecfa7_8)

[47] [https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/05/PB\\_73.pdf](https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/05/PB_73.pdf)

This was followed with the United Nations Secretary General Report, "**Sport: a global accelerator of peace and sustainable development for all**"[48], which "highlights the important role of physical activity and sport in mitigating the impact of the pandemic on health and well-being and examines the role of digital technology in helping sport to fulfil that role. It further examines means of building global resilience to counter future shocks through investment and innovation in sport and sport-related policies".The report defines resilience as "the ability of a system, community or society exposed to hazards to resist, absorb, accommodate to and recover from the effects of a hazard in a timely and efficient manner"; underlines that in order to build a systemic resilience, we need "policies, investments and innovation in sport to address the Coronavirus disease pandemic" and articulates a dual vision on technologies: on the one hand, "COVID-19 has demonstrated the vital role of digital technologies"; on the other hands and in line with the UN approach, we should guarantee that no-one is left behind.

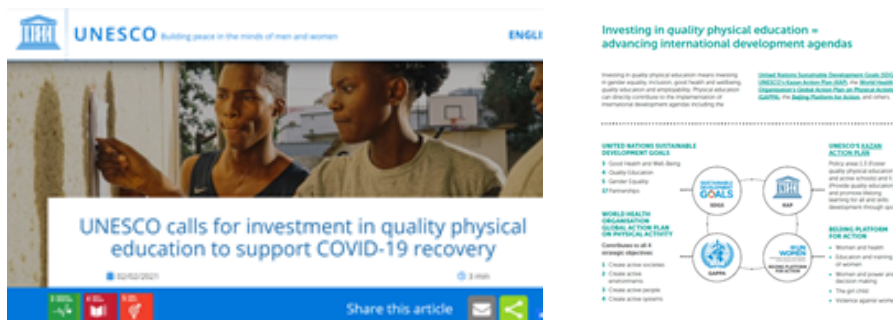
The document led to a plenary meeting of the UN General Assembly adopting by consensus a resolution reaffirming the role of sport as a global accelerator of peace and sustainable development for all, and in building global resilience to address COVID-19.

Strategically, the resolution acknowledges the impact of the COVID-19 pandemic on all aspects of sport, and encourages UN "Member States to include sport and physical activity in recovery plans post COVID-19, to integrate sport and physical activity into national strategies for sustainable development, taking note of the contributions sport makes to health, to promote safe sport as a contributor to the health and wellbeing of individuals and communities".

The text also recognizes the "importance of holistic approaches to health and well-being through regular physical activity, including sport and recreation, to prevent and control non-communicable diseases and promote healthy lifestyles, including through physical education"[49].

And in December 2020 this brought about the paper, "**RECOVERING BETTER: SPORT FOR DEVELOPMENT AND PEACE - Reopening, Recovery and Resilience Post-COVID-19**"[50]. In this advocacy paper, the UN Secretary General Antonio Guterres wrote:

"The multifaceted and unprecedented impacts of the COVID-19 pandemic have torn at the already fraying social fabric, deepening inequalities, sharpening divides and heralding a need for transformative change.



[48] <https://www.un.org/development/desa/dspd/sport-development-peace/unsg-report2020.html> : <https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/09/A75155-Sport-SG-report-ENG.pdf>

[49] [www.olympic.org/news/ioc-welcomes-un-resolution-recognising-positive-impact-of-sport-for-covid-19-recovery](http://www.olympic.org/news/ioc-welcomes-un-resolution-recognising-positive-impact-of-sport-for-covid-19-recovery)

[50] <https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/12/Final-SDP-recovering-better.pdf>



The world of sport was among those sectors most visibly affected -- hard and early. Already a pioneer and promoter of inclusive and sustainable development in an unstable and unequal world, the sporting world must now redefine and redesign itself, not only to improve its resilience to future shocks, but to broaden its contribution to the world's efforts to meet the Sustainable Development Goals".

## THE ROLE OF (REGIONAL) MULTILATERAL FORA: THE CASE OF THE EUROPEAN UNION

A special case has to be done for the European Union (EU): the EU, in fact, has recognized the power of sport and innovation since the Italian Presidency of the Council in 2014, when the "Conclusions of the Council and of the Representatives of the Governments of the Member States, meeting within the Council" were adopted on **"Sport as a driver of innovation and economic growth"** [51].

This reflection was further deepened in 2018 with the Austrian Presidency and the Council Conclusions on the "Economic dimension of sport and its socio-economic benefits"[52] and are currently articulated by the 2021 Portuguese Presidency, which stated: "the Presidency will map innovation in sport and identify new trends in 'sport of the future' as part of the next EU Work Plan for Sport"[53].

But apart from this evolution in the Council, the European Commission received in April 2020 a call to action by many sport organizations led by the EU Office of the European Olympic Committees[54], alerting the suffering of all stakeholders of the sport eco-system. Consequently, the European Commissioner responsible for Sport, Mariya Gabriel, finalized a study analyzing the relevance of sport in the economy in general and the impact of COVID-19 on the Sport Eco-System in particular[55].

As we stressed at the beginning of this Report and as has been recognized by the European Union, sport is a strategic economic sector [accounting for 2.15% of the EU global GDP, equal to EUR 363,3 billion euros and employing 6,46 million people, equal to 2.84% of the total EU employment]. And these statistics demonstrate both an increase from previous measurements as well as the fact that sport represents a "growth driver" closely related to sectors such as: Manufacturing and provision of traditional and digital sporting goods and services; TV and online broadcasting of premium sport content; Health, including injury prevention and nutrition; Tourism and Transport et al.

But the analysis also underlined that there was a contraction of sport-related GDP by at least 10% in 2020; that the impact varies considerably across sport sectors and organizations due to its segmented nature; and that "sport should be embedded in economic and social development strategies", in order to "leverage cross-sectoral links especially with public health, the EU Green Deal and other relevant areas such as research or youth"[56].

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[51] <https://data.consilium.europa.eu/doc/document/ST-14954-2014-INIT/en/pdf>

[52] <https://data.consilium.europa.eu/doc/document/ST-13764-2018-INIT/en/pdf>

[53] <https://www.2021portugal.eu/media/rohpsqf/portuguese-presidency-en.pdf>

[54] "Position paper on the impact of the COVID-19 crisis on the sport sector" [https://euoffice.eurolympic.org/files/position\\_paper\\_COVID-19%20final\\_revision.pdf](https://euoffice.eurolympic.org/files/position_paper_COVID-19%20final_revision.pdf)

[55] [https://ec.europa.eu/commission/commissioners/2019-2024/gabriel/announcements/closing-speech-commissioner-mariya-gabriel-high-level-conference-recovery-sport-sector-after-covid\\_en](https://ec.europa.eu/commission/commissioners/2019-2024/gabriel/announcements/closing-speech-commissioner-mariya-gabriel-high-level-conference-recovery-sport-sector-after-covid_en)

[56] European Union, "Mapping Study On Measuring The Economic Impact Of Covid 19 On The Sport Sector In The EU", November 2020 <https://op.europa.eu/en/publication-detail/-/publication/76b94a58-2f3c-11eb-b27b-01aa75ed71a1/language-en/format-PDF/source-175633451>

This has continued to be the focus of European institutions (including with activities from the side of the European Parliament<sup>[57]</sup>), the European Commission (the European Commissioner for Sport will be launching an initiative called "HealthyLifeStyle4All"<sup>[58]</sup> in September) and the external stakeholders<sup>[59]</sup>. The relationship between sport and health (and promoting sport and healthy lifestyles – and the "Health Union Initiative") has become explicit in the policy-making reflections.

## 7. DIGITAL TRANSFORMATION + INNOVATION + SPORT: HOW TO MAKE THE FIT/BRIDGE BETWEEN RECOVERY STRATEGIES AND SPORT? BUILDING FORWARD BETTER.

We need to think harder about sport, (open) innovation and digital transformation. Jean-Baptiste Alliot (CSO @LaSource & Advisor to UEFA Innovation Hub<sup>[60]</sup> – Entrepreneurial, creative and solution-oriented innovation strategy specialist working in the sports industry) indicated us the way to the future.

"The world is changing like never before. The sport industry has been disrupted and is not immune to change. Maintaining the status quo isn't enough. We must adapt now. And this applies even to the pre-COVID-19 landscape. New technologies are there – they are changing how we consume, how we coach, how we practice sport – traditional behaviors are changing. Technologies are accessible everywhere and anywhere. The challenges brought about by COVID-10 are accelerating this disruption, making us re-think sport and entertainment. We live in an era of change. There are changes in the sport economy (we now have a "connected fan"). We must consider the societal impact of sport, and sport is part of the entertainment industry (in terms of lifestyle, power, equality, climate, data)".

JBA's advice was to "align with other Ministries": "COVID-19 had an impact as an acceleration of 3-4 years in terms of already existing trends in the digital space and 4th Industrial Revolution – this is where the world is going. At the end of the day, you need to find communities where they are". Examples from the UEFA Innovation Hub were enunciated and articulated, but mostly because "we need to think about innovation and the next generation of athlete/players and societal players. We want people to stay active in the sport – in 2030 there will be many other forms of entertainment, but we want society be active/outside/learn with others...and we will lose a generation if not do anything. If we are only business-driven only or if we do not do anything in terms of smart cities and active/healthy life-styles, it will be super-hard to bring them back to sport".

For this reason, we need to combine innovation, imagination and sport with strategy and pragmatism in order to "future-proof yourself", we need to be "pioneers". Because, as JBA suggests, "Innovation is about more than just using the latest technologies. It's how we catch trends, anticipate the future and operate with agility to remain relevant. It's not just about digital or tech, about defining or positioning, it's about remaining in the driver's seats".

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[57] European Parliament Think Tank, "How Coronavirus infected sports", January 2021, [https://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS\\_BRI\(2021\)659449](https://www.europarl.europa.eu/thinktank/en/document.html?reference=EPRS_BRI(2021)659449)

[58] [https://ec.europa.eu/commission/commissioners/2019-2024/gabriel/announcements/closing-speech-commissioner-mariya-gabriel-high-level-conference-recovery-sport-sector-after-covid\\_en](https://ec.europa.eu/commission/commissioners/2019-2024/gabriel/announcements/closing-speech-commissioner-mariya-gabriel-high-level-conference-recovery-sport-sector-after-covid_en) "This will be a sort of follow-up to the Tartu Call for a Healthy Life Style. Building on its achievements and broadening the cross-sectoral cooperation.

This initiative will promote healthy lifestyles across generations with the ultimate goal of establishing a community.

It will be shaped around three pillars: (1) More awareness for healthy lifestyle across all generations, from young to elderly; (2) Easier access to sport & physical activity, with special focus on inclusion and non-discrimination to reach disadvantaged groups; (3) Teaming up for a holistic approach to food, health, well-being and sport.

My wish is to integrate a new dimension on intergenerational sports.

Central to the initiative would be an online Pledge Board that would invite stakeholders to sign and deposit pledges for concrete action and results linked to one of the three pillars".

[59] <https://fesi-sport.org/fesi-mapping-of-covid-19-national-measures/>

[60] Initiator and lead of UEFA Innovation Hub, which delivers high quality innovation programmes to address UEFA's needs in delivering the 2019–24 UEFA strategy, through new partnerships and diverse collaborations with a wide range of stakeholders (including UEFA staff, start-ups, academic institutions, cross-sport federations and more)



"Innovation never happens alone. Innovation is a Team Sport. The greatest innovations in sport will come from strategic collaborations between industry leaders and external players". We could not agree more [61] . This echoes the words of Aleksander Čeferin (UEFA President) that "The most dangerous thing UEFA could do is rest on its laurels" [62] but also Thomas Bach's concern of "change or be changed" (and for this reason, the IOC President launched the original Agenda 2020 within the International Olympic Committee).

This is why for the past six years the GSIC has been contributed to creating a wide ecosystem composed by tech-based companies, sports entities, public and private institutions, universities, industry professionals and other stakeholders. At GSIC, in this Working Group and beyond, we believe that by joining forces we can achieve the perfect symbiosis between sport, innovation and digital transformation, preparing us for the future.

## **WHERE ARE WE GOING? CONCEPTUAL MAP (& SUSTAINABILITY) FOR THE FUTURE.**

The unintended consequence of the pandemic is an opportunity to re-think our model. The big question remains "Where do we need to invest now, in order to deliver change?", but we need to transform ideas into action. We need to recognize the role of sport for the future of our society in our post-pandemic landscape. In order to do so, we need to be prepared with conceptual maps and with action plans dedicated to sport and innovation.

- We need to invest Global System and the global investment in institutions/governance must lead to a common conceptual map, a new storytelling and a new advocacy for the future.
- There is a general re-consideration of public health and we should include sport in this conversation. Sport should be considered also a public health component...missing this debate means losing a "window of opportunity".
- We need to incentivize innovation – applying it to and leveraging it from the Sport Eco-System.

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[61] "I think the thing that people are missing today is that, more than ever, technology is a multi-disciplinary sport." (Brad Smith, President, Microsoft). Brad Smith, An interview with Microsoft President

<https://www.microsoft.com/en-us/research/podcast/an-interview-with-microsoft-president-brad-smith/>

[62] Aleksander Čeferin, 43rd UEFA Congress, 7th February 2019. UEFA Strategy 2019-2024

[www.uefa.com/MultimediaFiles/Download/uefaorg/General/02/59/06/32/2590632\\_DOWNLOAD.pdf](http://www.uefa.com/MultimediaFiles/Download/uefaorg/General/02/59/06/32/2590632_DOWNLOAD.pdf) in terms of "Changing and adapting" and also the concept of "Purpose over Profit".

Sustainability will be the philosophy of our generation

Sport has to lead the change via open innovation

As Sir David Attenborough taught us: «It is our last chance: we have 10 years to repair the planet».

As the UN Secretary General wrote<sup>[63]</sup>, we need to "strengthen government action to include sport and physical activity in recovery plans post-COVID-19, integrate sport and physical activity into national strategies for sustainable development and encourage the United Nations system to support Member States in such efforts"; we need "harness digital technology to advance sport as a tool to achieve the Sustainable Development Goals" and we need to "encourage United Nations entities to continue to provide research, normative and policy guidance to further advance the engagement of Governments and other stakeholders in their use of sport for the achievement of development and peace, accelerate the implementation of the 2030 Agenda, and strengthen efforts in this area", while noting the "lack of centralized global socioeconomic data and statistics on sport" and the need (together with the progress) in the "development and adoption of common indicators to measure the contribution of physical education, physical activity and sport".

This dual attention for sport and innovation is reflected in the IOC "Olympic Agenda 2020+5", which has become the renewed strategic roadmap to 2025<sup>[64]</sup>. It consists of 15 Recommendations, building on the framework of the Olympic Agenda 2020.

Introducing the Agenda, IOC President Thomas Bach explained: "The coronavirus crisis has changed our world in fundamental ways. The world will never again be like it was before. Even once we have finally overcome the health crisis, we will face the far-reaching social, financial, economic and political consequences". Thus, the need for a vision of the future, focused on 5 themes/trends.

- The need for greater solidarity within and among societies;
- the growth in digitalisation, while keeping in mind the need to expand digital capability to the currently digitally underserved;
- the urgency of achieving sustainable development;
- the growing demand for credibility, both of organisations and institutions;
- and the need to build resilience in the face of the financial and economic consequences that will result from the COVID-19 pandemic and which will influence priority-setting among governments and enterprises.

As lessons for the future, we should never forget the sustainability agenda and the search for a more sustainable development model. The long-term scarring and the shock of the pandemic impacts on climate change, sustainability, human capital and innovation. The lessons for the future are:

- COVID-19 is an opportunity to re-think also business model and change the paradigm
- We are facing the biggest challenge of our generation
- Don't count on the pandemic to change your strategy
- We need to find a formula calibrating inter-dependence, creative innovation and trust (also in institutions)
- Sport as a technology frontrunner/innovator/accelerator and this means – as a corollary that:

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<sup>[63]</sup> <https://www.un.org/development/desa/dspd/sport-development-peace/unsq-report2020.html> ; <https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/09/A75155-Sport-SG-report-ENG.pdf>

<sup>[64]</sup> IOC Session Approves Olympic Agenda 2020+5 As The Strategic Roadmap To 2025, 12 March 2021.

<https://www.olympic.org/news/ioc-session-approves-olympic-agenda-2020-5-as-the-strategic-roadmap-to-2025>.



## **NEW STORYTELLING? "NOT PREACHING TO THE CONVERTED": WE NEED TO SPEAK UP**

There is consensus in the Working Group that we need a new story-telling about sport – as we have been (frequently) ignored in the past. We need to simplify and we need to clarify to other what sport can do – mostly when we are speaking to others (i.e. Finance Ministers or Health Ministers). We need to be ready to say that..the role of sport post-COVID19 is to (1) connect people; to (2) inspire the next generation; to (3) entertain; to (4) play a role in improving general well-being, mental and physical health for everybody; and to (5) innovate.

It is necessary to have a dialogue between the authorities and the sport stakeholders in order to understand the necessities of the Sport Eco-System and to imagine the new generation of solutions.

As any crisis, COVID has exacerbated inequalities – both in terms of sport participation as well as in terms of sport practice. There has been and there will be key disruption in the Sport Eco-System in terms of events, workforce and volunteering – both at a macro and at a micro level. But we need to step up, speak up and team up.

## **PRAGMATIC/CREATIVE OPTION: POSITIONING SPORT IN THE POLITICAL AGENDA + REIMAGINING THE ROLE OF PUBLIC/PRIVATE INNOVATION (& INVESTMENTS) FOR THE RESILIENCE OF OUR ECO-SYSTEM**

We need to be creative and pragmatic. In order to position sport in the political agenda, we have established this Working Group. We have just stated to imagine the role of public/private innovation (and investments) for the resilience of our Eco-System.

We will undertake a series of action in order to confirm our commitment to Sport/Innovation:

1. We will try to bring this Report to the European Institutions and to the Portuguese Presidency of the EU;
2. We will try to articulate an approach towards the 2021 UNESCO Ministerial Meeting;
3. We will try to bring – for the first time in a structural way – sport (mostly sport & innovation) to the G20 – as some of us have proposed on the "Italian Financial Times"[65]. As Prof. Gabriela Ramos capture, "I am worried about culture. Sport needs to be at the same level in terms of visibility and reference. Sport provides nourishment for the soul and it brings us together as humans. We need to be vocal. We would be so happy to support you in the G20".
4. We will continue to elaborate on a call for multilateralism, imagination and sport for the future of our society, as we need stronger multilateral coordination, multilateralism and there is a role to play by the UN entities and collectively by the UN.

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[65] <https://www.ilsole24ore.com/art/dalla-scuola-sport-g20-pamphlet-prospettive-innovazione-ADUetU4>

## **ACTION-ORIENTED IMPLEMENTATION/FUTURE-PROOFED POLICY COHERENCE? PLEASE!**

We need to focus on policy-coherence, anchored in the SDGs. We need to elaborate new data and bring it across in order to bring change and influence decision-making. Advocacy is and will be crucial.

The next pandemic is climate change, there is an epidemic of obesity and, in order to remain relevant, the vectors of innovation and sport have a role to play as global social accelerators in the post-COVID landscape. Digitalization can support the sport sector in all forms and the sport sector can explore new avenues through innovation. We need to be future-proof and we need to future-proof policy coherence<sup>[66]</sup>.

## **RECOMMENDATIONS? NO!**

We do not want to draw a conclusion, as the post-COVID landscape is evolving fast. We want to build a coalition because we believe sport inspires, connects, engages, is vital for wellbeing and innovates.

*"Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning". Winston Churchill*

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[66] ASOIF has undertaken (pre-COVID) a thought-provoking exercise in imagining "The Future of Global Sport". [https://www.asoif.com/sites/default/files/download/future\\_of\\_global\\_sport.pdf](https://www.asoif.com/sites/default/files/download/future_of_global_sport.pdf)

FIFA undertook (during COVID) a similar reflection.

FIFA & Sports Innovation Lab. "The future, in your hands - Innovation opportunities on the road to 2026". January 2021. <https://www.sportslab.com/fifa>

## **ANNEX – GSIC'S CONTRIBUTION TO THE SPORTS TECH ECO-SYSTEM**

GSIC counts with 200+ members from 38 countries with whose support we can promote initiative such as this one, where joining forces we can achieve this perfect symbiosis between sports, innovation, and digital transformation.

For that purpose, GSIC has developed different services that have been modified and improved according to the existing demand of our members and of the sport industry market in general. These services seek to boost technological innovation covering different fronts of the sector: startups and companies, sports entities, educational institutions, government organizations. Some of these services are exclusive for members and others may also be provided to entities not associated with the center under other conditions.

### **Workshops for sport entities**

The GSIC has developed a methodology of Design Thinking that is applied in the workshops that the association organizes for the different sports entities. The methodology consists of two phases: first, the challenges of each entity are detected by area and they are prioritized according to their importance. Then, we work with the brainstorming, relating them to each area and, based on the material developed during the working session, we prepare a route map for the entity in question. The objective of these sessions is to initiate sports entities in their digital transformation processes, organizing them a work session in which they can have assistance from the GSIC professionals who will guide them to generate ideas and think of possible solutions to their challenges.

### **Business Days**

The Business Days are a methodology for mutual knowledge and business opportunities. With the Business Days the GSIC launched a format of activity particularly oriented to the generation of business opportunities between companies of all sizes and sports organizations. This activity focuses on previously defined themes that guarantee real possibilities of collaboration between the participants of the event. It can be done in person or remotely through Microsoft Teams, so we can connect any partner with the sports entity interested in knowing the technological innovation applied to sport.

Sports entities are showing more and more interest in this type of activity that allows them to advance in their digital transformation processes. On the other hand, this activity allows the GSIC to provide its members with good business opportunities and to generate personal contacts with the executives and decision makers of sports entities.

### **Inspiration Day**

It is a methodology that was implemented in the GSIC with the aim of making the operation of the Center, its structure and working model, better known to all the publics who wish to learn about it. In addition, we offer a detailed view of the current situation and the development of the sports industry in connection with the latest technological innovations.

The main audiences for this activity, which has always been very successful, are companies in our sector and others not directly related to the sports industry. The former are interested in understanding the GSIC model and the possibilities opened up by the Center to the entities that make up our ecosystem, and the latter want to broaden their general knowledge about the sector and, in some cases, seek new ideas for developing their business.

This activity is also of interest to educational institutions and they include it in their training programs. Throughout the year, we have received several visits from groups of students starting with children in primary school and ending with students in different Master's programs. It is worth noting that these visits are both national and international origin.

#### **Diagnostics: Current situation of sports entities**

During 2019, the GSIC offered this service to different sports entities to help them identify their current situation in digital transformation. Through a study conducted to the entity in question identifies where it stands compared to other actors of similar nature in the industry and offers a series of data and recommendations about the solutions to be implemented along with their respective order of priority. Thanks to this type of initiative, sports entities can start their own digital transformation process and new business opportunities are generated for technology companies and startups.

#### **Business trips**

Business trips are an excellent opportunity to meet relevant players in the sports industry in different countries. The first business trips made were organized by the GSIC in collaboration with Microsoft Sports and were undoubtedly very successful among the members.

These experiences have allowed the GSIC to develop the concept of business travel where we offer our members to travel to different countries strategically interesting for their business. A business trip provides GSIC members with various networking opportunities with relevant sports entities in each country concerned, such as clubs, federations and leagues. They can also meet large companies linked to the sports industry and the media.

In addition, GSIC has developed its network of ambassadors to achieve more presence in different countries. One of the opportunities that arise from the relationship with this network is the organization of business trips to the country of each ambassador. In this way we offer our members the best agendas for these trips and also facilitates the GSIC from the point of logistics organization.

#### **Working Groups**

The working groups are born as a necessity to give an answer to the companies that compose our ecosystem with specific challenges or processes of technological or knowledge transfer that need structured support and with results in demo or proof of concept format.

We propose them as meeting points where to develop solutions to real challenges for technological innovation in the sector and, therefore, this initiative has as a final objective the implementation of specific projects. This allows companies to be at the forefront of innovation in the sector, to act as driving forces for other industries and, therefore, to play an important role in innovation and sport.



The working groups are constituted as closed spaces for the work of the members, although on certain occasions experts can also be invited, to enrich the contents of this.

Currently the association has already started different working groups such as Education, Sports, Intelligent Stadium and Professional Sports.

#### **Knowledge transfer conferences**

Activities of this type serve as an emphasis for the creation of a working group since they allow us to explore the interest generated by the topics about which we are proposing the future lines of work of the GSIC. These are events in which we give exclusive priority to our members so that they can expose the current topics of the fields in which they work and discuss them with the public formed by the members of our ecosystem.

Thanks to these actions, from the association we can evaluate the possible ways of developing research and work that bring innovation closer to the sports sector.

#### **Members Solutions Showcase**

International Virtual Meetings, events that strengthen links with international members of the GSIC as they are done virtually using Microsoft Teams.

Our Virtual Meetings are virtual spaces where our members can share their solutions with others. Thanks to these monthly meetings, international members, located in different continents, can share their activity and knowledge of the sector, as well as carry out networking activities.

#### **Reports**

From its beginnings as an innovation center, the GSIC has considered on several occasions the creation of reports for the industry to help our positioning as experts in different topics of the sports sector.

In 2019, we have been able to produce a report on our members' vision for the digital transformation of sports entities by 2025.

Thanks to the extensive ecosystem built up by the GSIC over the years, we have the opportunity to reach out to relevant entities and senior professionals with extensive industry experience who can contribute great value to our reports.

## CONTACTS



**Iris Córdoba**  
General Manager  
[iris.cordoba@sport-gsic-com](mailto:iris.cordoba@sport-gsic-com)



**Iñigo Bonilla**  
Strategic Alliances and  
Business Development Director  
[i.bonilla@sport-gsic-com](mailto:i.bonilla@sport-gsic-com)



**Jorge Gómez**  
Partner Solution Program  
Manager  
[jorge.gomez@sport-gsic-com](mailto:jorge.gomez@sport-gsic-com)



**Sofiya Goncharova**  
Head of Communication and  
Public Affairs  
[sofiya.goncharova@sport-gsic-com](mailto:sofiya.goncharova@sport-gsic-com)



**Andrea Suinaga**  
APAC Content Program Manager  
[andrea.suinaga@sport-gsic-com](mailto:andrea.suinaga@sport-gsic-com)



**Francesco Anesi**  
GSIC Ambassador  
[anesifrancesco@gmail.com](mailto:anesifrancesco@gmail.com)

## GSIC powered by Microsoft

Global Sports Innovation Center was born in 2015 with the support of the Microsoft Sports division in order to create an international meeting point for innovation applied to the sports industry. Since then, GSIC is successfully operating based on a model that allows sustainable growth and the construction of a global ecosystem of companies and institutions linked to sports and technology.

GSIC is betting on a vision of teamwork, building from the effort, providing support to entrepreneurship, applied research and education, as well as generating a meeting, networking and business space for our members' network that today reaches 225 members. All our members in 38 countries get involved in different onsite and remote activities that are helping them with their internationalization processes.

**More info:** <https://sport-gsic.com/>

Report with the support of:

