



Mapping smart specialisation strategies for sport

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Sport

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Background on the Research and Innovation Strategies for Smart Specialisation approach: smart specialisation strategy and sport

In the context of Europe 2020 strategy¹, the Research and Innovation strategies for smart specialisation (RIS3) represents a key element to achieve the three thematic priorities of Europe 2020, i.e. smart, sustainable and inclusive growth. The RIS3 approach is based on five key elements²: a) focus on key national/regional priorities and challenges; b) focus on regional strengths, competitive advantages and potential for excellence; c) private-investment stimulation through technological support and practice-based innovation; d) enhancement of the stakeholders engagement; e) evidence-based with monitoring and evaluation tools.

Smart specialisation strategies can be developed in three thematic areas: agro-food, energy and industrial modernisation. Actions to support the development of the sport sector have been embedded in the industrial modernisation thematic area.

The inclusion of sport as thematic area for the development of smart specialisation strategies shows its importance as an economic sector. It could be argued that sport contributes to the development of different sectors and industries, such as manufacturing, construction, transport and tourism. Moreover, sport might play a crucial role in relation to the development of territories by enhancing their attractiveness, social cohesion, urban regeneration as well as their economic vitality.

However, the impact of sport is often underestimated, and its inclusion within the specific regional strategies could still be further enhanced and maximised. In this sense, a clustered approach might represent an important instrument aimed at enhancing the comparative advantages of a specific region, by establishing partnerships and connections between different sectors and economic domains. The present research shows how the clustered approach in the field of sport might benefit to different sectors, such as tourism, technological and infrastructural innovation, health and wellbeing, and vice-versa.

It is worth mentioning the ClusSport partnership³ here, which represents an important example of interregional cooperation in the field of sport. This cooperation embodies the potential of sport as a driver of regional development, and has been followed by different other regions. The main objective of ClusSport is to help strengthen the sport industries at the EU level through a cross-regional collaboration. This interregional partnership of 12

¹ Communication from the Commission - *Europe 2020: A strategy for smart, sustainable and inclusive growth*, COM(2010) 2020, Brussels, 3.3.2010, <https://ec.europa.eu/eu2020/pdf/COMPLET%20EN%20BARROSO%20%20%20007%20-%20Europe%202020%20-%20EN%20version.pdf>

² European Commission, *Guide to Research and Innovation Strategies for Smart Specialisation (RIS3)*, May 2012, <http://s3platform.jrc.ec.europa.eu/documents/20182/84453/RIS3+Guide.pdf/fceb8c58-73a9-4863-8107-752aef77e7b4>

³ See further: <http://s3platform.jrc.ec.europa.eu/sport>

regions (status 2019) led by Lapland and the South Netherlands regions, brings together stakeholders from the sport sector and related industries. Research, technology, education providers, managing regional authorities and local stakeholders are invited to join efforts in developing and implementing a common strategy that will enable investments and establish research and innovation facilities across Europe to boost growth and economic development.

This paper maps and analyses the existing good practices in terms of regional smart specialisation strategies which have included sport as a thematic area for regional development. The mapping was done through a web-based research in the Eye@RIS3 database, a tool created by the Joint Research Centre of the European Commission, which allows users to consult the smart specialisation strategies of all regions in the EU⁴.

The research was conducted in two steps: first, it identified those regions that have included the sport sector in their smart specialisation strategies, either under the economic domain 'Sports activities and amusement and recreation activities' or the scientific domain 'Recreational and sporting services' – according to the NACE⁵ and respectively the NABS⁶ classifications. The database queries according to these specifications returned 216 results (representing 102 unique regions, since the results showed duplicate results: the same region counted several times in both queries). These regions are shown in **Annex 2** of the present paper, along with further methodological specifications.

The second step consisted in a thorough analysis of these results. However, it was possible to detect a specific sport strategy in only 16 out of the 102 regions, either because the relevant documentation was missing from the database, or because the documentation was not uploaded in the English language. For these reasons, despite the inclusion of sport as part of their smart specialisation strategies, it was not possible to identify or review their specific strategies and approaches. The 16 smart specialisation strategies thoroughly analysed are summarised in **Annex 1** of the present paper.

The present research identified 3 main thematic areas recurrently linked to sport in the analysed smart specialisation strategies. The three identified thematic areas are: **tourism**, **health and wellbeing** and **technological and infrastructural innovation**. The different ways in which sport contributes to the development of these areas according to the mapped smart specialisation strategies are presented in the following sections.

⁴ Consult the tool here: <http://s3platform.jrc.ec.europa.eu/map>

⁵ Statistical Classification of Economic Activities in the European Community, see further details: https://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=NACE_REV2

⁶ Nomenclature for the Analysis and Comparison of Scientific Programmes, see further details: https://ec.europa.eu/eurostat/ramon/nomenclatures/index.cfm?TargetUrl=LST_NOM_DTL&StrNom=CL_NABS07&StrLanguageCode=EN&IntPcKey=&StrLayoutCode=HIERARCHIC

Sport for tourism

The significant growth of the 'sport tourism' sector in the last decade has contributed to the development of this clustered approach within different regional smart specialisation strategies. The term refers to a type of tourism in which the tourists' involvement in sport activities represents the essential motivational reason for traveling. In this context, a territory offering a wide range of sport-related activities or events might certainly benefit in terms of visitors' flows and touristic branding, as well as a valid tool to counteract the seasonality of tourism affecting different European regions. This aspect is particularly relevant for those regions in which tourism flows are mostly condensed within the summer period (seaside areas) or within the winter period (mountain areas): providing a touristic offer also based on sport-related activities might effectively enhance their attractiveness and distribute the flows along the whole year. The analysis of the 16 reviewed documents has shown that 7 regions aim to develop their tourism sector through a smart specialisation strategy focused on sport, by counteracting tourism seasonality or by developing niche markets relating to specific sports.

The region of Aragon, in Spain, shows how sport and tourism might be linked within the same smart specialisation strategy. In fact, within the province of Huesca, this region aims to develop 'sport tourism' as a niche market, thus offering an alternative to the tourism based on the natural and cultural heritage. In order to achieve this goal, the region aims to develop a clustered approach also based on investments for the development of industries producing sporting equipment and materials, which might support the growth of the 'sport tourism' niche sector. Moreover, in the Balearic Islands sport is also considered as an important chance to incentivise off-peak travels in the region, as it has been noted that the development of the 'sport tourism' represents an important source of attraction for tourists in the region from October to April. In addition to this, the region of Murcia has also identified as priority activity the further development of the tourism sector, and as part of this, maritime sports are identified as type of activities that might enhance the development of the sector.

The Sardinia region, in Italy, has indicated as one of the priorities within their smart specialisation strategy, the further development of the tourism sector. However, the region aims to develop a niche market within their tourism offer through a diversified destination management approach. For this reason, the region aims to develop a diversified offer of touristic opportunities, thus relating to cultural, food and sport tourism, aiming also at reducing the tourism seasonality.

The Polish region Warminsko-Mazurskie aims to develop a tourism sector based on new services for the health promotion, rehabilitation and sport services, which will enable higher profits and ease the problem of seasonality in this sector of economy, while making its development more sustainable. In fact, the re-distribution of the tourism flows would certainly reduce the heavy burden on the natural environment within the peak periods, as this might represent a serious issue for the Masurian Lake district.

In Lapland region (located in Finland) the sport sector has a strong tourism profile and sport is recognised as an emerging industry, getting support from the regional tourism cluster and the sport expertise provided by local educational organisations. In return, sport industry is playing an important role when developing sustainable and year-round tourism.

Sport for health and wellbeing

The 2013 Recommendations of the Council on promoting health-enhancing physical activity across sectors⁷, highlights the role of sport and physical activity in lowering the risk of cardiovascular diseases and of several types of cancer and diabetes, in improving the musculoskeletal health and body weight control, as well as in contributing to overall mental health development and cognitive processes. However, in order to fully develop the potential of sport in the health sector, it is important to adopt a cross-sectorial approach and a closer cooperation between multiple sectors.

For this reason, the smart specialisation approach might be of fundamental importance to incorporate sport in existing strategies aimed at improving the health and wellbeing in regions through, for instance, the medical technology thematic area. As shown by the following examples, there is a strict connection between the promotion of health and wellbeing through sport and technological innovations. The analysis of the smart specialisation strategies documents has shown that 7 different European regions have adopted a clustered approach aimed at the cooperation between the sport and health sectors.

For instance, the region of Galicia in Spain aims to become a leading region in Southern Europe in the field of new technologies for active ageing and healthy living. In this sense, new sporting activities would be supported by the development and marketing of new knowledge intensive products based on adding value to the potential of spa culture and sport for therapeutic purposes and the promotion of personal autonomy. Moreover, within the RIS3 document prepared by the region of Castilla la Mancha (Spain), the focus on industrial modernisation plays an important role in the fields of health, wellbeing and sporting activities, that will be developed through the clustered approach.

The Balearic Islands, in Spain, provides an interesting example of a smart specialisation strategy aimed at using sport as a tool to promote health and wellbeing. In particular, by acknowledging that the tourism sector is already flourishing in this region, the document defines the importance of the physical activity for the citizens' lifestyle, contributing to the anti-ageing and disease-rehabilitation programmes. The region of Murcia, in Spain, also aims to develop activities for the promotion of a healthy lifestyle through investments in the biomedical and sport fields. In this sense, the investments shall focus on the research of new

⁷ Council of the European Union, Council Recommendations on promoting health-enhancing physical activity across sectors, Brussels, 25.11.2013, https://ec.europa.eu/health/sites/health/files/nutrition_physical_activity/docs/2013_hepa_en.pdf

food products and medicines for people practicing sport at different levels, as well as monitoring IT tools and newly developed apps.

In the Helsinki region, in Finland, sport and physical activity are seen as part of the 'environmental well-being', for this reason, the region aims to enhance the sporting activities participation, its relation with the community service design, software and application development.

Sport for technological and infrastructural innovation

Another area in which sport can play a role through the implementation of a clustered approach is relating to the potential benefits in terms of technological and infrastructural innovations. The first type of innovation relates to the improvements in terms of quality and accessibility of facilities and public spaces, which are also important conditions to enhance the sport participation and overall experience. Moreover, sport can also be a driver of technological, and subsequently, social innovations. These aspects might also have an impact on the regional economic attractiveness and related job market growth. Through the review of the available documents it has been possible to detect 8 regions owning a smart specialisation strategy aimed at developing a clustered approach between the sport sector and the technological and infrastructural innovation.

The region of Cantabria, in Spain, represents an example of how improving the quality and accessibility of facilities and public spaces can be linked to sport. In particular, the broad objective is to develop in the region a 'sporting environment'. This environment is mainly based on the further development of research centres on sporting and physical activities through the creation of a Scientific and Technological Park that shall also include sport facilities.

On the other hand, in the 2014-2020 Bulgarian national innovation strategy for smart specialisation, it is indicated the relevance of the thematic areas 'Industry for Healthy lifestyle and Bio Tech' and 'New technologies in the Creative and Re-creative Industries'. These specialisation areas are defined for the North-Eastern region, and particularly for the Shuman province. The definition of these areas is important as the stated aim of these innovation strategies is to enhance the regional development of alternative sports.

Pohjois-Savo region, in Finland, aims to further develop an IT tool prototype named SENSOFITIA. It is a provider of software and embedded systems with special expertise in virtual healthcare services. The customer can contact the physician via video from home or the office. The physician can submit e-prescriptions or prescribe drugs using a health and sport application. The application is connected to a smart wristband and other wearables, collecting and analysing the customer's health data and monitoring its relation with the sporting

activity. The industrial modernisation in terms of sport equipment is also considered an important area for smart specialisation in the French region Nord – Pas de Calais.

Another example of specialisation in service production through research and technological innovation can be found in the top sports and exercise skill concentration located in the Southern Ostrobothnia province, in Finland, which acts as a training and testing centre for the exercise and welfare sectors.

The region of Emilia Romagna in Italy aims to increase the specialisation of its industries through the focus on the sporting automotive sector. Despite the region is already offering luxury and excellence products in this field, the smart specialisation strategy aims to further develop this niche sector.

In the South Netherlands region, sport is an inherent part of the existing smart specialisation strategy. This RIS3 bases its approach on clusters. In addition to the efforts to be made on established clusters, the region's strategy is to further develop a number of emerging clusters and to promote cross-overs between clusters. The areas with growth potential are those that deliver innovative solutions to societal challenges (including health care, and sustainability in general). The priorities related to health, demography and welfare organically incorporate sport as well. Cluster Sports & Technology represents the smart specialisation goal on innovation for sport and vitality. The cluster consists out of more than 100 companies, research organisations, field labs and governmental organisations focused on innovation for sport and physical activity. It is a good example of a sport cluster that benefits from cross-overs in other economic areas of smart specialisation (such as health, environment or transport).

Main findings / Conclusions

As the analysis has shown, there are different regions at the European level that have included sport as a priority within their smart specialisation strategy. The analysis has however taken into account only 20% of the regions that included sport as part of their smart specialisation strategy, due to the lack of documents uploaded and available within the Eye@RIS3 database. Nevertheless, it has been noted that within their smart specialisation strategies, regional authorities tend to create industrial clusters between the different domains, thus, establishing, for instance, partnerships between health, sport and technological industries, or even between touristic and sport equipment industries to develop niche markets.

An important initiative in the topic of industrial modernisation within the RIS3 is ClusSport, in which multiple regions join efforts in developing and implementing a common strategy for sport and other related disciplines (e.g. tourism, health, environment or transport) to benefit local communities, that will enable investments and establish research and innovation facilities across Europe to boost growth and economic development.

The analysis indicates that within the different smart specialisation strategies analysed, sport is more often linked with certain economic sectors, in particular: the technological and infrastructural innovation (50%), tourism (35%) and health and wellbeing (35%) sectors (within several smart specialisation strategies sport is linked with more than one of the economic sectors specified above). These estimations are conservative, given the above-stated limitations of the present research. Annex I shows in detail how sport contributes to regions' smart specialisation strategies by being linked with the above-mentioned economic sectors.

Annex I – Identified regions with a specific sport strategy (16)

Regions / provinces	Main sectors associated with sport in the RiS3		
	Tourism	Health and wellbeing	Technological and infrastructural innovation
Shumen (BG)		Innovation strategies in the fields of healthy lifestyle, creative and re-creative industries are also aimed at enhancing the region capacity for alternative sport	Innovation strategies in the fields of bio tech
Aragon (ES)	Developing the 'sport tourism' by also investing on industries producing sporting equipment and material		
Balearic Islands (ES)		The document defines the importance of the physical activity for the citizens' lifestyle, contributing to the anti-ageing and disease-rehabilitation programmes	
Cantabria (ES)	Develop a niche tourism through investments in specific sports, such as golf, surf and sailing		Further development of research centres on sporting and physical activities through the creation of a Scientific and Technological Park that shall also include sport facilities
Castilla La Mancha (ES)		Social innovation in the fields of health, wellbeing and sporting activities needs to be reached through the development of key enabling technologies	
Galicia (ES)		Becoming a leading region in Southern Europe in the field of New Technologies for active ageing and healthy living	
Murcia (ES)	Focus on maritime sports against seasonality of tourism	Achieving a healthy lifestyle through investments in the biomedical and sport fields	Investments shall focus on the research of new food products and medicines for people practicing sport at different levels, as well as monitoring IT tools, as newly developed App.
Helsinki (FI)		Exercise, sport and physical environment as part of well-being	
Pohjois-Savo (FI)			SENSOFTIA is a provider of software and embedded systems with special expertise in virtual healthcare services. The tool prescribes preventive drugs by using a health and sport application

Southern Ostrobothnia (FI)			Top sports and exercise skill concentration acts as a testing and development centre for the exercise and welfare sectors
Nord – Pas-de-Calais (FR)			Developing high-level sporting equipments
Provence-Alpes-Côte d’Azur (FR)	Sport development as a way to counteract seasonality of tourism		
Emilia Romagna (IT)			Focus on sporting automotive sector in order to increase the capacity of the market
Sardegna (IT)	Sport development as a way to counteract seasonality of tourism		
Warminsko-Mazurskie (PL)	Development of the tourism sector towards new services based on sport service	Developing specialist services, relating to health promotion, rehabilitation and sport	
Jämtland County (SE)	Tourism, sport and outdoor activities are strong business segments and comprise a strong regional cluster that is supported by research		More inter-industry innovation and business collaborations and durable cluster investments in tourism, sport and the outdoors

Annex II - Complete list of all regions that have included sport and physical activity in their smart specialisation strategies (102)

The Eye@RIS3 database provides comprehensive information on the public investment priorities for innovation across European regions. The tool designed to consult the database allows for researches according to three specific criteria: **economic domain**, **scientific domain** and **EU policy objectives**⁸.

The economic domain refers to the economic activities which define a priority area of public investment, based on which the strategy is created. The categorisation of these domains in the database reflects Eurostat's NACE2 sectoral codes.

The scientific domain refers to the scientific and research topics which are included in the priority area of public investment. The categorisation of these domains in the database reflects Eurostat's NABS sectoral codes.

The 'EU policy objectives' criterion reflects the main EU strategy documents and outlines the main EU policy objectives. As such, this category is composed of ten EU-wide policy areas corresponding to the so-called 'Societal Grand Challenges' identified in Horizon2020 and the headline policies in the Innovation Union Flagship Initiative, including Creative and Cultural Industries, Key Enabling Technologies (KETs), Social Innovation and the Digital Agenda. Since sport and physical activity is not specifically mentioned in none of these policy areas, our research did not include this criterion in the database query, as the results would have been too broad: sport can indirectly be linked to the majority of the categories in this field.

There is no apparent reason for which a region's smart specialisation strategy appear under the economic domain's query or the scientific domain's query. The majority of the strategies mapped appeared under both queries. However, there are strategies in which sport and physical activity appeared under the economic domain and others which listed it under the scientific domain, with no apparent difference of approach. The limits of this research must be bore in mind: only 16 strategies were analysed in details, as the others were either unavailable or uploaded in local languages. As such, a more in-depth evaluation is required in the future, to determine more accurately the place of sport in existing smart specialisation strategies, as well as the main differences of approach (if any) between targeting economic activities or scientific areas.

⁸ More details on the research criteria: <https://s3platform.jrc.ec.europa.eu/eye-ris3>

No.	Regions
1.	Vienna (AT)
2.	Burgerland (AT)
3.	Salzburg (AT)
4.	The Tyrol (AT)
5.	Shumen (BG)
6.	Cyprus (CY)
7.	Central Bohemia + Prague (CZ)
8.	Schleswig-Holstein + Hamburg (DE)
9.	Bavaria (DE)
10.	Berlin (DE)
11.	Brandenburg (DE)
12.	Bremen (DE)
13.	Hessen (DE)
14.	Lower Saxony (DE)
15.	Denmark Capital Region (DK)
16.	South Denmark (DK)
17.	Central Jutland (DK)
18.	North Jutland (DK)
19.	Epirus (EL)
20.	Ionian Islands (EL)
21.	Continental Greece (EL)
22.	East Macedonia (EL)
23.	West Macedonia (EL)
24.	Western Greece (EL)
25.	Peloponnese (EL)
26.	Attica (EL)
27.	South Aegean (EL)
28.	North Aegean (EL)

29.	Crete (EL)
30.	Andalusia (ES)
31.	Galicia (ES)
32.	Cantabria (ES)
33.	Navarra (ES)
34.	Aragon (ES)
35.	Castile-La Mancha (ES)
36.	Castile and Leon (ES)
37.	Catalonia (ES)
38.	Extremadura (ES)
39.	Balearic Islands (ES)
40.	Murcia (ES)
41.	Valencia (ES)
42.	Canary Islands (ES)
43.	Helsinki – Uusimaa (FI)
44.	South Karelia (FI)
45.	Pohjois-Savo (FI)
46.	Kainuu (FI)
47.	Lapland (FI)
48.	Southern Ostrobothnia (FI)
49.	Central Ostrobothnia (FI)
50.	Kanta-Häme (FI)
51.	Brittany (FR)
52.	Limousin (FR)
53.	Centre (FR)
54.	Nord/Pas-de-Calais (FR)
55.	Franche-Comté (FR)
56.	Rhône-Alpes (FR)

57.	Provence-Alpes-Côte d’Azur (FR)
58.	Martinique (FR)
59.	Guadeloupe (FR)
60.	Réunion (FR)
61.	Abruzzo (IT)
62.	Campania (IT)
63.	Valle d’Aosta (IT)
64.	Apulia (IT)
65.	Basilicata (IT)
66.	Calabria (IT)
67.	Marche (IT)
68.	Trento (IT)
69.	Sicily (IT)
70.	Sardinia (IT)
71.	Emilia-Romagna (IT)
72.	Lazio (IT)
73.	Malta (MT)
74.	Friesland (NL)
75.	Mazowieckie (PL)
76.	Malopolskie (PL)
77.	Swietokrzyskie (PL)
78.	Lubuskie (PL)
79.	Kujawsko-Pomorskie (PL)
80.	Warminsko-Mazurskie (PL)
81.	Algarve (PT)
82.	North (PT)
83.	Centre (PT)
84.	Lisbon (PT)
85.	Azores (PT)

86.	Alentejo (PT)
87.	Centre (RO)
88.	South-East (RO)
89.	North East (RO)
90.	Örebro County (SE)
91.	Kronoberg (SE)
92.	Gotland County (SE)
93.	Värmland County (SE)
94.	Kalmar County (SE)
95.	Dalarna County (SE)
96.	Halland County (SE)
97.	Västernorrland County (SE)
98.	Jämtland County (SE)
99.	Västerbotten County (SE)
100.	Norrbotten County (SE)
101.	Cornwall and Isles of Scilly (UK)
102.	Scotland (UK)

