Building a sustainable bridge between the Swiss and Dutch sports related industries

Market report with strategic recommendations to capitalize on the identified opportunities for Dutch organisations

Netherlands Enterprise Agency

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Executive summary

Switzerland is a country with many opportunities for Dutch organisations active in the sports industry. Sport is an integral part of the Swiss society, with 71% of the population regularly engaging in physical activities. The country has a solid sports infrastructure, including around 32,000 sports facilities and nearly 20,000 sports clubs, indicating the efforts by both public and private organisations.

The Swiss sports market is a significant contributor to the economy, with an annual turnover of EUR 22.7 billion in 2019 and a gross value added of EUR 11.8 billion, contributing 1.7% of GDP. Key segments include sports events & competitions, infrastructure & facilities, equipment & apparel, media & broadcasting, sponsorship & marketing, and sports tourism. The market consists of a robust ecosystem of public and private stakeholders that work together to deliver the possibility to perform and consume sports in Switzerland.

Globally, Switzerland functions as the central place for strategy and coordination of sports, being the headquarters for over 50 international federations like the International Olympic Committee (IOC) and FIFA. Besides contributing significantly to the national economy, these federations position Switzerland as the stepping stone to the global sports market. The opportunities that follow from both the national and international characteristics present enormous potential for Dutch organisations succeeding to engage in business.

To seize these opportunities, Dutch organisations need to adopt a tailored approach. Switzerland's decentralised governance structure necessitates a nuanced understanding of regional differences, which in turn requires customised strategies for engagement. Joint propositions by specialised Dutch organisations can be particularly effective in meeting the complex needs of the Swiss sports market. Collaborative approaches that combine Dutch innovation with Swiss precision are likely to resonate well with Swiss organisations, which often favour partners who can offer comprehensive solutions.

The opportunities for Dutch organisations are the result of specific needs that arise from prevailing trends within the Swiss sports market. The trend of digitalisation has transformed the sports industry, creating demand for advanced technologies such as artificial intelligence, wearables and blockchain. Dutch companies, with their specialised expertise in these areas, can offer solutions that enhance athlete performance, optimise sports experiences, and streamline business operations.

Fan engagement is another critical area where Dutch organisations can make a significant impact. Swiss sports organisations are increasingly seeking ways to deepen their connections with fans, both within and outside stadiums. Dutch expertise in creating interactive, personalised content and deploying innovative digital platforms can help Swiss organisations meet these challenges.

The shifting focus within sports, driven by the rise of e-sports, the emergence of new sports like padel, and the growing emphasis on diversity and inclusion, also presents opportunities. Dutch companies can assist Swiss organisations in adapting to these changes, whether through the development of new facilities, the promotion of women's sports, or the integration of e-sports into traditional sports offerings.

Finally, sustainability is a trend that cannot be overlooked. As Swiss sports organisations increasingly prioritise environmental, social, and governance (ESG) criteria, there is a clear demand for sustainable solutions. Dutch organisations, known for innovative solutions for sustainability, can provide the expertise and technologies needed to help Swiss entities meet their sustainability goals, whether through the adoption of circular economy principles, the development of green facilities, or the implementation of comprehensive ESG strategies.

Dutch organisations entering the Swiss sports market must navigate a complex regulatory landscape, including business establishment, employment laws, taxation, and intellectual property protection. Compliance with Swiss legal frameworks, such as licensing, sponsorship regulations, data protection, and environmental standards, is essential for successful operations. Understanding these nuances, including dispute resolution mechanisms, ensure Dutch businesses can capitalise on opportunities while minimising risks in Switzerland's well-regulated market.

1. Introduction

Towards building a sustainable bridge between the Swiss and Dutch sports related industries
This report is written at the instruction of the Dutch Embassy in Switzerland and RVO in the Netherlands to explore the areas of opportunities for Dutch companies in the Swiss sports market. The goal is to analyse where Dutch organisations can add sustainable value and how to achieve a strengthened transnational relationship. This report aims to comprehensively describe the opportunities that rise from the trends in the market and provide strategic recommendations to foster a long-term bridge regarding trade, research, innovation, investment, and impact.

Extensive desk research and expert interviews provided high quality information
The compilation of this report involved in-depth desk research, incorporating data and insights from advisory bureaus and national statistical organisations. Additionally, in-depth interviews with several experts in the sports industry from both Switzerland and The Netherlands were conducted to gather qualitative insights and validate the findings from secondary sources. The report is created by Nathalie Smeeman supported by consulting firm The Next Organization. The RVO and the Dutch Embassy in Switzerland hold the exclusive copyright.

This report builds up to concrete strategic recommendations for capitalising on opportunities
The report is structured to first provide an extensive overview of the Swiss sports landscape, describing why Switzerland has a unique position both nationally and on a global scale. An economic analysis of the total market and its sub-markets provides insights into the scale and characteristics of the national sports industry.

Subsequently, the report explores four key themes and their respective trends within the sports industry. For all four themes, concrete opportunities are described. First, 'digitalisation' focuses on the possibilities that new digital technology has to offer in the different areas of sports. Second, 'fan engagement' highlights new opportunities for sports organisations to deepen and broaden their relationships with fans. Third, 'shifting sports focus' describes how the sports itself need to keep innovating to stay relevant in the fast-changing world. And fourth, the theme of 'sustainability' examines how sports organisations need to keep up with the ever-increasing demand for sustainability.

The report concludes with presenting strategic recommendations on how to capitalise on the opportunities for Dutch companies looking to enter or expand within the Swiss sports market. It provides actionable steps to ensure that Dutch companies can effectively navigate and thrive in the Swiss sports landscape. Additional relevant information on important topics such as upcoming events, legal issues, subsidies, and the use of tenders ensures that Dutch companies are equipped with all the resources they need to enter the Swiss sports market successfully.


Report Structure
The central role of sports in Switzerland and its global influence
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Strategic recommendations on how to capitalize on the opportunities for Dutch companies

2. The central role of sports in Switzerland and its global influence

Sport is an integral part of Swiss society (1) (2) (3)
Sport plays a pivotal role in Swiss society, with an impressive 71 percent of the population engaging in regular physical activities. This widespread enthusiasm for sports is supported by a solid infrastructure with approximately 32,000 sports facilities and 980 fitness centres across the country. Furthermore, Switzerland is home to around 19,000 sports clubs, collectively counting over 2 million licensed members. Memberships for youth are growing whereas the number of memberships for adults is going down. A particular growth can be seen in Women participation in sports.

The high sports participation rates are reflected in the governmental vision that puts sport and physical vitality as a focal point, promoting both recreational and competitive sport through different governmental institutions. The Federal Office of Sport (BASPO) which is responsible for promotion and development of sport and physical activity at all levels in Switzerland plays a central role. Its main activities are setting national policies, funding sports initiatives, and overseeing the training and education of athletes and coaches, thereby shaping the overall sports landscape in the country. The day-to-day organisation of most sports is however organised on a regional level (per canton). Although following the national vision, this means that doing business creates the necessity for a decentral approach.

The most popular sports in Switzerland (1) (4) (5)
Football ranks as the top sport in Switzerland, both in terms of participation and as a spectator favourite among people of all ages. With around 300,000 members and 1,300 clubs, the Swiss Football Association is the largest sports organization in the country. In terms of sports consumption it is also the largest, with a solid amount of spectators following watching the games every week. Skiing is the second sport, being Switzerland's national sport and being deeply rooted in the country's alpine heritage and national identity. Renowned as one of the world's leading ski destinations, Switzerland sees about one-third of its residents hitting the slopes regularly, giving it the second-highest percentage of skiers in Europe. Third, ice hockey is a hugely popular sport in Switzerland, known for packed stadiums and captivating fans watching from home. The National League games draw some of the highest attendance figures in Europe, with a record 2.6 million spectators attending games in a recent six-month period. Last, tennis is also highly popular in Switzerland, where 7.2 percent of the population plays the sport—the highest percentage in Europe.

Switzerland is a popular country for sports tourism (6) (7)
Switzerland's natural beauty and well-developed infrastructure make it a prime destination for sports tourism. The country's picturesque landscapes, including the Alps, attract millions of tourists annually for activities such as skiing, hiking, and biking. In the winter of 2023-2024 alone, Switzerland saw an estimated 17.5 million overnight stays, with summer tourism expected to reach 23.7 million overnight stays in 2024. The country's commitment to maintaining extensive outdoor sports facilities and offering a variety of sporting events ensures that it remains a top choice for sports enthusiasts from around the world.

Switzerland's central place in the global sports market (8) (9) (10)
Switzerland occupies a strategic position in the global sports market, serving as the headquarters for more than 50 international sports federations. The International Olympic Committee (IOC), the international football federation (FIFA), and the European football federation (UEFA) are among the most prominent organizations based in Switzerland. These federations have chosen Switzerland due to its political neutrality and stability, strong economic climate, attractive tax regulations and liberal employment laws. The presence of these federations contributes significantly to the Swiss economy and their influence extends globally, with Switzerland serving as a hub for international sports governance and innovation. Those organisations are responsible for many of the important global

decisions and the organisation of most international events (globally representing 30 billion EUR in revenue in 2023), engaging in commercial relations with them has enormous potential. One such example is in digital communication strategies; many international federations are currently reworking these strategies and are looking for strategical and operational support.

Sports events have a big effect on the country
Major international sporting events have a wide range of effects on sport, the economy and society. They play an important role and contribute to the positive image of Switzerland and Swiss sport abroad. Major sporting events are not only important for Switzerland in terms of sports policy; they are also an important economic factor and have a diverse impact on society. They help to develop popular and competitive sport, are an important communication platform for its country and help to shape Switzerland's image abroad. The most appealing upcoming project is for Swiss Olympic to host the 2038 Winter Olympic Games in Switzerland. In the organisation of most big events the BASPO plays a key role, offering support and promotion. Together with Swiss Olympic, they also run the Coordination and Specialist Centre for Major Sporting Events.

Engaging with the numerous international federations requires a relational investment
With their global influence and extensive activities, international federations in Switzerland present highly attractive opportunities for collaboration. However, gaining access to these organizations can be challenging due to their preference for working within established networks. Much like many Swiss organisations, the federations operate with a familial approach, often favouring partners they know and trust. For foreign entities, establishing these relationships is a crucial initial step. Leveraging connections with individuals or organisations that possess an extensive Swiss network can facilitate introductions and foster trust. Establishing a local entity in Switzerland is another option that organisations can implement to engage with these federations. Building the relational foundation is essential for foreign organisations aiming to navigate and succeed within the Swiss sports market, ultimately enabling them to offer their expertise and innovative solutions to these influential bodies.

Swiss sports organisations are looking for ways to engage and connect fans and practitioners
(11) (12) (13) (14)
In Switzerland, both professional and amateur sports rely heavily on the engagement of fans and participants for their economic sustainability. Professional sports depend significantly on sponsorship deals, which are driven by fan engagement, including viewership and merchandise sales. Similarly, amateur sports draw substantial financial support from membership fees and sponsorships. Research confirms that the amount of paying members is among their biggest concerns for the future. To maintain and enhance their economic models, Swiss sports organisations are therefore continuously innovating to strengthen their connection with fans and participants. This commitment to innovation is highlighted by Switzerland being named the most innovative country in Europe by the European Commission in 2024. An example that illustrates the attention to innovation in sports is the Swiss University of Sport, exclusively dedicated to this field. Swiss organisations are open to foreign collaboration that can contribute to this goal. Dutch organisations offering innovative solutions to enhance the sports experience have substantial opportunities to make a significant impact in the Swiss sports market.

3. Overview of the Swiss sports market

3.1. Total sports market

While sport is not only considered to be a highly valued leisure activity, the national and international sport markets also play a significant role in the Swiss economy. The latest most accurate available figure for the annual turnover of the Swiss sports sector is EUR 22.7 billion in 2019. A figure for 2020 is also available, but as this is highly influenced by COVID-19, this does not give a proper indication for the size of the sports market in Switzerland. Nevertheless, it accounted for about EUR 18.8 billion in 2020, which does give an indication for the order of magnitude of the total market. (15) As a means of benchmarking, the value of the Dutch sports economy was EUR 18.1 billion in 2019 (16). Moreover, the Swiss sports market generated a gross value added of EUR 11.8 billion, contributing 1.7 percent of the Swiss gross domestic product (GDP). The sector employs a total of 97,900 people, which constitutes 2.4 percent of total employment in Switzerland (17).

A significant portion of the total sports revenue is accounted for by the 53 international sports federations that have their headquarters in Switzerland (18). These organisations create an average yearly economic impact of EUR 1.77 billion for Switzerland (19). Much of the revenue of (mega) events goes through these federations, accounting for such a large portion of the GDP that the government corrects its GDP for these events. In 2023, growth in GDP corrected for sports events was 0.3 percent, while uncorrected for sports events accounted for 0.7 percent (20). In total more than 3,400 people are employed permanently in Switzerland by the federations (8) (9).

In this report, the total market is studied in detail by defining and analysing six submarkets. These submarkets include events & competitions, infrastructure & facilities, sports equipment & apparel, media & broadcasting, sponsorship & marketing, and sports tourism.

3.2. Sports sub-markets

This chapter provides a structured overview of the sub-markets that constitute the total Swiss sports market. In each subchapter, the submarket is introduced and defined, followed by its value chain, the market structure including relevant characteristics, and the key players. Note that the key players may also constitute key partners, dependent on the context that requires partnership.

3.2.1 Sports events and competitions

The Swiss market for sports events and competitions ranges from organising and promoting to commercialising various sports events and competitions. This market engages professional, amateur, and youth sports across numerous disciplines, involving athletes, teams, governing bodies, sponsors, broadcasters, and passionate fans. The infrastructure and facilities used for these events and competitions, including building maintenance, are part separate sub-markets.

A significant contribution to the Swiss economy by the Swiss sports events and competitions market

Professional leagues, amateur and youth sports, international events, individual competitions, extreme sports, e-sports, ticket sales, and hospitality services are included within this sub-market and contribute to the Swiss economy in many ways. The main source of revenue for events is ticket sales, while for the competitions the biggest share is from contribution of the practitioners.

The value chain of sports events and competitions

The value chain of sports events and competitions in Switzerland involves four key phases: planning and organisation, marketing and promotion, event/competition execution, and evaluation. The first step is planning and organisation, where securing funding, obtaining permits, gaining sponsorship, and logistical planning are of essence. This phase ensures that events and competitions are well-financed, legally compliant, and logistically sound. In the second step, marketing and promotion efforts bring in participants and spectators, maximise media exposure, and engage fans through social media. These activities help build excitement and attract a larger audience. The third step occurs on the event day or during the competition: effective execution is vital for the satisfaction of participants and spectators and creates a memorable experience for all attendees. The final phase, evaluation, involves assessing the event's performance, gathering feedback, and strategizing for future improvements. This reflective phase allows organisers to learn from each occurrence, enhancing future planning and execution.

Market structure and characteristics (21)

Switzerland's sports events and competitions market is characterised by a blend of major international federations and local entities. Renowned global bodies like FIFA and the IOC play key roles, bringing international prestige and significant financial resources to the market. These organisations help attract global attention and high-profile events to Switzerland, boosting the local economy and enhancing the country's reputation as a premier sports destination. Examples of these events are the UEFA Women's EURO 2025 and the 2026 IIHF World Championship (Ice Hockey). See the appendix for all major sports events in the upcoming years. Meanwhile, local professional and amateur clubs enrich the country's sports culture by organising grassroots participation in the sports competitions and community engagement. Organisations such as Swiss Olympic and various other national sports federations ensure smooth operations and development at multiple levels, providing structure and support to both elite and community-level sports.

Events are often multi-facetted projects that require expertise of different fields. Organizers are therefore looking for partners who can offer a complete solution for all these challenges. Companies that can deliver this by working together, with a joint proposition, have a higher chance of getting these highly lucrative opportunities. A coordinating party can be of great value to bring the parties together

The success of the Swiss sports events and competitions market is driven by various key players/partners

Several key players play a central role in the Swiss sports events and competitions market, including governmental, federal and local authorities, professional sport clubs and event organisers. Prominent figures that provide essential governance, funding, and promotional support include Swiss Olympic, the Swiss Football Association, the Swiss Ice Hockey Federation, and Swiss Athletics. Leading professional sport clubs such as FC Basel, BSC Young Boys, SC Bern, and HC Davos also contribute significantly, not only by excelling in competitions but also by engaging local communities and fostering youth development. Major event organisers like Swiss Indoors for tennis, Tour de Suisse for cycling, Engadin Ski Marathon, Patrouille des Glaciers and Zurich Marathon bring excitement and prestige to the market, showcasing Switzerland's capacity to host world-class events. Government agencies, including the Swiss Federal Office of Sport (BASPO) and cantonal sports authorities, provide crucial support and management, ensuring that events comply with regulations and benefit from public funding. Local authorities, such as the City of Zurich Sports Department play vital roles in hosting and supporting a variety of sports events and competitions. Their involvement ensures that events and competitions are well-integrated into the local community, promoting economic benefits and community engagement.

3.2.2 Infrastructure and facilities

This section discusses the infrastructure and facilities in Switzerland. We define this market as follows: infrastructure includes all construction work that does not directly service a customer (e.g. all construction that is needed to build a stadium), while facilities include all construction work that does directly serve a customer (e.g. catering in a stadium or ski lifts). Within infrastructure we further distinguish between permanent and temporary infrastructure.

Switzerland possesses a high concentration of facilities and sports centres (1), (2)

The Swiss market for sports infrastructure and facilities is extensive, featuring around 32,000 sports facilities and 980 fitness centres. With approximately 19,000 sports clubs hosting two million licensed members, it is evident that a significant portion of the Swiss population actively participates in sports clubs. Football stands out with over 1,300 clubs and more than 270,000 licensed players. This well-developed infrastructure fosters a thriving sports culture and contributes substantially to the economy.

The value chain of the infrastructure and facilities market

The generic value chain in Switzerland's sports infrastructure and facilities market contains three stages: planning and design, construction and development and facility management. The process begins with planning and design, which includes conducting feasibility studies, securing funding, and obtaining necessary permits. The construction and development phase follows, emphasising the delivery of high-quality projects on time and within budget, while adhering to safety and environmental regulations. Facility management is vital for maintaining and operating these facilities efficiently, ensuring safety, and providing services. Temporary structures have an additional last step, for it needs to be dismantled and transported.

Infrastructure and facilities market dynamics are driven by cooperation between public and private organisations (22) (23) (24)

The market structure for sports infrastructure and facilities in Switzerland consist of both public and private organisations, both complementing each other and working together. On the one hand, the public sector plays a role in ensuring accessibility to sports facilities and promoting sports participation. Moreover, they are often the investing party for the construction of infrastructure. The public institutions are known to set very high construction standards, with relatively high costs to realise new projects as a result. Examples of public sector entities include cantonal governments and municipal authorities. On the other hand, the private sector comprises of construction companies, facility management firms, and real estate developers, who focus on the construction of the facilities and infrastructure. Often, local construction companies and architects are employed by municipalities or cantons to build infrastructure. Recent studies show that one-third of the sports clubs are unsatisfied with their facilities, indicating a large need for organizations that can provide construction or renovation.

Key players/partners in this sector

Prominent public players in the Swiss sports infrastructure and facilities market include the cantonal governments and municipal authorities. The private sector features leading construction companies like Implenia AG and HRS Real Estate AG, renowned for delivering high-quality projects. Facility management firms such as Sodexo Schweiz play a crucial role in maintaining these facilities. Real estate developers, including Halter AG and Steiner AG, are significant contributors in the construction and development phase. Additionally, sports organisation like the Swiss Football Association (SFV/ASF) and Swiss Ice Hockey Federation (SIHF) are dedicated to securing modern facilities and promoting athlete development. Educational institutions, including universities and schools, provide facilities for student and community use, supporting physical education programs. Financial institutions such as UBS AG and Credit Suisse Group AG, along with insurance companies like Swiss Re and Zurich Insurance Group, ensure profitable investments and support sustainable projects. Regarding temporary structures, the Swiss company Nüssli is a well-experienced and often used provider at major events inside and outside of Switzerland.

Case Study: "Swiss Football Home" - SFV launches feasibility study for a national football centre

The Swiss Football Association (SFV) is taking the first step towards the national football centre "Swiss Football Home". The central board has approved the budget for a feasibility study and commissioned Silvio Hartmann (Hartco Construction SA) to prepare one. "Our first goal is to examine the feasibility of a national football centre. The focus is on the question of location, the search for suitable partners and the financing of the construction and operation of such a centre," said SFA President Dominique Blanc on the launch of the project. Silvio Hartmann is a civil engineer and has extensive experience in the construction and development of infrastructure. He has managed numerous important projects in Switzerland, Africa and the USA. He played football in the Challenge League and was Co-President in the Challenge League and First Division for seven years. The budget for this project is 35-50 million and candidate cities are: Chur, Cham, Muntelier and Payerne. With a decision by the SFV Council to be expected in 2024 the opening is aimed for 2027.

3.2.3 Sports equipment and apparel

The sports equipment and apparel market in Switzerland is a dynamic sector that fuels both professional athletes and casual sports enthusiasts. This market includes the production, distribution, and sale of athletic footwear, clothing, and gear. Together they play a crucial role in driving consumer spending and fostering innovation in sports technology within the Swiss economy.

Value chain of the sports equipment and apparel market

The value chain in the sports equipment and apparel market is comprehensive and involves four stages: manufacturing, distribution, service provision, and marketing. It begins with manufacturing, which covers the production of high-quality sports gear and apparel. This is followed by distribution, ensuring products reach various retail outlets. Retail involves both physical and online stores where consumers purchase these products. Additionally, service provision includes maintenance and customisation services, enhancing product value. Lastly, marketing plays a pivotal role in promoting brands and engaging consumers, driving the market forward.

Market structured by blending global and local brands

The market structure of Switzerland's sports equipment and apparel sector is diverse and well-developed. It features a blend of global and local brands, specialised equipment manufacturers, distributors, wholesalers, and a variety of retailers. Prominent global brands coexist with strong local brands, creating a competitive market landscape. The sector includes specialised manufacturers focusing on niche sports equipment, supported by national and specialised distributors and wholesalers. Retailers range from large retail chains to specialty stores and online platforms, providing widespread accessibility to sports products.

Key players/partners

The Swiss sports equipment and apparel market is powered by a mix of influential global and local players, specialised equipment manufacturers, distributors, retailers, and wholesalers. Leading global brands such as Nike, Adidas, and Puma dominate the sports apparel segment, offering a wide range of products. A local brand like On, renowned for innovative running shoes, and Odlo, specialising in sportswear, hold significant market positions. Specialised equipment manufacturers, including Mammut for mountaineering gear and BMC Switzerland and Scott for high-quality bicycles, are key contributors. Distribution is efficiently managed by companies like Intersport Switzerland and Transa Backpacking AG, with specialised wholesalers such as Bucher + Walt SA and Outdoor Import GmbH ensuring targeted distribution. Retail giants like Decathlon and SportXX, along with specialty stores like Ochsner

Sport and Stöckli, cater to diverse consumer needs. Online retailers like Galaxus and Athleticum provide additional convenience.

3.2.4 Media and broadcasting

Switzerland's sports media and broadcasting market is built on an ecosystem that encompasses the creation, distribution, and consumption of sports-related content. This market is driven by a strong national interest in sports, and includes live broadcasts, streaming services, and on-demand content catering to diverse sports enthusiasts.

Growth of sports media and broadcasting fuelled by digital trend

The Swiss sports media and broadcasting market is poised for significant growth, underpinned by substantial investments in advanced broadcasting technologies and media rights. As part of the broader media and entertainment industry, it is rapidly adapting to digital trends, with streaming services and on-demand content driving this evolution. The shift from traditional TV to live streaming services and on-demand options reflects changing consumer habits and positions the Swiss market for continuous expansion.

Value chain of sports media and broadcasting

The value chain in the Swiss sports media and broadcasting sector spans across five steps: planning and research, acquisition of broadcasting rights, content creation, advertising and distribution, and maintenance of broadcasting and streaming platforms. It begins with planning and research, in which the researcher analyses audiences, channels, and platforms to understand the needs of the viewer. This step is followed by the acquisition of broadcasting rights. Content creation involves writing, editing, and analysis, leading to targeted advertising and efficient distribution through both online and offline channels. Maintenance of broadcasting and streaming platforms is crucial, as is the development of on-demand services and applications.

Broadcaster types and market dynamics in sports media and broadcasting (25) (21) (26)

Within the sports media and broadcasting market a mix of public and private broadcasters exists alongside a growing number of streaming services. Supervision by the Federal Department of the Environment, Transport, Energy and Communications (DETEC) and the Federal Office of Communications (OFCOM) ensures a regulated environment.

This market is currently influenced by several large companies that are founding their own streaming sites. Big Tech have entered the market in multiple ways: through acquiring rights packages to strengthen their video value proposition, through acquiring a small number of games of top-tier leagues that leverage a large consumer base, and through acquiring rights of a second-tier league and building a direct-to-consumer proposition powered by technology. On top of that, major non-European media companies with substantial financial resources are prepared to take on significant expenses to capture market share in national sports media markets, including the Swiss market.

Sports media and broadcasting market includes public and private organisations as key players/partners (27)

The Swiss sports media and broadcasting market includes the international federations, both public and private broadcasters, streaming services, newspapers, and magazines. International federations have broadcast rights to sell to broadcasters, which is also often the largest source of Olympic revenue for them. For instance, the IOC receives 61 percent of their revenue from media rights, while ticket sales constitute 25 percent. Public broadcasters like SRF (Schweizer Radio und Fernsehen), RTS (Radio Télévision Suisse), and RSI (Radiotelevisione svizzera di lingua Italiana) are pivotal, offering extensive sports coverage. Private entities such as Blue Sport provide specialised sports content via pay-tv, while streaming giants like DAZN, Eurosport Player, and Sky Sports cater to the growing demand for digital content. In sports journalism, newspapers like Neue Zürcher Zeitung, Tages-Anzeiger, and Le Matin deliver in-depth coverage, supported by digital platforms like SRF Sport, 20 Minuten Sport, and Watson Sport, which offer real-time updates and multimedia content. Magazines such as Schweizer Illustrierte Sport enrich the media landscape with feature articles and interviews. On a European level, the European Broadcast Union (EBU) representing all public European broadcasters is based in Geneva, similar to international federations choosing Switzerland as a headquarter base. EBU brings over 170 major sporting events to hundreds of millions of viewers across Europe and beyond. Media rests not only on technology and the ability of the programme maker. It also needs legal understanding and skills. Protecting and arranging copyright issues have been a major activity for the EBU, as have the legal frameworks for public service media.

3.2.5 Sponsorship and marketing

The sponsorship and marketing market is a key element of the sports industry, boosting the revenue streams and growth of sports events, teams, and athletes. This sector is built on corporate sponsorships and specialised marketing agencies, delivering not just financial backing but also strategic promotion, creating a deeply engaged audience and ensuring significant returns on investment for sponsors.

The steps of the sponsorship and marketing value chain

The sponsorship and marketing value chain consists of four steps: market research, rights acquisition, contract negotiations, and marketing and promotion. In the sponsorship and marketing ecosystem, the journey begins with market research to pinpoint promising sports, events, and athletes. This foundation leads to rights acquisition, followed by strategic contract negotiations. Finally, marketing and promotion activities are designed to amplify the sponsorship's impact. Securing marketing and/or media rights, crafting compelling marketing campaigns, and engaging with the target audience through diverse platforms are crucial steps in this process, ensuring maximum visibility and engagement.

Purpose-driven sponsorship as the new sponsorship model (28)

The traditional sponsorship and marketing market has transformed from transactions that are focused on a company's brand visibility to purpose-driven sponsorships. Purpose-driven sponsorships can be described as a partnership between the sponsor and the sponsee, where the partnership revolves around the fan. In this type of intercompany relationship, the two companies' set-up marketing campaigns together. An example is the International Olympic Committee, who obliges its sponsors to offer more than just sponsorship money through its Olympic Partner programme. Illustrative is beer brand Corona, being the global beer sponsor of the Olympic Games with their zero-alcohol beer, highlighting commitment to responsible alcohol consumption. Or transportation Toyota as the first ever mobility partner of the Olympic Movement, creating fan-centred solutions in collaboration with the IOC.

Blend of large corporations and specialised agencies form key players/partners of Swiss sports sponsorship and marketing market

Switzerland's sports sponsorship and marketing landscape is a blend of large corporations and specialised agencies. Major corporations like Swisscom and Credit Suisse are at the forefront, sponsoring a wide array of sports, from football to winter sports. Swisscom is the official partner of the Swiss national teams and Credit Suisse holds the title sponsorship of the Swiss Super League. In the realm of marketing, agencies such as Infront Sports & Media, TEAM Marketing and Sportfive are pivotal. These agencies offer comprehensive services including media rights distribution, sponsorship consulting, and event management. Infront Sports & Media, excels in marketing rights distribution and event management across multiple sports. They are one of the largest rights holders in terms of marketing rights. TEAM Marketing, based in Lucerne, manages media and commercial rights for prestigious European football competitions. Sportfive, an international agency, focuses on media rights distribution and marketing services within Switzerland.

Worth to mention is the “Swatch Group” with brands like Omega, Longines, Swatch, Hamilton,Tissot and Rado, all very active in Sport sponsorship. They even started their own timekeeping company “Swiss Timing” serving the Swatch brands with timing and data services. Nowadays Swiss Timing, based in Courgemont, is an independent entity delivering high quality data and timing services for the International Olympic Committee and many International Sport Federations.

3.2.6 Sports tourism

Sports tourism in Switzerland is very popular thanks to its landscapes and outdoor sports opportunities. Activities like cycling, hiking, skiing, snowboarding, and touring attract an excess of visitors each year. (24)

Winter tourism is at the centre of Swiss sports tourism (6) (29) (30) (31)

Winter tourism is the cornerstone of Swiss sports tourism. For the 2023/2024 winter season, overnight stays are projected to hit a total of 17.5 million stays. In the 2022/2023 season, ski stations generated transport revenues of 837 million EUR, underscoring the economic importance of this sector. The top ski resorts, including Zermatt, Saas-Fee, Flims Laax Falera, Corviglia/St. Moritz, and Jungfrau Ski Region Grindelwald, are amongst the most popular destinations for tourists. In 2022/2023, Valais led with 8.5 million skier days, followed by Graubünden with nearly 6 million, contributing to a national total of 22.3 million skier days. Summer tourism is on an upward trajectory, with overnight stays forecasted to reach 23.7 million in 2024. This steady increase signals a growing popularity of summer sports and outdoor activities. Popular destinations for summer skiing are Zermatt and Saas Fee.

Sport tourism value chain consists of many elements provided by local businesses that collaborate to boost tourism

The sports tourism value chain in Switzerland is multifaceted, encompassing facilities, transportation, equipment, and promotion. Key elements include accommodation providers (camping sites, hotels), ski resorts, sports rental services (for lake or mountain activities), and local businesses that collaborate to boost tourism. Effective promotion and facilitation are crucial for the sector's success. The value chain considers inbound logistics like transport infrastructure and equipment (buy and rental), operational aspects at mountain resorts and facilities, accommodations, food and beverages, rental services, outbound logistics managed by travel agencies and booking platforms, marketing and sales efforts, customer service, and infrastructure maintenance. Whereas only if these are used for tourism purposes. For example, food and beverages consumed during a local football match are excluded. This comprehensive approach ensures a seamless and enjoyable tourist experience, from initial travel arrangements to the activities at the destination.

High diversity of key players/partners in sports tourism market

The sports tourism market in Switzerland is diverse and involves various local players across different segments. The structure includes accommodations, ski resorts, and rental services, along with local businesses that engage in partnerships to enhance tourism promotion. These entities collaborate to create a dynamic and responsive market that meets the varied demands of tourists. The market structure is characterised by the synergy between accommodation providers, equipment rental services, and promotional partners, ensuring a cohesive and streamlined experience for visitors.

The Swiss sports tourism market includes ski resorts, accommodation providers, rental services, local business owners and other stakeholders. Major ski resorts such as Zermatt, Saas-Fee, and St. Moritz are pivotal in drawing winter tourists. Accommodation providers, including hotels and camping sites, play a crucial role in hosting tourists. Sports rental services and local businesses provide necessary equipment and facilitate various activities. Local partnerships and collaborations with business owners enhance promotional efforts, ensuring a comprehensive and engaging experience for tourists. Stakeholders like government bodies, local communities, tourists, and investors are integral to the successful operation and growth of the sports tourism sector in Switzerland.

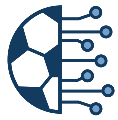
Swiss Snowsports is a service association that sells 6 million snow sports lessons per year via the 187 Swiss ski and snowboard schools. Swiss Snowsports is also responsible for the training of Swiss snow sports instructors. It is their philosophy to promote snow sports that are in demand among tourists and to promote new trends.

The tourism industry is represented by Switzerland Tourism, based in Zurich with 130 employees, promoting the benefits of Switzerland. Switzerland Tourism has a B2B platform and regularly opens tenders for joint marketing activities or cooperations. Switzerland Tourism cooperates closely with industry and corporate partners under the umbrella of the strong brand Switzerland. Thirteen regional and numerous destination partners as well as other Swiss service suppliers have invested a total of CHF 13.2 million in joint marketing activities.

4. Trends in the market present valuable opportunities

This section describes the various themes that impact the sports market in Switzerland. Four themes have been identified: Digitalisation, fan engagement, shifting sports focus, and sustainability. Each theme is described in a paragraph, which is structured to have an introduction, followed by an analysis of all individual trends that constitute the theme. After this trend analysis, opportunities follow on how Dutch companies can add value to Swiss organisations in these trends. Finally, an example of an organisation that has successfully leveraged on such a trend is put forward

4.1. Digitalisation



Introduction

Digitalisation has had and will continue to have a profound impact on a global scale. This theme has also naturally affected the sports industry in many ways. Digitalisation has led to an unprecedented increase in efficiency and effectiveness of organisations, from streamlining communications and work streams to enabling the collection and analysis of data to improve performance. This transformation affected businesses, but in the sports industry, it also changed the status quo for the individual athlete.

In the context of the Swiss sports market, digitalisation holds significant relevance. Despite a slower pace of technology adoption compared to other sectors, the potential benefits for Swiss sports organisations are substantial. Innovation regarding digitalisation can augment the sports market in a myriad of manners, from enhancing athlete performance to improving a sports business' overall performance in terms of strategy and operations.

Three trends have been identified in the theme of digitalisation to explain how it is shaping the sports industry: Artificial intelligence (AI) and data analysis, gamification and wearables, and Web3 and blockchain. The analysis on aspects of digitalisation in fan engagement can be found in the next sub-chapter, which specifically focuses on the fan-facing applications of digitalisation in fan engagement.

Artificial intelligence and data analysis

Artificial intelligence (AI) and data analysis have gained increasing popularity in recent years, driven by rapid advancements in technology and the increasing need to process large datasets effectively. AI technologies enable users to analyse data, identify patterns, and make informed decisions or predictions. Ranging from simple chatbots to complex generative AI systems, these technologies are reshaping various industries. The rise of generative AI has notably accelerated this trend. A 2024 McKinsey global survey revealed that 72 percent of organisations have adopted AI in at least one function, with 65 percent using generative AI similarly (32).

In Switzerland, the relevance of AI and data analysis in sports is substantial. A PwC report highlights that the sports industry is often a late adopter of new technologies (33), a trend also observed in Switzerland. Accenture data further suggests that Swiss executives feel less prepared for technological changes compared to their global counterparts (34). Although AI adoption in the Swiss sports industry lags other sectors, its potential is undeniable. In the next two paragraphs, the application of AI and data analytics in enhancing athlete performance, and business strategy and operations is discussed.

Enhancing athlete performance is a key application. AI can analyse data from training sessions and competitions to pinpoint strengths and weaknesses, offering personalised recommendations for improvement. This approach not only boosts athletic performance but also aids in injury prevention, giving athletes a competitive edge. AI will also support by improving scouting and recruitment, talent development, technical training, and the health and fitness of athletes. In the future sports data analytics likely will be professionalised through research centres that rely on interdisciplinary expertise from statistics, medical research and business.

AI and data analysis can also play a central role in business strategy and business operations. In business strategy, AI has a significant application in the processing of fan data. Fan data can be used to provide deeper insights into fan behaviour, enabling more effective marketing strategies and increasing the top line in terms of sales (e.g. tickets or merchandise). Tapping into a market of over 55 billion connected devices by 2025 worldwide (35) brings much potential. In business operations, AI and data analysis can optimise event and venue management. By examining data on attendance, purchasing patterns, and other factors, sports organisations can streamline operations, enhance security, and improve overall event efficiency. Furthermore, AI supports financial planning, legal compliance, and IT management, offering comprehensive assistance across various aspects of sports business operations (11). An example of innovative software making event and venue planning more efficient is OnePlans`s software used for the Olympic Games Paris 2024 to define and organise many of its venues. The digital approach makes it easier to make adjustments and try alternatives before putting it to praxis. Besides that, it is way easier to share amongst stakeholders.

Gamification and wearables

Gamification and wearables have been grouped together due to their complementary value. Although these trends have existed for decades, they have gained significant traction since the 2010s (34) and the rise of the Internet of Things. The COVID-19 pandemic has further accelerated their growth (36), as quarantine measures pushed sports teams and businesses to become more innovative in training their players and engaging their fan base.

Both fans and athletes benefit from gamification and wearables. The use of gamified apps and wearables generates data, thanks to the connectivity introduced by the Internet of Things. Use of these technologies by fans or other users produces data that can be analysed or utilised in AI algorithms. Athletes, on the other hand, can use wearables to collect data during practice, aiding in performance optimisation.

There are two main possibilities with gamification and wearables. First, a sport can be gamified into a video game played using wearables in mixed reality (XR). Second, (club) apps can be gamified to allow data collection from fans – a non-fan-facing application of gamification. For the purpose of collective exhaustiveness in this report, we do not discuss tech in clothes as that has not shown to be successful yet and large companies need to take up initiative in this area (25), general wearables such as sports watches, or wearables used in normal athlete training, as this is a market that is too niche to consider.

The integration of wearables and gamification is evident in XR, where athletes and other users (such as fans or children) can train or play in a gamified environment. This controlled setting offers several advantages. Athletes can train under specific conditions and collect data on their performance. Additionally, it provides a safe space for children to become familiar with sports without the usual risk of injury. Data collected from these environments can help tailor training programs and promote physical activity in a safe and controlled manner (37).

As a standalone trend, gamification offers opportunities through the gamification of apps used by sports organisations to interact with their users. This approach enables data collection which can help to understand user behaviour, personalise content, increase user retention, and offer products that users are likely to purchase. (37) (38) (28)

Web3 and blockchain

Web3 has been an upcoming concept for over ten years, and uses blockchain technology to create a more transparent and decentralised web. Blockchain, which is essentially a distributed ledger, allows for secure and transparent storage of information. Currently, not many organisations are working with these concepts: 74 percent of organisations lack a Web3 strategy, with the primary barrier being a lack of expertise (39). However, this trend does provide some potential, as sports organisations can leverage Web3 and blockchain in areas such as ticketing, decentralised investment and tokenisation of collectibles, virtual experiences (Metaverse, AR, VR), and launching various other digital assets that engage with their fan base.

The relevance of Web3 and blockchain technology for Switzerland is significant, as Switzerland is already a global hub for finance and technology. Switzerland's regulatory environment is conducive to blockchain innovation, offering clear guidelines that foster development while ensuring security and compliance. This makes the country an ideal landscape for sports organisations to explore and implement Web3 strategies.

In the context of events and competitions, blockchain can enhance ticket security. Traditional paper and digital tickets are susceptible to fraud and counterfeiting, but blockchain-based ticketing systems ensure each ticket is unique and traceable, reducing the risk of forgery. For media and broadcasting, blockchain technology provides a robust method for tracking and managing content rights. By recording rights ownership and transactions on a transparent ledger, broadcasters can efficiently license and monetise their content, ensuring that rights holders receive accurate and timely compensation (40) (39).

Investments within sports can also benefit from blockchain. Blockchain enables new models of investment and ownership, allowing third parties to buy stakes in clubs or players. This can democratise investment in (e-)sports, opening opportunities for fans and smaller investors to have a stake in their favourite teams. Furthermore, in sponsorship and marketing, blockchain can revolutionise the market for sports collectibles. Tokenising sports memorabilia and collectibles on the blockchain ensures authenticity and guarantees origin, making it easier to verify the legitimacy of items and reducing the market for counterfeit goods. Organisations are already collaborating with NFT companies to build their own digital trading cards (41).

Blockchain can also provide a foundation for virtual experiences in the Metaverse, augmented reality (AR), and virtual reality (VR). It can do so by ensuring secure and transparent transactions within these virtual environments. Fans can purchase virtual tickets to live events, participate in virtual meet-and-greets with athletes, or own virtual sports memorabilia, all backed by blockchain to ensure security and authenticity.

Some clubs, brands, athletes and sport leagues already have some presence in Web3. Whether through games, NFTs, fan tokens or other experiences, the sports industry already has some application of Web3 and blockchain. According to a Deloitte report, personalised and digitally connected experiences will be the future of the relationship industry between sport teams and fans, especially around Generation Z (42). PwC and Strategy& even mentioned that they would not be surprised if digital asset sales become one of the largest revenue streams for many teams and leagues in the next five years (41). Major soccer clubs like Paris Saint Germain, Barcelona and Manchester City have already launched digital assets. Other examples of sports that have developed fan tokens include F1, rugby, tennis and MMA teams. These initiatives have the aim of being a new point of contact between the sporting institution and the fan. Especially fans that are esports viewers in Switzerland have an interest in crypto or NFTs: they are almost three times more likely to show interest in these topics compared to non-e-sports viewers (25).

Opportunities for Dutch organisations

Enhancing Swiss Sports with Dutch AI Solutions

Switzerland has a strong focus on innovation and the Swiss sports industry is starting to realise the growing potential of AI in different aspects of their operations. However, the adoption of AI is currently still relatively low, and they are struggling to effectively monetise data they collect from their fans (39). Different Dutch organisations can provide in this need with their specialised expertise in the use of innovative data analysis. Helping Swiss organisations to gain insights in their fan behaviour enables them to develop more effective business strategies, as well as an enhanced overall fan experience. On a professional sports level the highly specialised Dutch organisations can be of great value in providing insights in athlete performance. Helping sports clubs with AI that can analyse training and competition data to identify strengths and weaknesses, offering personalised recommendations for improvement.

Innovation in gamification and wearables

Technological advancement has boosted the innovation in both the gamification in sports and the use of wearables. These trends have gained traction with the advent of the Internet of Things (IoT), yet Swiss sports organisations have been slower to adopt them. Swiss sports organisations recognise the big opportunities but are searching for concrete solutions to integrate in their activities. The Netherlands is home of multiple specialised organisations that can fulfil this demand. Delivering technology that improves the performance of athletes by providing insights and simulating different environments for them to train, can enable them to gain the competitive advantage they are looking for. Helping them subsequently with utilising gamification to create an enhanced sports experience and more engaged fans present opportunities with big potential.

Start-up and blockchain expertise from the Dutch start up hub

Web3 and blockchain technology offer numerous opportunities for the Swiss sports market. The integration of these technologies can revolutionise ticketing security, provide transparent tracking of media rights, enable novel investment opportunities in sports clubs and players, and secure the market for sports collectibles. As the Web3 market is still a relatively small space, many of the players in the ecosystem are start-ups or scale-ups. The Netherlands, and specifically Amsterdam, is the home of many tech start-ups and is considered the start-up centre of Europe (43). They possess the specialised expertise to help Swiss sports organisations with their need specific needs in for example secure ticketing systems, transparent media rights tracking, and the creation of immersive virtual experiences.

Use cases

Artificial Intelligence & Data Analysis: OnePlan Events

An example of a company that implemented AI in their software offering is OnePlan Events. Their software makes event and venue planning more efficient. It is used for the Olympic Games Paris 2024 to find, define and organise many of its venues. The digital approach allows for event planners to understand the various needs for a venue more easily, and allows them to make adjustments and try alternatives before putting it to praxis. It also simplifies reporting to stakeholders, as information can be easily shared.

Gamification & Wearables: Active E-sports Arena

Active E-sports Arena illustrates the possibilities within the gamification of sports and the use of wearables. They offer an XR service where the user is immersed in VR using a headset and tracking their movement via hands-free technology that does not require a suit of any kind. The company found that this service, without the hindrance of a suit, allowed for the most natural immersion into the technology. Moreover, data collected by the company pointed out that children who were playing gamified versions of sports in this XR setup were more likely to eventually enrol in a similar sport in "real life" (37) (44).

Web3 & Blockchain: Stepn

Stepn is a Web3 lifestyle app that combines elements of fitness and gaming with blockchain technology. Users earn cryptocurrency by walking, jogging, or running outdoors while using the app, which tracks their activity via GPS. The app utilises NFTs in the form of digital trainers that users need to own or rent to participate. Stepn's unique model incentivises healthy living by rewarding physical activity with its native token, which can be used in-app or traded on various exchanges. It has gained popularity as a pioneer in the move-to-earn space, blending fitness and decentralised finance (DeFi). (45)

4.2. Fan engagement

Introduction

In recent years, the Swiss sports market has undergone a significant transformation in fan engagement with their favourite sports and teams. New digital technologies have created opportunities for sports organisations to deepen and broaden their relationships with fans in unprecedented ways, making the sports experience more interactive and participatory.

The traditional "physical link" between the club and the fan has evolved; being a fan now extends beyond physically attending matches in the stadium (36). With a more globalised audience, the experience outside the stadium has become increasingly important.

More engaged fans generate more revenue by attending matches more frequently, purchasing more merchandise, and consuming more sports at home, leading to increasingly attractive sponsorship deals with record amounts of money each year (36). Sports organisations have therefore recognised the importance of capitalising on these opportunities not only to generate financial growth but also to remain relevant in this rapidly changing sports consumption landscape.

This chapter explores the opportunities for organisations to enhance both the in-stadium and out-stadium experiences for their fans, to create more meaningful relationships and monetise them effectively.

In-stadia experience (36) (46) (47) (33) (48)

Physically watching sports has been an integral part of our culture since the earliest form of football in ancient China, Cùjū, to the spectacle of the Colosseum in ancient Rome. Sports and entertainment leaders around the globe have long understood the importance of atmosphere and excitement in keeping fans happy and engaged (33).

While attending games remains a significant part of the fan experience, recent years have seen a stagnation or slight decrease in stadium attendance across many leagues, despite steady revenue growth for teams (36). This trend, coupled with rapidly evolving technology, presents a substantial opportunity for sports clubs to reverse the decline. Research indicates that nearly 70 percent of sports fans using new technologies believe these advancements have enhanced their spectator experience, both inside and outside the stadium (46).

Important to note is that for the experience to truly be enhanced, a stadium needs to have the basics right (33). Basics that have been the same for centuries and remain crucial today. It must be 1) a high-quality game, 2) with an exciting atmosphere, 3) in a safe and comfortable environment, 4) with a view from the seats that matches the expectation.

The quality of the game depends on the athletes or teams, but technology can intensify the experience of quality moments. Various teams are experimenting with providing live statistics about the players and the game to spectators. An option is to show this information on big screens, but mobile devices give even more possibilities. A live-updated app can deliver personalised content related to the ongoing match, allowing fans to choose the statistics they are interested in.

Creating an exciting atmosphere is not guaranteed in every stadium. A unique feeling that distinguishes watching a game in person from watching at home requires a combination of several elements working together. Innovative technology can enhance these elements. Sound in a stadium is a critical factor, and new possibilities to amplify or suppress certain sounds from both the audience and the organisation can offer more control. Synchronisation with an integrated lighting system can set a new standard for stadium atmosphere.

New technology can also enhance safety and comfort in the stadium experience. Recent examples show how mobile applications can be effectively used for crowd control. Live information about queue times at food and drink stands allows viewers to choose the optimal moment to step away from the game. Some venues even offer food or drink delivery, with pre-order options available days in advance. Live updates on busy areas can ensure smooth and safe logistics when entering or leaving the stadium.

Organisations can also ensure that the seat a fan purchases meets expectations. New stadium analysis options allow for the visualisation of the view from a particular seat, eliminating surprises. Spectators rate their experience higher when seated among like-minded individuals. Clubs can use data to offer seating options with people who share similar preferences or interests, fostering a sense of community (33).

Once the basics are right, sports clubs can consider how to broaden the stadium experience. For many, attending a match is a full-day program, presenting a significant opportunity to meet further needs. Examples from around the world illustrate the potential of stadiums evolving into entertainment districts (48). Music shows and other fan engagement activities during downtime between plays are becoming increasingly popular and attract new audiences (33). Building fan zones around the stadium is also becoming increasingly popular. Additionally, offering services like office spaces, restaurants, bars, and shopping opportunities enables clubs to monetise the large crowds they draw to their locations. Furthermore, there are opportunities around the peripheral items at stadia: sound and light installations are essential, improving the stadium floor using innovative floors, and monitors are some examples of the items needed that all contribute to the fan experience (28).

Out-stadia experience (49)

Sports organisations have started to realise that being a fan means more than only physically watching games in a stadium. To attract and retain fans they are looking for innovative ways to keep them engaged. Research shows that more than 60 percent of fans say that having a great “year-round experience” would make them more likely to be more engaged with the team in the coming season and 55 percent of fans say that it would make them more likely to purchase a ticket in the future (49). Innovative strategies and new technologies allow the opportunities to provide for these needs and can be the tools to compete with the ever-increasing entertainment offering available worldwide.

A year-round experience involves providing live sports content during the season and engaging content during the off-season. This continuous engagement keeps fans connected to their favourite teams, fostering loyalty and increasing the likelihood of future ticket purchases. Digital technology plays a crucial role in creating these opportunities, enabling sports organisations to reach a global audience.

For instance, Paris Saint-Germain (PSG) schedules some of its matches in the afternoon to cater to Chinese viewers, demonstrating how strategic planning can enhance global engagement.

One significant trend affecting fan engagement is the shift away from traditional cable TV. Consumers are increasingly “cutting the cord,” with a notable number choosing streaming services instead. However, sports remain one of the few content genres that many consumers prefer to watch live. This presents a unique opportunity for sports organisations to capitalise on live broadcasts, leveraging over-the-top (OTT) platforms to offer exclusive content (36). Paid OTT platforms allow organisations to launch their own channels, providing direct access to fans and retaining more revenue. Despite this, overall satisfaction with broadcast and OTT experiences is only 39 percent, highlighting the need for continued technological advancements to improve fan experiences across devices, including the integration of various audiovisual options (e.g. streams), flexible resolution, an offline viewing option, an algorithm to propose relevant content to fans, augmented reality (AR), virtual reality (VR), social media, and betting.

Digital technology also facilitates innovative ways to consume sports (47). For example, some broadcasts now offer special camera angles and the ability to choose announcers, enhancing personalisation. Live statistics provided by AI chatbots, AI-generated subtitles, and AR/VR enhancements are transforming how fans interact with sports content. These advancements cater to the consumer demand for high-quality viewing experiences on any device, at any time (47).

The social aspect of watching sports is increasingly important, especially for younger fans. Social media platforms facilitate real-time interaction, community building, and rapid updates, which are crucial for Gen Z fans that prefer highlights and updates over in-depth analysis. This generation values immediacy and the ability to connect with their peers over shared interests. Social channels like Twitter, Instagram, TikTok, and Snapchat provide platforms where fans can engage with live commentary, share reactions, and participate in discussions during and after games. For example, during a major football match, hashtags and trending topics on X can generate millions of interactions, creating a virtual stadium atmosphere. Instagram stories and TikTok videos allow fans to share their experiences and react to key moments in real-time, while Snapchat's location-based filters can enhance the sense of being part of a global fan community. Exclusive content, such as behind-the-scenes footage, player interviews, and interactive Q&A sessions, can significantly boost community loyalty. Manchester City FC’s "Treble Winners" series on Netflix, which offers fans a glimpse into the team's personal lives, preparations and post-match reactions, is a prime example of how behind-the-scenes content can deepen fan engagement. Furthermore, innovative tools like PSG’s fan tokens allow fans to influence club decisions and participate in virtual events. These tokens not only increase engagement but also create a sense of belonging and ownership among fans. By integrating social and interactive elements, sports organizations can cater to the preferences of younger audiences, ensuring sustained engagement and loyalty (28).

Personalised content is another vital aspect of fan engagement. By leveraging data analysis and predictive analytics, sports organisations can tailor content to individual preferences, ensuring fans to see only what interests them. This approach involves collecting and analysing data on fan behaviour, preferences, and interactions to deliver customised experiences. For instance, fans can receive personalised highlights via email, app notifications about their favourite players, and recommendations for related content based on their viewing history. The NBA app, for example, offers customised notifications and video clips based on a user's favourite teams and players, keeping them engaged with relevant content. Advanced AI algorithms can also predict what type of content will resonate most with each fan, further increasing their time on the app. Personalisation extends beyond content delivery to include targeted marketing campaigns, personalised offers, and exclusive promotions. Analysing purchase history and engagement patterns can help clubs create bespoke offers that cater to individual fan preferences. By understanding the unique preferences of their audience, sports organisations can create a more immersive and satisfying fan experience. This not only enhances the fan experience but also strengthens the bond between fans and their favourite teams. This drives revenue through increased merchandise sales, ticket purchases, and digital subscriptions. (28)

Opportunities for Dutch organisations

Enhancing Digital Fan Experiences

Swiss sports organisations are increasingly in need of advanced digital solutions to elevate fan experiences both in-stadium and out-stadium. The demand for high-quality, interactive, and engaging content that can be accessed on any device at any time is growing. Dutch organisations, known for their technological innovation, are well-positioned to meet this need. Their expertise in developing AI-driven applications, immersive AR/VR experiences, and sophisticated digital platforms can significantly enhance the fan experience for Swiss sports enthusiasts. By deploying AI-powered chatbots, AR/VR solutions, and innovative additions to OTT platforms, Dutch companies can help Swiss sports clubs offer personalised content, real-time game statistics, and immersive viewing experiences, thereby attracting and retaining a global fan base.

Developing Comprehensive Year-Round Engagement Strategies

Maintaining fan engagement throughout the year is another critical need for Swiss sports organisations. Fans seek a continuous connection with their favourite teams, which extends beyond the sports season. Dutch organisations excel in content creation, digital marketing, and community building, making them ideal partners for developing comprehensive year-round engagement strategies. Dutch expertise in social media campaigns, content marketing, and interactive fan engagement can help Swiss sports organisations provide consistent, high-quality content. This includes live streaming of games, off-season player interviews, training sessions, and interactive social media campaigns, ensuring that fans remain connected and invested, ultimately driving ticket sales and merchandise revenue.

Utilising Data Analytics for Personalised Fan Experiences

Personalisation is paramount in modern fan engagement, and Swiss sports organisations require advanced data analytics solutions to deliver tailored experiences. Dutch companies are leaders in data analytics and predictive modelling, specialising in collecting and analysing large datasets to generate actionable insights. By partnering with Dutch organisations, Swiss sports clubs can implement data analytics platforms that track and understand fan behaviour. This allows for the creation of personalised content, targeted promotions, and customised interactions, enhancing fan satisfaction and loyalty.[14] Leveraging Dutch expertise in data-driven marketing and engagement strategies can significantly deepen the connection between Swiss sports organisations and their fans, increasing both engagement and monetisation opportunities.

Use cases

In-Stadia Experience: Sorama (50)

One exemplary Dutch company making significant strides in enhancing in-stadium experiences is Sorama. Sorama specialises in innovative sound solutions that can transform the atmosphere of a sports stadium. Using advanced sound imaging technology, Sorama can analyse and optimise the acoustics of any venue, ensuring that the sound quality is perfect throughout the stadium. This is a cutting-edge example of how technology can enhance the live sports experience, making it more immersive and exciting for fans.

Sorama's sound cameras and advanced acoustic sensors can precisely pinpoint sound sources, allowing for the amplification of crowd noise and the suppression of unwanted background sounds. This technology not only enhances the overall atmosphere but also ensures that fans have a clearer and more enjoyable audio experience. The integration of Sorama's technology can make announcements, music, and other auditory elements of a game more impactful, heightening the excitement and engagement levels.

Out-Stadia Experience: Ex Machina[13]

Ex Machina, another Dutch company excels in enhancing out-stadia experiences through its expertise in interactive fan engagement and second-screen solutions. Ex Machina develops platforms that enable fans to engage with live sports events in real-time from anywhere in the world. Their innovative approach to integrating live data, interactive content, and social media allows fans to participate in the sports experience beyond the confines of the stadium.

One of the key offerings from Ex Machina is their second-screen app, which synchronises with live broadcasts to provide fans with interactive features such as real-time polls, trivia, and live statistics. This level of interactivity keeps fans engaged throughout the game, even if they are not physically present. Additionally, Ex Machina's platforms can offer personalised content based on fan preferences, enhancing the overall viewing experience.

4.3. Shifting sports focus

Introduction

Sports have continuously evolved throughout history, reflecting changes in societal values, technology, and cultural trends. From ancient times, where sports were primarily physical competitions for survival and honour, to the modern era, where professional leagues and global events dominate, the landscape of sports has been changing continuously. In recent years, the rapid rise of digital technologies has created new possibilities to engage in sports never thought possible. The popularity of new sports has risen significantly, and multiple existing sports have tried to innovate to stay relevant. Shifting societal norms have introduced new demands for a more diverse and inclusive sports landscape. These ongoing developments have been even more accelerated by Covid-19, forcing sports to reinvent themselves in multiple ways (36).

These shifts in the focus of sports present various new needs of Swiss organisations for innovative solutions. This section will analyse the opportunities that arise from three trends influencing the sports market: the rise of e-sports, upcoming sports with big potential, and the need to incorporate diversity & inclusion.

E-sports

Traditionally seen, sports are competitive physical activities or games that involve skill, strategy, and physical exertion, aiming to enhance or maintain participants' physical abilities while providing entertainment and enjoyment. They are often organised with established rules and guidelines, and can be played individually or in teams, ranging from amateur to professional levels. In addition to physical benefits, sports also promote teamwork, discipline, and social interaction among participants and fans. Recent technological advancements, however, have provided a whole new way on how to look at sports. With the ever-increasing digital possibilities and the growing popularity, a new form of sports has emerged: e-sports. It involves significantly less physical exercise, but contains all the other aspects of what sports traditionally are.

Alike most countries globally, Switzerland has seen a big rise in popularity in recent years. The country's strong technological infrastructure provides a solid foundation for the growth of e-sports. Currently 6.6 percent of the population can be identified as an e-sports player (51). The consumption of e-sports is even more notable, with more than one million people who watch e-sports regularly (52). Rising platforms like Twitch and YouTube Gaming are making widespread viewing and streaming of e-sports events accessible for everyone. The global e-sports market was about EUR 865 million in 2020, with a then-expected CAGR of 11.1% between 2020-2024 (53), while global video gaming market of 8.8% CAGR between 2024-2027 (54); these data points demonstrate that increasing popularity of e-sports and video gaming is not likely to decrease.

Despite significant growth in recent years, the esports audience remains “under-monetised” from an economic standpoint (55). The widespread availability of relevant free content makes it challenging to convert media content into revenue. Currently, direct revenue from end customers mainly comes from merchandise and event tickets, while revenue from premium content access, memberships, and similar sources remains relatively minor.

Organisations active in e-sports events are actively looking for possibilities to increase the proportion of paying consumers (55). An increased penetration in the society is an important first step driving monetisation, creating a need for specialized agency in (sports) marketing. A second step is increasing the amount of expenditure of viewers. Occasional viewers primarily spend their esports budget on event tickets and merchandise, often linked to attending live events. As engagement increases, a greater portion of their spending shifts towards paid esports content, esports betting, and other products, such as access to online esports communities or membership programs. More engaged fans have shown to spend more than 4 times as much as the occasional audience.

The rising popularity of e-sports has also caught the attention of various (international) sports organisations. Traditional sports and their digital equivalent can potentially have a synergetic effect for both, and sports organisations have a growing need for innovative solutions to bridge the gap between the two. Several notable examples illustrate the potential and can provide inspiration. As sports clubs are looking for ways to attract new member, e-sports have shown to motivate children to participate in physical sports. For people with a disability doing physical sport might be more challenging, but the way higher percentages for watching, playing and livestreaming e-sports indicate a big potential to connect with them in a non-traditional sports way (56). For fan engagement, digital games have the potential to increase excitement and attendance for the physical sports organisations, as people have bigger excitement for the sport and its professional players in general.

Upcoming sports

In the landscape of physical sports, significant shifts in popularity are also emerging. Especially the younger population is constantly looking for what’s new and exciting, enabling new sports to gain momentum quickly and force traditional sports to reinvent themselves. These changes in the sports people participate in and consume for entertainment have big effects on the needs of sports organisations looking to stay relevant.

The most striking example of a new sport that has seen an immense spike in popularity is padel, both worldwide and in Switzerland specifically. It is considered the fastest-growing sport globally, appealing to a wide demographic due to its accessibility and social nature. Its global market size is estimated at about EUR 300 million in 2022 with an expected growth of 9.6 percent per year (57). The market in Switzerland is growing, but the sport does not have the global adoption rate yet. Sports organisations and investors realize this and are actively looking for companies that can facilitate the construction new clubs to prepare for the likely peak in popularity. Also sports clubs that traditionally focussed on tennis are not blind for the (financial) potential and need the expertise to transform tennis courts into padel courts. Besides the necessity for new facilities, all the players want adequate equipment and apparel, creating a new demand with big potential.

Outdoor sports are quickly gaining popularity as well in Switzerland. The beautiful and diverse landscape of the country is the ideal environment for physical activity in nature. The most notable of the outdoor sports is trail running, with more than 65,000 kilometres of marked hiking paths in the Swiss Alps (58). Especially younger people are quickly picking up on the sport, drawn by the appeal for being outdoors and not needing much equipment or expensive facilities. This rising amount of people who love trail running is also notable in other countries and when looking for the most beautiful paths many of they end up in Switzerland. More often these sports tourists are visiting the country, on top of that they come for other summer sports, such as hiking. Other outdoor sports that are gaining popularity amongst natives and tourists are mountain biking, cross country, and ski touring.

A perfect example of a traditional sport that has introduced an innovative new variant to stay relevant is basketball. The international federation (FIBA) recognised a need for a form of the game that fits the current taste and lifestyle of the world. As a response they introduced 3x3 Basketball, which is simpler, shorter and more entertaining. With great success. Social engagement surged immensely, from 1 million in 2012 to 536 million in 2022 (59), which especially skyrocketed after being included in the 2020 Olympics in Tokyo. The other sports federations, besides FIBA, have a similar need to keep engaging fans in new ways and have to form their own solutions. Organisations that can contribute with this innovation and provide in the needs for new facilities and equipment can add great value.

The popularity of a sport is largely driven by the changing needs of the practitioners and fans, but can also be the product of commercial activities. Many of the biggest sports leagues in the world are trying to gain global momentum by expanding in other countries (33). Bringing their world-famous teams and players to countries like Switzerland can have big effects of the engagement with this sport. It can offer the leagues a big untapped potential of new fans who want to visit matches, buy products and watch games online. When big leagues like the American National Basketball Association (NBA) want to expand to Switzerland, this creates a big need for companies that can provide in all the sub-markets within the total sports market.

Diversity and inclusion

As sports are an integral part of society, the effects of sociological trends are impactful in changing the way we look at the whole sports industry. In many aspects of social life there is a lot of attention for how to embrace diversity and create a more inclusive environment, with the sports market this is no different. This reflects on both the participation and the consumption of sports. As a society Switzerland has recognized the importance of making participation in physical activity available for everyone. Lots of fans are starting to broaden their view on sports and are actively supporting more than just the men’s teams.

In Switzerland, the number of people with disabilities is estimated at around 1.8 million out of 8.8 million Swiss, with 29 percent considered severely disabled (60). This significant demographic highlights the need for inclusive sports programs and facilities to cater to a wide range of abilities and backgrounds. Implementing accessible facilities and adaptive equipment for disabled people can significantly improve participation rates. By ensuring that sports venues are equipped with ramps, lifts, and other accessibility features, and providing adaptive sports equipment, more people with disabilities can engage in sports activities. This approach not only promotes physical health and social inclusion but also creates a sense of community and belonging for disabled athletes, enhancing their overall well-being. Therefore sports federations, sports clubs and governmental institutions are all looking for partners to help them adapt and create these facilities

In sports consumption women’s sports have emerged as a key market force. The global revenue of women’s elite sport is expected to be more than 1 billion USD in 2024, which is at least 300 per cent higher than the valuation three years ago (61). Research shows that 84 percent of sports fans are interested in women's sports, with 51 percent of those fans being male (62). Despite the increasing attention and the high interest in the population, the growth could even be bigger as fans experience barriers that prevent them to keeping up with women’s sports. The main cited factors in this are the lack of available information and the lack of access. And when asked who they feel should be responsible for promoting women’s sports, the majority points at the media and brands (63). Organisations active in the Swiss sports market have witnessed the increased attention and are trying to tap into this shifted sports focus. They have realized that to stay relevant, a less central role for the main men’s team is needed. By highlighting female athletes' achievements and creating compelling narratives around women's sports, media outlets can draw a broader audience. This increased exposure can lead to more sponsorship opportunities and financial support, further developing women’s sports in Switzerland. Enhanced media presence can also inspire young girls to participate in sports, fostering the next generation of female athletes.

Opportunities for Dutch organisations

Enriching the E-sports ecosystem

With the rising popularity of E-sports indicates a big potential in the market. E-sports teams and event organisers are attracting big audiences, but have shown difficulty to monetise their efforts effectively. Herein lays a big opportunity for the internationally recognised Dutch agencies specializing in sports and athlete marketing. They can add great value by increasing attracting new spectators and increasing penetration rates in the Swiss society and from there in the rest of the world. The experts in fan engagement can help by making fans more invested with e-sports, driving up expenditure and the sales of fan products. Also the more traditional sports organisations offer a great opportunity for Dutch business, as they are looking for ways to incorporate e-sports elements into their core business with the goal of attracting new people and engaging with them more intensely.

Facilitating the rise of upcoming sports

With all the international sports federations looking for ways to stay relevant and the quickly rising popularity of new sports, big opportunities arise for Dutch organisations in many areas. Dutch companies have for example established a strong reputation in building high-quality padel courts, known for their innovation and adherence to stringent quality standards (64). For Swiss sport organisations, this expertise is highly attractive, offering durable and weather-resistant courts suitable for the diverse climate in the country. For both new sports and newly introduced leagues it is key to attract enough fans and build a strong relationship with them. This creates big opportunities for Dutch companies that are known for their innovative sports marketing and fan engagement expertise.

Enabling diversity and inclusion in Switzerland

Switzerland pursuits a more diverse and inclusive sports landscape and Dutch organisations have a big advantage when they are looking for partners to help them achieve it. The Netherlands is still perceived as a very progressive country, and this is confirmed by research of leading institutions. In Berkeley’s Index for 2023 the Netherlands was top three of the world in inclusiveness (65). Dutch organisations specialized in the accessible sports facilities can be of great value for all the sports clubs looking for a more inclusive environment. With 1.8 million people with disabilities, this is an opportunity with big potential. The popularity of woman’s sports in the Netherlands, and especially football, has shown that the Netherlands has quickly embraced it as a central part of sports consumption. The upcoming UEFA Women's EURO 2025 in Switzerland offers an exquisite chance for Dutch organisations in the sports industry to use this momentum to engage in business in Switzerland. The 2024 Olympics show the high success rate of Dutch woman in different sport, being responsible for 61% of the medals. Comparing the policies by the NOC*NSF and/or local sports federations could be of great value for its Swiss counterparts with their goal to make women’s sports more successful.

Use cases

E-sports – Ajax Gaming Academy (66)

The professional Dutch football club Ajax has launched an app connected to the highly popular football game FIFA. In this online academy the 110 million FIFA-players can improve their skills by watching tutorials by influencers on different aspects of the game. They can learn on aspects like how to take penalties, what team formations to use and the use of different skill moves. Research by Ajax had shown that FIFA players are constantly looking for ways to improve themselves and by offering them the tools to do that Ajax has created a new way to interact with fans. With both new and existing fans the online engagement has increased, with also higher offline engagement as a result.

Upcoming sports – Padel Nederland

Padel Nederland is a company specialized in facilitating and distributing innovative padel courts. They offer modular and sustainable aluminium courts, in combination with maintenance service. The material is weather-resistant, due to the durable and high-quality materials used, making it ideal for export to countries with a climate like Switzerland. They offer the perfect option for events with their option for a special padel court that can be assembled and disassembled in two days.

Diversity & inclusion – Van Raam (67)

Van Raam is a Dutch manufacturer of bicycles, specialized in offering solutions for people with special needs. In their search to create the experience of freedom and independence, they adapted their designs for specific use cases. Examples are wheelchair bikes, side-by-side tandem bikes and mobility scooters. This enables a big group of people to participate in biking that was otherwise neglected.

4.4. Sustainability

Introduction

Over the past decades, sustainability has become a pressing issue globally. The increasing awareness of environmental degradation, climate change, and resource depletion has spurred industries across the board to adopt more sustainable practices. This shift is not merely a trend but a necessity to ensure the longevity of ecosystems and the wellbeing of future generations.

In Switzerland, the relevance of sustainability in sports is particularly pronounced. The country's natural landscapes, including its renowned ski resorts, clean water bodies, and extensive hiking trails, are vital to both the local economy and the national identity. However, these natural resources are under threat from climate change. Global warming poses a severe risk to winter sports, with predictions that 90 percent of Europe's ski resorts will face critical shortages of natural snow if current warming trends continue (68). Similarly, maintaining clean water resources is crucial for sports like swimming, sailing, and fishing, and for the overall health of the population.

The international sports federations have started to realise that sustainability has to become an integral part of their strategy and operations. Some examples of organisations that show initiative on this topic are the IOC, Sustainable Mountain Alliance, and AISTS. However, not all sports organisation are at an advanced state yet. Driven by both fast-evolving laws and regulations, as well as demand by fans, having sustainability as an integral part of strategy & operations has quickly become a main topic (69). Illustrative is that 17 of the 36 summer sport federations have adopted sustainability strategies and 10 have a full-time staff person dedicated to working on this agenda. Although the first steps are taken, this also shows that the organisations are still looking to find their way to deal with the issues (70).

This section examines the opportunities that arise from the trends in the Swiss sport market within the theme of sustainability. These include incorporating ESG (Environmental, Social, and Governance), working towards a circular economy and creating green facilities.

ESG

Organisations worldwide face increasing pressure to operate in a sustainable way. A framework widely used to evaluate the operations and impact of organisations is ESG, with assessing criteria regarding Environmental, Social, and Governance. Sports organisations in Switzerland are no different and are required to demonstrate their commitment to these principles. Recent proposals by the Swiss government for broader and stricter sustainability reporting requirements highlight the increasing necessity for companies to integrate ESG in their strategy (71). The proposed regulations mandate that companies, including those in the sports sector, provide detailed disclosures on their environmental and social impacts, as well as their governance practices. Moreover, consumers and fans increasingly prefer to support organisations that align with their values; research shows that fans who perceive their club as including sustainable initiatives spend more money towards the club (72). A recent survey by PwC indicates that stakeholder pressure is the primary driver for 84 percent of sports industry leaders to engage in social and environmental sustainability (73).

Although crucial to keep complying with laws and regulations, as well as complying with the demand of their fans and stakeholders, studies show that sustainability is often the first topic to be dropped when organisations find themselves under financial pressure (74). Organisations struggle to make it clear what sustainability means for them specifically, how they can make it an integral part of the business strategy and operationalise their objectives in the business.

Fast-evolving technology makes it increasingly easy to gain insights in carbon-footprinting and other impact categories (75). Software that uses robust methods like lifecycle assessment is getting more and more accessible for non-experts to use and can be integrated with existing IT-landscapes, making it possible for automated and real-time reporting. Identifying what impact each step of the whole supply-chain has on the environment is a crucial first step to assess how positive change can be achieved. Taking it a step further, integrating sustainability data in the design process of products and services can prevent negative impact to happen in the first place. Smart usage of these kinds of solutions can be part of the answer for organisation looking to actively make their impact transparent and actionable.

Circular economy

An important part of working towards a more sustainable sports market is focussing on the continual use of resources and eliminating waste. More and more organisations in the sports market are developing strategies to work towards the concept of a circular economy. The main goal is to create closed-loop systems where products and materials are reused, repaired, and recycled rather than discarded. Yet, this is a difficult process and there is a substantial need for specific waste-reduction solutions in all the different submarkets. Four elements can be identified in the hierarchy of waste-reduction (as summarised by the UEFA 2024 circular economy guideline): Reduce, Reuse, Recycle, Recover (76).

The preferred way to work towards the circular economy is to reduce the amount of waste by prevention (77). This includes adopting strategies such as using biodegradable materials for disposable items, implementing comprehensive waste sorting and management systems, and designing venues with materials that require minimal replacement or maintenance. Furthermore, digital transformation plays a critical role in reducing waste, with solutions like digital ticketing and online programs replacing paper-based materials. Efficient waste management systems that track and minimise resource use are also crucial. Dutch organisations with expertise in sustainable waste management and digital solutions can provide valuable insights and technologies to help Swiss sports organisations reduce their waste footprint while enhancing operational efficiency.

In the context of reuse, there is a growing demand for durable products and infrastructure in sports venues. Organisations need equipment, uniforms, and other materials that are designed for extended use and ease of refurbishment (78). The reuse principle calls for partnerships with suppliers who can offer modular, easily repairable products. There is a need for innovative solutions from specialised organisations that can deliver high-quality, long-lasting materials and services that emphasise design for disassembly, allowing for parts to be reused or repurposed efficiently.

Besides the before mentioned efforts, sports organisations are looking for ways to Recycle more efficiently and turn waste into a valuable resource. This applies to a range of topics, from recycling construction materials during stadium renovations to ensuring uniforms are made from recyclable fabrics (79). The focus here is on closing the loop. Swiss organisations are looking for specialised partners to advice on waste separation and processing.

The last step of the waste hierarchy is the goal to recover as much as possible from the collected waste (69). Sports organisations are increasingly exploring technologies that allow them to harness value from waste materials produced at events and venues. As they are not in the position to do this alone, a network of partners specialised in creating this value is essential to complete this last aspect of the process towards a circular economy.

Several notable examples have shown that a lot can be achieved when the circular economy is an integral part of the strategy. The most recent one is the Paris 2024 Olympics, which is set to be the most sustainable games ever (80). Over 1 billion EUR has been invested in sustainable projects, demonstrating a significant business commitment to environmental stewardship. A known problem for the Olympics is what to do with all the extra facilities that were built for the events. Many of the previous editions have left behind abandoned buildings that lack a new purpose, but Paris 2024 has included 95 percent existing or temporary infrastructure, and the rest has been built with a second purpose in mind.

Green facilities

Much of the environmental impact of sports organisations is a result of the facilities that are used; there is a growing need for partners that can help these organisations reach their ESG goals and improve the various ESG-related aspects of the facilities. Two key focus points for understanding the environmental impact of sports facilities are construction, and operations and logistics. Facilities start at the construction phase: the facilities of the future need to have sustainability as an integral part of the design phase. During construction, the most innovative equipment should be used to reduce impact wherever possible. The operations and logistics of the facilities are the second and last important focus point for impact reduction.

The construction of sports facilities must incorporate sustainable practices from the outset. This includes using materials that require less energy for production and maintenance, and integrating renewable energy sources such as wind turbines and solar panels to reduce carbon footprints (81). Digital twin technology is a powerful tool that can assist in the sustainable design and operation of facilities by enabling virtual modelling for scenario planning, real-time monitoring, and adaptive management. This technology helps organisations optimise their sustainability initiatives and ensures that their facilities are environmentally efficient (81). Additionally, designing multi-purpose and temporary facilities can significantly reduce environmental impact by maximising building usage and minimising the need for new constructions. Examples like Daikin's temporary ice facility demonstrate how temporary installations can meet high standards of efficiency and sustainability (82). Worth mentioning is that Switzerland is known for its strict construction standards, driving up the costs of building sports infrastructure. The local municipalities or cantons are often the investors and have the tendency to favour local construction and architecture companies, not always necessarily going for the highest quality. Foreign companies offering innovative infrastructural solutions therefore have the possibility to distinguish themselves once they have been introduced (83).

Every component of a sports venue, from lighting and flooring to seating and sanitation, should be optimised for sustainability. Swiss organisations are actively seeking specialised partners to enhance eco-friendly solutions for these components. Integrating intelligent systems and sensors can transform facilities by allowing precise control of lighting, temperature, air quality, soil humidity, and sound levels in real-time (81). These technologies ensure that energy is used efficiently and only when needed, avoiding unnecessary expenditure and optimising resource use. By incorporating smart technologies, facilities can reduce their environmental impact while simultaneously enhancing the user experience. An example of an organisation that is working much on this topic is Philips: Philips creates 3D printed products that they have designed for circularity. The products that Philips creates require less material and components, potentially created from recycled material, which reinforces their commitment to the reduce-reuse-recycle approach. They provide, for example, sustainable (stadium) lighting solutions.

Operations and logistics surrounding sports facilities and events are crucial in achieving environmental sustainability. Reducing carbon emissions associated with transportation is a priority, with Swiss organisations exploring solutions that encourage the use of ride sharing, public transport and bicycles over individual cars and the use of planes. Fan travel is often the biggest contributor to the carbon footprint of sporting events (84). Water management is another critical aspect, with facilities implementing systems for rainwater collection and reuse and efficient management of snow and ice. These strategies conserve water resources and help mitigate the effects of climate change on sports operations. Sports organisations are actively looking for expert water management partners to achieve this.

Opportunities for Dutch organisations

Implementing Advanced ESG Solutions

Swiss sports organisations are under mounting pressure to adhere to evolving regulations and meet stakeholder expectations regarding environmental, social, and governance (ESG) principles. There is a strong demand for comprehensive tools that integrate ESG criteria into their operations, track sustainability progress, and transparently communicate their efforts. Dutch companies, renowned for their expertise in developing sophisticated ESG reporting and management solutions, can provide robust software platforms and consultancy services tailored to these needs. By offering advanced ESG solutions, Dutch organisations can assist Swiss sports entities in achieving regulatory compliance, enhancing their reputation, and building stronger relationships with fans and sponsors who value sustainability. These solutions can be applied to any sports submarket, as these are sector-agnostic.

Pioneering Circular Economy Initiatives

Transitioning to a circular economy presents challenges for Swiss sports organisations and offers Dutch companies the opportunity to share their expertise in sustainable design and waste reduction with the Swiss sports market. As Swiss organisations seek to implement closed-loop systems, Dutch companies can provide innovative solutions that focus on recycling, repair, and reuse of sports equipment and materials. Dutch firms can collaborate with Swiss manufacturers to develop durable and recyclable products, as well as establish take-back programs and second-hand markets. By promoting circular economy principles, Dutch companies can help Swiss sports organisations reduce costs, enhance sustainability, and meet consumer demands for eco-friendly practices, thereby gaining a competitive edge in the market.

Designing and Operating Green Sports Facilities

As Swiss sports organisations aim to reduce their environmental footprint, there is an increasing demand for sustainable sports facilities incorporating eco-friendly materials, renewable energy sources, and smart technologies. Dutch companies excel in sustainable architecture (25), engineering, and smart technology integration, offering expertise in renewable energy usage, multi-purpose facility design, and intelligent systems for real-time monitoring and control. Dutch companies specifically have great strength in water management (85). Dutch expertise in advanced water management systems, such as rainwater harvesting and smart irrigation, can significantly benefit Swiss sports venues aiming to conserve water and reduce utility costs. Another example is making snow, which Polar Europe is already doing for the Ski Federation FIS (86). Additionally, Dutch companies are experts in artificial turf and can offer solutions that require less water and maintenance, further reducing environmental impact (85), (21), (87). By integrating renewable energy systems and green technologies, Dutch firms can help Swiss sports facilities enhance their sustainability profiles and appeal to environmentally conscious sponsors and fans.

Use cases

ESG – PRé Sustainability (88)

PRé Sustainability, a Dutch company specialising in lifecycle assessment (LCA) software, has been instrumental in helping organisations across various industries enhance their ESG frameworks. PRé Sustainability enables sports organisations to accurately measure and reduce their carbon footprints and environmental impacts through their software solutions. These solutions analyse and optimise operations, identifying key areas for improvement in sustainability performance. PRé Sustainability helps sports organisations implement effective ESG strategies, reduce emissions, and improve transparency in sustainability reporting.

Circular economy – Adidas (Futurecraft.Loop) (89)

Adidas’ Futurecraft.Loop project is an innovative initiative focused on creating fully recyclable running shoes as part of the company’s commitment to sustainability and the circular economy. The Futurecraft.Loop shoes are made entirely from a single material – 100 percent recyclable thermoplastic polyurethane (TPU) - that can be ground up and reused to create new shoes. This innovative approach eliminates waste and embodies the principles of a circular economy by designing products that can be continuously cycled back into the manufacturing process. The shoes are crafted using advanced manufacturing techniques, including fused bonding, which avoids the need for glue and facilitates easy recycling.

Green facilities - Slinger (90)

The Slinger app, a Dutch innovation, offers a practical solution for green logistics and transportation to sports events, significantly reducing the carbon footprint associated with event attendance. The app facilitates ridesharing among attendees, promoting carpooling and reducing traffic congestion and emissions. It also integrates with public transportation systems to offer users the most sustainable travel options. Slinger already has partnerships with large sports organisations in the Netherlands, such as the KNVB, Ajax, and the Johan Cruijff Arena, as well as the UEFA outside of the Netherlands.

5. Navigating Swiss business: regulations, subsidies and tenders

5.1. Regulatory and legal

Understanding the regulatory and legal landscape is crucial for Dutch organisations seeking to enter the Swiss sports market. This chapter provides a high-level overview of key themes and considerations to ensure compliance and successful business operations in Switzerland. By navigating these aspects effectively, Dutch organisations can capitalise on opportunities while minimising legal risks.

Business Establishment and Legal Structures (91)

Switzerland has various legal structures for businesses, each with specific requirements and implications. The most common forms include the Aktiengesellschaft (AG) and Gesellschaft mit beschränkter Haftung (GmbH). The AG and GmbH are comparable to the Dutch NV and BV, respectively, and choosing the right structure depends on factors such as liability, capital requirements, and administrative obligations. To establish a business, Dutch organisations must register with the Commercial Register and comply with Swiss corporate laws, which include drafting articles of incorporation, appointing directors, and meeting minimum capital requirements. Understanding the nuances between Swiss and Dutch business structures helps in making informed decisions. For example, the AG requires a higher minimum capital than the GmbH but offers greater flexibility in share transferability.

Employment Laws and Regulations (92)

Swiss employment laws are designed to protect workers while allowing flexibility for employers. Key aspects include hiring practices, employment contracts, labour rights, and social security. Swiss employment regulations require clear, written contracts detailing terms of employment, including probation periods, notice requirements, and termination procedures. Dutch employees must obtain the appropriate work permits and visas, as Switzerland has specific quotas and conditions for foreign workers. Employers are also obligated to contribute to social security schemes, including old-age, survivors, and disability insurance (AHV/IV), and occupational pension schemes (BVG/LPP).

Taxation (93)

Switzerland's tax system is characterised by relatively low corporate tax rates, but it is essential to understand the various taxes applicable to businesses. Swiss corporate tax rates vary by canton, generally ranging between 12% and 21%, making it crucial for strategic planning to understand these cantonal differences (94). The standard Value Added Tax (VAT) rate is 8.1%, (95) with reduced rates for certain goods and services. Dutch organisations must register for VAT and comply with reporting requirements. Switzerland also offers tax reliefs and incentives, particularly for companies involved in research and development, which can be advantageous for sports technology firms.

Intellectual Property Rights (96)

Protecting intellectual property (IP) is vital for maintaining a competitive edge in the sports market. Switzerland provides robust IP protection mechanisms. Dutch organisations should register trademarks and patents with the Swiss Federal Institute of Intellectual Property to secure their rights. While copyrights and designs can be protected without registration, formal registration can provide stronger enforcement options. Switzerland has stringent enforcement mechanisms to protect IP rights, including legal actions against infringement.

Licensing and Permits (91)

Operating in the Swiss sports market requires various licenses and permits, depending on the nature of the activities. Organising sports events may require (e.g. event) permits from local authorities, including safety and crowd management plans. Compliance with Swiss safety standards for sports facilities and equipment is mandatory, and certification (e.g. SN EN Standards) may be required to prove adherence to these standards.

Sponsorship and Advertising Regulations (97)

Sponsorship and advertising play a significant role in the sports industry. Swiss regulations govern these activities to ensure fair practices and consumer protection. Sponsorship agreements must comply with Swiss contract law, requiring transparency and clearly defined mutual obligations. Advertising within sports venues and during events is subject to specific restrictions to protect consumers, particularly minors, from harmful content. Compliance with ethical standards in advertising is mandatory, preventing misleading or false advertisements.

Data Protection and Privacy (98)

Swiss data protection laws, influenced by the General Data Protection Regulation (GDPR), are critical for organisations handling personal data. Organisations must ensure lawful processing of personal data, including obtaining consent and ensuring data security. While Switzerland is not part of the EU, GDPR affects Swiss businesses dealing with EU citizens, making compliance with both Swiss and EU regulations essential. Establishing protocols for data breaches, including timely notification to affected individuals and authorities, are a legal requirement.

Health and Safety Regulations (99)

Health and safety standards are paramount in the sports industry, ensuring the well-being of athletes, employees, and spectators. An example is the NFPA 101 - Life Safety Code for Gymnasiums and Fitness Centres. Compliance with health and safety standards for sports facilities includes regular inspections and maintenance. Organisers must implement safety protocols, including emergency response plans and crowd control measures, to ensure the safety of all participants. Employers must adhere to occupational safety regulations, providing a safe working environment and necessary protective equipment.

Environmental Regulations (100)

Environmental sustainability is increasingly important in the sports industry. Swiss regulations promote sustainable practices and environmental protection. Organisations are encouraged to adopt sustainable practices, such as reducing waste and minimising energy consumption. Compliance with local and national environmental regulations, including waste management and emission controls, is mandatory, for example ISO 20121 Event Sustainability Management System. Obtaining green certifications can enhance an organisation’s reputation and demonstrate commitment to environmental responsibility.

Consumer Protection (101)

Consumer protection laws ensure that fans and customers receive fair treatment and high-quality products and services. Transparency in pricing, clear terms of service, and honest marketing practices are mandated by Swiss consumer protection laws. Mechanisms for resolving consumer disputes, including mediation and arbitration, provide avenues for addressing grievances.

Dispute Resolution and Legal Support (102)

Navigating legal disputes requires an understanding of Swiss dispute resolution mechanisms and available legal support. Mediation and arbitration are preferred methods for resolving commercial disputes, offering faster and more cost-effective solutions than court proceedings. Access to legal support, including specialised sports law firms and consultants, can help organisations navigate complex legal landscapes. Understanding the role of institutions like the Swiss Federal Tribunal and cantonal courts is crucial for effective legal recourse.

Finding assistance in the complex regulatory environment

The complex nature of a foreign regulatory environment can cause Dutch organisations to require assistance in certain situations. There is a variety of (Swiss) organisations that can assist Dutch organisations in navigating this environment, and the easiest access to these organisations is through a liaison who is familiar with the key players. Companies that may provide assistance include, but are not limited to: Swiss Olympic (103) for topics pertaining to the 2038 Olympic Games, SportAccord (104) as the main hub for sports organisations representing international federations, Swiss Business Hubs for market entry advice, consultants familiar with Swiss regulation on tenders, subsidies and sports governance, local Swiss partners who can offer insights into licensing and compliance, and the IOC.

5.2. Subsidies and support

For Dutch organisations aiming to enter and operate within the Swiss sports market, subsidies and other forms of support can be of great value. Financial aid can significantly help by offsetting initial costs, fostering innovation, and promoting international collaboration. Further advice and guidance by organisations with expert knowledge can be instrumental in navigating a foreign market. This chapter aims to deliver a high-level overview of notable subsidies and support offered by Swiss, Dutch and European organisations.

Swiss organisations

The Swiss government offers subsidies and support with various institutions, designed to promote development and innovation within the sports sector (105). The most influential organisation promoting sports and exercise is the Federal Office of Sport (BASPO). Their goal is to be the service provider for Swiss sport and to contribute to the success of competitive sport. This includes the operation and maintenance of sports centres and sports facilities, the promotion of young talent, cooperation with clubs and associations, as well as the promotion and support of sports science research projects and services. A notable example is the Jugend+Sport program, which uses a federal funding of 100 million CHF to organize sports camps for young people to participate in, and train to become leaders or experts (106). Instructors of these camps can use the platform mobilesport.ch, the federally funded online environment for physical education and training, offering practical information and instructions for sports related activities (107).

Other key programs and initiatives include grants from the BASPO for sports infrastructure development and innovation funding from Innosuisse, the Swiss Innovation Agency (108). By strengthening science-based innovation and entrepreneurship, Innosuisse contributes to sustainable, economic, social and ecological development on a national and global level. Innosuisse is looking for projects that are highly relevant to society (like sports) and lead to a systemic strengthening of the Swiss economy and society.

The National Sports Facilities Concept (NASAK) is another federal funding instrument for the development and renovation of sports facilities of national importance (109). Taking a coordinating role, their objective is to improve the infrastructural conditions for the national sports associations and to increase Switzerland's competitiveness both in sport and in the organisation of important international sporting events. This while also having a connecting role in the alignment with other federal policies. In order to achieve these objectives, NASAK provides financial assistance for the construction and renovation of sports facilities of national importance.

An organisation specifically aimed to help foreign companies succeed is Switzerland Global Enterprise (S-GE) (110). With a big global network, they help Swiss companies in their international business and help innovative foreign companies on their way to settling in the country. Offering advice, resources and networking possibilities they can help starting sustainable business relations.

Dutch organisations

The Dutch government provides subsidies to support the international expansion of Dutch businesses, including those entering the Swiss sports market. These subsidies are designed to encourage global trade, foster innovation, and promote international collaboration, helping Dutch companies establish a strong presence abroad. The main organisation responsible is the Netherlands Enterprise Agency (RVO), with a variety subsidies and support programs (111). The DITF (Dutch Trade and Investment Fund) helps Dutch companies to do business abroad by providing loans, guarantees and export financing (112). Another notable project is the DHI (Demonstration Projects, Feasibility Studies, and Investment Preparation Projects), providing subsidies for Dutch SMEs to conduct feasibility studies or prepare investment projects in foreign markets, including Switzerland (113).

An organisation that works in collaboration with the Dutch government to promote international cooperation and business opportunities for Dutch companies and institutions involved in the sports sector is the Orange Sports Forum (OSF) (114). Its main objectives are to enhance the international presence of Dutch sports organisations, foster innovation, and facilitate global partnerships. OSF offers a network of over 300 Dutch companies and organises trade missions and network meetings. With a recently opened Orange Sports Hub in the Maison du Sport International in Lausanne they can form a valuable entry point in Switzerland.

European organisations

At a continental level, the European Union also offers a range of subsidies and funding programs aimed at supporting international projects and fostering collaboration among member states. Horizon Europe is one of the key funding programs aiming to drive scientific and technological advancements through research and innovation (115). While Switzerland is not an EU member, it has participated as an associated country in previous EU Framework Programs for Research and Innovation, allowing Swiss organisations to collaborate with EU partners.

Co-funded by the Horizon program is the European Partnership on Innovative SMEs and 37 EUREKA countries, including Switzerland (115). It supports two funding programs, Innowwide and Eurostars, which together have a committed funding of nearly one billion EUR. At Innowide, companies can apply for a grant of 60,000 EUR to assess the viability of your research or commercial ambitions. Eurostars aims to assist innovative SMEs to work together with companies from other participating countries (116).

For the European sports market specifically, Erasmus+ is the main source of EU funding (117). Erasmus+ actions in the field of sport promote participation in sport, physical activity, and voluntary activities. Their key action points to be achieved with their funding are the further development of grassroot sports building partnerships and capacity building. New sports initiatives that might turn into EU funding programs are also encouraged. They are called Pilot Projects and Preparatory Actions (PPPAs) and can be of great support for innovative ideas.

5.3. Tenders

For Dutch organisations looking to do business in Switzerland, tenders can be great opportunities. They are competitive bidding processes for a contract to provide a certain product or service. Securing these projects can provide a steady revenue stream, enhance organisations credibility, and open doors to further opportunities. Some are for projects in Switzerland, but also international projects organized by the international federations offer big potential. This chapter is aimed to provide a high-level overview of both public and private tenders and where to find them.

Public tenders

Public tenders are crucial for the development and maintenance of public sports facilities, infrastructure, and community sports programs. Federal, cantonal, and municipal authorities, as well as public institutions like schools and universities, are the primary issuers of public tenders. Illustrative examples of concrete opportunities for Dutch companies are the yearly organised tenders by the Swiss Tourism Agency. Dutch organisations have not actively participated yet, but could tap into this potential with the right local knowledge.

Switzerland has structured public tenders that are mandatory above a certain threshold (118). As a rule, mandates of CHF 230,000 and over (for services and goods) or CHF 2,000,000 and over (for construction works) have an official tender procedure. These are published on SIMAP.ch, the official electronic public procurement platform of the federal government, the cantons and communes (119). All interested parties and suitable tenderers can submit an offer and the FDFA (Federal Department of Foreign Affairs) evaluates the offers using pre-defined, published criteria. The mandate is awarded to the most economically advantageous bid, which is published on SIMAP.

For mandates between CHF 150,000 - 230,000 (for services and goods) or CHF 300,00 - 2,000,000 (for construction works) an invitation procedure is mandatory (118). This means the FDFA decides which tenderers are to be invited directly to submit offers. Wherever possible the FDFA must obtain three tenders. The FDFA compares the offers and awards the mandate to the most advantageous bid. Below the described mandate amounts there is a direct procedure, without the obligatory comparison between organisations.

On a European level the EU also publishes various tender, including projects in Switzerland. The official portal is TED (Tenders Electronic Daily), the EU public procurement journal, which in total publishes around 520.000 public procurement notices per year, worth more than €420 billion (120). It offers various filter option to find relevant tenders, including industry and country.

Private tenders

Private tenders are issued by private companies seeking specialised services or products. These tenders typically involve projects such as the development of sports technology, provision of sports equipment and apparel, and management of private sports events. Major sports clubs, leagues, and private enterprises are the primary issuers of private tenders. Unlike public tenders, private tenders may offer more flexibility in terms of requirements and processes, since they are not bound by a mandated procedure.

The fact that companies are not required to make tenders publicly available underscores the importance of having a good network. Swiss organisations have the tendency to favour organisations they have had good experiences with and are more likely to invite know parties to participate in the bidding process. Investing in professional networks and industry connections is key.

Nevertheless, there are still plenty of open tenders organised by companies that can be found online. Multiple platforms that offer the options to filter on the sports market and/or the country Switzerland are worth mentioning. Tenders On Time (121), Global Tenders (122), TendersGo (123), TenderNews (124), Tenders Info (125) and SwitzerlandTenders (126) are well-known platforms.

6. Strategic recommendations on how to capitalise on the opportunities for Dutch companies

The Swiss sports market offers great opportunities for Dutch organisations

On a national level sports are deeply embedded in Swiss culture and on a global level Switzerland takes a central role. In Switzerland itself, the BASPO works together with national federations and local clubs to actively promote sports with innovative solutions. On a global scale, the country holds a strategic position as the host for numerous international sports federations, like the IOC and the FIFA. Engaging with these federations can offer a gateway for Dutch organisations to expand their influence worldwide and to showcase their expertise and innovative solutions.

One of the main activities of both national and international sports federations is organising events. The economic impact of the large events is enormous and touches upon all the previously described submarkets, providing opportunities for Dutch organisations with various specialisations. With upcoming major events like the UEFA Women's EURO 2025 and the high chance for the 2038 Winter Olympics, Switzerland holds significant potential for companies from The Netherlands to be of great value.

Switzerland has a big focus on innovation and organisations are constantly looking for ways to stay relevant in the fast-changing world and to bind and engage more with their financially crucial paying fans, members and sponsors. Dutch organisations can provide in this need and provide substantial value to the Swiss sports market by leveraging their strengths in digitalisation, fan engagement and sustainability. Nationally organised support by organisations like BASPO and Innosuisse can be leveraged to introduce new innovative products and services to the Swiss sports market.

Switzerland's reputation for economic stability, liberal employment laws, and favourable tax regulations further adds to its attractiveness as a market for Dutch companies. This environment not only supports domestic growth but also positions Switzerland as a launch pad for international expansion. As such, the Swiss sports market holds immense potential for Dutch organisations aiming to broaden their horizons and explore new avenues for growth.

Seizing the opportunities and approaching the Swiss market requires a tailored strategy

The Swiss sports landscape is uniquely organised on a regional basis, necessitating a strategy that accommodates the decentralised nature of the market. For Dutch organisations, understanding regional nuances and building relationships at the cantonal level is crucial for success. Establishing a local presence, such as setting up a Swiss entity, can be instrumental in gaining the trust of Swiss partners as well as navigating the local laws and regulations.

Swiss organisations value long-term relationships and prefer collaborating with entities they are familiar with. Therefore, Dutch companies should focus on the relational aspects of business development. A key strategy is to utilise a respected entity with the strength and capacity to act, who can bridge the gap and facilitate introductions to potential Swiss clients. This relational approach is critical for overcoming initial entry barriers and establishing a strong foothold in the Swiss market.

With joint propositions the specialised Dutch organisations can maximise the match between supply and demand

Dutch organisations excel in bringing innovative products and services to the sports market. Although these solutions are globally recognised, they are often quite specific and require integration into broader, more comprehensive offerings that Swiss organisations seek. By forming alliances and creating joint propositions, Dutch companies can present more holistic solutions that meet the demands of Swiss and international federations. Especially organisers of large events have a strong need for end-to-end solutions, since all submarkets intersect in the organisation of a large event. Possible clusters of complementary topics for joint propositions include the concrete opportunities described in the trends. Specialised offerings in the themes of digitalisation, fan engagement, upcoming sports and sustainable infrastructure hold great potential.

Collaborative efforts allow niche Dutch companies to compete effectively against larger, well-funded international firms. By pooling resources and expertise, Dutch organisations can deliver comprehensive projects that align with the strategic goals of the Swiss sports organisations. This approach not only enhances competitiveness but also increases the likelihood of securing significant contracts and projects. To showcase Dutch innovations and joint propositions participating at both national and international events can be an effective way to reach target audiences. Speaking slots can be at international sport congresses like Sportaccord (104) and IF Forum (127), or Swiss National Forums like Forum.Schweiz, Swiss Sport Forum (128) and Swiss Olympic Forum (129). The participation in such events is dependent on having the right connections, underscoring the importance of networking and investing in strong relations between the countries.

Realising the Swiss sports market's big potential depends on well-prepared central action

With major international events on the horizon, such as the UEFA Women's EURO 2025 and the high chance for the 2038 Winter Olympics, now is the opportune moment for Dutch organisations to engage with the Swiss sports market. This can be supported by actively investing in bilateral relationships and promoting collaboration between Dutch and Swiss entities. Historic examples show that an effective way to achieve this would be in the form of trade missions. Organising such recurring official events can create and sustain the necessary momentum to foster ongoing engagement. An excellent example of such a trade mission being successful for Dutch organisations is architecture firm VenhoevenCS. By taking part in a trade mission in France they were offered the opportunity to build the Olympic swimming stadium in Paris (130). Dutch organisations could benefit in a similar way with various big projects in Switzerland, for example the Swiss Football Federation developing a new national sports centre.

For all the parties involved to be successful, a thorough preparation would be needed. An important role herein lies for the person or team acting as liaison between the parties. Bringing the right organisations together and preparing them to optimally fulfil the prevailing needs, is essential for creating a successful match. To organise meetings or events with the goal to build these relations, a strategic location and local presence is essential. There are three major sports hubs in the country that could serve this purpose Lausanne, Zürich, Bern and Basel. These cities are home to major sports organisations and events, making them ideal locations for initial outreach and collaboration.

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8. Appendices

8.1. Major international federations and upcoming events

8.2. The global position of Switzerland in competitiveness and innovation

The infographic below shows the relative ranking of Switzerland compared to other countries in terms of competitiveness, innovation, and talent.

8.3. List of interviewees

Person	Function/Expertise
Alexandra Rickham	Director of Sustainability at World Sailing
Bart Prinssen	Head Equipment & Venue Centre at FIBA (International Basketball Federation)
Bart Schellekens	Voorzitter Kennisgroep AVG & Privacy Voorzitter Kennisgroep AVG & Privacy at Ministerie van Financiën
Bobby Hare	Director ESL FACEIT group
Camil Smeulders	Orange Sports Forum
Frank Leenders	Director General and Delegate of the Board at FIBA Media & Marketing Services SA
Ingrid Beutler	Co-founder Sustainable Mountain Alliance, Legal and Integrity Director at bloomUp
Matthias Remund	Director BASPO (Federal office of sports)
Peter Kortenhoeve	Founder and CEO PWXR
Peter Sprenger	President Volleyball Federation Netherlands, Chairman at Techonomy
Peter van Gend	Expert sports infrastructure
Ralf Looze	Consultant Fan Engagement at Two Circles
Robbert de Kock	Former president and CEO World Federation Sporting Goods Industry, President Swiss Badminton

8.4. Contacts

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