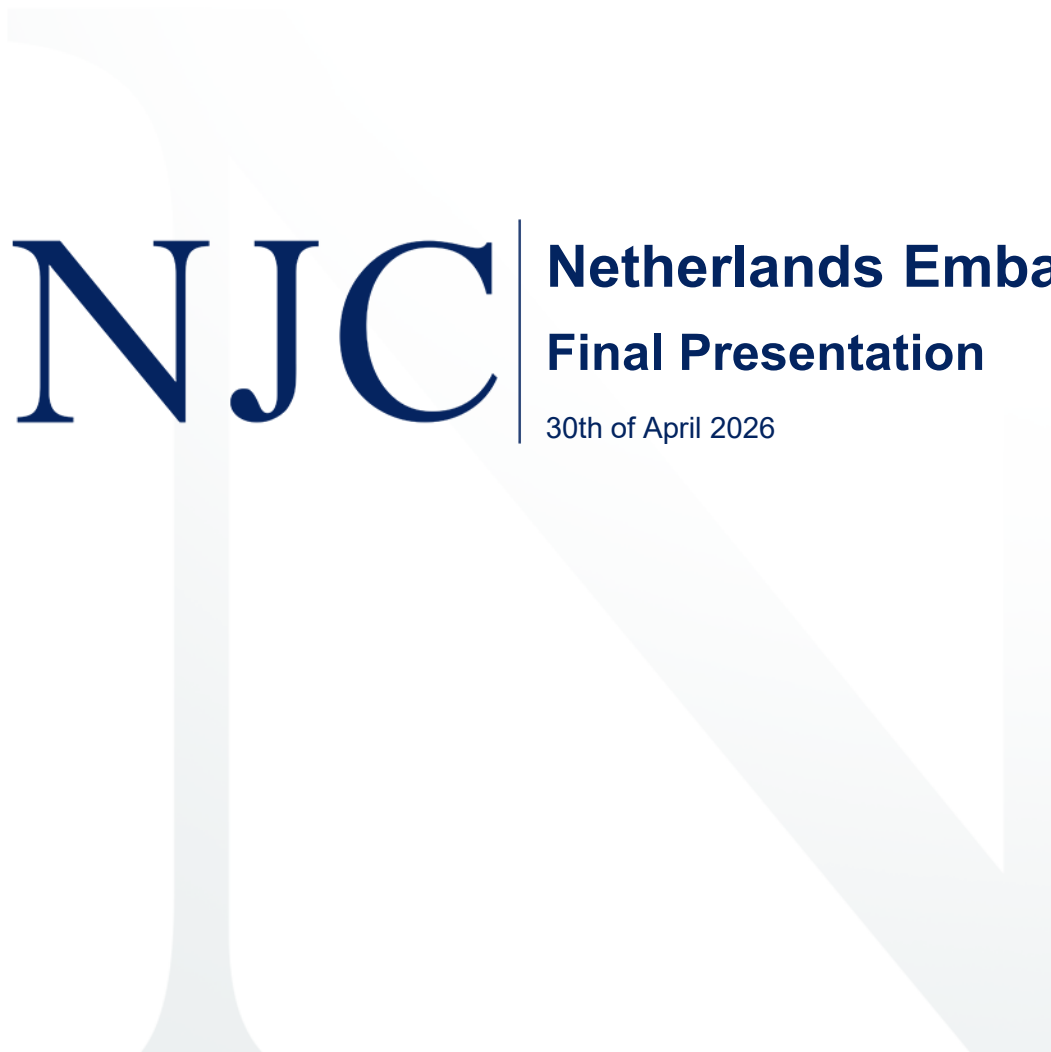




NJC

**Netherlands Embassy
Final Presentation**

30th of April 2026



Países Baixos

The FIFA World Cup 2030 will act as a catalyst for **significant, multi-sector investment in Portugal**, creating a **time-sensitive window of opportunity** for Orange Sports Forum (OSF) companies to enter and position themselves in the market.

We followed a structured approach that began with a **market and investment mapping** to identify key demand drivers and trends. This was followed by a **brainstorming phase** to generate opportunity areas, which were then evaluated through an **OSF capability analysis** to ensure strategic fit. Based on this, a **strategic prioritization** was conducted to select the most relevant opportunities, which were subsequently explored through **in-depth analysis** to develop clear and actionable entry frameworks.

This project identifies **six priority opportunity areas** where **strong market demand, OSF capabilities and entry feasibility converge: Infrastructure Modernization, Fan Experience Platforms, Operations Monitoring Platforms, Integrated Mobility Platforms, Cybersecurity Infrastructure, and Smart Sustainability Solutions**. These opportunities are driven by **large-scale infrastructure upgrades, rapid digitalization and increasing regulatory and sustainability requirements**.

Across all opportunity areas, the analysis shows that **success will not come from direct competition with established players**, but from a **partnership-led entry strategy**. OSF companies are best positioned to act as **specialized solution providers, integrating into existing ecosystems** and delivering **high-value, technology-driven components** within larger projects.

Each opportunity has been translated into a **clear, actionable entry framework**, including **market structure, stakeholder ecosystems, competitive dynamics and go-to-market strategies**, enabling OSF companies to **move from opportunity identification to execution**.

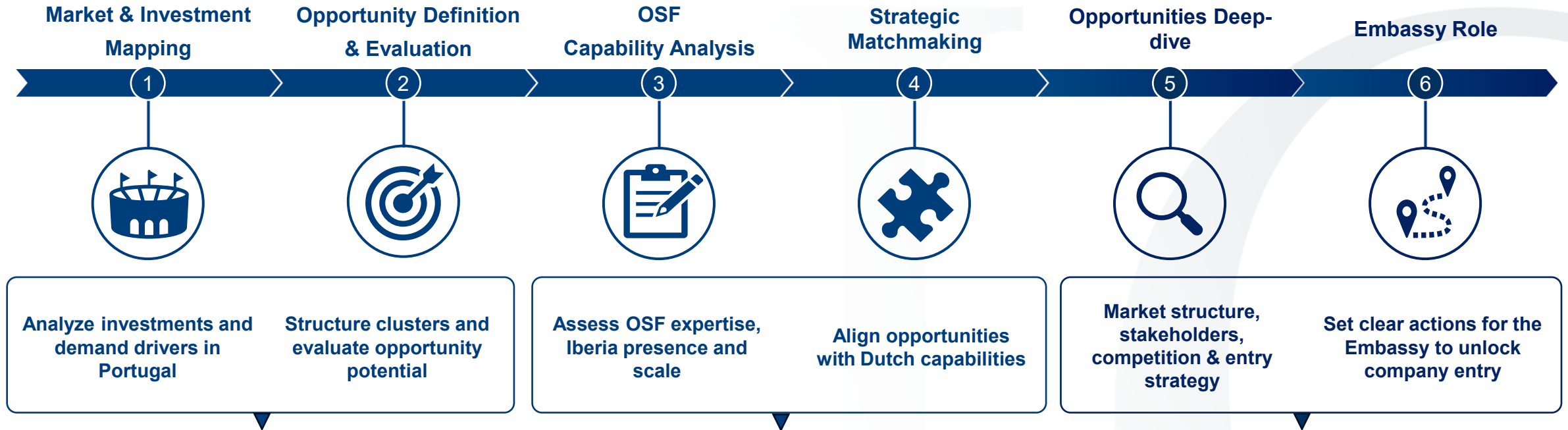
The Netherlands Embassy plays a **critical enabling role**, providing **institutional access, strategic connections and local market guidance** all essential to navigate a **complex, multi-stakeholder environment** and accelerate successful entry.

This document serves as a **standalone decision-support tool**, enabling OSF companies to **prioritize opportunities, define entry strategies and act early to capture value** from WC2030-related investments.

The project follows a structured approach to identify WC2030 opportunities and translate them into actionable entry strategies for OSF companies

0

Final Presentation Goals



Key Final Presentation Objectives

- 1** Validate insights & confirm relevance
- 2** Capture feedback and close remaining gaps
- 3** Ensure alignment for the OSF presentation

1. WC2030 Context & Scale

2. Key Investments

3. Methodology

4. Opportunity Snapshots

5. Embassy Role

6. Annex

The 2030 World Cup is expected to generate significant economic impact and long-term strategic benefits for Portugal

1

WC2030 Context & Scale



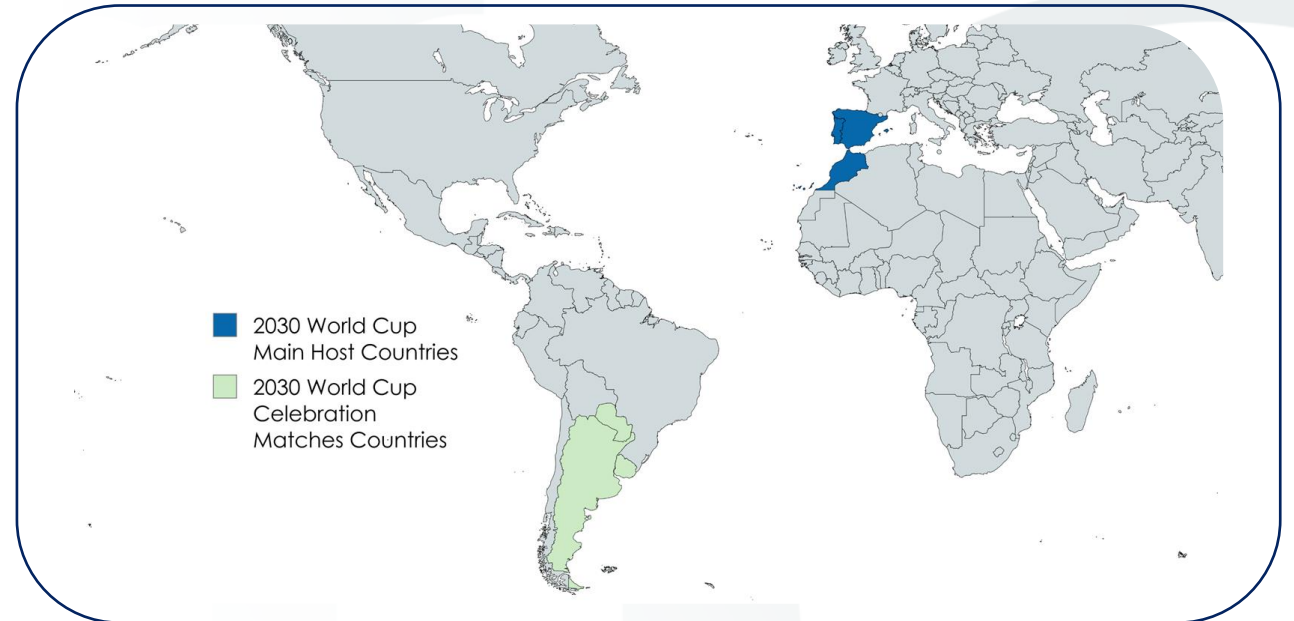
Tournament overview

- **Edition:** 24th FIFA World Cup
- **Date:** 8th of June 2030 - 21st of July 2030
- **Significance:** Marks the **100th anniversary** of the first World Cup
- **Host structure:** First World Cup held across three continents (Europe, Africa, South America)



Impact in Portugal

- **Additional visitors expected:** 300k - 500k
- **Visitor spending:** €500M - €660M
- **Projected GDP impact:** €700M - €860M
- **Expected new jobs:** 18K - 23K
- **Expected tourism revenue growth:** Approximately 2.3%



Beyond immediate economic effects, WC2030 creates a **platform to attract international investment, foster strategic partnerships** and **unlock long-term sectoral opportunities**

1. WC2030 Context & Scale

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WC2030 is accelerating multi-sector investment across infrastructure, technology and mobility in Portugal

2

Key Investments | Overview

Transport & Mobility

 **€3.98B** expected to be invested in **mobility**

 Route **expansion** and renewal of the **traffic signals**

Infrastructure

 **€445M** will be invested in **expanding** the stadiums

 Porto have already **invested €8M** in their **academy**

Hospitality

 **Hotel upgrades** in **Lisbon** and **Porto**

 Expansion of **food trucks** and **pop-up** units

Tourism

 **1.29M** guests in Algarve generated **€522.5B** in revenue

 **The Algarve** views the World Cup as a major **opportunity**

Security & safety

 **Border control** assets due to number of **non-EU travelers**

 Upgrade in **surveillance systems** in Lisbon and Porto

Technology

 **Saas** and **modernization** of cashless payment

 Advanced **recovery technology** for the players

Telecommunications

 **€4.2B** in 5G and **fibre optic** network **expansion**

 **Microsoft** commits **€8.5B** in AI infrastructure at Sines

Sustainability

 **80%** of **electricity** generated from **renewable resources**

 **€3.1B** committed to a **climate action** and sustainability plan



1. WC2030 Context & Scale

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| **3. Methodology**

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The team assessed and prioritized strategic opportunities to identify the most promising ideas for further in-depth analysis

3

Opportunity Landscape | Methodology



Selection of the opportunities

Opportunities were identified by **analysing previous investments** and grouping them into similar categories. Then, innovative and **high-potential options** were selected for each category



Parameters used in the evaluation

Impact

Value the initiative brings in terms of **financial return**, **brand exposure** and **alignment** with long-term goals

The **expected timeframe** it will take for planning, execution and completion of the initiative

Timeline

Competition

The **level of existing players** and **how crowded** or competitive the market is

The main **parties involved or affected** (e.g., FIFA, government) who **influence decisions** and approvals

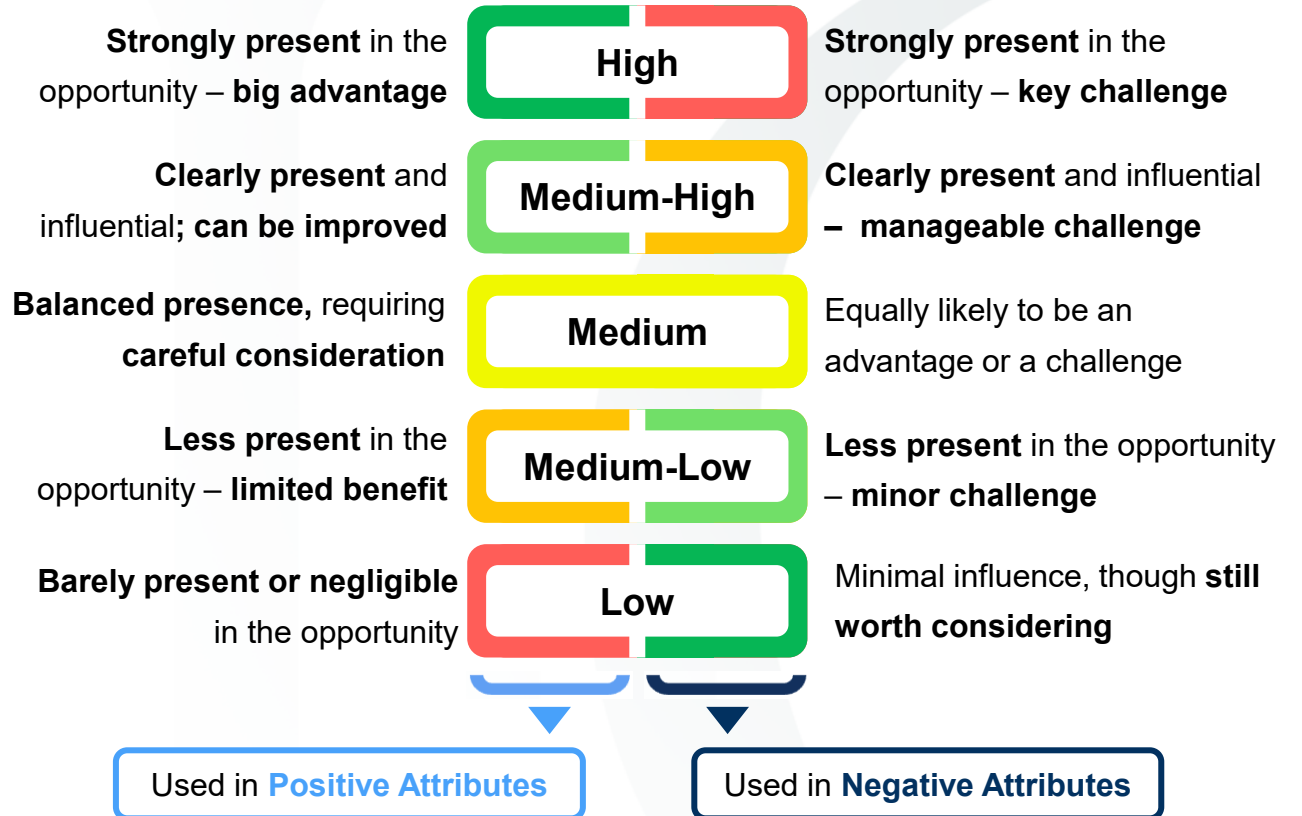
Stakeholder Complexity

Entry Barriers

Obstacles or requirements (e.g., legal, financial) that make it difficult to enter or execute in the market



Evaluation Criteria



Transport & mobility opportunities show strong impact potential, with smart mobility platforms offering the easiest entry

3 Transport & Mobility | Opportunities Evaluation

	<i>Event Mobility Systems</i>	<i>Integrated Mobility Platform (MaaS)</i>	<i>Smart & Low Emission Mobility</i>
Impact	Medium-High	Medium-High	Medium-High
Timeline	2-4 years	0-2 years	0-2 years
Competition	Medium	Medium	Medium-High
Entry Barriers	Medium-High	Medium-Low	Medium-Low
Stakeholder Complexity	High	Medium-High	High

Key Takeaways



All opportunities show **strong impact potential**, with mobility platforms enabling **scalable system optimisation**



Competitive pressure is moderate overall, though smart mobility solutions face **increasing market rivalry**



All initiatives are **implementable before WC2030**, but **stakeholder coordination and entry barriers** make event mobility systems harder to execute

OSF's technology positioning aligns with market capability trends while project scale and limited Iberian presence shape opportunity feasibility

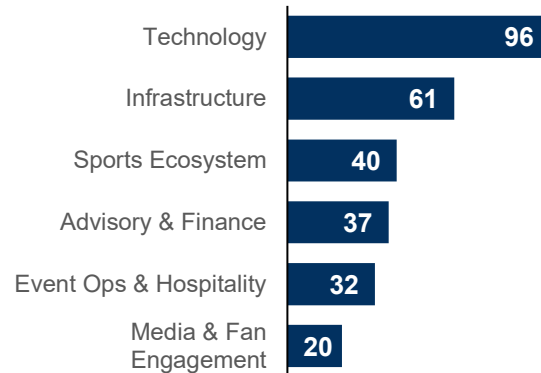
3

OSF Companies Analysis | Overview

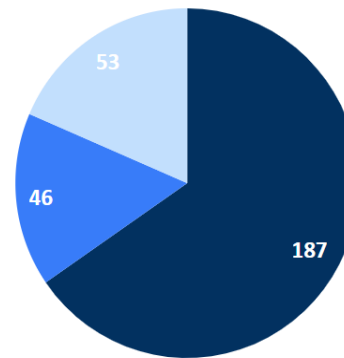
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NOVA
JUNIOR
CONSULTING
Junior Enterprise of Nova SBE

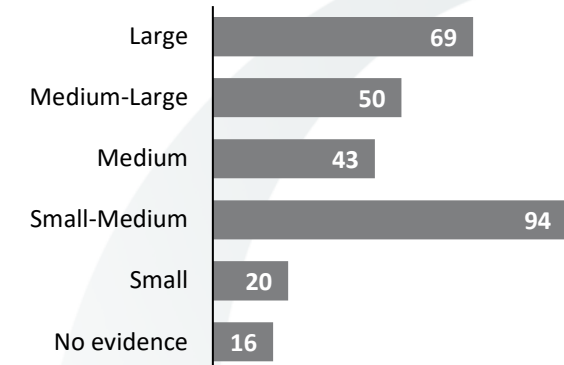
Prominent Sectors



Iberia Presence



Average Project Size



Key Takeaways



OSF is strongly positioned through **technology-driven capabilities** and **complementary operational strengths**, directly aligning with the market's **key competitive differentiators**



As competitors are mainly active in **medium-low to medium-high project scales**, OSF should **prioritize opportunities within this range** and **pursue larger projects through strategic partnerships**



Limited structural presence in Iberia (35%) will likely **affect project feasibility** by **reducing access to key stakeholders** and **limiting strong positioning** within the regional sports ecosystem

Relevant Companies



Twynstra Gudde



Six priority opportunities emerge where strong WC2030 demand intersects with OSF capabilities and feasible market entry

3

Opportunities Prioritization

	Infrastructure Modernization	Fan Engagement Platform	Operations Monitoring Platform	Integrated Mobility Platform	Cybersecurity Infrastructure	Smart Sustainable Solutions
 Market Demand	FIFA-driven stadium upgrades and capacity expansion	Visitor journey demand	Need for real-time, cross-system operations visibility	High pressure on city mobility from large fan flows	Critical need to secure systems	Strong push for low-emission infrastructure
 OSF Fit	Engineering & tech capabilities	Digital platform and fan engagement expertise	Advanced analytics and real-time monitoring capabilities	Experience in mobility integration and data coordination	Expertise in cybersecurity and critical systems	Capabilities in sustainable energy solutions
 Feasibility	Entry enabled through standardized upgrade packages	Modular add-ons enable integration into existing platforms	Fragmented ecosystem enables entry via targeted analytics solutions	Platform layer allows entry without owning transport assets	Specialist modules can be embedded within larger security systems	Modular solutions allow integration into broader projects

1. WC2030 Context & Scale

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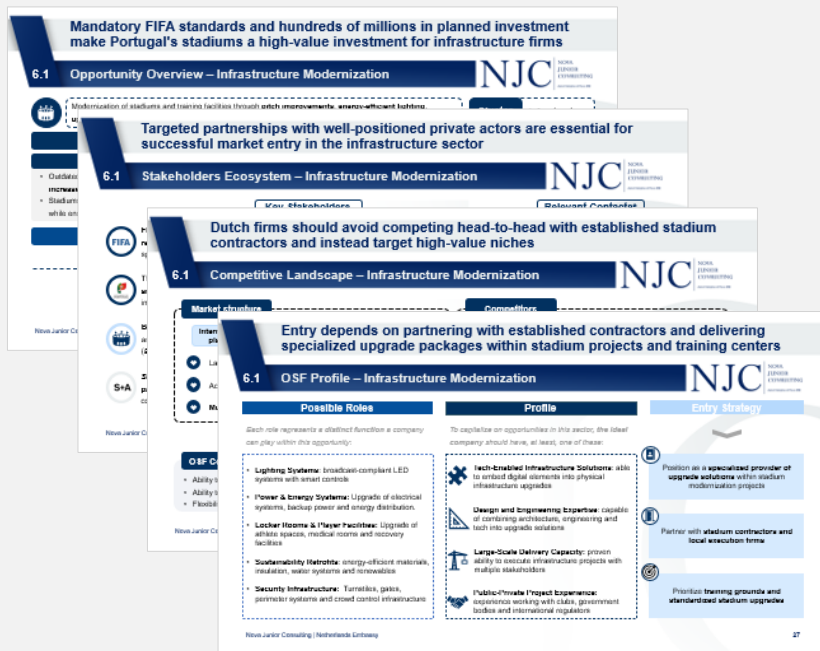
5. Embassy Role

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For all six opportunities an extensive Deep-Dive was conducted to define Key Stakeholders, relevant Competitors and the ideal OSF Profile

3 Opportunities Deep-Dive

Annex: Opportunities Deep-Dive



Methodology

Environment Overview

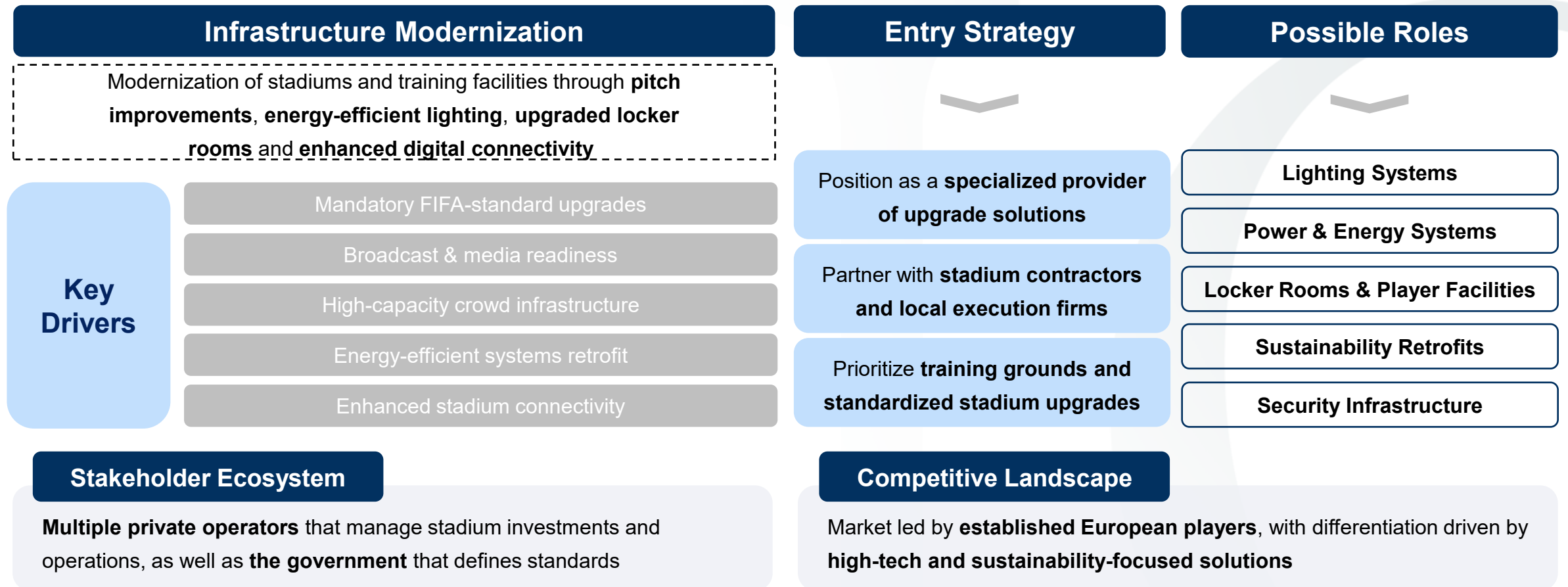
- 1 Opportunity Overview**
Identification of Market Demand, Associated Investments and Key Timings
- 2 Stakeholders Ecosystem**
Characterization of Key Stakeholders and Relevant Contacts
- 3 Competitive Landscape**
Definition of Market Structure, Key Players and OSF Competitive Edge

Profile

- 4 OSF Profile**
Profiling of Key Company Characteristics and Definition of Entry Strategy

Mandatory modernization across stadiums and facilities will drive demand for specialized upgrade solutions

4.1 Opportunity Snapshot – Infrastructure Modernization



Value in this opportunity lies in integrating existing systems, rather than developing standalone platforms

4.2 Opportunity Snapshot – Fan Experience Platform

Fan Experience Platform

Development of **an integrated fan experience platform** that combines mobile apps, ticketing, stadium navigation, mobility information and interactive services to **support visitors throughout the tournament**

Key Drivers

- Fan services are currently split across separate apps
- Ticketing and access must integrate with FIFA's platform
- Cashless payments need scaling for peak demand
- FIFA requirements push digital-first fan experiences
- Established players raise barriers for standalone platforms

Stakeholder Ecosystem

Multiple stakeholders control different layers, including public and private players (city councils, Globant, stadium operators)

Entry Strategy

- Position as the **integration layer across fan services**
- Partner with **platform owners and ecosystem players**
- Start with **focused pilots (stadium, fan zone or event)**

Competitive Landscape

The opportunity is **currently dominated by established players**, raising the entry barriers for standalone or unproven platforms

Possible Roles

- Mobile App Development
- Ticketing & Access Integration
- Payment & Commerce Integration
- Content & Broadcast Integration
- Accessibility & Assisted Services

Transform live stadium operations into seamless, real-time intelligence through integrated monitoring and crowd management platforms

4.3 Opportunity Snapshot – Operations Monitoring Platform

Operations Monitoring Platform

The deployment of **real-time event management platforms** integrating **data** from stadiums, **transport systems** and **sensors** to **monitor operations** and support **crowd management**

Key Drivers

Stadiums undergoing seat expansion

Heavier passenger flows in the stadiums

Transports to face higher passenger volumes

Usage of reliable data for future events

Improve coordination among exits

Stakeholder Ecosystem

The **stakeholders** bring together **inputs** from **urban management**, **emergency response**, transport, **security**, venues and technology

Entry Strategy

Early positioning is crucial, along with **securing partnerships**

Ecosystem integration across stadiums and transport

Analysis of possible **improvements** of other **platforms**

Competitive Landscape

A **fragmented private market** where **early entry** is crucial amid **international players** and **scalable platforms**

Possible Roles

Mobile App Development

Software Improvement

Sensors' development

Crowd Management

Integration Between Apps

Unify city mobility into one seamless platform delivering real-time, multimodal travel, ticketing, and optimized flow experiences

4.4 Opportunity Snapshot – Integrated Mobility Platform

Integrated Mobility Platform

The development of a **Mobility-as-a-Service (MaaS) platform** integrating **public transport, event shuttles** and **bike-sharing** into a single application for route planning, **ticketing** and **real-time travel updates**

Key Drivers

Need for a reliable source of mobility information

Usage of reliable data for future events

Simplify mobility flows

Improve the experience of the visitor

Reduce congestion in metropolitan areas

Stakeholder Ecosystem

It combines **connectivity, payments, transport services**, and real-time data into a **unified ecosystem**, enabling **seamless coordination**

Entry Strategy

Early positioning and clear **stakeholder approach**

Focus on **pain points** in mobility to be **covered** by the **platform**

Study the **best way** to optimize city **mobility flows**

Possible Roles

Mobile App Development

Software Improvement

Real-Time Updates Development

Crowd Management

Event shuttles Integration

Competitive Landscape

A **fragmented private market** where **multimodal integration** and scalable platform models **determine competitive positioning**

Cybersecurity infrastructure becomes critical to ensure reliable operation of integrated World Cup systems under strict regulatory requirements

4.5 Opportunity Snapshot – Cybersecurity Infrastructure

Cybersecurity Infrastructure

The **deployment of cybersecurity systems to protect digital infrastructure** like **ticketing platforms**, payment networks, **broadcasting systems** and event management platforms for the World Cup **against threats**

Key Drivers

FIFA's strict cybersecurity standards

Need to protect visitors' personal information

Expected higher demand in platforms' security

Improve visitors' experience

Need for safer broadcasting channels

Stakeholder Ecosystem

The stakeholders operate under a **centralized oversight**, requiring **alignment** across regulatory layers to enable **coordinated** decision-making

Entry Strategy

Get familiar with **operational** and **regulatory requirements**

Work **on top of existing systems**, as most are already in place

Position **within** broader digital and infrastructure projects

Competitive Landscape

A market dominated by a small number of **large global players** controlling **most major contracts**

Possible Roles

Security layers for ticketing

Software Improvement

Improve payment systems

Infrastructure protection

Data & access solutions

Smart sustainability solutions require integrating scalable, low-emission infrastructure into complex, large-scale event systems

4.6 Opportunity Snapshot – Smart Sustainability Solutions

Smart Sustainability Solutions

Smart sustainability solutions enable **low-emission, resource-efficient** infrastructure across various World Cup related areas, combining **energy systems** and **long-term operational infrastructure**

Key Drivers

Rising temporary energy demand

Stronger emissions reduction pressure

Need for efficient on-site power

Opportunity for circular resource solutions

Dutch strength in sustainable engineering

Stakeholder Ecosystem

Driven by large-scale projects with and **long-term contracts** and **high entry barriers**

Entry Strategy

Target **niche solution** areas within larger sustainability projects

Prioritize **deployable systems** such as **microgrids** and temporary power

Integrate **without replacing** existing stadium and city infrastructure

Competitive Landscape

Large players **control infrastructure**, while smaller firms can help support **execution** and **operations**

Possible Roles

Microgrid deployment

Temporary energy systems

Event power supply

Waste management solutions

Circular resource optimization



Thank You!

April 30th, 2026

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| 6.1 Infrastructure Modernization

6.2 Fan Experience Platform

6.3 Operations Monitoring Platform

6.4 Integrated Mobility Platform

6.5 Cybersecurity Infrastructure

6.6 Smart Sustainability Solutions

Mandatory FIFA standards and hundreds of millions in planned investment make Portugal's stadiums a high-value investment for infrastructure firms

6.1 Opportunity Overview – Infrastructure Modernization



Modernization of stadiums and training facilities through **pitch improvements**, **energy-efficient lighting**, **upgraded locker rooms** and **enhanced digital connectivity** to meet international tournament standards

Cluster

Infrastructure

Strategic Relevance for the WC2030

Critical Issue

- Outdated lighting and power **systems limit broadcast quality and increase operational risks** during high-profile matches
- Stadiums must **handle massive crowds of diverse international fans**, while ensuring **safety**, **efficiency** and **comfortability**

Investments & Key Drivers

- Mandatory upgrades required to **meet FIFA technical and broadcast standards**, making modernization non-optional
- **Hundreds of millions** are expected to be invested in **improving and expanding** the three main stadiums (*Dragão*, *José Alvalade* and *Luz*)

Timeline

2027



Estádio da Luz major redevelopment construction expected to begin, with 2-year build window ¹

2028 – 2029



FIFA-mandated deadline for all structural and infrastructure works to be complete for **inspection**

Targeted partnerships with well-positioned private actors are essential for successful market entry in the infrastructure sector

6.1 Stakeholders Ecosystem – Infrastructure Modernization

Key Stakeholders



FIFA sets **technical standards and requirements**, influencing all stadium upgrade specifications



The **Portuguese Government** provides **funding and policy direction**, enabling large-scale infrastructure development



Benfica, Sporting, Porto manage **investment and operational decisions** in their stadiums (*Estádio da Luz, Alvalade, Dragão* respectively)



Saraiva & Associados acts as **local execution partner** in *Estádio da Luz*, ensuring regulatory compliance and enabling implementation



Populous leads **stadium master planning and design** in *Estádio da Luz*, defining the overall vision and upgrade scope



Ithaka drives **commercial strategy and fan experience** in *Estádio do Dragão*, shaping investment priorities in stadium modernization



Fenwick Iribarren oversees **stadium redesign and modernization** in *Estádio de Alvalade*, shaping infrastructure and technology upgrades

Relevant Contacts*

João Borges, Nuno Catarino and André Bernardo

Important executive decision-makers in stadium upgrades and investments

Vasco Anjos and Catarina Araújo

Lisbon & Porto sports councillors key for sports infrastructure delivery

Pedro Dias

Portuguese Secretary of State for Sport that oversees national sports policy



Jorge Betancor

Principal and leader of Populous's Iberian operations key for stadium developments

Dutch firms should avoid competing head-to-head with established stadium contractors and instead target high-value niches

6.1 Competitive Landscape – Infrastructure Modernization

Market structure

International
players

Private
market

Consolidated
market

- Large stadium projects led by **established** European **contractors**
- Access **tenders** require **strong local partnerships**
- Multi-stakeholder** alignment is **key** to winning

OSF Competitive edge

- Ability to deliver **high-value niche solutions** within large projects
- Ability to integrate **physical infrastructure** with **smart digital solutions**
- Flexibility to operate as **subcontractors** within complex projects

Competitors



Tétris is a **large European design firm**, delivering **premium interiors**, with projects at *Estádio do Dragão*



Signify is a **global market leader**, providing **smart LED lighting systems**, with strong presence in **Portugal and Europe**



ColosseoEAS is a **European specialist**, delivering **LED and fan engagement systems** for international stadiums



AIFI is a **small, innovative tech player**, deploying **autonomous retail solutions** in *Estádio do Dragão*

Entry depends on partnering with established contractors and delivering specialized upgrade packages within stadium projects and training centers

6.1 OSF Profile – Infrastructure Modernization

Possible Roles

Each role represents a **distinct function** a company can play within this opportunity:

- **Lighting Systems:** broadcast-compliant LED systems with smart controls
- **Power & Energy Systems:** Upgrade of electrical systems, backup power and energy distribution.
- **Locker Rooms & Player Facilities:** Upgrade of athlete spaces, medical rooms and recovery facilities
- **Sustainability Retrofits:** energy-efficient materials, insulation, water systems and renewables
- **Security Infrastructure:** Turnstiles, gates, perimeter systems and crowd control infrastructure

Profile

To capitalize on opportunities in this sector, **the ideal company** should have, at least, one of these:

-  **Tech-Enabled Infrastructure Solutions:** able to embed digital elements into physical infrastructure upgrades
-  **Design and Engineering Expertise:** capable of combining architecture, engineering and tech into upgrade solutions
-  **Large-Scale Delivery Capacity:** proven ability to execute infrastructure projects with multiple stakeholders
-  **Public-Private Project Experience:** experience working with clubs, government bodies and international regulators

Entry Strategy

-  Position as a **specialized provider of upgrade solutions** within stadium modernization projects
-  Partner with **stadium contractors and local execution firms**
-  Prioritize **training grounds and standardized stadium upgrades**

6. Annex

6.1 Infrastructure Modernization

6.2 Fan Experience Platform

6.3 Operations Monitoring Platform

6.4 Integrated Mobility Platform

6.5 Cybersecurity Infrastructure

6.6 Smart Sustainability Solutions

Fragmented digital services and FIFA's digital-first mandate create a big window for integrated fan platform solutions

6.2 Opportunity Overview – Fan Experience Platform



Development of an integrated **fan experience platform** combining mobile apps, **ticketing**, stadium navigation, mobility information and **interactive services** to support visitors throughout the tournament

Cluster

Digital & Technology

Strategic Relevance for the WC2030

Critical Issue

- Ticketing, stadium entry, concessions and transport are currently **managed by separate apps**, causing **confusion** and **long wait times**
- **Ticketing platforms and cashless payment infrastructure require upgrades** to handle the number of users and prevent transaction failures

Investments & Key Drivers

- All three venues will need to **integrate ticketing and access infrastructure with FIFA's centralized platform**
- **FIFA's strategic objectives** and 2030 bidding requirements **emphasize digital-first**, sustainable and **high-tech experiences**

Timeline

End of 2025



FIFA partnered with **Globant¹** to build FIFA app and fan software for "multiple future tournaments"

2027 – 2028



FIFA expected to **announce official Technology Partner and Telecom Sponsor** for WC2030 ^{1 2}

2028 – 2029



FPF may start procurement for Portuguese fan-facing mobile and digital services

Access to the ecosystem is controlled by the platform owner, requiring OSF companies to integrate and partner with key data and content providers

6.2 Stakeholders Ecosystem – Fan Experience Platform

Key Stakeholders



City Councils (Lisbon and Porto) enable **access** to city **data** and **systems** for platform integration



FIFA (International Association Football Federation) defines **platform requirements** and **controls** official content



FPF (Portuguese Football Federation) **aligns** platform with **FIFA requirements** and **coordinates** local **fan engagement**



Platform Owners (Globant) control the core platform, so **all services** must **integrate** into their system



Stadium Operators (Sporting CP, FC Porto) provide **venue data** and **services** for the platform



Turismo de Portugal provide **tourism content** and **promote platform** to visitors



Bike/Scooter Sharing Operators (GIRA, Lime) provide **real-time availability** and **booking** integration to support **fan mobility**



Streaming and Broadcast Partners (Sport tv, DAZN) provide live and on-demand **match content**

Relevant Contacts*

Maria Luísa Aldim and Rodrigo Passos
Lisbon & Porto innovation councilors are key for data access

Nacho Fresco
FIFA Director of Technology is key for platform integration

Luis Ureta
Globant Portugal's head is key for local partnerships and platform integration

João Faria
Sport tv Digital Director is key for streaming and fan in-app engagement

Dutch firms should avoid competing with established fan platforms and instead position themselves as the integration layer connecting services

6.2 Competitive Landscape – Fan Experience Platform

Market structure

International
players

Private
market

Consolidated
market

- Core fan platforms controlled by **FIFA and global tech partners**
- Early entry** is **critical** in high-growth market
- Access depends on **integration with existing platform owners**

OSF Competitive edge

- Strong positioning as **integration layer across fan services**
- Innovative in **fan engagement** and **digital services**
- Flexibility to partner with **platform owners and data providers**

Competitors



Globant is **FIFA's technology partner** powering the 2026 World Cup **fan platform**



Deltatre is a **leading sports technology** provider that enables organizations to **stream content** and **manage digital platforms**



YinzCam is a specialized **sports technology company** that develops **mobile apps** for **international football leagues**



Sport TV is a **Portuguese sports-oriented** premium cable and satellite **television network** with premium channels in Portugal

Entry requires integrating into existing platforms through partnerships, starting with focused pilots rather than standalone solutions

6.2 OSF Profile – Fan Experience Platform

Specific Roles

Each role represents a **distinct function** a company can play within this opportunity:

- **Mobile App & Platform Development** : building fan-facing features within the app
- **Ticketing & Access Integration**: connecting entry systems and ticketing infrastructure to the platform
- **Payment & Commerce Integration**: embedding contactless payment capability for food, merchandise and services within the platform
- **Content & Broadcast Integration**: addition of live match data, replays, statistics directly into the platform
- **Accessibility & Assisted Services**: dedicated platform features for fans with disabilities

Profile

To capitalize on opportunities in this sector, **the ideal company** should have, at least, one of this:

-  **Integrated Platform Capability**: able to deliver a unified solution combining multiple fan services into a single interface
-  **Ecosystem Experience**: proven capability of working inside complex digital environments
-  **Multi-Service Relevance**: able to create value across several services like ticketing, content, mobility and payments
-  **Real-time Data & Personalisation**: capability to process live event data and translate it into personalized fan-facing outputs

Entry Strategy



Position as the **integration layer across fan services**



Partner with **platform owners and ecosystem players**



Start with **focused pilots (stadium, fan zone or event)**

6. Annex

6.1 Infrastructure Modernization

6.2 Fan Experience Platform

| 6.3 Operations Monitoring Platform

6.4 Integrated Mobility Platform

6.5 Cybersecurity Infrastructure

6.6 Smart Sustainability Solutions

Isolated data across operators creates a gap that real-time, cross-border operations monitoring platforms are uniquely positioned to fill

6.3 Opportunity Overview – Operations Monitoring Platform



Deployment of real-time **event management platforms** integrating data from stadiums, transport systems and sensors to **monitor operations** and support **crowd management**

Cluster

Digital & Technology

Strategic Relevance for the WC2030

Critical Issue

- **Lack of predictive alerts** for bottlenecks, crush risks, or transport failures, forcing manual coordination calls during critical match windows
- **Isolated data** between stadiums, metro/bus operators, and police command centres leads to **slow and reactive crowd management**

Investments & Key Drivers

- **WC2030 occurs in 3 countries**, making cross-border ops platform **essential to unify data standards** and command protocols.
- Smart stadium software segment **is projected to grow at over 15% CAGR through 2030¹**

Timeline

End of 2025



Lenovo announced its Intelligent Command Centre for real-time **multi-venue operations monitoring***

2028 – 2029



FPF may start to procure nationally for event management, CCTV and crowd analytics ²

The platform's effectiveness relies on coordination across fragmented, interdependent stakeholders

6.3 Stakeholders Ecosystem – Operations Monitoring Platform

Key Stakeholders



City Councils (Lisbon and Porto) oversee city operations and provide **real-time urban data**



FIFA (International Association Football Federation) sets operational requirements and ensures platform alignment with event standards



Portuguese Government coordinate **national operations** and set **response protocols**



Public Transport Operators (Lisbon and Porto) provide **real-time transport data** for operational monitoring



Stadium Operators (Sporting CP, FC Porto) provide venue data and coordinate on-site operations



Security Forces (PJ, GNR, PSP) **monitor incidents** and **coordinate rapid response systems**



Emergency Services (INEM) provide **real-time emergency data** and enable **rapid response coordination** within the platform



Technology Partners enable **real-time monitoring** and data integration

Relevant Contacts*



Rosa Branco

Leads Lisbon's georeferenced information division, making her relevant for integrating city-level spatial data

Pedro Dinis and Hugo Beirão

Lisbon & Porto mobility heads oversee mobility systems and traffic management

Carlos Cabreiro and Rui Veloso

PJ National Director and GNR Commander-General are key for real-time incident intelligence

Dutch firms should focus on delivering analytics, monitoring and data integration capabilities across fragmented stakeholders

6.3 Competitive Landscape – Operations Monitoring Platform

Market structure

International
players

Private
market

Fragmented
market

- ♥ Large contracts led by **global system integrators**
- ♥ Operations fragmented across multiple **public and private actors**
- ♥ **Global tech** providers lead with **data-driven solutions**

OSF Competitive edge

- Strong positioning in **analytics, monitoring and real-time data solutions**
- Flexibility to integrate across **multi-stakeholder environments**

Competitors



Atos/Eviden is a next-generation **technology leader** focusing on digital, cloud, big data, and security. Official IT partner of UEFA



NTT DATA is a **global IT services** provider and **consultancy** that helps organizations with **digital transformations**



Capgemini is a **global leader** in **technology** focused on **digital transformation** using AI, data, cloud and software



Indra Group is a **leading technology and engineering firm** focused on **mobility, defence** and large-scale **systems integration**

Entry is driven by early engagement with public stakeholders and proving value through targeted, single-use monitoring solutions

6.3 OSF Profile – Operations Monitoring Platform

Possible Roles

Each role represents a **distinct function** a company can play within this opportunity:

- **Sensor & IoT Infrastructure:** supplying and installing the physical sensors
- **Inter-Agency Coordination Tools:** a shared alerting and escalation layer between agencies
- **Control Dashboard Provider:** develop the core interface aggregating live data into a single operational view
- **CCTV & Surveillance Infrastructure:** supplying and installing camera systems across locations
- **Crowd Analytics & Density Monitoring:** integration layer for analyzing movement patterns and congestion risks in real time

Profile

To capitalize on opportunities in this sector, **the ideal company** should have, at least, one of this:

-  **Real-time data integration and monitoring:** able to aggregate live feeds from security systems and sensors into a dashboard
-  **Deployment in Complex Environments:** track record in environments where failure has direct safety and operational consequences
-  **Advanced Analytics and Decision Support:** use of AI, simulation or predictive tools to convert live data into actionable intelligence
-  **Compliance-Ready & Secure Architecture:** platforms built to meet regulatory standards ensuring readiness for critical contexts

Entry Strategy



Position as a **specialized provider of monitoring and analytics solutions**



Engage early with **public authorities and system integrators**



Start with **single use cases** (crowd monitoring or incident response)

6. Annex

6.1 Infrastructure Modernization

6.2 Fan Experience Platform

6.3 Operations Monitoring Platform

6.4 Integrated Mobility Platform

6.5 Cybersecurity Infrastructure

6.6 Smart Sustainability Solutions

Portugal 2030 programme investments and lack of unified event mobility create a strong case for a MaaS platform with lasting post-event value

6.4 Opportunity Overview – Integrated Mobility Platform



Development of a **Mobility-as-a-Service (MaaS) platform** integrating public transport, event shuttles and bike-sharing into a single application for **route planning, ticketing** and **real-time travel updates**

Cluster

Transport & Mobility

Strategic Relevance for the WC2030

Critical Issue

- During **Euro 2004** (Portugal's last major tournament), **fans faced 90-minute queues for trains** and no real-time alternative routing
- **No single source of truth** for combining match schedules, road closures, special event shuttles and regular public transport

Investments & Key Drivers

- **Major investments under Portugal 2030¹ Program**, such as rail upgrades, urban transport systems and intermodal connectivity
- **Platform can be pivoted** into a **national tourism app** (which is increasing rapidly in Portugal) post-event, ensuring **long-term ROI**

Timeline

2026



Morocco–Spain–Portugal Business Forum in Salé identified **mobility as one of the central pillars** for tri-national 2030 World Cup coordination ²

2028 – 2029



Municipalities, with the **FPF**, expected to **begin procurement** for integrated event transport and MaaS platform building on existing app ³

Access to publicly controlled infrastructure is the key barrier, making partnerships with transport authorities essential for platform entry

6.4

Stakeholders Ecosystem – Integrated Mobility Platform

Key Stakeholders



Public Transport Operators (Lisbon and Porto) provide **core services** and **data** for platform functionality



EMEL (Lisbon's municipal mobility operator) manages and enforces **paid urban parking**, acting as a key controller of curbside access



Technology Partners enable **integration** and **real-time data** across mobility services



Scooter Sharing Operators like Lime and Bolt provide **short-distance mobility** within the platform



Bike Sharing Operators (GIRA, Bird) provide **short-distance mobility** within the platform



Payment Gateway Partners (Revolut, Mbway) enable **integrated payments across** mobility services



Event Shuttle Operators (Flixbus, Expresso) enable **long-distance connections** between key event locations



Telecom Providers (NOS, MEO) enable **connectivity** and **real-time data flow** across the platform

Relevant Contacts*

Rui Gaspar Lobo and Luís Osório
Carris president and STCP president
provide public transport information

João Mello Franco
SIBS CEO is key for enabling integrated payments and ticketing

Ricardo Pereira
FlixBus Network Planning Manager Iberia
is key for route optimization across cities

Pedro Dinis & Hugo Beirão
Lisbon & Porto mobility heads allow for a successful integration

Dutch firms should not compete with global navigation apps, they should provide event-specific integration and mobility intelligence

6.4 Competitive Landscape – Integrated Mobility Platform

Market structure

International
players

Private
market

Fragmented
market

- ♥ Mobility services fragmented across **public and private operators**
- ♥ Core navigation led by **global platforms**
- ♥ Access depends on **partnerships with transport authorities**

OSF Competitive edge

- Strong in **mobility integration and data-driven solutions**
- Experience across **multi-modal transport systems**
- Flexibility to integrate across **public and private operators**

Competitors



Moovit is an urban mobility platform that offers **real-time**, multi-modal **trip planning** that can be used by the **fans** in the **World Cup**



Citymapper is an urban transit app that helps users **navigate cities** by **comparing all transport** options in **real-time**



Google Maps is a **global navigation platform** that provides real-time **GPS navigation**, traffic **updates**



Apple is a global **technology leader** that **designs, manufactures** and **markets** smartphones. It's known for its **user-friendly design**

Entry should focus on solving critical mobility bottlenecks through city partnerships, positioning solutions within broader smart city initiatives

6.4 OSF Profile – Integrated Mobility Platform

Possible Roles

Each role represents a **distinct function** a company can play within this opportunity:

- **MaaS Platform Architecture & Development:** connect transport services into a unified journey
- **Coordination Interface:** Provide dashboards for operators to monitor transport flows in real time
- **Ticketing & Mobility Integration:** Link transport tickets, event access and digital platforms
- **Transport Data Integration:** connect transport data from public and private sources, micromobility like scooters & bicycles
- **Parking Intelligence:** integration of a feature that dynamically provides city-wide projected parking fees/availability

Profile

To capitalize on opportunities in this sector, **the ideal company** should have, at least, one of this:



Platform-First Thinking: a platform able to unify all mobility services into one user journey without owning the underlying infrastructure



City-Scale Mobility Integrators: proven experience deploying across complex urban transport systems with multiple stakeholders



Real-Time Optimization: use of live data and predictive analytics to manage congestion and dynamically reroute fan movement



Public-Private Aggregators: capability in securing, and leveraging real-time data from public and private transport networks

Entry Strategy



Position as a **mobility integration and coordination layer**



Partner with **cities and transport operators**



Focus on **high-impact bottlenecks (stadium access, peak flows)**

6. Annex

6.1 Infrastructure Modernization

6.2 Fan Experience Platform

6.3 Operations Monitoring Platform

6.4 Integrated Mobility Platform

6.5 Cybersecurity Infrastructure

6.6 Smart Sustainability Solutions

Possible breach damages and tightening EU regulation make cybersecurity infrastructure one of the most urgent procurement areas for WC2030

6.5 Opportunity Overview – Cybersecurity Infrastructure



Deployment of **cybersecurity systems protecting digital infrastructure** including ticketing platforms, **payment systems**, **broadcasting networks** and **event management platforms**

Cluster

Security & Safety

Strategic Relevance for the WC2030

Critical Issue

- A single **breach of ticketing or payment systems** would leak 2M+ passport details and credit cards, causing reputational and legal damage
- **Broadcasting networks must be isolated from public internet** to prevent feed manipulation or denial-of-service during live matches

Investments & Key Drivers

- **EU’s NIS2 Directive** (2024) imposes strict incident reporting and fines for critical infrastructure, including sports event systems
- The **ECCC¹ call for proposals**, launched under the **DEP**, mobilised **€50 million to deploy strategic cybersecurity capabilities** across Europe

Timeline

2027 – 2028



A **joint tri-national cybersecurity framework** for the WC2030 may be issued ²

2028 – 2029



Ticketing platform and payment system security accreditation processes to begin

Cybersecurity Infrastructure is structured around centralized state control, shaping participation and limiting private influence

6.5 Stakeholders Ecosystem – Cybersecurity Infrastructure

Key Stakeholders



CNCS (National Cybersecurity Centre) defines national cybersecurity standards and coordinates threat response



Ministério da Administração Interna sets security standards and oversees national cybersecurity coordination



ANACOM (National Communications Authority) ensures **resilience** and **security** of national communications networks



FIFA (International Association Football Federation) sets cybersecurity requirements and ensures compliance across event systems



Ticketing platforms (Ticketmaster, Eventim) secure ticketing systems and protect access validation to cyber threats



Streaming and Broadcast Partners (Sport tv, DAZN) secure media streams and protect live content from cyber threats



Payment Gateway Partners (Revolut, Mbway) enable secure, real-time transactions across the platform



Telecom Providers (NOS, MEO) provide secure connectivity infrastructure for platform and event systems

Relevant Contacts*



José Azevedo

SIBS Fraud Prevention Director, relevant for real-time fraud monitoring and payment security

João Filipe Alves

ANACOM Head of Security is key for ensuring resilient telecom networks and protecting critical infrastructure

Lino Santos

CNCS Head is key for ensuring secure data sharing and protection across digital platforms and mobility systems

Dutch firms should avoid competing on full-scale solutions and instead specialize in securing critical systems within complex environments

6.5 Competitive Landscape – Cybersecurity Infrastructure

Market structure

International
players

Private
market

Fragmented
market

- Large contracts led by global **tech providers and system integrators**
- Demand driven by **strict EU and national cybersecurity requirements**

OSF Competitive edge

- Strong in **specialized cybersecurity modules within larger systems**
- Ability to secure **integrated, multi-system environments**
- Flexible positioning within **complex, regulated ecosystems**

Competitors



Atos/Eviden is a next-generation **technology leader** focusing on digital, cloud, big data, and security. Official IT partner of UEFA



Microsoft is a **global technology** company that **develops** and supports a wide range of **software**, hardware, and **cloud services**



Cisco Systems is a **network cybersecurity** company that builds the **infrastructure** for the internet



Accenture is a global **services company** that helps organizations **reinvent themselves** by suggesting how to **improve performance**

Entry is best achieved by embedding specialized security solutions into larger systems, targeting high-risk, compliance-driven environments

6.5 OSF Profile – Cybersecurity Infrastructure

Specific Roles

Each role represents a **distinct function** a company can play within this opportunity:

- **Network & Endpoint Security:** strengthening the connectivity hardware against intrusion
- **Multi-Stakeholder Coordination Layer:** enable information sharing and coordination between authorities, venues and operators
- **NIS2 Compliance Advisory & Audit:** supporting Portuguese operators in meeting their regulatory obligations under the new legal framework
- **Threat Intelligence:** real-time intelligence feeds and predictive threat monitoring systems
- **Identity & Access Management:** Secure authentication for staff, vendors and systems

Profile

To capitalize on opportunities in this sector, **the ideal company** should have, at least, one of this:

-  **Critical Infrastructure Security Specialists:** focused on securing high-risk systems (payments, broadcast and ID infrastructure)
-  **SOC-Capable Infrastructure:** able to deliver 24/7 monitoring, incident response and threat intelligence in live environments
-  **Integrated Cross-System Protection:** capability to secure interconnected platforms and coordinate security layers end-to-end
-  **NIS2-Ready Architecture:** solutions tailor-made to align with the existing cybersecurity regulations in Portugal, specifically NIS2

Entry Strategy



Position as a **specialist in securing critical systems**



Embed within **larger digital and infrastructure projects**



Focus on **high-risk systems (payments, ticketing, platforms)**

6. Annex

6.1 Infrastructure Modernization

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| 6.6 Smart Sustainability Solutions

FIFA sustainability compliance requirements and the €3.1B investment in Sustentável 2030 position smart energy solutions as a high-value opportunity

6.6 Opportunity Overview – Smart Sustainable Solutions



Smart sustainability solutions that enable **low-emission**, **resource-efficient** infrastructure across various World Cup related areas, combining **energy systems** and **long-term operational infrastructure**

Cluster

Sustainability

Strategic Relevance for the WC2030

Critical Issue

- Event operations must balance **high energy demand** with **emissions reduction targets**, increasing need for efficient on-site solutions
- **Infrastructures can become inefficient, costly to operate or underutilized after 2030** due to lack of smart and sustainable systems

Investments & Key Drivers

- **€3.1B¹** invested by the EU using the **European Cohesion Fund** on the “**Sustentável 2030**” programme
- Large **public** and **institutional investments** are driving the transition toward **low-emission** and **scalable** infrastructure solutions

Timeline

2027 – 2028



FIFA to publish **WC2030 Sustainability Strategy**;
Portugal will need to submit implementation plan ²

2027 – 2028



Expected **stadium smart-energy system upgrades** in renovation works at all venues ³

Mid 2028 – 2029



Carbon measurement, green certification and reporting frameworks required to be **operational**

Successful delivery depends on aligning regulatory approval, grid infrastructure, and decentralized energy solutions

6.6 Stakeholders Ecosystem – Smart Sustainability Solutions

Key Stakeholders



ERSE (Energy Services Regulatory Authority) regulates **energy systems** and enables sustainable solutions



Portuguese Government sets national sustainability policy and drives public investment and regulatory frameworks



Stadium Operators (Sporting CP, FC Porto) implement **sustainable** practices **within stadium operations**



EPAL (Portuguese Waters Company) **provide water infrastructure** and support sustainable resource management



Energy/Sustainability Companies (Galp/EDP) **provide** and **optimize** sustainable energy solutions



Valorsul (Waste Management Operator) is responsible for **waste treatment** and supports sustainable resource management



Microgrid Companies (Aggreko, LoxamHune) deliver **decentralized**, sustainable **power solutions**



REN (National Energy Network) operate national energy networks and **ensure grid reliability**

Relevant Contacts*

João Abril de Abreu and Tiago Gonçalves

EDP and GALP innovation leaders, key for developing new energy solutions



Jorge Esteves and João Emanuel Afonso

ERSE and REN technical leaders, key for shaping regulatory frameworks

Catarina Freitas and Marta Andreia da Silva Pinto

Lisbon & Porto environmental heads are key for approving sustainable policies

Dutch firms should avoid competing with large players and instead deliver modular, integrated sustainability solutions in broader infrastructure systems

6.6 Competitive Landscape – Smart Sustainability Solutions

Market structure

International
players

Private
market

Fragmented
market

- Large energy players control **core systems and investment**
- Strong demand driven by **decarbonization and sustainability targets**
- Projects require integration of **energy, storage and smart controls**

OSF Competitive edge

- Strong in **modular and deployable energy solutions**
- Ability to integrate **energy systems with digital infrastructure**
- Expertise in **sustainability and resource optimization**

Competitors



EDP is a **major global energy** company focused on **renewable** energy, **electricity generation**, distribution, and **supply**



Siemens AG is a leading technology company focused on **automation, smart infrastructure** and **healthcare technology**



Veolia is a global **environmental** services company that specializes in **water management**, waste management, and **energy services**



ENGIE is a multinational **utility company** and a global leader in the **low-carbon energy** transition, aiming for **net-zero carbon** by 2045

Entry should prioritize modular, high-visibility sustainability use cases, leveraging partnerships with infrastructure and energy operators

6.6 OSF Profile – Smart Sustainability Solutions

Possible Roles

Each role represents a **distinct function** a company can play within this opportunity:

- **Carbon Tracking & Reporting Platforms:** app to measure & aggregate emissions across locations
- **Temporary Microgrid Deployment:** install modular energy systems for fan zones & stadiums
- **Post-Event Transition:** adapt temporary systems into permanent or reusable infrastructure after the tournament
- **Water Efficiency & Recycling:** optimize water use across different facilities and accommodation
- **Food Waste Reduction Systems:** Forecasting potential food waste and redistribution solutions for stadiums and hospitality players

Profile

To capitalize on opportunities in this sector, **the ideal company** should have, at least, one of this:

-  **Energy System Integrators:** able to deploy integrated energy solutions that ensure reliability under peak demand
-  **Connected Infrastructure Operators:** capable of linking physical systems with digital platforms, to aid monitoring and optimization
-  **Sustainability Reporting:** expertise in measuring and reporting emissions, in line with EU compliance guidelines
-  **Temporary-to-Legacy Solution:** able to build solutions for rapid deployment, but with long-term value beyond the World Cup

Entry Strategy



Position as a **provider of modular sustainability solutions**



Partner with **infrastructure players and energy operators**



Focus on **visible, measurable use cases (energy, emissions, waste)**