



# Policy paper

*Mapping smart specialisation  
strategies for sport*

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# Policy paper

## *Mapping smart specialisation strategies for sport*

written by



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## Table of Contents

Background on the RiS3 approach: smart specialisation strategy and sport.....	5
1. Sport for tourism .....	6
2. Sport for health and wellbeing.....	7
3. Sport for innovation .....	8
Main findings / Conclusions .....	9
Annex 1 .....	10
Annex 2 .....	13

### *Background on the RiS<sup>3</sup> approach: smart specialisation strategy and sport*

In the context of Europe2020 strategy<sup>1</sup>, the smart specialisation strategy approach represents a key element to achieve the three thematic priorities of Europe2020, i.e. smart, sustainable and inclusive growth. In particular, the RiS<sup>3</sup> (Research and Innovation strategies for smart specialisation) approach<sup>2</sup> is based on five different factors<sup>3</sup>: a) focus on key national/regional priorities and challenges; b) focus on regional strengths, competitive advantages and potential for excellence; c) private-investment stimulation through technological support and practice-based innovation; d) enhancement of the stakeholders engagement; e) evidence-based with monitoring and evaluation tools.

Smart specialisation strategies can be developed in three areas: agro-food, energy and industrial modernisation. Actions to support the development of the sport sector are usually embedded in the industrial modernisation thematic area. In this paper, we map and analyse the existing good practices in terms of regional smart specialisation strategies including sport as thematic area through a web-based research on the *Eye@RiS<sup>3</sup>* database<sup>4</sup>. In particular, we have identified those regions that have included in their smart specialisation strategies the economic domain 'Sports activities and amusement and recreation activities'. This research has provided 82 results (representing 70 regions, since several of them including twice this economic domain), but it has been possible to detect a specific sport strategy in only 16 regions. In fact, the majority of the regions identified has not uploaded the relevant documentation within the database or the documentation has not been uploaded in English. For this reason, despite the inclusion of sport as part of their smart specialisation strategies, it was not possible to identify or review their specific strategies and approaches.

The inclusion of sport as thematic area for the development of smart specialisation strategies shows its importance as an economic sector. It could be argued that sport contributes to the development of different sectors and industries, such as manufacturing, construction, transport and tourism. Moreover, sport might play a crucial role in relation to the development of territories by enhancing their attractiveness, social cohesion, urban regeneration as well as their economic vitality. However, the impact of sport is often underestimated, and its inclusion within the specific regional strategies could still be further enhanced and maximised. In this sense, a clustered approach might represent an important instrument aimed at enhancing the comparative advantages of a specific region, by establishing partnerships and connections between different sectors and economic domains. Our analysis will show how the clustered approach in the field of sport might benefit different sectors, such as tourism, infrastructural or technological development, health and wellbeing, and vice-versa.

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<sup>1</sup> [https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy\\_en](https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy_en)

<sup>2</sup> <http://s3platform.jrc.ec.europa.eu/what-is-smart-specialisation->

<sup>3</sup> <http://s3platform.jrc.ec.europa.eu/documents/20182/84453/RIS3+Guide.pdf/fceb8c58-73a9-4863-8107-752aef77e7b4>

<sup>4</sup> <http://s3platform.jrc.ec.europa.eu/map>

It is worth mentioning the ClusSport partnership<sup>5</sup> here, which represents an important example of interregional cooperation in the field of sport. This cooperation embodies the potential of sport as driver of regional development, and has been followed by different other regions.

In the following paragraphs we will take into consideration the different thematic areas linked to sport within different regional smart specialisation strategies. In particular, this analysis will be divided into three sections, according to the specific economic domains connected to the regional sport developmental strategies. The three identified economic domains are: **tourism, health and wellbeing** and **technological and infrastructural innovation**.

### *1. Sport for tourism*

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

Our analysis of the 16 reviewed documents has shown that 7 regions aims to develop their tourism sector through a smart specialisation strategy focused on sport, by counteracting tourism seasonality or by developing niche markets relating to specific sports.

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

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<sup>5</sup> <http://s3platform.jrc.ec.europa.eu/sport>

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

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

## *2. Sport for health and wellbeing*

The Council of the European Union Recommendations on promoting health-enhancing physical activity across sectors (2013)<sup>6</sup>, highlights the role of sport and physical activity in contributing to the weight control and in preventing multiple diseases. However, in order to fully develop the potential of sport in the health sector, it is important to adopt a cross-sectorial approach and a closer cooperation between multiple sectors.

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

The region of Galicia, for example, aims to become a leading region in Southern Europe in the field of new technologies for active ageing and healthy living. In this sense, new sporting activities would be supported by the development and marketing of new knowledge intensive products based on adding value to the potential of spa culture and sports for therapeutic purposes and the promotion of personal autonomy. Moreover, within the *RiS<sup>3</sup>* document prepared by the region of Castilla la Mancha (Spain), the focus on industrial modernisation plays an important role in the fields of health, wellbeing and sporting activities, that will be developed through the clustered approach.

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[https://ec.europa.eu/health/sites/health/files/nutrition\\_physical\\_activity/docs/2013\\_hepa\\_en.pdf](https://ec.europa.eu/health/sites/health/files/nutrition_physical_activity/docs/2013_hepa_en.pdf)

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

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

### *3. Sport for innovation*

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

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

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



Pohjois-Savo's region, in Finland, aims to further develop an IT tool prototype named SENSOFTIA. It is a provider of software and embedded systems with special expertise in virtual healthcare services. The customer can contact the physician via video from home or the office. The physician can submit e-prescriptions or prescribe drugs using a health and sports application. The application is connected to a smart wristband and other wearables, collecting and analysing the customer's health data and monitoring its relation with the sporting activity. The industrial modernisation in terms of sport equipment is also considered an important area for smart specialisation in the French region Nord – Pas de Calais.

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

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

#### *Main findings / Conclusions*

As the analysis has shown, there are different regions at the European level that have included sport as a priority within their smart specialisation strategy. Our analysis has however taken into account only 20% of the regions that included sport as smart specialisation strategy, due to the lack of documents uploaded and available within the Eye@Ris<sup>3</sup> database. Nevertheless, it has been noted that within their smart specialisation strategies, regional authorities tend to create industrial clusters between the different domains, thus, establishing, for instance, partnerships between health, sport and technological industries, or even between touristic and sport equipment industries to develop niche markets. The analysis has also shown that, the sectors where sport is more often linked to, are the infrastructural and technological development (50%), tourism (35%) and health (35%) sectors, as also shown in Annex I that summarises our main findings.

Annex I: Regions identified with a specific sport strategy (16)

Annex II: Complete list of all regions that have included in their smart specialisation strategies the economic domain 'Sports activities and amusement and recreation activities' (70)

## Annex I

### Regions identified with a specific sport strategy (16)

Regions / provinces	Main sectors associated with sport in the RiS <sup>3</sup>			
	Tourism	Health and wellbeing	Infrastructural development	Technological innovation
<b>Shumen (BG)</b>		Innovation strategies in the fields of healthy lifestyle, creative and re-creative industries are also aimed at enhancing the region capacity for alternative sport		Innovation strategies in the fields of bio tech
<b>Aragon (ES)</b>	Developing the 'sport tourism' by also investing on industries producing sporting equipment and material			
<b>Balearic Islands (ES)</b>		The document defines the importance of the physical activity for the citizens' lifestyle, contributing to the anti-ageing and disease-rehabilitation programmes		
<b>Cantabria (ES)</b>	Develop a niche tourism through investments in specific sports, such as golf, surf and sailing		Further development of research centres on sporting and physical activities through the creation of a Scientific and Technological Park that shall also include sport facilities	

<b>Castilla La Mancha (ES)</b>		Social innovation in the fields of health, wellbeing and sporting activities needs to be reached through the development of key enabling technologies		
<b>Galicia (ES)</b>		Becoming a leading region in Southern Europe in the field of New Technologies for active ageing and healthy living		
<b>Murcia (ES)</b>	Focus on maritime sports against seasonality of tourism	Achieving a healthy lifestyle through investments in the biomedical and sport fields		Investments shall focus on the research of new food products and medicines for people practicing sport at different levels, as well as monitoring IT tools, as newly developed App.
<b>Helsinki (FI)</b>		Exercise, sports and physical environment as part of well-being		
<b>Pohjois-Savo (FI)</b>				SENSOFTIA is a provider of software and embedded systems with special expertise in virtual healthcare services. The tool prescribes preventive drugs by using a health and sports application
<b>Southern Ostrobothnia (FI)</b>				Top sports and exercise skill concentration acts as a testing and development centre for the exercise and welfare sectors

<b>Nord Pas-de-Calais (FR)</b>				Developing high-level sporting equipments
<b>Provence-Alpes-Côte d'Azur (FR)</b>	Sport development as a way to counteract seasonality of tourism			
<b>Emilia Romagna (IT)</b>				Focus on sporting automotive sector in order to increase the capacity of the market
<b>Sardegna (IT)</b>	Sport development as a way to counteract seasonality of tourism			
<b>Warmińsk o-Mazurskie (PL)</b>	Development of the tourism sector towards new services based on sports service	Developing specialist services, relating to health promotion, rehabilitation and sports		
<b>Jämtland County (SE)</b>	Tourism, sports and outdoor activities are strong business segments and comprise a strong regional cluster that is supported by research		More inter-industry innovation and business collaborations and durable cluster investments in tourism, sports and the outdoors	

## Annex II

### **Complete list of all regions that have included in their smart specialisation strategies the economic domain 'Sports activities and amusement and recreation activities' (70)**

The Eye@RIS<sup>3</sup> database provides comprehensive information on the public investment priorities for innovation across European regions. The tool designed to consult the database allows for researches within three specific domains: economic, scientific and EU policy objectives. Within the economic domain it is possible to choose single or multiple priority domains according to Eurostat's NACE2 sectoral codes and OECD categories<sup>7</sup>. As for the purpose of this research, the chosen economic domain is 'Sport activities and amusement and recreation activities'.

No.	Regions
1.	Vienna (AT)
2.	Salzburg (AT)
3.	The Tyrol (AT)
4.	Shumen (BG)
5.	Schleswig-Holstein (DE)
6.	Bavaria (DE)
7.	Berlin (DE)
8.	Brandenburg (DE)
9.	Bremen (DE)
10.	Hessen (DE)
11.	Lower Saxony (DE)
12.	South Denmark (DK)
13.	Central Jutland (DK)
14.	North Jutland (DK)

<sup>7</sup> <http://s3platform.jrc.ec.europa.eu/eye-ris3>

15.	Epirus (EL)
16.	Ionian Islands (EL)
17.	Continental Greece (EL)
18.	Peloponnese (EL)
19.	Attica (EL)
20.	South Aegean (EL)
21.	Crete (EL)
22.	Galicia (ES)
23.	Cantabria (ES)
24.	Aragon (ES)
25.	Castile-La Mancha (ES)
26.	Extremadura (ES)
27.	Balearic Islands (ES)
28.	Murcia (ES)
29.	Helsinki – Uusimaa (FI)
30.	South Karelia (FI)
31.	Pohjois-Savo (FI)
32.	Kainuu (FI)
33.	Lapland (FI)
34.	Southern Ostrobothnia (FI)
35.	Centre (FR)
36.	Nord/Pas-de-Calais (FR)
37.	Franche-Comté (FR)
38.	Rhône-Alpes (FR)
39.	Provence-Alpes-Côte d’Azur (FR)
40.	Martinique (FR)

41.	Réunion (FR)
42.	Valle d'Aosta (IT)
43.	Basilicata (IT)
44.	Calabria (IT)
45.	Sicily (IT)
46.	Sardinia (IT)
47.	Emilia-Romagna (IT)
48.	Lazio (IT)
49.	Friesland (NL)
50.	Mazowieckie (PL)
51.	Malopolskie (PL)
52.	Swietokrzyskie (PL)
53.	Lubuskie (PL)
54.	Warminsko-Mazurskie (PL)
55.	Algarve (PT)
56.	Centre (PT)
57.	Lisbon (PT)
58.	Alentejo (PT)
59.	Centre (RO)
60.	North East (RO)
61.	Örebro County (SE)
62.	Gotland County (SE)
63.	Värmland County (SE)
64.	Dalarna County (SE)
65.	Västernorrland County (SE)
66.	Jämtland County (SE)

67.	Västerbotten County (SE)
68.	Norrbotten County (SE)
69.	Cornwall and Isles of Scilly (UK)
70.	Scotland (UK)





