



EUROPEAN SPORTSTECH REPORT

2018

The first comprehensive view on the European SportsTech ecosystem.



Welcome —

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About This Report

We're excited to present you the first European SportsTech Report. It comes to you as mix of data driven insights and interviews with people at the core of a fast moving and thrilling ecosystem.

“The European SportsTech scene is gaining traction” is a phrase you hear quite often these days. And when you speak to people or visit related events you feel that this phrase is absolutely true. But there have been two things missing so far from our perspective: Firstly, a reliable fact based view of the market, to grasp its actual size and development. And secondly, an overview of the involved people and projects, to showcase opportunities and success stories. We believe that with this report we've created the first truly comprehensive view on the European SportsTech ecosystem. It has the goal to raise transparency and awareness and to contribute to the further growth of the community. The report will be published annually, as we believe that the most valuable insights come from a continuous view on the market.

Times for European SportsTech are indeed exciting. We have more than 1.000 SportsTech companies in Europe and the invested capital reached a new all time high with about 135 M€ in 2017, after a steady growth and more than tripling compared to 2013. We have strong SportsTech countries and regions, like the UK, France, the Nordics, the German speaking countries, the Iberian countries or the Benelux region, with great startups spreading all over the continent. Big sports organizations are hosting tech events and are applying tech based solutions in their day to day business. New initiatives, projects and events are popping up everywhere. We believe that this is just the beginning of a new era in sports. And Europe is ready for it.

But we'd also like to address one topic which clearly has a lot of room for improvement: Gender diversity in SportsTech. It's been highlighted in the press recently, it's obvious when you go to industry events and it was present when we were looking for people to interview for this report. So we hope in a year from now we can present a higher female ratio in this report.

Last but not least we'd like to send some special thanks to our data partner Dealroom.co and to all the great people we spoke to. Your contribution was essential for this report. Thank you very much.

To all readers: Enjoy the report and feel free to get in touch.

Benjamin Penkert
Managing Director at leAD SportsTechX
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#SPORTSTECHEUROPE

About Us —

The European SportsTech Report is brought to you by leAD SportsTechX, the consulting and digital product arm of leAD Sports. We are supported by our great data partner, Dealroom.co.



leAD Sports

leAD - legacy of Adi Dassler - is a Berlin based sports entrepreneurship platform that helps fund and nurture remarkable sports startups. It was initiated by the grandchildren of Adi Dassler together with a unique group of shareholders who are experts in the fields of venture capital, business, sports business and tech. It consists of the following elements.

The leAD Sports Accelerator targets seed stage companies with innovative products, services and business models in or applicable to the realm of sports. This next-generation accelerator model with tightly aligned support for entrepreneurs and a linked fund that will capture value from the accelerator's leading companies creates an unprecedented ecosystem for sports technology value-creation.

The ADvantage fund intends to invest in early stage technology companies aimed at reshaping how we play and experience sports. Backed by leAD Sports and OurCrowd, the leading global equity crowdfunding platform, ADvantage will leverage a strong global network to source leading opportunities in the spaces of fan engagement & experience, connected athletes & communities, and derivative sports.

leAD SportsTechX is the consulting and digital product arm of leAD. With a data driven and knowledge based approach leAD SportsTechX helps athletes, sports organisations & corporates to grasp startup driven opportunities in sports. Additionally leAD SportsTechX promotes and connects startups and the international SportsTech scene.

Dealroom.co

Dealroom.co helps corporations, investment firms and governments to identify & track growth opportunities and innovative companies, through intelligent data-driven software powered by a proprietary global database.



dealroom.co

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People In This Report

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equilab



Alexander Bente
Co-Founder
leAD Sports



Alex Kornilov
CEO & Founder
Betegy



Alex Zurita
Specialist Advisor
London Sport



Andreu Bartoli
Co-Founder & CEO
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CEO
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Natalia Karbasova
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Oleg Fomenko
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Director
Le Tremplin



Bertan Baytekin
Co-Founder & CEO
ProTipster



Boris Pourreau
Co-Founder & CEO
Sport Heroes Group



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Emily Ross
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Co-Founder & CEO
All Square



Peter Holm
CEO & Co-Founder
Tonsser



Philip Skogsberg
Co-Founder
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Raphael Morgulis
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Roman Sandoval
Co-Founder
DefyU



Filipe Esteves
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Fredrik Ademar
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Giels Brouwer
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Grainne Barry
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Ruben Saavedra
Co-Founder & CEO
Metrica Sports



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Investment Manager
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Sascha L. Schmidt
Director of the Center for Sports
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WHU - Otto Beisheim School of
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Sohail Godall
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COPA90



Jan Erola
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Jeremy Pressman
Partner
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João Gonçalo Cunha
CEO
KickUP



Kristof de Mey
Sports Technology &
Business Developer
Ghent University Victoris



Stefano Tambornini
Director
Wylab



Stephane Mottaz
Sales & Marketing Director
ThinkSport



Terho Lahtinen
Senior Manager
Movesense



Tim Krieglstein
Managing Director
leAD Sports



Tomasz Swietlikowski
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Lilli Ofstad
Project Manager
Sport Tech Norway



Luis Vicente
Chairman
3vs Sports Partners



Martina Skelly
Co-Founder
SportsTech Ireland



Martin Wiklund
Founder & CEO
Sportswik



Michael Broughton
Partner
Sport Investment Partners



Tomi Kaukinen
CEO
Comment

#sportstecheurope
is the new common
hashtag for the European
SportsTech community.



The Experts —

#9

The European SportsTech ecosystem is evolving rapidly. So it's time to hear what some of the most experienced and renowned people in the scene think about it. We had the chance to speak to several experts about their views on current developments, startups which excite them and their expectations for the future.

Expert Interviews _



3vs Sports Partners
Valencia, Spain

LUIS VICENTE
Chairman

Senior Sports Industry Expert with 25 years experience in Executive Management, Commercial Growth, Talent Management, Strategy, Content, Digital, Data, Relationship Management, Marketing and Brand development. Has created, developed and executed world first commercial opportunities at the highest level in various sports, managed some of the largest global names in the football industry and lead the transformation of major football brands into global properties. Today, is considered to be one of the leading sports transformers in the world and is dedicating his time to advise different investors in sports properties and sports technologies as well as advising leading technology brands, digital and analytics agencies, sports leagues and sports organizations.



How did the European SportsTech scene develop in 2017?

In my view, European Sports Tech market made a big step forward in 2017, developing at a rapid pace, giving rise to a steadily increasing number of start-ups and creating a growing momentum propelling the industry forward. Incubation and Acceleration are strong now, with a substantial number of public and private initiatives, a growing number of associations between the best of the best academic world talent and leading media, tech, advisory, sports organizations very well supported by the largest financial investment institutions in the world. Sports rights holders seem to have understood at last that Technology & Innovation need to be at the center of their strategies and the number of opportunities to young creative companies participate in the strategic roadmap of large clubs, team and federations has significantly grown. Exciting times really.

Which startups excited you in 2017?

Great competition in that space but I will say that my top five favourites are mature start-ups:

- 1) mycujoo, now the leading football streaming company in the world, changing forever the definition of premium content, as they focus on 2nd and 3rd tier content.
- 2) Symanto, an AI solution for football, gaming and many global corporations, utilizing Psycho-linguistic Profiling and Artificial Intelligence to provide a deep understanding of the human behavior.
- 3) Peloton, brings your private cycling studio from home, all in one bike, providing unlimited access to daily live classes and more than 7,000 on-demand taught by elite NYC instructors.
- 4) Kahoot, is a free game-based learning platform, with more than 60 million active users a month. Is now starting to be applied in sports and massive potential for fan gamification, instant rewarding and engagement.
- 5) Omaze is a online fundraising platform that offers in- a-lifetime experiences and exclusive merchandise in support of critical causes. Also it starts to be applied in large scale in sports and with sports personalities.

What topic trends do you currently see?

I think the most important trends actually are the following:

- 1) Wearables
- 2) Smart Gear
- 3) Big and Small Data and its use in sport
- 4) Datatainment
- 5) Funding/Crowdfunding
- 6) Content creation and distribution
- 7) Fan Engagement
- 8) E-sports vs r-sports

What is still missing in European SportsTech?

Even if we can see a strong evolution, we still are missing the same proactivity, support and scale of US based VCs. European Investors are still more traditional, less risk-takers and demanding. We also need a better connectivity between sports world, investment world and tech world. Tech & Innovation can and should be the priority tools to secure a real democratization of sport. We need more unity, conversion & aggregation. We also definitely need more investment and capabilities to create more sports innovation hubs, accelerators & incubators programs with a clearer fit-to-purpose.

What do you expect from 2018?

I expect a very important year for the real start of digital transformation in sports. Leading rights holders have finally understood the relevance, the scope and what is in stake. Some Massive movements will happen:

- 1) Sport merging with entertainment
- 2) The "Silicon Valley" for and of sports
- 3) Fast & Furious race between US and European based sports
- 4) "Netflix" of Sports next chapters
- 5) Aggregation and convergence revolution will continue. Expect more Disney/21st century fox happening
- 6) A real clash of titans - Technology and Data companies prioritizing sports
- 7) Traditional Leading sports properties will continue to lose ground for innovation and for innovative properties
- 8) FIFA and other leading rights holders driving serious digital revolutions

Expert Interviews _



leadsports.com

leAD Sports
Berlin, Germany

ALEXANDER, HORST & KLAUS BENTE Co-Founders

Alex holds a Master's degree in Accounting and Finance from the University of St. Gallen, one of the leading business schools in Europe. He's the great grandson of Adi Dassler, the founder of the sporting goods company adidas. Along with his father and his uncles, Alex is on a journey of preserving his great-grandfather's legacy through several initiatives. These initiatives include an accelerator program to identify and fund the next great ideas in the world of sports, the investment fund ADvantage targeting A round sports companies, the development and production of a feature Hollywood movie about Adi Dassler's life, the creation of an athlete management and advisory firm, and launching a Multi Family Office providing financial and estate planning advice to a selected group of like-minded families and entrepreneurs around the globe.



How did the European SportsTech scene develop in 2017?

As an accelerator program, we saw the European sportstech scene develop a lot of momentum. We were truly overwhelmed by the number of applications we received for our first cohort in Berlin in 2017. 480 startups applied to the program from 23 different countries and a wide range of verticals related to sports - a result we could not have imagined when planning the program. This strong interest illustrates just how many early stage sports startups are out there looking to take the next step. Our highlights were of course the 15 startups that made it into our program. One that particularly resonated with us was Wingfield, a European startup which has developed an innovative approach to advancing a sport we all love - Tennis.

Which startups excited you in 2017?

On many levels, it was exciting to be part of the process of running an accelerator. To be close with these amazing entrepreneurs, getting in touch with their ideas and feeling their passion for sports has validated our desire to be involved in this space. As mentioned before, we followed Wingfield and the connection to Tennis with great interest. We were also intrigued by Who Knows Wins, as a creative fan engagement platform and finally Evolve sports because of their creative and scalable training app. sports hardware.

What topic trends do you currently see?

Specifically, in the field of fan engagement & experience, we are just at the beginning stages of truly engaging the modern fan. Connected technologies (tracking, activity data & analytics etc.) and the derivatives sport market (fantasy sports, new sports, gamification of sports) are two other areas primed for change. We see tremendous interest and growth in these verticals. Sports, for participants as well as spectators, is evolving faster than ever before.

What is still missing in European SportsTech?

Success stories. Europe is home to many of the most iconic sports brands and teams in the world, yet the overall SportsTech exits out of the region are still somewhat lagging. Israel, and the US have set the bar for SportsTech, especially since these markets are more mature and provide financing on every level which is not yet the case in Europe. While there are many options for SportsTech companies to raise funds from business angels, there are far fewer early stage investors to help those companies take their next steps.

What do you expect from 2018?

In general, we expect technology to continue to play a prominent role in shaping how we play and experience sports in 2018. When it comes to our activities at leAD, our accelerator program will have two more batches in 2018 and we have just announced a \$50M sports technology fund called ADvantage that will focus on A round investments. We have identified an A round crunch in the SportsTech market where not enough capital is being made available to promising ideas and concepts. That's where we see a niche and real opportunity for our JV SportsTech fund with OurCrowd.

Expert Interviews _



ugent.be

Ghent University Victoris
Ghent, Belgium



KRISTOF DE MEY (PhD)
Sports Technology & Business Developer

Kristof De Mey is the Sports Technology & Business developer at Victoris, Ghent University (Belgium). He brings together about 40 experts in different domains related to sports. With them, he is mainly active in setting up projects in which researchers, companies and clubs collaborate on particular sports technological or analytical innovations. He has a PhD in sports physical therapy, experience in youth and adult professional sports training and now combines sports technology transfer with business development activities. He is also the founder of Sport-up, a community of Belgian sport startups.



How did the European SportsTech scene develop in 2017?

Day after day, I'm surprised by the amount of new technologies being developed! Following blogs, social media, newsletters, etc. I'm regularly impressed to see what is happening in the sector. In terms of startup quantity, 2017 was huge! On the other hand, I ask myself: where will this end? What's the success rate of all these startups and what are the reasons for (not) succeeding? Who will scale-up? And also: what's the quality of each startup in the performance and sports medical space (my main expertise)? Are they actually doing what they say they can, and are they as valuable as they think they are? Working at a university with lots of expertise in sports science, it's remarkable to see how few startups actually have (some) proof of evidence for their effectiveness. Nonetheless, the speed at which startups collect relevant data has drastically increased in the last years. On some aspects, startups are catching up with science and some are even overtaking it in some way. Great times for university-business collaborations! From a practical point of view, I believe we reached a tipping point at which people working in the field (trainers, analysts, therapists, etc.) became frustrated about not knowing all the brands, being unable to compare the different technological options, etc. There are just too much. Therefore, I believe that the implementation of available tools is becoming at least equally important as the development of new ones.

Which startups excited you in 2017?

I'll start with a project from our own group (always feeling most passionate about those ones). Based on a decade of research on talent detection and identification, we created a tool that is able to detect which sports match best with a (6-12y old) child's natural talents. The testing is based on both physical (anthropometric, performance and motor learning capabilities) as mental parameters (what children like most and what motivates them to do it). The tool is called 'SportKompas' and is already applied in both local as foreign settings. Despite the benefit of the application is mainly found on the broader societal level, proper orientation at the start is also the prerequisite for appropriate sport specific skill development and ultimate success in elite sports at later stages. Furthermore, local Belgian startups that attracted special attention this year are LedsReact (an interactive LED cone for fun agility training), CoachBox (a highly user-friendly endurance training platform) and Bioracer Motion (a data driven bike fitting technology). Dutch companies that excited me are SciSports, Dashtag and Metrica Sports to name a few. However, I could go on for a while with these kind of lists...

What topic trends do you currently see?

Personalization is definitely a big one. Both on the fitness, rehabilitation training or strength and conditioning level, a variety of tools are trying to guide people with a more tailor-made approach. The same is true in the health side of the wearable tech, monitoring and analytics market. In this regard, I also see the trend 'from fitness gadget to medical device' popping up, which will ultimately benefit the end-user if you ask me. Overall, the fan engagement and digital media side of sportstech is of course getting a lot of attention with technologies as AR and VR now breaking through. What's happening in e-sports is even more impressive!

What is still missing in European SportsTech?

We still miss a clear view on the specific strategies that are behind successful entrepreneurs and how these could be translated to sportstech in general and specific subcategories of sportstech in particular. I also feel we lack vision and leadership in different fields. In addition, sport is not yet fully recognized as a significant market, despite organizations as the European Platform for Sports Innovation (EPSI) are doing an important job to put sport on the agenda on e.g. the EU level. We also need a closer connection between the corporate, SME and startup world. The same is true for the intersection between the people acting on the playing field, the business professional and the scientific researcher.

What do you expect from 2018?

Much more new technologies, merges between companies, many failures and some successes... As seen in other sectors, I think we will see a trend towards scale-ups instead of startups. Furthermore, I believe that sports technology and analytics events will focus more on specific topics. I also think we will see more clusters of accelerators and incubators looking for synergies. In the US, I noticed that larger companies started to acquire some smaller ones, or decided to invest in them (Hudl for example recently acquired VolleyMetrics, Intel Capital invested in Kinduct, Krossover has been acquired by Blue Star Sports). I think we will see this happening in Europe too. Overall, I hope more and more people are experiencing the value of technology for their organization. And in order to make this possible, shouldn't we think a bit more on the business model rather than the technological innovation level?

Expert Interviews



csm.whu.edu

**WHU - Otto Beisheim
School of Management
Düsseldorf, Germany**

**Prof. Dr.
SASCHA L. SCHMIDT**
Director at the Center for Sports and
Management (CSM)

Prof. Dr. Sascha L. Schmidt is the director of the Center for Sports and Management (CSM) at WHU - Otto Beisheim School of Management. The "Future of Sports" being one of his key research areas, among other things, Sascha observes the impact of new technologies on business models in sports. He is also the academic director of the "SPOAC - Sports Business Academy by WHU", which has established itself as education institution for future executives in the sports business. Schmidt studied, completed his doctorate and habilitated at the universities of Essen, Zurich, St. Gallen, the EBS University in Oestrich-Winkel and at the Harvard Business School in Boston. He also worked as strategy consultant at McKinsey and as entrepreneur.



How did the European SportsTech scene develop in 2017?

European SportsTech is on the rise. More and more European startups emerge with smart-thinking business models. Initiatives like the leAD Accelerator underline further growth potential. Interestingly, top football clubs like Arsenal or FC Barcelona launched innovation labs to identify ground-breaking ideas helping them improving matchday experience or engaging fans globally. Nevertheless, in terms of risk appetite and willingness to invest, we are still lagging far behind the US.

Which startups excited you in 2017?

In my opinion, sporttotal.tv is one of the most exciting ventures in the international sports business right now. The heart of sporttotal.tv is a unique 180-degree camera technology that is permanently installed on the pitch. The special innovation of the system is its software, which is able to follow the game fully automated - without a chip in the ball or in the jersey of a player. Considering the huge potential in amateur sports around the world, sporttotal.tv could be a disruptive force when it comes to broadcasting live sports events.

What topic trends do you currently see?

Although Machine Learning and Augmented Reality are still featuring teething issues that will need to be overcome before we see them start to feature more prominently, I think they will impact the worldwide Sports Business big time. Especially Augmented Reality is one of the evolving technologies that has burst onto the sports scene in the past year. The implementation of augmented reality in sports is gaining momentum and it has potential to change the fan experience and create enhanced training opportunities for athletes.

What is still missing in European SportsTech?

There is currently no single hot spot, like a "Silicon Valley for SportsTech", in Europe. A lot of exciting SportsTech startups are coming from Israel. The Israeli sports tech market is one of the most exciting and financially powerful in the world. With their technical innovations, more and more Israeli companies are shaping the international SportsTech scene.

What do you expect from 2018?

New business models in sports will emerge due to the rise of blockchain technology and artificial intelligence. Both will not only change our societies but also transform the business of sports dramatically.

For more insights
about the international
SportsTech scene go to
medium.com/sportstechx

SportsTech Framework —

#19

In 2017 we developed a systematic framework which helps to categorize SportsTech companies in various sectors and sub-sectors. This approach enables us to visualize the market and thereby create transparency. As a result we're able to grasp the industry better, to discuss startups and content on a common wording and to compare different business models and target groups.



SportsTech Framework

A framework for the SportsTech industry to create a common understanding and structure.



Activity & Performance

Solutions surrounding the actual performance, no matter if it's before, during or after the activity. Typical offerings are data tracker, wearables and new kinds of sports equipment.

Management & Organisation

Solutions that help to manage organisations, venues, leagues and events. Also covers platforms to find other sportsmen, coaches, etc. and to buy products and services, such as tickets or trips.

Media & Fans

Solutions that provide sports interested people and companies with all kinds of content and data. Also includes social platforms that help with branding and connecting fans with athletes, teams, etc.

Games & Bets

Companies that provide eSports, Fantasy Sports and Betting solutions, for players & gamers and as a service.

Descriptions for the various sub-sectors:

1.1 Wearables & Equipment

Physical resources that are worn or used during an activity.

1.2 Activity Data & Analytics

Solutions that measure the activity where it happens, mostly from an athlete or coach/club/team perspective.

1.3 Preparation

Offerings that help to plan activities, such as specific information or tutorials.

2.1 Teams & Clubs

Solutions to run sports organisations, e.g. for recruiting, communication or administrative purposes.

2.2 Venues, Events and Leagues

Solutions to manage venues, e.g. access or payments, and to organise events and leagues, e.g. registrations or fixtures.

2.3 Marketplaces & Discovery:

Search and exploration platforms which lets you find, book and buy other sportsmen, clubs, venues, events, tickets, trips etc.

3.1 News & Content

Live streaming offerings and information providers, e.g. via articles, news, live scores, commentaries or videos.

3.2 Media & Data Analytics

Providers of data and insights, mostly from a media and broadcasting perspective.

3.3 Fan Engagement & Social Platforms

Solutions to build and manage relationships with fans and networks that help sports related people and organisations interact with each other.

4.1 eSports & Fantasy Sports:

Offerings related to video game competitions and online games in which players build virtual teams.

4.2 Betting

Solutions that offer to put wagers on the result and happenings of sports events.

You can listen to our
SportsTech podcast on
soundcloud.com/sportstechx

Startup Companies —

#23

Europe is home to some of the most exciting SportsTech startups on the planet. In the upcoming pages we present you 24 of those companies, six in each of the four sectors of the SportsTech framework (see page 20). The chapter ends with some data driven insights about the European SportsTech market, based on our own database.



1. Activity & Performance

#25

equilab

Gothenburg, Sweden



Adam Torkelsson Co-Founder

Adam always strives to improve and realised the only good way of doing so is to keep amazing people around you. He thinks that is something they truly succeeded with at Equilab, and to have fun while doing so.

What's your company's value proposition?

Equilab enables equestrians to track their progress, connect to their team and organise their riding. After each training they get insights linked to their their gait distribution, stride, beat, turns and even if they have not performed the training by themselves they get instant access to the information. Equilab helps equestrians take control over their training and adapt it to reach new heights!

What were your highlights in 2017?

During 2017 Equilab grew from almost no users to becoming the largest Equestrian training app in the world. We were awarded the best Equestrian app and saw growth all around the world. In the end of the year our users rode 7 laps around the earth every month! We also saw a growing interest from other actors to collaborate and started several large projects together with key actors in the market.

Which trends do you currently see in your area?

We see that more riders have started taking control over their own training and moved away from the traditional ways of acquiring new knowledge. What we believe is that this is a response of the slow and ineffective way new research is communicated to equestrians. We do as well see a good growth in the market, especially in emerging market were new people discover the joy of horseback riding everyday.

www.equilab.com



Metrica Sports

Amsterdam, Netherlands



Ruben Saavedra Co-Founder & CEO

Rubén Saavedra was born in Barcelona, where he completed his studies in Biotechnology. After working 3 years in the pharmaceutical industry in the UK he moved to The Netherlands to do a PhD in Molecular Neurosciences. In Amsterdam he met Bruno Dagnino and Enzo Angilletta, with whom he founded Metrica Sports in 2014 allowing him to combine his scientific background with his passion for sports and technology.

What's your company's value proposition?

Our products help coaches and analysts improve the performance of their teams by combining video and data analytics like never before. Thanks to this approach they can: 1) Identify in a matter of seconds what happened during the game (via our customizable pattern recognition technology), 2) Get unique insights into the statistics of those patterns (thanks to our built-in analytics dashboard) and 3) Communicate more efficiently with their players (by means of on-video visualizations and annotations).

What were your highlights in 2017?

One of the most interesting developments in 2017 in the European SportsTech ecosystem has been seeing big tech companies like Amazon, Facebook and Twitter getting involved in buying sports broadcasting rights. Having companies that are very technology-oriented getting involved will eventually have really big implications for everyone in the sports tech ecosystem. reasonable cost.

Which trends do you currently see in your area?

Consolidation. Initially, in our area it was just enough for companies to offer physical data to clubs. In the past years, clubs realised that having data was not enough and started to look for solutions that improved their analysis capabilities with content as well as data. But that is no longer enough. Each coaching staff has very specific needs, and even though there are many solutions in the market nowadays, each one of them only covers a small part of their needs. The big winner will be the one that can cover all of their needs in just one platform.

www.metrica-sports.com



Movesense

Vantaa, Finland



Terho Lahtinen Senior Manager

Terho Lahtinen has over 25 years of experience of sports wearables as an athlete and, since 2000, in various product and business related roles at Suunto including product management, new concepts creation, consumer experience management and user insights collection. Currently in Suunto Emerging Business Team, he is driving Movesense, an open development platform for motion sensing solutions. In his leisure time, he is coordinating popular trail running events in Finland.

What's your company's value proposition?

Suunto is a Finnish manufacturer of world renowned sports watches, dive computers and precision instruments for the toughest conditions. Our new initiative, Movesense, is an open development environment and a programmable sensor for motion tracking and other sensor solutions for and beyond sports. With Movesense, you can commercialize your own sensor ideas quickly and cost-effectively without having to

worry about hardware development and manufacturing.

What were your highlights in 2017?

Big news in 2017 was TomTom, Adidas and few others exiting sports wearables. One might say the market is saturated but I disagree. Many companies followed the wearables hype and launched products with low user value. These products are now suffering but creating new good ones is hard. Meanwhile, sports specific sensors from smaller players are gaining traction. Movesense has a big role here because we enable easy building of POC's and commercializing of successful concepts at a reasonable cost.

Which trends do you currently see in your area?

Consumer oriented sports tech products today are mainly about GPS, heart rate and activity tracking. Most devices now have an acceleration sensor and are technically able to measure motion. Companies are actively working on new motion based benefits that will open new ways to measure sports, e.g. technique, strength training, speed training and other areas where GPS and heart rate are not useful. Thinking of the new value creation opportunities that motion measurement opens in sports, I think that we are in the beginning of a major growth trend of sports measurement.

www.movesense.com



1. Activity & Performance

#27

SciSports Enschede, Netherlands



Giels Brouwer CEO

Giels Brouwer is a passionate player of the game Football Manager, which was the inspiration to build the first algorithm to identify the quality and potential of every player around the world. Giels dropped out of his Master Industrial Engineering to found SciSports with Anatoliy Babic in 2013.

What's your company's value proposition?

Science Supporting Football.

What were your highlights in 2017?

SciSports launched our new platform Insight, where clubs and agents are able to identify the quality and potential of over 200.000 professional football players in just a few clicks. SciSports helped with over 40 transfers this summer and our 3D data generation system BallJames was the first to track a Premier League match in Full-3D. SciSports was also elected as the most innovative football company in the world by the HYPE Foundation.

Which trends do you currently see in your area?

Data is getting widely available and clubs get a better understanding on how to use data in their decision making process. The entire industry is growing fast and more.

scisports.com



SoccerDream Barcelona, Spain



Andreu Bartoli Co-Founder & CEO

Andreu is an entrepreneur with 10+ years international managing career in two areas: 1) International start-up in the technology sector (Openbravo), leading sales and company growth by building and developing a global distribution channel. 2) Business consulting at Accenture, in Supply Chain Management area in the Consumer Goods and Pharma markets, in various European markets. Andreu also worked in ShenZhen, China and holds degrees in Industrial Engineering and European Engineering in Materials Science, studying in Spain, France, Germany and USA.

What's your company's value proposition?

SoccerDream is the first Virtual Reality Soccer Training Platform in the world. It provides a Football IQ Training Platform to develop: a) Smart Players: great perception, anticipation and that take better decisions. Players that better understand the game. b) Empowered Coaches: coaches who have the power to accelerate the learning of their teams, applying

their own personal touch and with seamless monitoring of players. c) Performant Clubs: clubs that embrace player's intelligence development, from the top management down to the technical staff, reinforcing the clubs' catching line, like world top clubs do.

What were your highlights in 2017?

During 2017, we conceptualized SoccerDream, raised 300+ k€, made the prototype and proved that it does help players improve their football game in the real field. We demonstrate that in Barcelona as well as in China in collaboration with the State General Administration of Sports and HTC.

Which trends do you currently see in your area?

In football, there is a clear trend to provide more and more importance to the cognitive side of the game beyond the technical and physical sides that have always been there, as top teams like FCB and Spanish National Team have been doing for the last 20 years. On the other side, VR cognitive learning is proven to be transferable to the real world by top researchers and universities and is being used in more and more areas, from Healthcare to Engineering industries and more. Along with those trends, SoccerDream has identified VR as the most powerful technology to train Football IQ because it allows to focus on the cognitive part of soccer aside from physical & technical aspects.

soccerdream.com



Spiideo Malmö, Sweden



Fredrik Ademar Head of Product and Marketing

Fredrik Ademar, Head of Product and Marketing at Spiideo. Driven by a great passion for sports, startups and cool gadgets. Has been in the mobile and tech industry for the past 15 years.

What's your company's value proposition?

Spiideo makes advanced sports video recording and analysis easy, useful and accessible for coaches, analysts and athletes. No more manual camera handling, hassle with equipment, cables, files, storage etc. The unique Spiideo Virtual Panorama technology provides tactical overview footage as well as details of individual players in the same experience. Spiideo is used in both individual sports like swimming and skiing, and field sports like football, handball, hockey, rugby etc.

What were your highlights in 2017?

2017 was very exciting in many ways. Spiideo is now widely trusted by clubs, leagues and federations across the world, and during 2017 we e.g. in football added clubs in 6 different US leagues, entire Swedish 1st and 2nd league, Norwegian league, a growing number of clubs/leagues in China etc. We really validated that our approach provides great value, solving real everyday problems - both for clubs with limited resources, and for premium clubs using full scale Spiideo setups (e.g. like Benfica).

Which trends do you currently see in your area?

A lot of emerging technologies like AR/VR, analytics and AI driven insights are now entering mainstream as tools to improve sports performance development. At the same time there is a technology fatigue. A sense that there is sometimes too much focus on technology, tools and planning instead of spending time with the athletes and coaching. There is also still a quantity vs. quality data challenge - and much of the truly powerful insights remain hidden in enormous amounts of detailed data sets.

spiideo.com



2. Management & Organisation

#29

Accredito Poznan, Poland



Tomasz Swietlikowski CEO

Founder & CEO Accredito.com and HIVE SPORTS & MEDIA digital sports agency. Built company which is now a leading provider for the Polish sport market. Worked for Robert Lewandowski, Electronic Arts, Reebok, Legia Warsaw and over one hundred other sport clients.

What's your company's value proposition?

Accredito.com connects press offices, journalists and editorial offices. Our cloud based platform is currently the one and only solution offering a set of tools to complete both press office and journalists relations. It's saves time for both sides, guarantees data verification and provides professional standards. Clubs, leagues and associations can provide their press offices on-line to organize accreditation processes, send press releases, check its' effectiveness and much more. Journalists with only one account gets access to many press offices. It's saves time for both sides, guarantees data verification and provides professional standard.

What were your highlights in 2017?

In 2017 one event was particularly remembered for us. We had the opportunity to attend the FC Barcelona Sports Technology Symposium conference. It was unique event for all sporttech sectors. Great speakers (including not obvious ones like NASA astronaut), inspiration, opportunity to meet people around the world and exchange insights.

Which trends do you currently see in your area?

For us everything leads to increase efficiency and mobility. Using example from our "home-ground". Clubs' spokesman today wants to be able to perform all his daily duties with one tool, anytime, anywhere. Something that once took him several hours, now must be done in just few minutes just using smartphone. Our task is to provide such solution which let him save time and increase efficiency. According to GDPR in 2018 data security will be even more important case than it was before. riding everyday.

accredito.com

Accredito.com

All Square Luxembourg City, Luxembourg



Patrick Rahme Co-Founder & CEO

Patrick has a strong passion for entrepreneurship, technology and golf. His startup has made him travel the world to meet influential decision makers and fantastic people from various backgrounds. He's always happy to connect the right people at the right time. Doing what you like is freedom. Liking what you do is happiness.

What's your company's value proposition?

All Square is the first international social media platform that brings the world of golf together. Golfers, golf clubs and brands use our web and mobile platforms to communicate and interact with one another. We allow golfers to explore more than 33,000 golf courses in 180 countries with reviews, HD images and the best tips to pick their next golf destination. CNN and The New York Times refer to All Square as the Facebook and TripAdvisor of golf.

What were your highlights in 2017?

One interesting aspect of sports today is that all highlights are immediately available on social media, which may affect the viewing numbers on TV. Free content seems to be the way forward but what impact will it have on media rights, sponsorship and global revenues in sports.

Which trends do you currently see in your area?

The golf industry is trying to consolidate and professionalize itself with more engaging online marketing and direct bookings. We will most probably see small tour operators disappear in the next decade as margins are shrinking every year. More and more golf resorts are offering direct bookings via their website. However, it is still very difficult to get a tailor-made package online and to compare offers easily.

allsquaregolf.com



FootballISM Lisbon, Portugal



Filipe Esteves Head of FootballISM

Filipe Esteves is Head of FootballISM and General Director of agap2IT. Is goal is to bring high performance standards to every department inside a Football club, youth of professional.

What's your company's value proposition?

FootballISM brings high performance standards to every department inside a Football club, youth or professional. Its presents to decision makers the cost, the revenue and the Return of Investment of all their clubs resources and assets. Now these entities can literally be manage as a Fortune 500 company, in real-time. Our Sports Tech / Sport Business platform integrates all departments of a club data and solves real issues in scouting, technical, medical, assets management, analytics and academy presenting ROI.

What were your highlights in 2017?

I think fan engagement played a big part of the Sport Tech in 2017. Especially the tools/platforms that can replicate the US venue model back here in Europe. Also full data integration tools like FootballISM started to surface more in 2017 and will continue in the future. Now we are starting to see so many different vertical platforms managing a specific part of the sport, that we are to fully integrate all of them in a single platform to take the best sports or business decisions. Based on these integration tools, analytics will provide the future insight.

Which trends do you currently see in your area?

The trends in our area, is to compile every piece of information of the player/club and use analytics to provide the coaches, directors the best information to take decisions. The challenge really is to find a way to connect everything, training performance, GPS wearables, nutrition, medical clinical history, philological profiling, game statistics and evaluation and find the next step of evolution of the player.

footballism.pt



2. Management & Organisation

#31

Sport Heroes Group Paris, France



Boris Pourreau Co-Founder & CEO

Boris Pourreau is the founder & CEO of Sport Heroes Group. He started as a strategy consultant and launched Running Heroes in 2014. Passionate about running, cycling and triathlon, he is deeply convinced that sport is a tool for humans to live better and longer.

What's your company's value proposition?

Sport Heroes Group create online communities and encourages them to be active with inspiring content, digital challenges and exclusive offers. By doing so, Sport Heroes HG helps brands reach and engage customers through its platforms runningheroes.com, cyclingheroes.com and skiingheroes.com. SHG also helps corporates motivate their employees to be physically active through its platform united-heroes.com. In short, our mission is to inspire and motivate people to be more active, in a variety of different ways. Physical fitness is irrelevant, it's about being a better version of yourself.

What were your highlights in 2017?

I had my head down focussing on the work Sport Heroes was doing - looking inwards rather than outwards. As such I'll highlight the fact we were able to grow our active community by more than 30%, with minimal marketing investment, continue to strengthen relationships with the biggest sports brands in the world to provide them with uniquely engaging marketing opportunities, and launch a very successful new product in the corporate wellness space, which we are now rolling out across wider Europe.

Which trends do you currently see in your area?

Brands are increasingly focussing on quality content and deep granular engagement, instead of shooting mindlessly for the traditional old media metrics which focussed on huge reach numbers and less on targeted activations. It's a tough environment for traditional media players in Europe, and it's more important than ever to double down on quality content for a niche audience, rather than trying to appeal to the masses and be everything to everyone. A number of new ways of targeting people using data have also emerged in the past few months and we see small players becoming real experts in engaging specific populations.

sportheroesgroup.com



Sportswik Stockholm, Sweden



Martin Wiklund Founder & CEO

Former professional football player who started building mobile apps in 1999. Spent 10 years at Capgemini and 3 years as a business coach for tech startups prior to founding Sportswik.

What's your company's value proposition?

Sportswik enables communities around teams at any age or level to share their passion for their teams and get a professional style media coverage from their games, based on user and robot generated content. The Sportswik app makes it super easy to shoot pictures, videos, comment, and live report goals and game events. We want to democratise sports media coverage by providing a niche social media for sports that does media coverage, stats and engagement way better than the broad social platforms.

What were your highlights in 2017?

Almost 8 000 new teams joined Sportswik and 40 000 games were covered on our platform. We became the official app and media platform of one of Europe's biggest youth leagues, S:t Eriks-Cupen, managed by the Stockholm Football Federation. We also launched Sportswik in the UK and got one of the biggest youth leagues, Sheffield & District Junior League, as our first league partner in the UK. We also raised another \$1M in capital and added 5 new awesome members to our team.

Which trends do you currently see in your area?

Social platforms and tech companies are starting to compete with media companies over top level sport media rights, and I within a few years, I think they will win as their money and reach is moving in the right direction. The sport media focus is getting even more concentrated to the top teams, leagues and individual players, leaving lower level leagues, clubs and teams on their own in keeping or increasing coverage and engagement.

sportswik.com

SPORTSWIK

Sweatcoin London, UK



Oleg Fomenko Co-CEO

Oleg is an entrepreneur with experience in mobile, telecoms and consumer goods. He is known for his ability to generate and polish a consumer business idea into an attractive proposition and to lead its implementation through securing funding, building teams and boards as well as negotiating groundbreaking commercial deals and partnerships.

What's your company's value proposition?

Sweatcoin is a digital currency backed by the economic value of physical movement. Through our app we help our users to be 9% to 20% more active per day by converting their physical movement in its simplest form - steps - into goods, services and experiences. Vendors, who supply the goods, in return get access to a highly sought-after physically active and technologically savvy audience.

What were your highlights in 2017?

Opening of the House of Sport by the London Sport - the first independent incubator for Health and Fitness businesses in Europe.

Which trends do you currently see in your area?

1) Mass-market wearables are on the way out. 2.) Specialised, high quality medical wearables are in. 3) Behavioural economics and psychology drive a lot of tech development (nudge, present bias, dopamine-oxytocin habit loops, etc.).

sweatco.in



3. Media & Fans

#33

COPA90 London, UK



James Kirkham
Head of COPA90

James Kirkham is a highly respected speaker and commentator on the digital media landscape and global media business, he has appeared on stage for six years running at the Cannes Lions Festival of Creativity and featured in BIMA's prestigious Top 100 for each of the past four years. A serial entrepreneur, James sold Holler - the digital advertising business he launched in 2001 - to advertising holding company Publicis Groupe and Leo Burnett London in 2010 and worked as Leo Burnett Worldwide's head of mobile and social until joining COPA90 in February 2016.

What's your company's value proposition?

COPA90 is all about how football feels. With its focus on everything outside the 90 minutes which make the 90 minutes matter more, it pioneered fan-centric thinking and an audience-first football media business philosophy. Recent hits and highlights include a pre-election appearance by Jeremy Corbyn on COPA90 which as widely cited as

helping mobilise the youth vote in the run up to General Election 2017. Its influence is far-reaching with Mundial magazine calling COPA90 'the voice of a generation'. new heights!

What were your highlights in 2017?

Turner International invested in our business. New partnerships were forged with adidas, Pepsi, Visa, Beats by Dre, Heineken, Continental Tires and Puma. We launched our first OTT Original content series with Verizon's go90. And the business saw a 500% increase in US revenue. Monthly views topped 100 million.

Which trends do you currently see in your area?

More live football rights going to more and varied platforms and brands. Football will soon be entirely enabled in a digital-first environment. Interaction and innovation are increasing with Facebook and Amazon the new heavyweight competitors to Sky and BT Sports. Gaming influence is now with young audiences playing as their favourite player in games like FIFA, then re-creating magic moments in the same environment post-live game. Virtual and offline are merging and in-game graphics are advertising real world objects. riding everyday.

copa90.com



Keemotion Belgium & USA



Milton Lee
CEO

Milton Lee is the CEO of Keemotion. Prior to that he was Vice President and a Director of Onexim Sports and Entertainment (Holding company for The Brooklyn Nets & Barclays Center). During that time he also served as Director of Basketball Operations for the Brooklyn Nets. He is an avid sports fan who played college basketball at the University of Pennsylvania. "I wake up excited every day to lead our team's efforts to disrupt the world of sports and media technology."

What's your company's value proposition?

Keemotion is a fully automated video production solution. We film, produce and stream live sporting events in 1080p HD with just the touch of a button. No cameramen, no camera trucks and no extra equipment necessary. We operate in 10 countries around the world with our largest footprint in France. We have partnered with the French LNB and SFR to live stream all men's and women's professional basketball content from over 50 of their arenas.

What were your highlights in 2017?

We expanded our reach in France to produce our 3rd entire basketball league, the LFB. It's our first professional women's basketball league. In Finland we expanded through Fanseat and the Korisliiga to produce and stream their first and second division. We have launched our first multi-angle productions and instant replay for referee applications. We partnered with 2 NHL teams to develop hockey and bringing it to Europe. We are lucky to work with forward thinking, aggressive partners in France and Finland that believe in the value of professional quality content for their leagues.

Which trends do you currently see in your area?

Keemotion is lucky to be at the epicenter of 3 rapidly changing industries: 1) Sports 2) Technology and 3) Media. The explosion of new viewing platforms for live sporting events has put pressure on the traditional ways of producing and monetizing content. There is great pressure to produce events in professional quality at an affordable price - in scale. Keemotion's automated solution fulfills that need and is poised to be a critical player in the future of sports media.

keemotion.com



mycujoo Amsterdam, Netherlands



Raphael Morgulis
Head of Communications

Raphael is an experienced sports communication and information manager. After his formative years in France, earning a Master's degree in communications from the Institute of Political Sciences in Paris and working for various corporate communication agencies, Raphael worked for more than seven years as a senior manager for FIFA. He recently joined mycujoo as Head of communications in order to lead the football streaming platform's communication strategy and activities.

What's your company's value proposition?

mycujoo is a live football streaming platform, helping competitions and clubs at all levels to broadcast their matches and content, and providing fans from anywhere with live and on-demand football. Our model is to offer a football-specific, free-to-use broadcasting technology at the lowest possible access price, enabling clubs and competitions at any level to seamlessly set up their streams and start reaching new audiences.

What were your highlights in 2017?

2017 was a great year for mycujoo. We did great in a certain number of metrics that we look at - more than 4,000 matches streamed, from more than 60 countries, with more than 2,000 clubs and teams shown on the platform. And it translated in terms of traffic as we had more than 12 million sessions and 40 million video views during the year. But more than numbers, what truly was our best success has been the response from the world of football to what we offer - more than just interest, we have elicited adhesion.

Which trends do you currently see in your area?

Regarding sports broadcasting in general, there is a profound change with the way people consume sports content. Digital is truly transforming every aspect of sports organisation. More specifically regarding long tail football broadcasting, we are seeing the emergence of different players with different proposals. The undervalued part of the football iceberg is slowly realising the importance and the value of its own content. We believe mycujoo is the best positioned to support the building of this value.

mycujoo.tv



3. Media & Fans

#35

Comment

Finland, Helsinki



Tomi Kaukinen CEO

Tomi is the CEO and co-founder of Comment. In the last six years he has founded several sports related start-ups in the tech area and worked intensely in the Spanish market with teams in both La Liga, Liga123, the ACB and Futbol Sala, as well as sports medias.

What's your company's value proposition?

We help broadcaster bring back data that otherwise ends up at Facebook. Through our social SDK we connect the audience of OTT-platforms and the viewership data to broadcasters and medias. Comment is a first screen technology that allows broadcasters take charge in the war of data ownership.

What were your highlights in 2017?

We announced a strategic partnership with the leading media of Malaysia, Media Prima and their tonton service. It's a VOD-platform with over 8,6 million users and Comment will be used as an engagement platform.

Which trends do you currently see in your area?

Video, video, video. The world is moving to video and by 2021 81% of all traffic is expected to be video according to statistics from Cisco. Since we are in the field of video this is great news. Another important trend is the rise of the OTT-platform which also will experience tremendous growth. And finally, data. Data is the gold standard of the media industry and will keep playing an important role, especially with the rollout of GDPR in Europe, medias need to become innovative.

comment.tv



Runator

Madrid, Spain



Bruno Muñoz CEO

Bruno is a Software Engineer who worked in large consulting companies in Spain, France and the US. Holding a M.S. in Project Management in Boston University. He led the tech teams in two startups in New York before his first marathon, the NY Marathon that made him start with Runator.

What's your company's value proposition?

Runator is the social network for runners. A mobile app where runners can share their running experiences, meet new runners and participate in fun global races and duels. Runator imports automatically the data from the running apps and gps watching focusing on the social interaction. In addition, Runator has created a concept "Global Races" that creates the experience of a running race, but people can run anywhere in the world and more flexible in time. Runator is the motivation you need to keep on running.

What were your highlights in 2017?

Having our customers repeating their global race is always a success like Lilly & Company and Bankinter. Organizing the Global Race for LaLiga, more than 5.000 runners around the globe competing for their favorite team. Selected by Google Campus for their first program in Spain to help startups, Campus Residency. Best sport startup in the Sport Innovation Summit of Paris. Raising a seed round of 400.000€. Reach more than 100.000 users in Runator.

Which trends do you currently see in your area?

Running is becoming on the most practice sports all over the world. Marathon participation is growing everywhere and people are getting addicted to this sport. Technology is helping a lot, wearables, gps watches, feet positioning control, cadence trackers, there are many solutions that help runners to keep learning and making it as easy as possible.

runator.com



Tonsser

Copenhagen, Denmark



Peter Holm CEO & Co-Founder

Peter Holm, 33, is a Danish Internet and football entrepreneur. As CEO & co-founder of Tonsser, Peter leads the team behind the popular app empowering aspiring football players to unlock their potential. With 500.000+ football players, Tonsser has in 3 years taken big steps towards creating the defacto online ecosystem in football where players, coaches, scouts, clubs and brands are empowered to connect, improve and discover through data.

What's your company's value proposition?

Empowering the football ecosystem to unlock their potential. Build on top of real stats and data, Tonsser is a platform and social network increasing transparency, talent identification and discoverability. Launched in 2015, Tonsser has today more than 500,000 players building their online player identity on the app in France, Germany, Denmark, Norway and Sweden and will officially be opening to coaches, clubs and scouts in 2018.

What were your highlights in 2017?

I would highlight the year in one word: Emergence. After years of separation in products between the absolute elite and everyone else, I was happy and impressed to see a number of emerging and affordable hardware and software products for 2018 that aim to empower athletes and organizations, without breaking the bank. I see this as another important, yet early, step towards decreasing the large gap in sport created by money. Hopefully I can say in a year that the 2018 word was 'adoption'.

Which trends do you currently see in your area?

Let's take a positive one. One we can say for sure is that we are seeing a behavioral change among the next generation of players and coaches. The aspiring teenagers have become more self-educational, data driven, brand aware and they listen to their coaches. I also see them living healthier and more professional than just a few years ago. There is also a very interesting change in personality and mentality among this generation of coaches who are approaching their practises in a more academic way, especially around decision making, argumentation and how they holistically work with and evaluate players.

tonsser.com

TONSSER

4. Games & Bets

#37

Betegy Warsaw, Poland



Alex Kornilov CEO & Founder

Alex Kornilov is a serial entrepreneur who started his first business at 18. In 2007 he won the Ukrainian edition of "Dragons Den". Since then he got involved in several "big data" projects. In particular, he took part in various research projects executed by The State Institute of Complex Technical-Economic Researches. In 2012, together with a partner, he started BETEGY. Its predictions are used by a number of companies and individuals worldwide, e.g. ESPN in the US, Yahoo Sports in the UK, Sport1 in Germany and Ringier Axel Springer in Poland.

What's your company's value proposition?

Most of the people who bet will make decisions by either guessing or using their knowledge of sports without any statistical analysis. They will be either lucky or wrong. We provide an automated self-learning system which predicts outcomes of football games with high accuracy. It crunches numbers and applies advanced statistical analysis on a scale which is not achievable by a human. As a

result, BETEGY helps players to make more intelligent decisions and win more.

What were your highlights in 2017?

The main highlight was the first official usage and global adoption of the video assistant referee system (VAR). Germany introduced the system during the 2017/18 Bundesliga and Italy in the 2017/18 Serie A. Since football is a low scoring game, incorrect red card or faulty penalty has a significant impact on the outcome of the game. Decreased number of referee errors will make analytical and predictive models more accurate and coherent.

Which trends do you currently see in your area?

Teams and the analytics providers have come up with increasingly sophisticated ways of monitoring and capturing ever-growing volumes of data. Even FIFA has recently allowed players to wear monitoring equipment during matches for the first time. It leads to the exponential increase of data point tracked for every event. Following the economy of scale, the revenues for collecting the data will decrease over time. But the cost for data analysis will grow. That is where margins will improve, and the primary added value will be generated. Predictive analytics in football will be a next big thing and will play a prominent role in football transformation.

betegy.com



Challengermode Stockholm, Sweden



Philip Skogsberg Co-Founder

Philip holds a M.Sc. in Computer Science and has several years of experience in software development, product development and digital marketing. As the co-founder of Challengermode and a long time gamer, Philip has held thousands of personal conversations with regular gamers over the past 2.5 years. The insights gleaned from that is used at Challengermode to create the best possible competitive gaming experience.

What's your company's value proposition?

Challengermode is an esports platform where gamers meet to compete and socialize around the biggest computer and console games in the world. Our mission is to make esports as accessible for non-professional gamers as regular sports are for regular people. That's why we're building a digital gaming arena for the 21st century. Large and small scale, national or international competitions at their very best. A virtual ball park in everyone's backyard.

What were your highlights in 2017?

We won the pitching competition at the SMASH sport tech conference in Helsinki and got the highest score across all categories by the judges.

Which trends do you currently see in your area?

There's an ongoing maturation going on within esports, and a consolidation of different players within the ecosystem. An example is media company MTG investing in esports by buying ESL and Dreamhack. Esports is set to appear in the 2024 Olympics. At the same time, there's still a huge gap in terms of opportunity between the hundreds of millions of regular gamers who love playing esports and the few thousand pro esports athletes. Challengermode, changing that by creating the infrastructure necessary to give regular players a path to the pro scene.

challengermode.com



DefyU Barcelona, Spain



Roman Sandoval Co-Founder

Roman received a BBA and a BSc/MSc in Aerospace Engineering. After working at a technology startup, Roman decided to go to UCLA Anderson to study in one of the best Business Schools in the US. Soon after graduation, he worked for BlackRock in NY where he learned to analyze financial statements and the manner in which companies operate from a strategic point of view. After almost two years at BlackRock, he founded DefyU with three of his best friends.

What's your company's value proposition?

By 2020 we want to be the 2nd screen for sports fans connecting more than 5M sports fans. We are going to achieve that by merging the concepts of Fantasy Sports and Videogames. At DefyU we are the first ones to use the videogame concept in Fantasy Sports; users have to train their players (by playing our minigames) in order to have higher chances at winning their fantasy league.

What were your highlights in 2017?

The biggest highlight that I see on the SportsTech 2017 market is the consolidation of alternative SportsTech industries such as Sports or Fantasy Sports. Companies like Skillz were able to raise \$28M, which proves that the SportsTech market is not only growing vertically but also horizontally as new industries are growing inside.

Which trends do you currently see in your area?

In recent years, similar companies introduced the option of putting money into a league-pool, and depending on your final position in the league, you would get a portion of the money from the pool. In most regions of the world this is considered gambling, which brings problems of scalability (companies need a gambling license), limited marketing campaigns (they are not allowed on social media), and legal costs can be up to 15% of the total budget for the company. This is the reason why at DefyU, we want to connect the videogame experience with Fantasy Sports. We want to make Fantasy Sports great again.

defyu.com



4. Games & Bets

#39

PandaScore Paris, France



Flavien Guillocheau CEO

Flavien Guillocheau is coming from a mixed background in Psychology (Social Cognition) and 42 (french coding school). Being a sport and an e-sport fan showed him the track e-sport should follow. That's how the idea of PandaScore is born, bringing at least the same statistical standard to the e-sport ecosystem.

What's your company's value proposition?

PandaScore is offering real-time statistics and odds on e-sport competitions. We help all kind of companies such as Media and Bookmakers with our data. We collect statistics with Artificial Intelligence "watching" video stream which enable the collection of deeper and faster statistics.

What were your highlights in 2017?

E-sport is definitely becoming a huge highlight in 2017. The essence of video game and technology are coming to sport with a high "tech" standard. Streaming platform are getting bigger and e-sport right and video stream acquisition is fairly new but it's showing a great healthy signal for e-sport.

Which trends do you currently see in your area?

The overall viewing experience is more demanding in e-sport, the fans are watching on streaming platform and at the same time they want real-time interactivity with bets or statistics feeds.

pandascore.co

PandaScore

ProTipster London, UK



Bertan Baytekin Co-Founder & CEO

Bertan is building teams that create efficient digital solutions since 2005. He's an ambitious leader who manages to remain as a solid and reliable team player, and only believe in agile teams. Ideas are free, products are secondary - it's people first. Mainly focused on developing concepts/projects/companies that work on the applications of sports or sportsbetting data - digital platforms, affiliate networks and native apps.

What's your company's value proposition?

ProTipster is an online social betting community. It aims to solve the player acquisition and retention problem for online gambling operators; while delivering the online betting community players are seeking. Users enjoy risk-free betting while viewing predictions of other members. An intelligent algorithm grades each tip and helps users find winners to bash the bookies. The aim is to keep the entertaining side for the individual while the algorithm utilises valuable content for the community. Since launching in 2015, ProTipster quickly

increased its presence to 13 domains/languages and managed to grow into a 50k+ community.

What were your highlights in 2017?

Live and on-demand video content supported by in-depth stats and optimised for mobile devices became the highlight of sports content. Perform Group with a major investment in DAZN and Amazon challenging rights-holders in UK clearly show that we will have more "Netflix of sports" attempts. Meanwhile, another multi-billion dollar merger echoed in online gambling industry: Ladbrokes Coral agreed to be taken over by GVC Holding. It's definitely a major competition to Paddypower-Betfair merger. Finally, online gambling is getting regulated by more US states and increases the expansion appetite of European operators.

Which trends do you currently see in your area?

2017 was definitely the beginning of consolidation, which resulted in major M&A activity in the affiliate area. Since online gambling industry is getting more regulated, being an affiliate is becoming a professional job rather than a hobby. Hence, many small/medium sized affiliates were acquired by companies that are backed by major VC capital, such as Catena Media, XL Media and others. It seems we are going to experience the same M&A behaviour like the travel industry a decade ago so I expect it to become a trend in 2018 until the business is dominated by a handful of giants.

protipster.com

 **PROTIPSTER**

Ultimate Fan Live London, UK



Sohail Godall Founder

Sohail is the Founder & CEO of UFL. He previously led deals for mobile games & sports content licensing at Buongiorno. Prior to that he led a number of global mobile innovation projects at Samsung. Sohail was also a professional eSports Gamer and at the 2002 World Cyber Games in South Korea he was a Silver Medalist for the UK.

What's your company's value proposition?

We are building real-time games around global live sport, powered by advanced live player data. Aimed at the next generation fan, following sport will become an interactive gaming experience visualised through stats. We currently have a live football app and our vision is to scale across sports/eSports and experiences (AR/VR).

What were your highlights in 2017?

In 2017 our userbase played 2.5M live football games while we saw 80% of new users join completely organically. We also raised an investment round led by one of the world's leading mobile gaming companies and are now backed by a strong board makeup of industry veterans. Lastly, our team size tripled that is ready to scale the business in the coming year.

Which trends do you currently see in your area?

I've seen that the next generation fan are very different to the past. They want more stats to consume during live sport along with bitesize content. The sports rights landscape is also fast changing and I believe Amazon Prime will very soon bid for football rights and become a major player. Lastly, watching sport live through VR is much closer away than most realise and will create for a much more interactive viewing experience.

ultimatefanlive.com

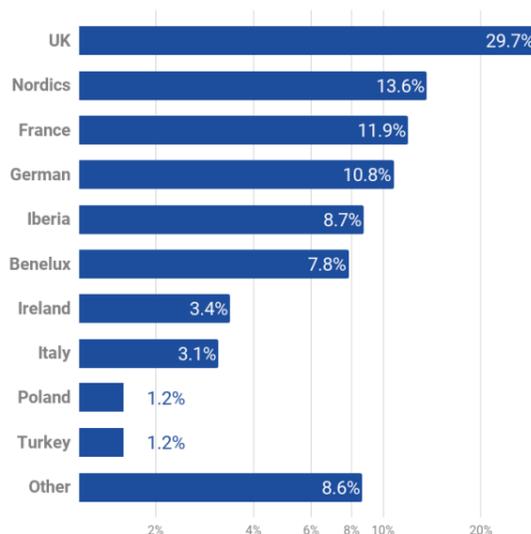


Startup Data

#41

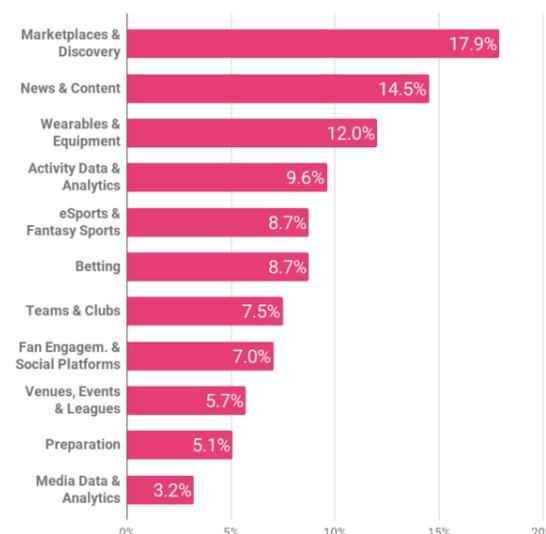
It's time to have a look at some facts and figures about the SportsTech startups in Europe. The following numbers are based on our database with more than 1.000 SportsTech companies.

Startups per country



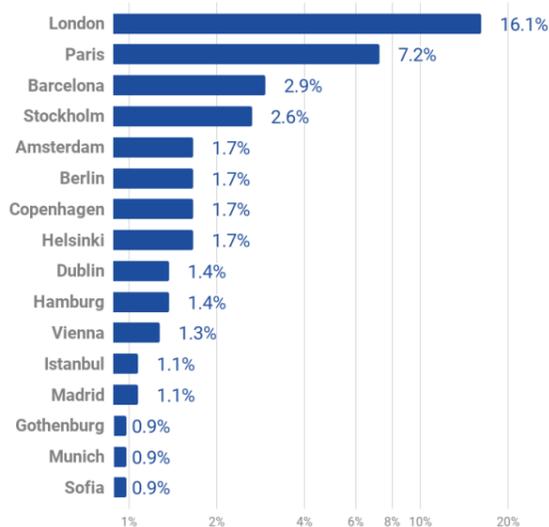
The United Kingdom is by far home for most of the European SportsTech startups, with more companies than the other two countries/regions of the Top 3 combined. Impressive to see the Nordic countries (Denmark, Finland, Iceland, Norway and Sweden) in the second place, with a population much lower than the follow-ups France, the German speaking countries (Austria, Germany, Switzerland) and Iberia (Andorra, Gibraltar, Portugal and Spain). Same goes for Ireland, with a high amount of SportsTech companies per capita.

Startups per SportsTech sector



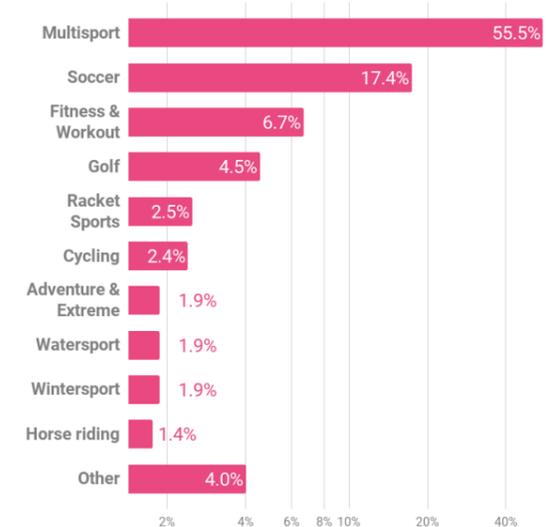
Most European SportsTech companies are offering rather classic “Marketplaces & Discovery” services (see SportsTech framework on page 20), followed by “News & Content”, a sector covering everything from live scores up to innovative streaming solutions. Places three and four go to activity and performance related solutions. Surprising to see that some of the trend topics like Fan Engagement or Smart Venues are not reflected by the number of startups in the respective sectors. eSports and Fantasy Sports are already amongst the Top 5 sectors.

Startups per city



London is clearly the capital of European SportsTech, being home for more than 16,1% of all startups, which equals the numbers of the five follow-up cities combined. Paris is a strong number two and we see three Nordic cities in the Top 8 (Stockholm, Copenhagen and Helsinki). The German speaking countries have three cities in the Top 16 (Berlin, Hamburg and Munich), the Iberian have two (Barcelona and Madrid). Interesting to see that London is the only UK based city within the Top 16.

Startups per sport category



Developing products and services that can be applied to multiple sports is clearly the most popular strategy for SportsTech companies in Europe, instead of having a focus on a specific sport. Soccer is clearly leading the race of single sport solutions, followed by Fitness & Workout offerings (also includes running). That's surprising as the Fitness category receives more funding than Soccer (see investment data on page 55). It's also interesting that the “Other” category reflects a strong 4% of the companies, gathering a broad variety of sports.

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Investors & Dealflow —

#43

Funding rounds are a core element of every startup & tech ecosystem and SportsTech is no exception. So we spoke to three investors about their individual approach, current developments in the market and their wishes for the future. In the second part of the chapter we present a comprehensive data driven overview about the capital flow in European SportsTech in the recent years.



Investors Interviews —

CREANDUM

creandum.com

Creandum
Stockholm, Sweden

SANNA WESTMAN
Investment Manager

Fencer gone VC. At Creandum she keeps an extra eye on Digital Health, while on the look out for extraordinary companies - regardless of industry sector. Previous experience in e-commerce and digital financial services; before joining Creandum she worked for the Kinnevik company Qliro Group, where she was responsible strategy and M&A, and later led the health subsidiaries Bodystore.com and FitnessMarket. Prior to this, she spent several years at McKinsey primarily in the Nordics and China. She's a sucker for endurance sports so after completing Ötillö last year, the focus for 2018 is set on Nordic Islands Adventure Race, a 6-day non-stop multisport race covering 580km from Sweden to Finland.



What is your investment approach?

At Creandum, we want to back the companies of tomorrow. This means that we are looking for people with bold ideas which can create or reinvent large industries - and has the ability to follow through. In terms of industries we are quite agnostic; we like to have to opportunity to invest in the best teams and companies across Europe. This applies to sportstech as well where we have invested in companies such as Fotball Addicts (Forza Fotball for fotball fans) and RFRSH (esports), and we will continue to have the ear against to rail to be able to invest in areas which we see taking off.

Which developments and highlights did you observe in 2017?

eSports have been growing immensely for a long time but I think 2017 was the year when you could almost remove the e - it's has become a sport also for the mainstream audience. E.g. the RFRSH tournament in Copenhagen got better TV ratings than the Olympics and X-games (and Eurovision song contest!). Filling a stadium with screaming fans of all ages, enjoying a good game and a hotdog is true sports culture! Along with that there's also a lot bubbling around accelerators and intersting cooperations, with more traditional sports companies wanting to develop along with start-ups which I think is a result of both the overall health interest and larger companies seeing the need for new ways of thinking to stay relevant. 2017 was also a year where we saw a broadening of the sports tech scene; with more and more companies on the intersection of technology and a large variety of sports popping up. I hope this will continue, because as with any sport you need the breadth to enable the growth of the stars.

What would you like to see in 2018?

Within sports there are large segments which are starting to get attention but not in relation to their size, e.g. equestrian sport. It will be very interesting to see how that will develop, and as this is also an area with a larger share of women it is also interesting from a diversity perspective. Additionally, on the intersection of DigitalHealth and Sports there is a lot of opportunity to improve peoples life; how you deliver physiotherapy, how to tackle physical inactivity among both children and adults. Large issues and opportunities which I would love to be part of to tackle.

Can you share some of your portfolio companies?

Forza Fotball is a super interesting company! They focus on fans and bringing them closer to the game. What we find so intriguing about this is while football is a huge sport, the dynamics show a huge opportunity for focusing on the fan base. Somewhat simplified there over 3bn football fans in the world, around 300m players but "only" around 30m coaches. We think Forza is truly in the right place. They are also a good example of co-operations and I think will increase during 2018; with more traditional sports companies collaborating with start-ups to develop their business. Today Forza Fotball has partners in companies such as Adidas and Nike, among others. RFRSH bring esports to the mass market for real and truly professionalize the industry, as well as enabling companies who are not traditionally associated in esports to benefit from the growth. During the event in Copenhagen, when the new jersey worn by Astralis (one of the teams participating) was announced at a fan event hosted by RFRSH Entertainment, a single Jack and Jones shop made 1/3 of all revenue of the company in Denmark.

Investors Interviews —

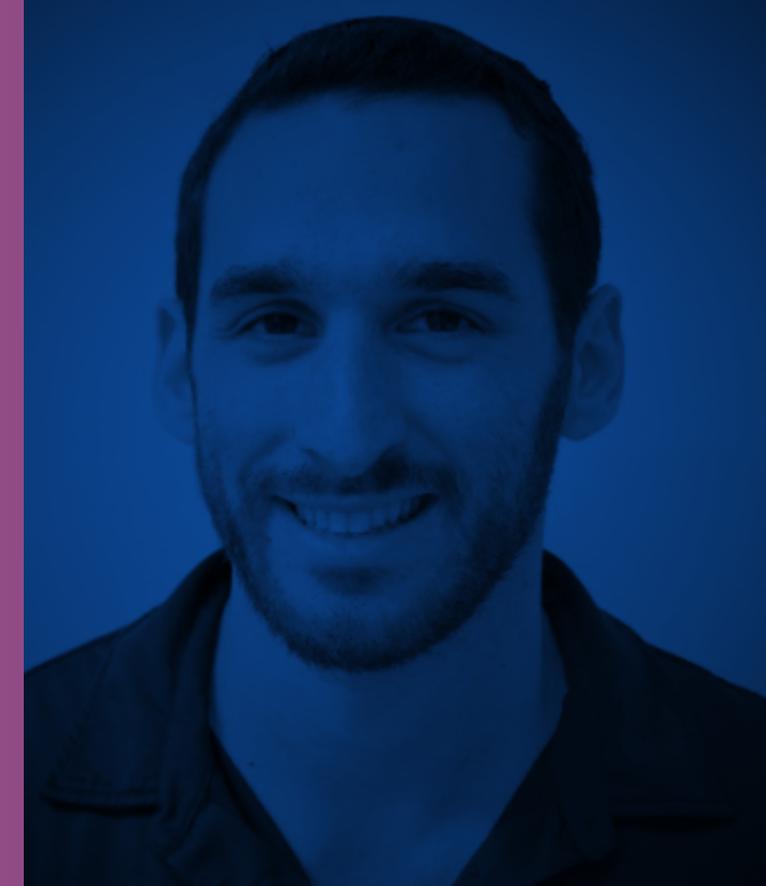
**ADvantage Sports Tech Fund
Nassau & Jerusalem**



**CHRISTOPH SONNEN
& JEREMY PRESSMAN**
Partner

"Christoph Sonnen is a serial entrepreneur and seasoned venture capitalist with vast experience in venture building and early stage investments. One of Red Bull's founding employees, Sonnen has founded, invested, built and sold multiple business ventures over the past two decades.

Jeremy is Israel's only active venture capitalist and professional basketball player. With over five years in venture, Jeremy has vast experience sourcing and conducting due diligence on technology deals with a specific focus on sports - including Replay Technologies (acquired by Intel \$180m). After a successful collegiate career at Yeshiva University where he was one of a dozen two-year captains in the school's history, Jeremy chose to pursue his basketball career in Israel. Jeremy is a veteran of Israel's Artzit basketball league having played five seasons on several teams in the Jerusalem and Tel Aviv areas. Jeremy has deep connections with professional athletes and teams in a number of international leagues, including the NBA, NFL, Euroleague, MLS, CBA, and many more."



What is your investment approach?

ADvantage's investment approach is relatively similar to that of other early stage investors. As experienced investment professionals and current and former athletes, we recognize the key importance of an exceptional team. We seek to back value-driven entrepreneurs with a team-first approach and proven ability to execute. Whether seasoned veterans or ambitious rookie entrepreneurs, we're focused first and foremost on backing highly motivated talent, tackling revolutionary ideas. Beyond the team, we assess a handful of other factors including: strength and defensibility of the underlying technology, addressable market size, commercial traction and co-investors. As one of the only sportstech funds with a truly global footprint, we look to leverage our robust and multi-disciplined global network and will be investing in companies where we can add meaningful value.

Which developments and highlights did you observe in 2017?

On the funding side, it is still relatively early days for the overall SportsTech scene in Europe as compared to the more mature funding ecosystems of the US - and to a lesser extent Israel - which have seen significant investment over the last few years. There were a few encouraging advancements for the SportsTech ecosystem in 2017. One such example is our partners at leAD Sports conducting the first global SportsTech accelerator class in Berlin. Another was the opening of the Arsenal innovation lab. Both have attracted international talent to Europe which benefits the overall ecosystem.

What would you like to see in 2018?

We anticipate seeing the continued development of a robust European SportsTech funding ecosystem. Spurring innovation and entrepreneurship requires participation from all sides of the ecosystem. Team innovation labs and dedicated accelerators are critical pieces of the puzzle. These investors coupled with marquee athletes and other high-profile business angels, have provided a launchpad for attracting new startups to the ecosystem. However, it seems to stop there. SportsTech companies have sufficient financing options in Europe (and abroad) when it comes to kicking off their ventures but are often left to struggle thereafter. There seems to be a shortage of value add venture investors focused on supporting young companies post the seed round. To attract Europe's best and brightest to SportsTech this gap needs to be filled.

Can you share some of your portfolio companies?

We look forward to sharing our initial investments later this year. ADvantage was co-founded by leAD Sports and OurCrowd, both of whom have significant experience investing in early stage sports startups. leAD Sports currently has a portfolio of 15 companies which graduated its inaugural accelerator program a few months ago and is currently in the process of screening hundreds of startups for their next class slated for later this year. OurCrowd has a robust portfolio of 145 startups globally spanning a wide array of sectors and was an investor in Replay Technologies which was acquired by Intel for \$180m in 2016 - the largest SportsTech exit out of Israel to date.

Investors Interviews —

SPORTS INVESTMENT
PARTNERS

sportsip.co.uk

Sports Investment Partners
London, UK

**MICHAEL
BROUGHTON**
Partner

C-Suite Executive and business strategist & operator linking finance and investment to sport & media sector. Michael founded the first specialist investment firm looking at the sport industry in Europe. With a focus on finding companies that operate in the sports and related spaces that have scale opportunity and provide the services that enable the sector to continue. As part of a small team he is a deal originator, manager and operator bringing finance and sport business opportunities together whilst then managing the investments on behalf of the investors.



What is your investment approach?

Ever since we were founded in 2010 we have had a very simple guiding philosophy. If it's just about money it's better to raise from someone else. We are all about operational leverage and adding real value. Smart money. As such one of the key criteria is: Can we help? Other than that, it's not rocket science. We look for high quality management teams to back who are involved in companies where we can see a real growth story and scale potential. It clearly has to be relevant to sport and associated businesses (Leisure, media, gaming) – the clue is in the company name. From a size perspective we will help as low as £250,000 all the way to £250m. The financial houses we work with can fulfil that wide range of investment size which gives a wonderfully broad scope.

Which developments and highlights did you observe in 2017?

The rush for innovation labs has been fascinating to watch. It's critical to see more companies investing in the space and it's an exciting time. The worry is that sports clubs may not be best suited to this business model. They rightly think more narrowly and about their own operational needs and transpose that onto the wider sector and that can lead to subjective decision making. The other key changes are the emergence of tech companies in Sport. Zuckerberg's updated mission statement refers to building communities and sport is perhaps the largest and most engaged of all communities, so this feels like the start of something. The very recent Disney/Fox transaction could also have a very interesting impact. Overall there seems to have been an awakening that the consumer matters, be that in new stadium design, the EFL's launch of the D2C platform amongst others. In the USA we have also seen the emergence of player power for something other than financial reward. I cannot recall a time other than perhaps Jackie Robinson or Muhammad Ali where athletes have made a stand against something where it's genuinely about something of real social value. Will we see that cross borders and how will it impact commercial models?

What would you like to see in 2018?

What I would like to see from these sports franchises is more of an open mind in their commercial models with suppliers. Many of the top echelon still expect suppliers/commercial partners to pay them for the privilege. If they were more open to other business models, rather than the innovation lab, I think you would see the sector prosper even more. That doesn't rule out taking equity or opening innovation labs, just requires a more open commercial mindset. What I would like to see from companies seeking to raise funds is more of an appreciation of how sport has worked to date. Where they see their company taking it and the challenges of that journey. Equally a recognition that this is an intrinsically competitive space and that offering a variation of what has come before is not enough to stand out. Lastly, attention to the problem and solution should be key to anyone raising funds. We rarely see a bad product or idea but equally it's not often that a pitch is made where the product has been positioned in a way that understands what the end user's issue may be. Seeing a few more decks with that taken into consideration would be exciting.

Can you share some of your portfolio companies?

Supponor's DBRLive technology connects global sport with local audiences by allowing in-event perimeter billboard advertising to be modified for different broadcast feeds and, therefore, targeted at specific audience groups. GameOnTechnologies are the leading chat bot supplier to the sports industry. The company provides a highly automated tech stack enabling rightsholders to engage and communicate with fans around the world on their platform of choice be that Messenger, Skype, Slack, Kik and others. The Racing Manager strives to dispel the drudgery of racehorse ownership, whether you are a syndicate member, a syndicate manager, a trainer, an agent, or simply an enthusiast. A new technology platform that transforms the racing experience. Rabble gamifies exercise to make fitness fun, so we can engage previously inactive people in exercise and double industry retention rates. All the games are designed to be enjoyable, accessible to all, a workout and highly sociable. Player LENS is a global football industry resource, bringing equal opportunity to all clubs by injecting volume, knowledge and execution solutions to the player transfer and loan market in an efficient, effective and harmonious manner.

Dealflow Data

#51

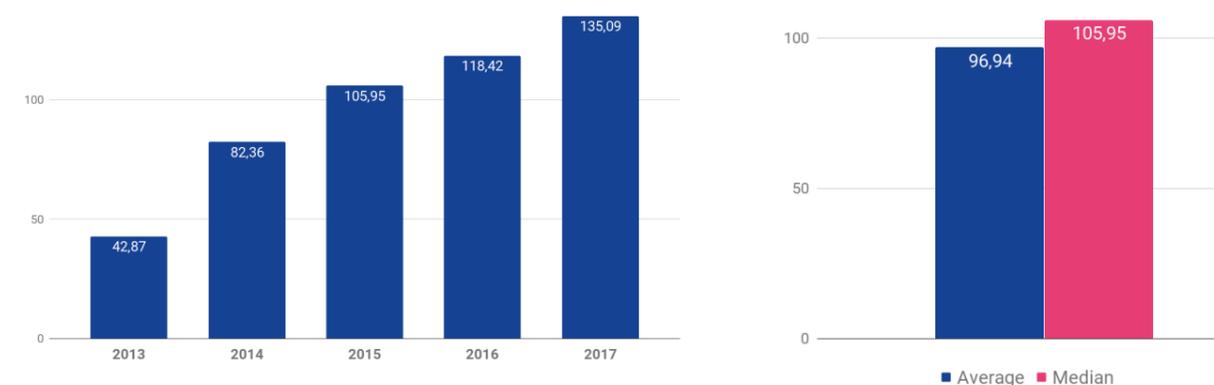
A collection of data driven insights into the European SportsTech investment landscape.

On the following pages we present facts and figures about the investment rounds in European SportsTech companies over the last years. The data helps to grasp the size, the maturity and the trends & developments of the market and is intended to help startups, investors and other involved people and organizations to discuss, negotiate and decide on a more fact based level. It is also useful to compare the SportsTech scene to other industries.

At this point we'd like to thank our data partner Dealroom.co, who provided us with the necessary information for these insights. Dealroom.co helps corporations, investment firms and governments to identify & track growth opportunities and innovative companies, through intelligent data-driven software powered by a proprietary global database.

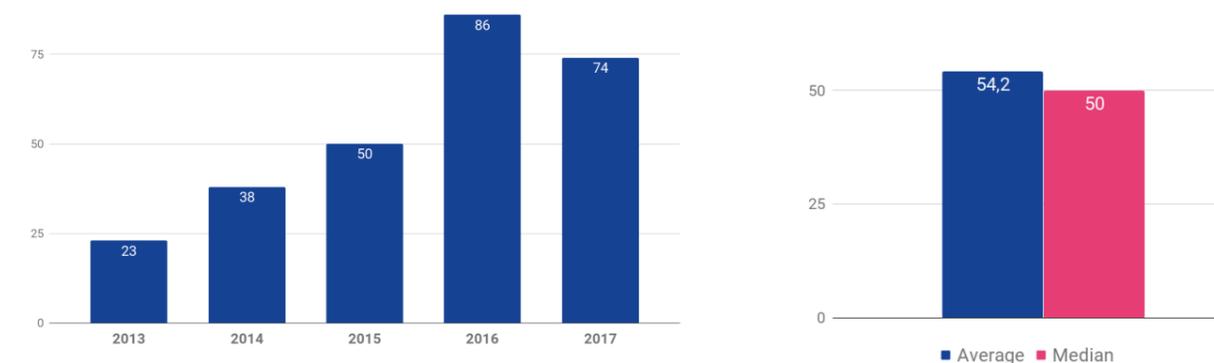


Capital invested 2013-2017 (in M€)



The data shows that the European SportsTech sector is indeed growing from a capital perspective. The invested amount per year is increasing year by year over the last five years, peaking in 2017 with more than 135 M€. That's still lower than in other industries, but growing into a significant amount.

Number of rounds 2013-2017

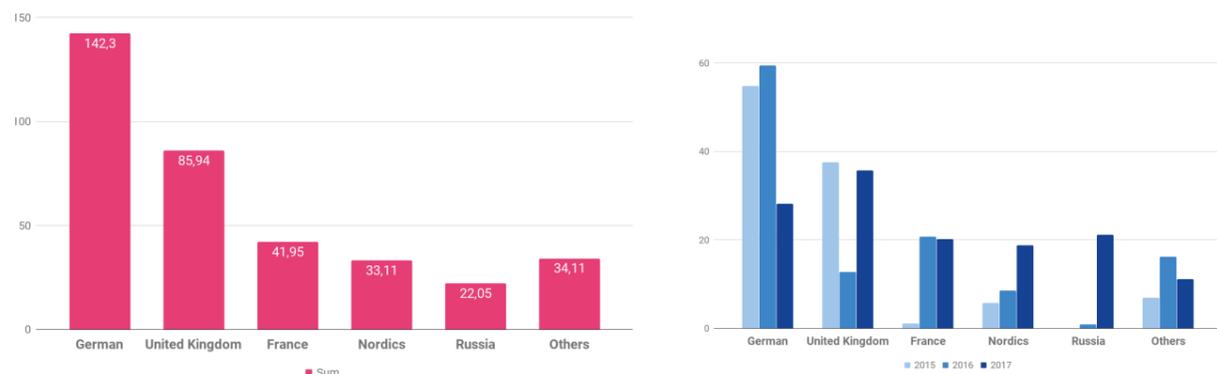


The trend for the number of investment rounds per year is clearly positive. 2016 saw an exceptionally high amount of rounds which could not be kept up in 2017. But the data indicates that the ticket sizes are growing if we take the invested amounts into consideration. Clear sign for a maturing market.

Dealflow Data

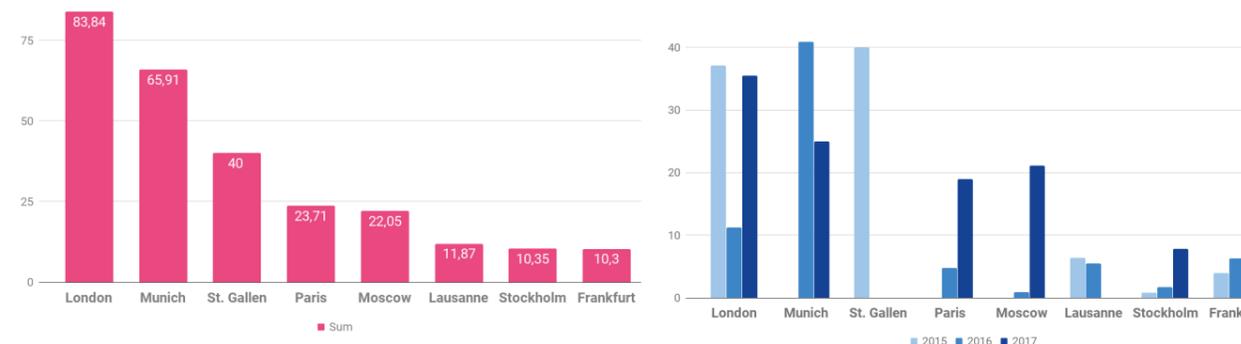
#53

Capital invested per country/region 2015-2017 (in M€)



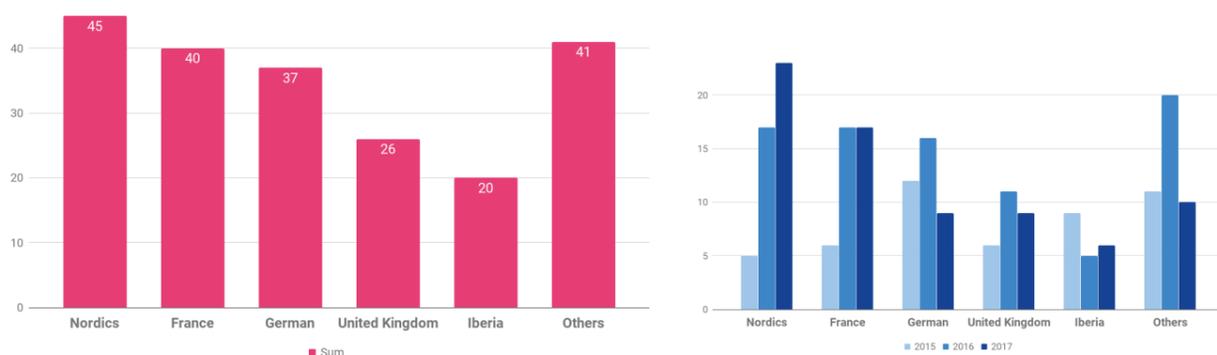
The most amount of funding in the last three years went to companies from the German speaking countries (Austria, Germany and Switzerland) and from the UK. But France and the Nordics (Denmark, Finland, Iceland, Norway, Sweden) are catching up, with a positive development in the last years.

Capital invested per city 2015-2017 (in M€)



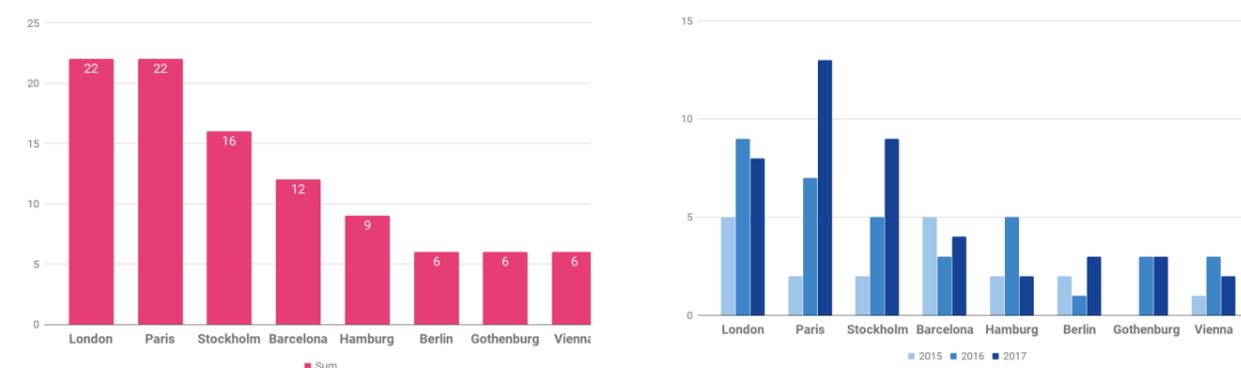
London and Munich are clearly dominating the SportsTech investment market over the last three years. St. Gallen was able to catch the third spot with one outstanding investment year in 2016. Interestingly german startup hotspot Berlin is not amongst the top cities and Moscow had a strong year 2017.

Number of rounds per country/region 2015-2017



Interestingly the Nordics and France are leading the European comparison when it comes to the number of rounds per country/region, again with a positive trend over the last years. The other players in the Top 5 are facing a rather declining amount of investment rounds.

Number of rounds per city 2015-2017

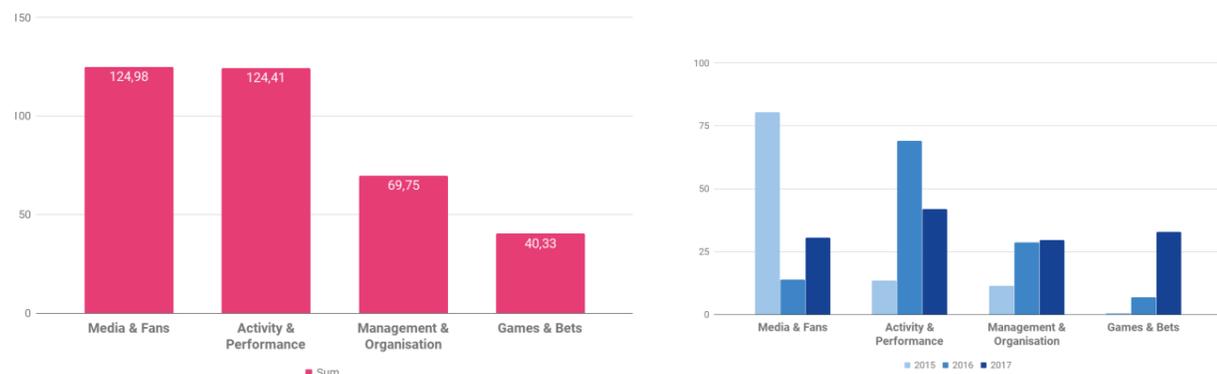


Companies from London and Paris are tied for the first spot regarding the number of investment rounds received over the last three years. Paris is clearly leading the 2017 ranking, followed by an impressive year of Stockholm based companies, who were even leaving London based companies behind.

Dealflow Data

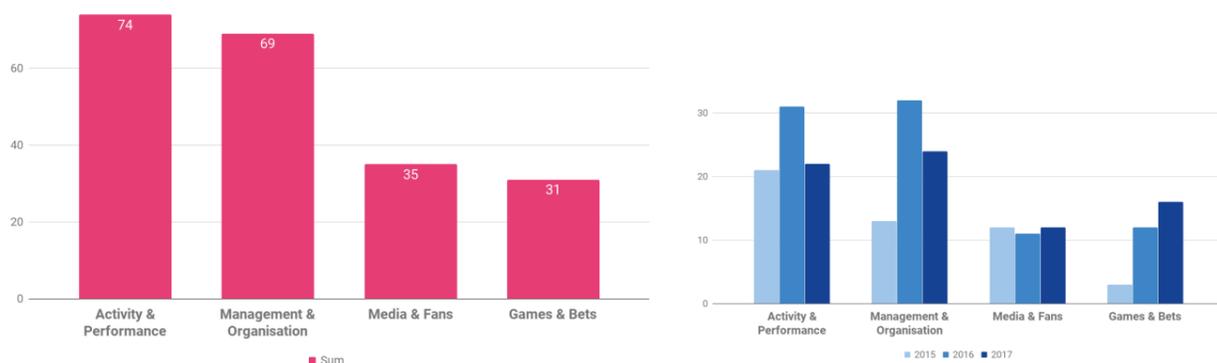
#55

Capital invested per SportsTech sector 2015-2017 (in M€)



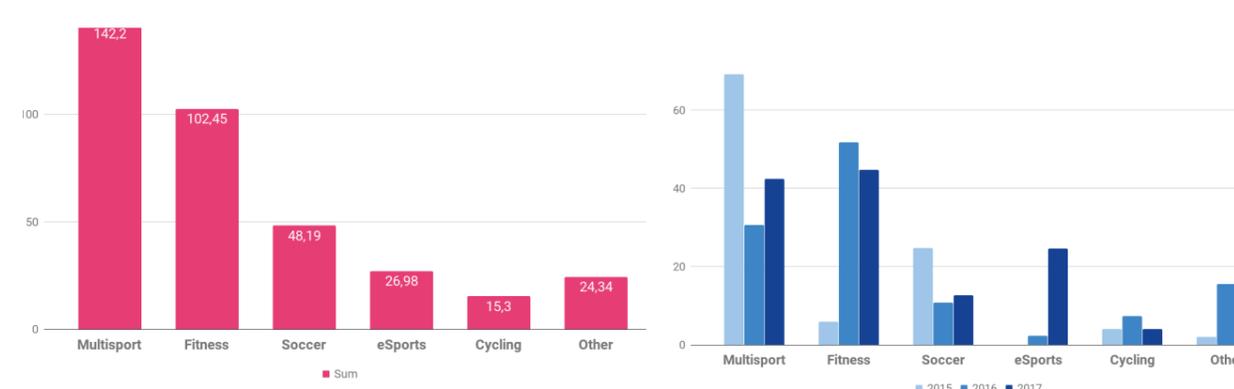
The most funding went to companies in the “Media & Fans” and “Activity & Performance” sector (see SportsTech framework on page 20). Interestingly the numbers from 2017 show a much more equal distribution between the different sectors.

Number of rounds per SportsTech sector 2015-2017



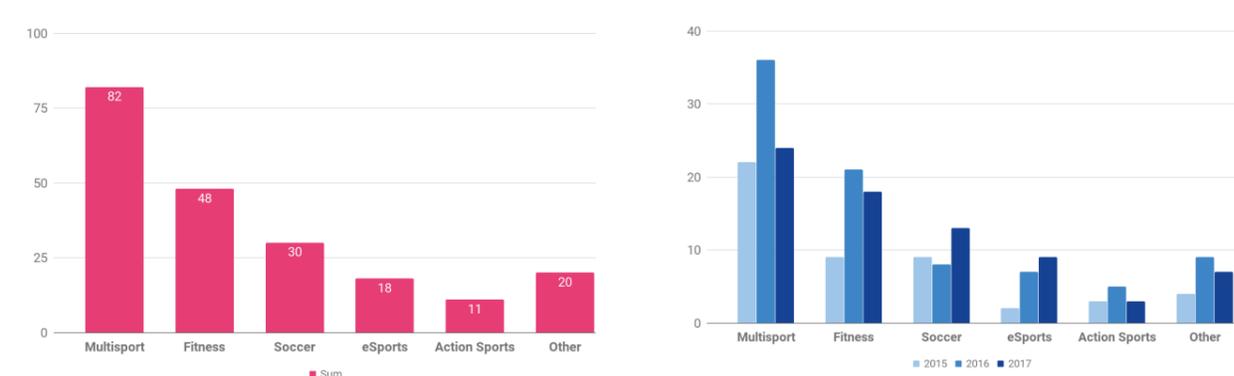
The “Activity & Performance” sector is leading the field with the highest number of rounds over the last three years. It’s interesting to see that the “Media & Fans” sector is receiving relatively few rounds despite having seen the highest amount of investment. “Games & Bets” is growing steadily over the last years.

Capital invested per sports category 2015-2017 (in M€)



Multisport companies received most of the funding, which is not surprising as this is the most popular strategy (see page 41). But it’s impressive to see that the fitness category (also including running and workout) received more than twice as much as soccer focused companies. And in each of the last two years they’re leading the overall funding. Investments in eSports have been exploding in 2017.

Number of rounds per sports category 2015-2017



The number of investment rounds is very much reflecting the capital flows, despite the fact that multisport companies are leading the field in each of the last three years. Interestingly the invested capital in eSports did not go along with a significant rise in rounds, clearly indicating that the ticket sizes are getting bigger.

Direct links to the people, companies and initiatives in this report? Visit sportstecheurope.com

Accelerator & Incubators —

#57

The maturity level of a tech scene is also reflected by the number of accelerator and incubator programs. Over the last few years more and more of those programs are popping up in the European SportsTech scene, and there is still room for more. We spoke to four initiatives to showcase their approaches, their activities and their plans for the future.



Accelerator Interviews



kickupsports.eu

KickUP
Lisbon, Portugal



JOAO GONÇALO CUNHA
CEO

Sports business executive and investor, passionate about sports and cheering sports innovators.

What do we have to know about your project?

KickUP is a sports innovation platform to support the next generation of sports startups, clubs & federations, and corporate innovators. KickUP assists sports startups in creating game changing technologies, processes and products, to scale globally and facilitating access to the most active investors. Allow the corporate to benefit from KickUP's proximity to the European sports startup ecosystem and innovate faster by connecting to rising startups, groundbreaking talent and technologies. Help investors discover the most exciting startups looking for funding by leveraging our continuous inbound flow of investment opportunities and curated portfolio deals. To bring the sports industry to another level, KickUP developed differentiated innovation programs to cover all the entrepreneurs stages, from Mindset (generating awareness and developing an entrepreneurship culture) to Scaleups (seeking to grow in terms of market, revenues, and team), industry experts.

What did you do in 2017?

2017 was the KickUP Sports Innovation launch. We partnered with SL Benfica to launch the first European Sports accelerator that emerged within a major sports club and with an investment vehicle. The KickUP Sports Accelerator is an international acceleration program, that aims to scout, accelerate and invest in early stage sports business startups, focused on Sports Performance, Lifestyle Activity & Health; Fan Engagement, Entertainment & Media; Smart Venue, Facility Management & Operations; eSports, Gaming & Betting. The first edition took place in Lisbon, Benfica's stadium, a 12 week full-service program gave the opportunity to 10 startups to build, execute and validate their business model, find the best international product & market fit, and get funding. The 10 selected startups, not only received an upfront investment of €10.000 but also had access to a mentor network to accelerate their business growth. The program was designed from scratch with a strong sportive approach so that all the founders would benefit from tailor-made nutrition plans, sports activities & competitions, and mindfulness programs.

What are your plans for 2018?

Replicate & Scale! 2018 is the year to internationalize our sports innovation approach, from hackathons, to pitch competitions, accelerators and live testing. We are also launching KickUP Venture Club: a pioneering investment network that invests in high growth potential sports companies and offers its members - sports organizations, athletes & coaches, industry leaders and investors - the opportunity to build a diversified global portfolio. On the communication side, we are also launching a groundbreaking media platform with cutting edge sportsbiz content.



Accelerator Interviews



leadsports.com

leAD Sports
Berlin, Germany



TIM KRIEGLSTEIN

Managing Director

NATHALIE SONNE

Head of Program

Tim loves making an idea take shape. He has always had a passion for communication and marketing, even starting his first business, an advertising agency at the age of 17. He is an entrepreneur with international marketing expertise of more than 20 years. He served as Marketing Director at Red Bull UK and Head of Marketing Northern Europe, advising all 18 Northern European countries, including Germany and Russia on Marketing Strategy. In 2012, Tim partnered with Christoph Sonnen at Zeitgeist Ventures, a members club developing ventures, as well as structuring and selling funds. Full of ideas, he is the company's strategist and always keeps an eye on their big goal. Zeitgeist Ventures is a partner in the Adi Dassler Legacy project.

Enjoying fast-paced environments, Nathalie has worked in several startups across the US and Germany. At leAD, she's swapping sides to help startups grow and succeed.



What do we have to know about your project?

The leAD journey started when Adi Dassler's grandsons decided to return to the sports business and to continue the legacy of their grandfather. Back in the first half of the 20th century, Adi Dassler founded a pretty successful startup and has since been referred to as the father of the modern sports industry. He inspired generations of sports enthusiasts and he inspires us today. So we started with the questions: How would he innovate today? Which areas would he tackle? We believe that most likely he would be supporting and investing in sports startups. So we decided to start where the really disruptive ideas are born: With early stage startups in an accelerator program. But not just any other accelerator program. Why? There are hardly any sports focused accelerators out there and we are the only one in Germany. Our focus is on sports only, so the entire network behind leAD is rooted in or closely linked to the sports industry. And leAD is an open platform. It is a private initiative, not a corporate program. That gives us the flexibility to invite everyone to join in. And last but not least, we put an especially strong focus on people.

What did you do in 2017?

While we were targeting around 300 applications, which itself is a very ambitious goal. Eventually we received more than 480 applications across 22 countries. We invited the top 40 startups to our selection days, during which we chose the 15 best ones (from 13 countries). Throughout the program we hosted more than 30 workshops and trainings and had weekly 1on1 sessions supporting the startups in shaping their business strategy, their investment strategy and financial planning. Sports were an important part of the program: Our space was nested between a Crossfit Studio and the Flying Steps Academy which were open to the teams. We also hosted yoga sessions and had several tennis, ping pong and soccer happenings. We ran various events for our startups to grow their network such as the Laureus Sport for Good Week, a SportsTech Meetup and weekly pitch trainings. We also went to StartupCon in Cologne, where all startups exhibited throughout the day and pitched on stage. Our Demo Day ended the program in December, with more than 150 investors, mentors and partners being present.

What are your plans for 2018?

We have a vision: to build a powerhouse for global sports entrepreneurship, linking innovation and investment into one platform backing the whole entrepreneurs journey from idea to exit - with capital, knowledge and our network. leAD is an open platform and we are inviting businesses, clubs and sports organisations searching for innovation and investors looking for deal flow to join leAD. We are also continuing with our accelerator program for our second batch for which applications are already open.

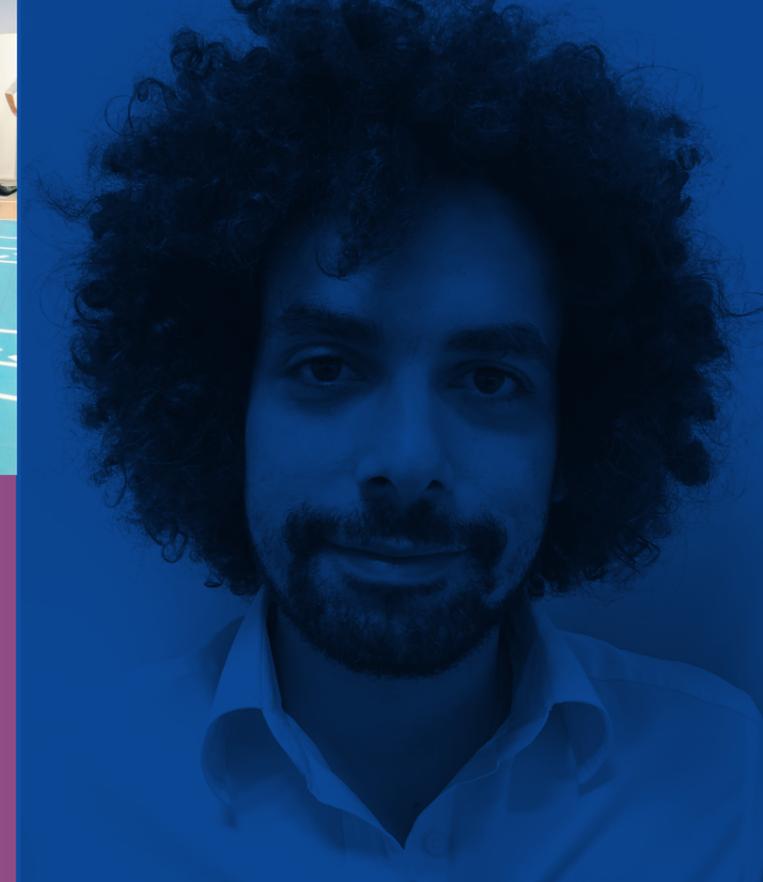


Accelerator Interviews



letremplin.parisandco.com

Le Tremplin
Paris, France



OMAR EL ZAYAT
Director

Engineering Graduate from UC Berkeley and Arts & Métiers ParisTech, Omar El Zayat started his career as a Financial Auditor at EY, in Paris before starting his company – KROMMATIK – a music co-creation platform. In 2015, Omar joins Le Tremplin – the first sports innovation platform – as head of the incubation program mentoring 57 startups and is currently the director of Le Tremplin.

What do we have to know about your project?

Launched in 2014 in Paris, Le Tremplin, the Sports Innovation Hub, brings together 57 sports-related startups with close to 30 large corporate and institutional partners around mentoring activities, workshops, conferences and networking events. Through our equity-free incubation program, we accompany startups to maturity by harnessing business opportunities in the sports market and linking them with industry leaders, investors, federations, leagues and institutions. Located in premises of 3,000 sq. m. in the iconic Jean Bouin rugby stadium, entrepreneurs benefit from individual and collective coaching as well as weekly conferences and workshops by curated industry experts.

What did you do in 2017?

Having settled down in our new co-working space during the Euro2016, 2017 was an important year of consolidation for Le Tremplin. Having grown from 17 to 57 incubated startups since 2015, we had to double our staff and bolster our network of mentors. We brought in renowned industry experts for more than 80 conferences and workshops. Bearing in mind our goal of becoming the central hub for sports innovation in France and in Europe, we opened up our venue to key corporate players in the realm of sports, thus creating countless pitching opportunities and business opportunities for our startups. We stepped up our communication efforts, resulting in much more press coverage and social media exposure for our companies. The bottom line speaks for itself: more than €65M have been raised in the past 2 years by our startups. Building on this momentum, we organized in December LeTremplin_Invest, a Demo Day co-organized with the French Ministry of Sports, gathering 55 investors and 17 startups.

What are your plans for 2018?

Drawing from 3 years of experience in fostering innovation in sports, our aim for 2018 is to further scale up. Beside the incubation of the upcoming 4th batch, we will continue to help our partners source economically viable innovative ideas (e.g. launching the first edition of our “Innovathon_Sport” in April 2018). Another objective remains to strengthen our international partnerships to help our entrepreneurs expanding abroad while enticing foreign startups to Paris. Last but not least, we gear up for major sporting events in France in the coming years such as the Ryder cup in 2018, the Rugby World Cup in 2023 and the 2024 Olympics in Paris. Innovation being recognized as a key component for these events, the future for our startups and the entire French SportsTech scene looks brighter than ever.



Accelerator Interviews _

wylab

wylab.net

Wylab
Chiavari, Italy



STEFANO TAMBORNINI
Director

Stefano graduated in economics and had an important experience in the banking sector (business plan, credit risk management and project management). Wylab represents a personal challenge for him and for all partners and important entrepreneurs that started and believed in this innovative project. Personally, he thinks that everything starts from the passion and the curiosity to meet young people (their dreams and challenges) and the desire to support them in the realization of their idea and in the development of their company.

What do we have to know about your project?

Wylab is the first Sport Tech Incubator in Italy. Our mission is to create a technological development hub bound to the sports business. Our main goal is to be the reference point for all innovative initiatives related to sports technology in Italy. We look to both the businesses that are emerging and those that are already consolidated and need to grow. We believe that the best way to help our economy is to create a place where Coworking and Incubation are the heart of a new model of business and cultural development. We created a space where Startups can interact among them and with clubs, federations, agents, sports associations of various kinds. Wylab is a place where it is possible to communicate with Universities, Industries and the Financial world. As a 100% private incubator, Wylab is able to manage a light and performing environment that allows Startups to grow up and expand their businesses quickly.

What did you do in 2017?

In just one year Wylab surveyed almost 100 applications. Among these projects, 8 of them became startups within the incubator, 5 have been accelerated with a seed investment directly from Wylab and introduced to the Angels Group. Our second Call for Applications was Launched in April 2017. We selected 14 startups from a pool of over 100, of them 8 promising startups have started their experience in Wylab at the beginning of June. During this time we organized dozens of events, exhibitions and workshops and at least 4 of them had international speakers. The population of our Coworking has reached about 100 people.

What are your plans for 2018?

Eight new startups, chosen from the III Call that took place in December 2017, will start the Incubator Program in January. The next Call for Ideas is scheduled for Autumn. Wylab is starting an Open Innovation Program with different sport Federations and Companies and a Digital and Sport Academy that will be launched in the next months.



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Events & Other Initiatives__

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A healthy tech ecosystem not only consists of startups, investors and accelerator/incubator programs. It also brings up events and other initiatives to showcase current developments, to bring people together and to create movements in certain communities. On the following pages we present some of the most outstanding ones in European SportsTech.



Events & Other Initiatives__

BURDA
BOOTCAMP



burdabootcamp.de

Burda & FitTech Summit
Munich, Germany



NATALIA KARBASOVA
Head of Burda Bootcamp

Natalia Karbasova is Head of Burda Bootcamp (startup lab by Hubert Burda Media) and organizer of the FitTech Meetup series in Germany. She's a certified fitness coach and founder of the startup SportsHeroes.

How did the Fitness Tech scene develop in 2017?

The scene is starting to develop its identity. A part of it is our FitTech Meetup series where fitness startups get an opportunity to tell their stories to an audience of sports enthusiasts, startups and investors. We are working on strengthening this community with our upcoming first European FitTech Summit on June 7, 2018. Overall, people are starting to develop more interest in digital fitness and, when you say "FitTech", they no longer confuse it with "FinTech".

Which startups excited you in 2017?

One of my favorite startups is Yoga Board. It's not quite „tech“, but I love the simplicity of the idea which makes workouts much more challenging. I'm still looking for a favorite software startup which does more than just providing me with a set of simple standard exercises and tracking my food habits. Till now, I've been an avid fan of Calm, a mental fitness app that helps you, well, calm down. This is not exactly what most people think about when they mean „fitness“, but the definition of fitness also includes the mindful and social components apart from just physical shape. I also love the concept of a young Munich startup Solos Mirrors that has basically built a new interface (a mirror, as the name already suggests) for gyms allowing you to provide a more personalized training to a standard gymgoer. Also, US-based Peloton has managed to provide a personal and motivating experience to people working out at home and connecting them to others, something we definitely need more of!

What topic trends do you currently see?

AI is definitely a topic. Here, we see more AI applied in fitness apps, but also in combination with hardware like this Kickstarter project "Vi". There's also more craving for a human connection and a more intimate sports experience – just look at the new fitness boutique „The Urban Heroes“ from Hamburg! People need to compete with others, achieve common goals and hold each other accountable, that's why I think the era of standard fitness apps with a set of simple exercises is over.

What is still missing in Fitness Tech?

The humans! There're a lot of apps and devices which help you to exercise more, however, they often forget that the best exercise wouldn't help if performed wrongly. At the moment, it's impossible to track if the exercise was performed correctly and check the real physical condition and possible muscle imbalances of the user. This is something a qualified fitness coach would be able to do in 15 minutes. Also, humans motivate us to do more sports. That's why we founded SportsHeroes which helps you find a personal coach for fitness and sports to motivate you, give you direct feedback and make you are staying on track.

What do you expect from 2018?

I expect fitness devices with form factors different from wristband trackers to gain more popularity. We have already seen this development with earphones like the Bragi Dash or rings like the Oura ring. Also, I think a more holistic health approach will hit the market, with a combination of sleep and eating habits, mind and body health and personal coaches, maybe with a direct involvement of human trainers or doctors.

Events & Other Initiatives__



londonsport.org

London Sport
London, UK



ALEX ZURITA
Specialist Advisor

Alex Zurita is London Sport's Specialist Advisor – Technology for Participation, with responsibility for shaping London Sport's strategic commitments to supporting technology, data and digital initiatives designed to raise levels of participation in physical activity and sport in the capital. This includes shaping the strategic design and implementation of the Sport Tech Hub, as well as leading London's plan of action in 'Making London the Heart of the Sport Tech World'. Having used technology and data while coaching football with international players, Alex is a committed technophile, a widely-recognised advocate for the role of technology in boosting participation in physical activity and sport, and a champion of the importance of sport for the future health of London and its residents.



What do we have to know about your project?

At London Sport we are committed to setting an agenda which will make London the Heart of the Sport Tech World'. We believe that supporting innovation in technology and data is a critical component of the future of physical activity and sport. A flourishing sport technology industry walks hand-in-hand with a physically active population; supporting the growth of Sport Tech, Fit Tech and Health Tech is a massive part of the jigsaw that will help London to become the most active city in the world, and vital to our efforts to support 1,000,000 Londoners to become more active by 2020. Inevitably the impact created by the London Sport Tech ecosystem will have a bearing on the rest of Europe and the world as companies scale their business and solutions across other markets. As we look to support the growth of London's SportTech ecosystem, we will increasingly look to collaborate across European networks, enabling cross-pollination and positioning Sport Tech as a viable vertical. London is already a great landing patch for tech companies across a vast number of verticals; we want to ensure the same is true for Sport Tech companies, whether they begin in London, across Europe or elsewhere across the world.

What did you do in 2017?

2017 was a monumental year for Sport Tech in London, which saw the creation and implementation of key components designed to help the Sport Tech ecosystem flourish in London. Backed and led by London Sport, the Sport Tech Hub launched in October becoming London's first ever sport tech incubator programme dedicated to physical activity start-ups. The ambitious programme is specifically delivered by industry experts and designed to support the brightest start-ups and emerging technology focussed on raising levels of participation in the capital. Complimenting this, key players in London from the Sport and Tech sectors backed a plan of action centred on Making London the Heart of the Sport Tech World. London's status as one of the world's great centres for technology makes it the perfect environment to set such an ambitious agenda for the future of SportTech, FitTech and HealthTech.

What are your plans for 2018?

The Sport Tech ecosystem will benefit from the Sport Tech Hub welcoming its second cohort with applications opening in mid-2018. Outside of this cohort, Sport Tech companies will also benefit from opportunities through the Open Data Institute's OpenActive Accelerator – launching in May 2018 and ukactive's ActiveLab – returning for its second round of acceleration in March 2018. At a strategic level, all three bodies behind these individual programmes (London Sport, ODI and ukactive) have established an active partnership to help broaden the scope and scale of the wider Sport Tech ecosystem. Having launched the plan of action geared at Making London the Heart of the Sport Tech World, 2018 will see London Sport and our partners take steps to tackle the key activities required to make this ambition a reality, including supporting diversification of tech talent, securing and creating investment funds to support tech companies, driving open data innovation and harnessing innovation opportunities with technologies such as AR, VR and AI.



Events & Other Initiatives__

SMASH

sportsmash.net

SMASH
Helsinki, Finland



JAN ERLOA
Development Director

Jan Erola is the development director of SMASH. He is start-up entrepreneur himself, with strong background in publishing, journalism and international communications. Basketball is Jan's game.



What do we have to know about your event?

SMASH is the first open startup event concentrating solely on sport and health. It brings together investors, startups, the sport world and other preventive health parties. In 2016, SMASH started as an official side event of SLUSH in Helsinki. Now, after two successful events in Helsinki, it brings a Nordic startup invasion to London in March 2018. We have high hopes there, as our soon-to-published British partners will help us take this event to a completely new level.

What did you do in 2017?

SMASH rocked the sports world for the first time on November 29th, 2016 in Helsinki. Altogether, 400 participants from ten different countries participated the event. On 2017 SMASH changed to a higher gear. World's Second SMASH was held on November 28th-29th, 2017 in Helsinki. There were 79 startups, 30 investors, and dozens of different actors from sports and health genres. Altogether, over 500 participants representing 46 nationalities joined to the two-day event. Two SMASH days included hours of hustle and bustle, new research and market information, innovation and curiosity. On the main stage, highly esteemed key speakers such as Albert Mundet from FC Barcelona, Lars Tegelman from Nielsen Sports and Mary Liz McCurdy from Google got a huge interest from the audience.

What are your plans for 2018?

Next March, Nordic and British sport/health startups roundup in London for the first time. The First day's Event takes place at the Finnish Ambassador's Residence (March 21st 2018) with an evening event for mingling. The Second day event is arranged together with our London partners, soon to be disclosed. We believe, that innovative technology can promote healthy lifestyle and help us live longer while having fun! We want to exceed the limits by bringing together the best new business ideas from sport, health and technology, globally. London is our next step and we already have plans for the other parts of the world.



Events & Other Initiatives__



sportstechireland.com

SportsTech Ireland
Limerick, Ireland



**EMILY ROSS,
GRAINNE BARRY &
MARTINA SKELLY**
Co-Founders

Gráinne Barry is a strategic and operational leader and the EMEA Regional Operations Director for Stats.com in Ireland. Prior to that, she was the COO of Salaso Health Solutions Ltd, a connected health technology company which she helped to scale internationally. Gráinne has worked with many start-ups and indigenous companies on technology development and commercialisation. Gráinne holds multiple qualifications in business, leadership, management and technology, and is a Chartered Director with a Distinction in Diploma for Company Direction from the Institute of Directors.

Martina Skelly is an entrepreneur, start-up advisor and CEO of YellowSchedule.com. She has won numerous awards, including the Vodafone Start-up Awards Businesswoman of the year and the Irish Internet Association's Net Visionary Awards Start-up of the Year. She was named by Silicon Republic as 1 of the top 100 women in STEM in Ireland. She has successfully brought YellowSchedule to a number of export markets, with export revenue constituting 95% of company turnover. Over 5 million appointments have been booked through the platform to date. She holds multiple qualifications in Marketing, Management and Technology.

Emily Ross is a marketing strategist, PR professional and serial entrepreneur. While client services director for a leading digital agency, she helped develop international digital strategies for HPSU's. At UNICEF Ireland, she helped double corporate income through strategic partnerships with the likes of Total Produce, IKEA, Aer Lingus and P&G. She spent four years with global healthtech platform WhatClinic, helping the business to grow annual traffic from 10 million unique visitors to 17 million. A writer, lecturer and public speaker, she holds multiple qualifications in Marketing, PR and Analytics.



What do we have to know about your project?

SportsTech Ireland was officially launched in June 2017 with the aim of positioning Ireland as a world-leading destination for sports innovation and technology. We have partnered with the Irish Government's Industrial Development Authority, leading universities and companies to stimulate foreign direct investment and support Irish start ups in the SportsTech space. Our goals are to support job creation and to aid the development of a sports innovation ecosystem.

What did you do in 2017?

At our launch last year we welcomed athletes, founders, government bodies, mentors and special guests to King John's Castle in Limerick city, situated in Ireland's Mid-West, where we shared our vision and our values, as well as some old fashioned hospitality to accompany the broad variety of sportstech companies that were showcased on the day. We featured hi-tech companies at every stage, from ideation right through to those turning over tens of millions overseas. We welcomed companies working in wearables, gaming, high performance, analytics, sports clothing, equestrian tech and more. Supporters and partners of our social enterprise include; University of Limerick, Munster Rugby, LERO (The Irish Software Engineering Research Centre), the IDA, Limerick Chamber of Commerce, University of Michigan, Ryerson University Toronto, London Sport as well as a number of technology companies based throughout Ireland.



What are your plans for 2018?

We estimate that the international SportsTech market is worth \$39.6b with projections to grow to \$113b by 2021. We have undertaken significant baseline research particularly in the area of key verticals and projected outcomes, and estimate the global market value of the SportsTech sector will at least triple by 2021. This year, SportsTech Ireland is particularly focused on the creation of an international corridor between the US and Europe for sports technology companies seek to access both markets. Data, analytics, sports performance & sports participation are of key importance to the Irish market. To keep up to date with programs and events for 2018, like our facebook page.



Events & Other Initiatives__

SPORT TECH NORWAY

Sport Tech Norway
Trondheim, Norway

LILLI OFSTAD
Project Manager

MSc in Human Movement Science from Centre of Elite Sport Research at Norwegian University of Science and Technology. She has experience from developing sport technologies during study time and has active in the Girl Geek technology forum in Trondheim. She also has experience from social entrepreneurship and marketing in the norwegian brand Live Arctic. In addition she work as a sport coach as well as being an active trailrunner herself.



What do we have to know about your project?

The idea of Sport Tech Norway occurred after a technology mapping that NxtMedia did on behalf of Trondheim municipality of Granåsen sport arena in 2017. Trondheim has applied for the World Championship in Nordic disciplines in 2023 and wish to display a new and high tech arena for the event. The aim for the rebuilding of a new arena was high tech arena, making Granåsen an arena for the future and up front international, adapted for everyday use for the recreational athlete as well as professional athletes and international events. The arena should be providing the newest technologies of today, but also be an arena for testing and developing new technologies.

What did you do in 2017?

The mapping resulted in a report and a cluster of business and companies and actors within sport technology, and a good potential for creating a network within sport technology, which yet did not exist. As Norway holds high competence in both sport and technology the network has a great potential.

What are your plans for 2018?

As STN at the moment is an informal network, NxtMedia and project manager Lilli Ofstad are now working on a project for formalizing STN and defining out potential and vision for the work ahead. This running project will end in an application for Innovation Norway's network-program in march 2018 and the result of this application will be leading for the work ahead and the agenda for STN in the future.



Events & Other Initiatives__

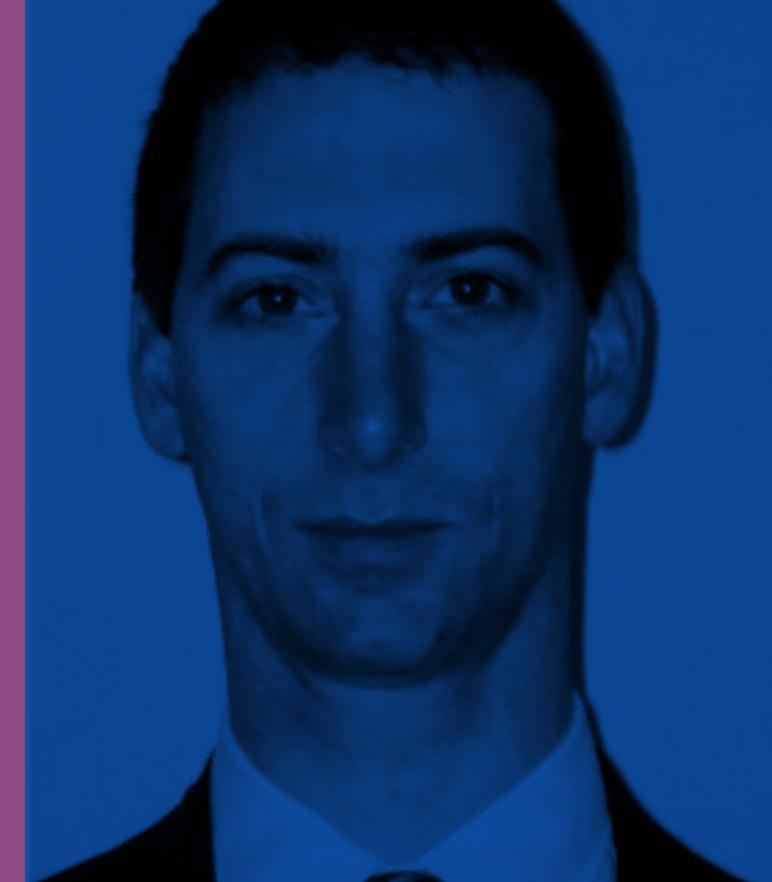


thinksport.org

ThinkSport
Lausanne, Switzerland



STEPHANE MOTTAZ
Sales & Marketing Director



Stephane is a Marketing & Sales Director with 10+ years' experience in international and Olympic sports organisations (Swiss Cycling, WADA, FIE, FISU) and major events (Olympic Games, Universiades, World Championships) combining a passion for both Sport & Innovation.

What do we have to know about your project?

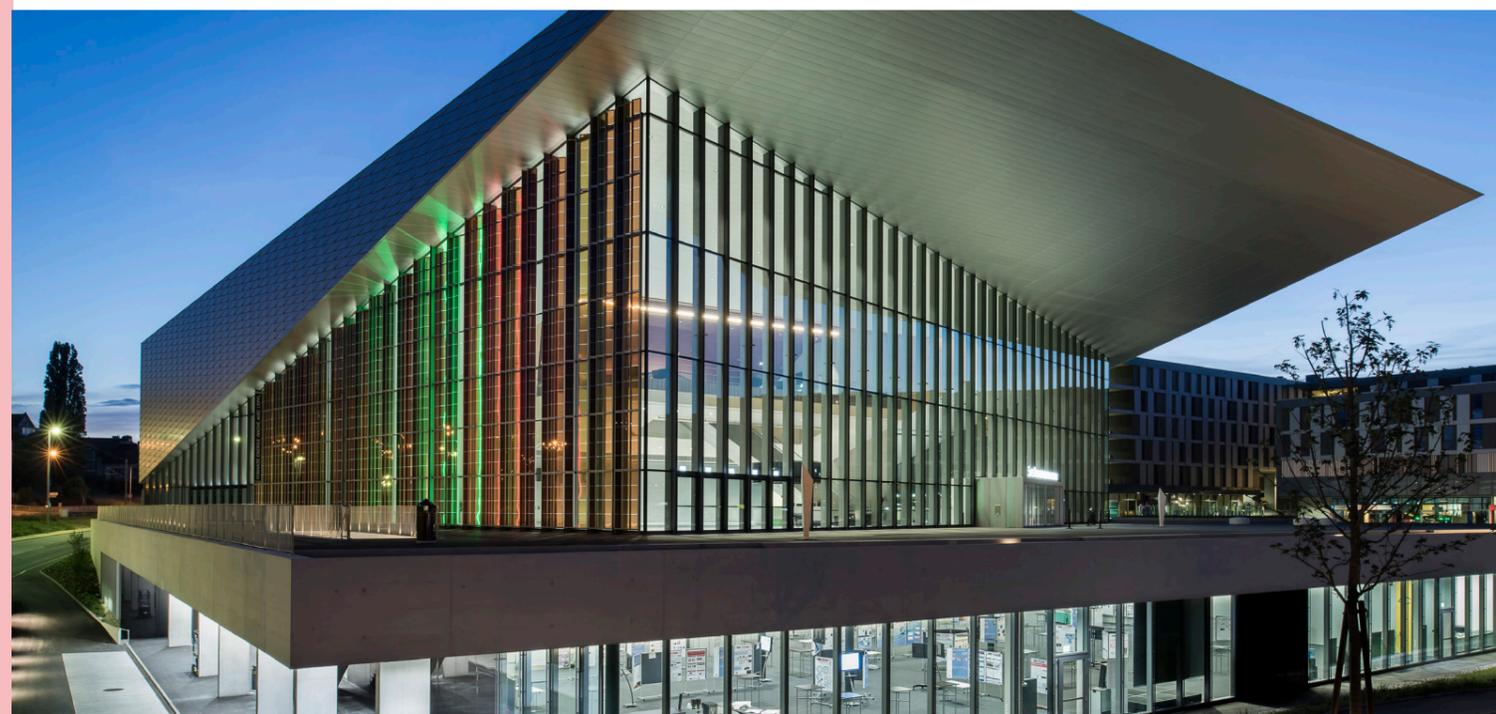
ThinkSport is the first network of its kind that brings together sports-related expertise and excellence in Lausanne, the Canton of Vaud and across Switzerland: from sports organisations, research and development institutes, educational bodies, businesses, health institutions, and the public sector, to international organisations and NGOs. We act as a facilitator for positive and creative dialogue between these different sectors, and as a one-stop-shop for any professional looking for information and expertise within the many strands of international sport. Our mission is to highlight the knowledge, expertise and diverse sport initiatives found in the City of Lausanne, Canton de Vaud, Switzerland, and to connect the variety of organisations and people with interest in international sport.

What did you do in 2017?

In 2017, ThinkSport has continuously developed its activities and notably its services to its members and its offer in terms of co-organised events as well as announced the launch of its flagship event, The SPOT, the first international sport innovation event organised in Lausanne Olympic Capital. The SPOT is a new initiative, uniting the creative imagination and expertise of business, sport, academia, media. Designed to showcase and promote innovative ideas, products, services, companies, and best practice, the two-day, international event will engage diverse sectors for collaboration, inspiration, and a uniquely enthralling experience.

What are your plans for 2018?

The SPOT event will be held in the Olympic Capital Lausanne. It aims to stimulate progress in sport by bringing together original ideas and the latest innovations from both inside and outside the sports industry. With the unique concentration of international sports organisations/federations located in the area, as well as the large number of local business and academic institutions with an interest in sport, the idea of creating a place to combine this expertise, debate and challenge the status quo, and allow people to make connections beyond their "comfort zone", was too intriguing to pass up. The inaugural edition of the annual two-day event will take place from 15 to 16 May 2018 at the SwissTech Convention Center in Lausanne, Switzerland, and will focus on the following themes: Connected Sport, New Sport, Performance & Health, Media & Marketing.



Did you know that there are almost 200 startups in Europe who are purely focusing on football?

Special —

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Last but not least: The final chapter in this report contains a special highlight. We had the great honor to speak to two of the biggest and best football clubs in the world about their tech approach. Find out how FC Barcelona and FC Bayern Munich are tackling Sports & Tech topics and what they are planning for the future.



Events & Other Initiatives__



fcbarcelona.com

FC Barcelona
Barcelona, Spain



What do we have to know about your project?

First of all, emerging technologies at F.C Barcelona are managed and facilitated internally through the Barça Innovation Hub, a sports industry center for knowledge and innovation with the idea of creating value for both the club and society in general. As such Barça Innovation Hub has formed an ecosystem that promotes a culture of transparency and openness, which includes prestigious brands, universities, research institutions, start-ups, entrepreneurs, students, athletes, investors, and visionaries around the world. By doing so, we aim to generate new knowledge and create and test new products and services. In this new scenario, Barça is becoming a truly "Sports Lab" that leverages internal assets with external collaboration. This happens in a cycle consisting of multiple phases. Firstly, we exchange ideas and knowledge with researchers and experts from around the world and combine it with that of our own professionals. Upon the incorporation of knowledge globally, we build common research venues and test those products and services- whose backbone tend to be newly emerging technologies- on our own athletes, fans and members. Once these products and services have been validated and proven to create value for Barça, we share it with other sports clubs, the market as well as other sectors.

What did you do in 2017?

In 2017, we had multiple successful projects of which three from each a different area will be explained in greater detail: Firstly, we co-developed with Real Track Systems, a user-friendly wearable tracking system, WIMU Pro. The system is able to provide the performance team with insight into technical, tactical and medical performance at an individual and a team level. The tracking system is the leader in precision, backed by a unique hybrid system, guaranteeing unrivalled accuracy to within 10 centimeters in any direction. The system is currently in use by F.C Barcelona's first team as well as the Spanish men's national team. Secondly, the 3rd edition of the Sports Technology Symposium was successfully held and attended by 600 professionals from the world of technology, innovation and sports. The event hosted by Barça Innovation Hub thus has further consolidated its position as one of the most important Sports Tech events in Europe. Third, with regard to education we successfully launched academic programs in collaboration with world, renown universities such as Georgetown University, Peking University, ESADE, ISDE and UAB. In addition to that we currently educate more than 3000 athletes, sports and business professionals on our online platforms.

What are your plans for 2018?

In general terms, the objective will be to add and incorporate additional relevant partners to our ecosystem in order to strengthen and consolidate our position as the leading center for sports knowledge and innovation. Aside from adding more partners to our ecosystem, we envision to solve the needs we have identified in the knowledge areas of Barça Innovation Hub. Within Health and Wellness, we intend to improve performance of our athletes by personalizing rehabilitation, hydration and nutrition. Furthermore, we hope to better track performance by recognizing fatigue early as well as by increasing positional data accuracy. Another objective will be to enhance the experience for our fans by providing new products and services within the stadium but also in the digital sphere. Lastly, we want to target social issues more effectively by developing innovative initiatives within the Barça Foundation.



Events & Other Initiatives



fcbayern.com

FC Bayern München
Munich, Germany



Stefan Mennerich
Director Media, Digital and Communication

Stefan Mennerich has been working for Bayern Munich in various positions since 1997 and is currently the Director of Media, Digital and Communication. He developed all of FC Bayern's online, mobile, and social media services; from website to Facebook presence to Bayern's very own TV channel as well as all Club TV programs broadcast worldwide, mobile and on television. Additionally, Mennerich is responsible for Communication, CRM and IT. Furthermore, the graduate in business studies is a member of the task force "Media Rights" of the UEFA and the DFL.



What do we have to know about your project?

The first step to approach tech topics at FC Bayern is to know what our fans expect from us in regard to tech. The second step is to know what the digital market offers. There are several ways for us to realize digital projects. Take the hackathon we hosted: more than 1.300 wanted to take part and in the end we had 220 participants. In other words, we received 220 opinions from our fans and what they want in regard to technology. But there are other ways to speak with fans or receive feedback via our digital platforms. This is an opportunity to enter a dialogue and explore what our fans expect from us. For the second step, there are many different ways to analyze the market. One approach is to analyze the benchmarks in sports, video, federations, e-commerce and other relevant sectors. We have a very good department within Bayern Munich with a great network around the globe. This way we hope to be up to date with all relevant developments. Another example of how we keep informed about current technological progress is through monthly meetings with many digital experts who show us what's happening around the digital globe. We bundle all of this information in our Innovations and Digital Department and then we decide what the next steps will be across the world.

What did you do in 2017?

One of the digital highlights was the Augmented Reality Fan Experience in our FC Bayern iOS-App. This experience, a novelty in soccer, enables users to place effigies of Manuel Neuer or Arjen Robben anywhere they like. Another highlight was the launch of our 24/7 TV Channel which provides extensive, non-stop coverage of our club. A further highlight for us was starting partnerships with Giphy, Tenor and Dugout. We were one of the first clubs in the world with a dedicated profile on Giphy and Tenor. GIFs are here to stay in the world of social media. With just a few seconds of video clips users can express their emotions, unrestricted by language barriers. We have accumulated more than 400 Million GIF views. Dugout is an innovative online platform providing football fans with one distinct area to connect with their favorite clubs and players. In that project we partner with the big European football clubs like Real Madrid, FC Barcelona, Manchester City, Arsenal London, FC Chelsea, FC Liverpool and Paris St. Germain, Juventus Turin and AC Milan. The new platform takes our fans off-pitch and offers exclusive glimpses into the world of FC Bayern.

What are your plans for 2018?

Generally speaking, we want to be one of the leading football clubs in the world in regard to digitalization. One step will be to improve the Allianz Arena experience through digitalization. For example, we plan to launch a new Arena App including features which enable new perspectives of our Allianz Arena and help the fans of Bayern Munich find their way around the stadium. Furthermore, we plan to launch an in seat ordering and pick up service for jerseys. As a consequence, we intend to improve our backend infrastructure to make it suitable for increased digitalization. Another very important topic for us is to improve the contextualization of our website and app. We aim to provide different contents for our users in Brazil working on their desktops in the morning compared to a fan using his smartphone in Tokyo in the evening. We want to achieve personal interaction and relations with our fans and will deliver the content they expect in order to give them maximum value.



Join us on the mission to
grow the international
SportsTech ecosystem.



Thanks & Get in touch —

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Once again we'd like to thank everybody who contributed to this report, especially to our data partner Dealroom.co and all the great people who took the time to give us an interview. But that's not it yet. We're continuously aiming to make this ecosystem even bigger. So everybody with interesting projects and crazy ideas is more than welcome to contact us.

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SPORTS TECH X

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