

MAGAZINE

2021

OFFICIAL PUBLICATION OF THE WORLD FEDERATION
OF THE SPORTING GOODS INDUSTRY



the **NEXT**
NORMAL

WORLD FEDERATION OF THE
SPORTING GOODS INDUSTRY



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MESSAGE

Co-Chair of the Board



The world has changed. The COVID-19 crisis has exposed world contradictions such as widening inequality and upset democracy. Economic stagnation, depopulation, major power conflicts, medical problems, and issues that will be resolved over time have also come true. Now, it seems that the ancient Roman goddess of peace and order, Pax, has disappeared and is under pressure to reconstruct 20th-century values.

The perception of global economists is that fairness and equal opportunity are essential to a sustainable growth strategy. The United Nations General Assembly adopted the outcome entitled "Transforming our world: The 2030 Agenda for Sustainable Development (SDG's)" in September 2015.

Specifically, it shows 17 global goals and 169 targets. These 17 goals can be broadly divided into three categories. The first one being support for developing countries such as poverty and hunger, health and education, and safe water. The second one is the way of thinking about energy, job satisfaction and economic growth, and the way of urban development. The third category covers climate change, the sea, and the land. The SDG's seek to solve contemporary issues on a global scale. It seems that the issues that have become apparent due to COVID-19 are in line with the issues presented by the SDGs.

Taking these goals into consideration, I think that the significance of sports has an important meaning.

The basic functions of sports are (1) a function to satisfy the natural human desire for basic physical exercise, (2) a character of playfulness, and (3) a function to maintain and improve health and physical strength. (4) It is a function that guides spontaneous creativity, ingenuity, and effort to bring about physical and mental training and a rich learning effect, (5) a function that brings about the activity of human beings exploring their own potential at the same time, (6) a function to foster communication through competition and joint relationships, and (7) a

function to bring health and wellbeing. These basic functions are some of the ways in which sport and our industry can collectively help meet the SDG targets. Through the WFSGI and its Committees, WFSGI members receive guidance, advice and leadership for the sporting goods industry on trade information and action, CR position papers and support in implementation, promotion of physical activity and play our part in transforming the world into a more fair and equal society as envisioned by the United Nations.

Our sports industry was also greatly affected by the one-year postponement of the 2020 Tokyo Olympics and Paralympics. Though the postponement was not in our control, we will strive to do everything in our power to adapt to the change and produce a positive outcome. We should turn the scourge brought by COVID-19 into a blessing by evaluating the way we work and live and making the changes necessary to prosper as businesses and as an industry in "The Next Normal".

The board and dedicated staff at WFSGI are committed to adapting to the "next normal" and supporting the industry with its needs. WFSGI maintains its function by making full use of remote work for the person-to-person connection lost due to COVID-19 through virtual meetings with committee members and directors around the world. The well-being and success of our members is at the heart of the WFSGI. It is my honor and my privilege to be the WFSGI Co-Chair for a second time. Working together with my fellow Co-Chair and the WFSGI Board, we strive to innovate and strengthen the sporting goods industry and to provide positive and stable leadership during this challenging time.

With best personal regards,

Motoi Oyama

WFSGI Co-Chair of the Board

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MESSAGE

Co-Chair of the Board



It is an honor for me to address you in this new role as Co-Chair of the World Federation of the Sporting Goods Industry. In our world today, we are facing a global pandemic and many challenges coming from that, but also, we are seeing a great opportunity for sport and the sporting goods industry to continue to come together and unify our world.

This year I have been elected as a Co-Chair of the WFSGI, together with my colleague, Motoi Oyama. It is truly a privilege to represent the WFSGI and our joint interests in bringing the sporting goods industry to the next level while striving to offer our industry stability and assurance during these turbulent times.

As our world is changing, we are entering into what appears to be “the next normal”. With a strong organization and system in place, including the leadership of the WFSGI Board of Directors, WFSGI membership, and staff, we are prepared to face the uncertainty of our current world and turn this into an opportunity.

The challenges resulted from the pandemic are impacting our industry in almost every sector: the postponement of the Olympic Games and Paralympic Games, the manufacturing and supply chain shortages and challenges, the reduction of workforce and labor, the environmental issues we continue to face in our time, but also the fear of the economy taking a more drastic toll than it already has. Traditional problem solving is dissolving, causing our industry to rely much more on technology and innovation.

We have been forced to adjust and innovate our way of thinking and our way of working. We are breaking down barriers and embracing the digital and virtual world to continue working together, meeting virtually to solve our industry's challenges.

Together with the WFSGI, I am ready to take on any challenge that the future holds. I look forward to serving the sporting goods industry and the WFSGI members for the duration of my term. Thank you for your trust in us.

With best personal regards

James Zheng

WFSGI Co-Chair of the Board

SUSTAINING MEMBERS

The sustaining membership is a complementary membership. Companies that choose to be a sustaining member demonstrate a strong identification with the Sporting Goods Industry worldwide, the WFSGI and its objectives.

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MESSAGE

President and CEO



What a year it has been! 2020 was a year filled with new challenges as we faced a global pandemic. During these unprecedented times, the sporting goods industry was forced to unite and face these challenges together.

At the beginning of 2020, the WFSGI elected new co-chairs to lead the WFSGI for the next 3-year term. The leadership of our past chair, and those who led before him, helped well position the WFSGI. With our new Co-Chairs, Motoi Oyama, and James Zheng, I am confident that we are in a strong position to support our industry, despite the challenges we have faced and will continue to face in this next normal.

The year began with preparations for the Tokyo 2020 Olympic and Paralympic Games and a significant area of new work in relation to World Athletics. Due to the postponement, we will continue to work in these areas in the new year.

While many countries entered a period of lockdown, the pandemic caused a surge in demand for bicycles and cycling. As a result, the Bicycle Committee exchanged best practices for production and supply chain challenges. Despite the lockdowns and restrictions surrounding the pandemic, we have continued to actively promote our global movement, offering our members a virtual platform to hold committee meetings, working groups, and webinars.

WFSGI has continued to be active in the areas of Trade, Legal, and Manufacturing.

In Trade, the Committee Members have exchanged and updated one another on the USA trade measures which were taken by the Trump administration and reviewed the Brazilian anti-dumping duties on footwear imports from China. Most recently, the WFSGI Trade Committee decided to actively engage in a new trade case involving the Indonesian initiated safeguard investigation on articles of apparel and clothing accessories.

In Legal, the Global Labelling Database continued to add value for our members, as well as companies outside of the WFSGI. The Legal Committee has also added a new working group on Digitalization of Product Information, aiming to find concrete solutions to push for digital labeling and sharing best practices among the Sporting Goods Industry.

In Manufacturing, the WFSGI has opened its Committee to both representatives from manufacturing companies, as well as representatives from brand and retail companies, allowing for a greater level of engagement across sectors.

We have further developed our digital platforms, including our social media channels and our website to better serve our members. The newly improved website, which will launch in 2021, is an essential part in simplifying access to our policy areas, confidential information for members, and registering for events.

Today there are numerous variables that are out of our control, however, there are ways where we can bring our influence and impact how we operate our daily business. Together with the WFSGI staff, Board of Directors, Committee Chairs, and Committee Members, I am confident that we can continue to bring global solutions to the industry, through our international teamwork.

Thank you for your membership and support!

With best personal regards,

A blue ink handwritten signature, appearing to be 'Robbert de Kock', written in a cursive style.

Robbert de Kock
WFSGI President and CEO

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By John Coates AC,
IOC Vice President, Chair of the
IOC Coordination Commission for
the Olympic Games Tokyo 2020

FINDING OPPORTUNITIES IN A NEW NORMAL

John Coates has been a member of the International Olympic Committee (IOC) since 2001, Vice President from 2013-17 and 2020-the present, and a member of its Executive Board from 2009-2013 and 2020-the present. He is currently Chair of the IOC's 2020 Tokyo Olympic and Paralympic Games Coordination Commission. A graduate in law (LLB), Coates has been President of the International Council of Arbitration for Sport and Court of Arbitration for Sport (since 2011); President of the Australian Olympic Committee Inc. (since 1990) and Chair of the Australian Olympic Foundation Ltd (since 1995). He was Chef de Mission of the Australian Olympic Delegations in Beijing, Athens, Sydney, Atlanta, Barcelona and Seoul. At the Sydney 2000 Olympic Games, Coates was awarded the Olympic Order in Gold. In 2006 Coates was appointed to Australia's highest civilian honour as a Companion in the General Division of the Order of Australia (AC) "for service to the development of sport nationally and internationally through the Olympic movement promoting the wellbeing of youth and values of tolerance, understanding, peace and mutual respect between peoples of the world".

How the International Olympic Committee has approached re-planning for Tokyo 2020 amid ongoing uncertainty. And why the first postponed Olympic Games will spearhead a new approach for the future.

One thing we all learned in 2020 is that certainty is only ever an illusion. You can come very close to something immense and suddenly it feels remote and full of unknowns. This was our experience with the Olympic Games Tokyo 2020.

The Covid-19 crisis that led to the historic postponement of these Games is unlike any other I have faced in my 40-year career in sports administration.

This crisis has been chronic; constantly evolving – hour by hour, day by day. We have had to take decisions in a global context of uncertain and rapidly changing information. And, in common with so many organisations this year, we have had to change direction.

Pivoting will be a familiar concept to anyone working in the sporting goods sector. Indeed, sports brands have provided some of the year's best examples. We've been humbled and inspired by your adaptability and commitment to continue supporting athletes during this period of unimaginable challenge for your businesses.

Pivoting, however, does not come easy on the scale of the Olympic Games. As an organisation, the IOC has been required to work in entirely new ways, and in ever closer collaboration with a large coalition of partners.

Of course, every crisis is also an opportunity. And the decision to postpone the Games by one year has set in motion a process that promises considerable long-term benefits – to the ways in which the IOC works as an organisation and also to the model of the Games.

As Chair of the IOC Coordination Commission for Tokyo 2020, I've been at the helm of a new joint taskforce, bringing together the IOC, International Paralympic Committee (IPC) and Tokyo 2020 with stakeholders from across the Olympic and Paralympic movements.

The body was created to streamline and accelerate decision-making as we approached the phases of redefining the product and re-planning the Tokyo 2020 Games to meet the new reality.

Together, we have worked through over 50 measures designed to maximise the cost savings – to the tune of potentially USD 280m – and increase efficiencies in Games delivery.

Examples include reducing the workforce, adjusting transport service levels, simplifying venue overlay and optimising use of new technology.

In addition, we are looking to simplify the Torch Relay, while maintaining the overall duration, the Look of the Games, and making the production schedule more efficient.

The efforts have been enormous, and they continue. We look from venue to venue, sport by sport, leaving no stone unturned. The only red lines – that we will not cross – relate to the athlete experience and field of play.

Finally, we must consider different scenarios, given the still-evolving context and the ongoing development of vaccines. These scenarios range from best case in which the virus is controlled worldwide, to different regional scenarios and cover a range of aspects including health, economic conditions, public policy/regulation and public opinion.

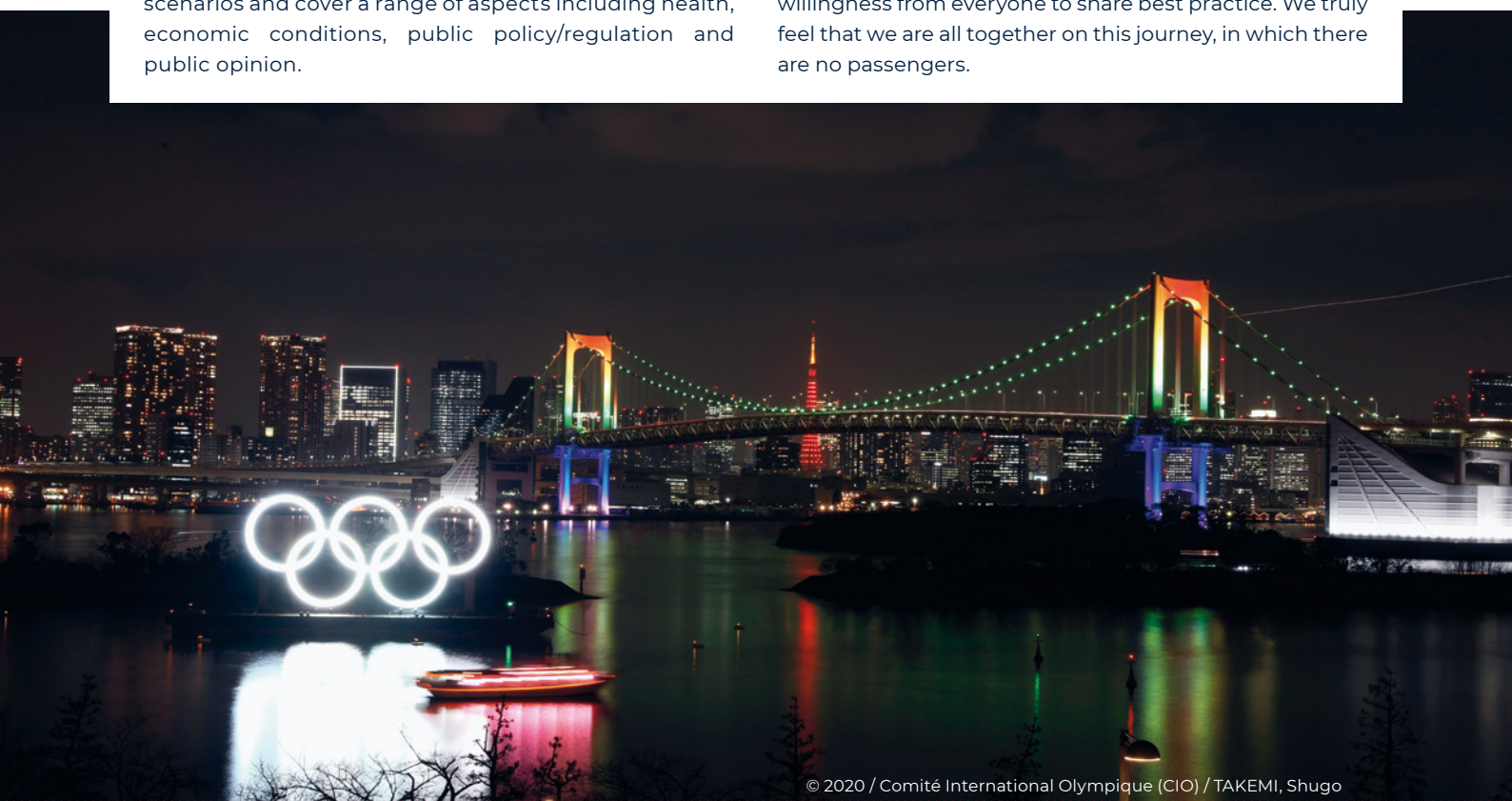
Practically, this means we are working with the joint taskforce and Japanese authorities to identify baseline operational requirements and Covid-19 counter-measures (social distancing, PPE, cleaning standards, etc.).

We will use these counter-measures to build a toolbox of solutions that can be rolled out when and if required. One such example is testing, which is central to the process for enabling participants to travel safely to Japan from around the world. We are closely monitoring the development of new tests, which will have a significant bearing on how this works.

In each scenario, we must also apply each measure to each of the Olympic Games functions. What does it mean for the Olympic Village, for example? Or for venue access? Or for public transportation? How will it impact spectator and fan experience?

The result is that we are planning for Tokyo 2020, Beijing 2022, Paris 2024, Milano Cortina 2026 and LA28 at once. The coordination required is immense, from the top levels of government right down to the individual volunteers, who will each carry some responsibilities for implementing the solutions.

What helps is that there is enormous goodwill and willingness from everyone to share best practice. We truly feel that we are all together on this journey, in which there are no passengers.



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In particular, the process has strengthened the IOC's collaboration with International Federations as well as other sports organisations such as Formula 1 and many of the European football leagues. We have learned from their experiences as their competitions have resumed; and we take encouragement from their success.

In the long-term too there will be positive benefits from new partnerships and coordination structures. Most significantly, the work we have completed together to redefine and simplify Tokyo 2020 is likely to become the new model for the Games.

In effect, the process has accelerated efforts initiated under Olympic Agenda 2020 to make the Olympic Games more efficient and sustainable for future hosts. The focus is on reducing volume, not services – for example by finding creative solutions to shorten venue rental periods.

Already, the teams from Paris 2024, Milano Cortina 2026 and Los Angeles 2028 are studying how to apply the new standards and the wealth of knowledge and experience shared through the taskforce. There is great enthusiasm, in a context where everyone is applying a new, post-Covid 19 filter to their vision and legacy programmes.

An example is the proposed revised venue plan for Paris 2024, with efficiencies enabling a reduction in the total number of venues to be used.

With Beijing 2022, which will take place just six months after Tokyo, the unique opportunity is to build and sustain audience engagement from one Games to the next – the first back-to-back Olympic Games since 1992.

And the story we will tell is also significant. The message we will bring to life in Tokyo is that we are #StrongerTogether. There is enormous power in working together, with a strength of purpose, towards a common goal.

I have seen it every day, from the start of this crisis, in the extraordinary efforts of our colleagues in Tokyo, including the Tokyo and Japanese governments, and from all our Olympic Movement stakeholders – partners, media International Federations, National Olympic Committees....

The common goal is Tokyo 2020, where we will all experience the joy, universality and shared humanity of the Olympic Games in a new and truly powerful way.





By Christophe Dubi,
Olympic Games
Executive Director

DRIVING INNOVATION

Christophe Dubi was appointed Olympic Games Executive Director in 2014. He is responsible for overseeing all activities related to the organisation of the Olympic and Youth Olympic Games, from host selection to the dissolution of the Organising Committee. Prior to this, Dubi, who joined the IOC in 1996, served as Sports Director overseeing the relationship with all International Federations and responsible for all aspects of competition.

How the IOC approaches innovation and why the future of the Olympic Games will be more experiential than ever

What is the future of the Olympic Games? At the International Olympic Committee (IOC), we know we are not alone in asking the question.

If the Games have survived and thrived through generations, it is because of their capacity to adapt to changes in global lifestyles and popular expectations.

But today we are facing a significant moment of digital and societal transformation.

And today we live in a world where innovation is less a process than a discipline.

Of course, this will come as nothing new to readers of this magazine. Innovation has long been the driving force of the global sporting goods industry, whose brands provide a frequent source of inspiration and learning for our teams.



This year, more than ever, we have seen sports brands take the lead in embracing the possibilities of new technology – and particularly in encouraging new forms of sports practice – helping to keep people active in lockdown and engaged with sport during a period when elite competition was on hold.

Innovation in the context of the Olympic Games is equally purpose-driven. Our aim is to attract and retain more fans by bringing the Games closer to more people; by involving more fans in the experience of the Games; and being more flexible to their needs.

The Olympic Games belong to everyone, and the strategy is based on putting people at the centre. It's opening our arms and finding new ways to make the Games more inclusive, participative and experiential.

In real terms, it means more free-of-charge fan activities; more opportunities to actively participate; and new ways to amplify the Games experience using digital channels.

Indeed, this focus on innovation sits at the heart of Olympic Agenda 2020. It can be seen in the new Olympic House – one of the world's most sustainable buildings – and in sweeping changes to the host selection process, designed to ensure that future Games fit better with local contexts and communities. The fundamental shift is that the Games adapt to the cities. Already, bid budgets for the 2026 Games were reduced by 80 per cent.

While measures to improve sustainability and efficiency have dominated headlines, work on the Games themselves has been just as intensive.

We began by mapping all the individual experiences that make up the Olympic Games, and which make the Games unique in the landscape of global sports and entertainment.

It starts inside the venues and becomes a question of how to amplify those experiences to reach a larger audience.

The “phygital” dimension – the combining of physical and digital spaces – is where we see great potential, in common with our partners in the Organising Committees, particularly in this context of accelerated digital transformation.

Mass participation events are also a key area of focus. Take the example of Paris 2024, where an open running race will be held on the same day and course as the Olympic Marathon competition. There will be different distances to ensure people who cannot manage the full marathon distance can still compete.

Such innovations have their roots in the Youth Olympic Games (YOG), which have become a reliable laboratory for new sports events and experiences since the first edition in Singapore 2010.



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It was at those Games, for example, that we saw the first official Basketball 3X3 event – a discipline that will feature in the postponed Tokyo 2020 Games next year. Likewise, Breaking – complete with a pioneering video qualification process – was a break-out hit at the YOG Buenos Aires 2018, and is now set for inclusion in Paris 2024.

New sports such as Surfing, Skateboarding and Sport Climbing are also driving a shift towards a more experiential and lifestyle-oriented Games.

The new Playground experience concept will take future Games to the heart of host cities. Fans without tickets will be able to watch and interact with Olympians during open warm-up sessions, alongside participating in urban sports workshops, enjoying great food and experiencing live music and entertainment.

Overall, the trend is always towards bringing people closer to the action. This is equally true in the digital space, where the IOC's new strategy is based on a 'direct-to-people' approach, using personalisation, localisation and athlete-led content to drive direct engagement with Olympic Games audiences.

Meanwhile, LA 28 has made its own statement about innovation and inclusion with the launch of the first ever-changing animated Games logo, that celebrates the city's diversity through individual stories.

The Olympic Games will survive and thrive because of innovations like these – big and small; structural and experiential; inspired and driven in collaboration with our vast network of partners.

The future of the Olympic Games will have innovation at the heart of the story, just as it has always been, based on a fundamental openness to change; to new ideas; and to people.



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By **Charlie Greenwood**,
CEO and Founder,
Sports Loft

7 AREAS WHERE TECHNOLOGY WILL SHAPE THE FUTURE OF THE SPORTS INDUSTRY

Charlie runs Sports Loft. They work with the tech companies that they believe will shape the future of the sports industry. Sports Loft currently works with 10 companies - 6 from the US, 3 from the UK and 1 from Israel ranging from late seed through to Series A and Series B. Previously Charlie worked at Nike and AEG and has consulted with many of the leading sports organisations such as the FA, Premiership Rugby, Puma, Limelight Sports, Adidas, British Tennis, British Athletics, F1, NFL UK and M&C Saatchi.

At Sports loft, we seek out the companies that will shape the future of the Sports Industry. We have identified 7 areas that we think are going to change significantly through rapid digital adoption and where rightsholders, brands, broadcasters and other stakeholders in the sports eco-system need to be aware of the latest technologies. From on-pitch performance to engaging with fans at home and new ways to create content, these are the areas to watch.

At Sports Loft, we seek out and support the companies that we believe can shape the future of the sports industry. The “seeking out” part of that sentence is easily overlooked – as we spend lots of time meeting with companies and working out which are really exciting. However, to do that, you have to have a point of view as to where the industry is going and which are the areas that will see the highest levels of adoption of new technology.

We have identified 7 areas in the sports and media industry that we feel are going to change significantly in the coming years (much of which will be driven by the macro effects of COVID), where innovative tech companies can shape the future of the industry and where Sports Loft’s network and expertise can help them. For this article, I’m going to set out the 7 areas that we think are going to see the most demand for new technologies.

1 Half of Premier League clubs spend more than 70% of their revenues on player salaries. The players are in most cases the most valuable assets that a club has. Whether that is sustainable is a different matter, but if you are going to spend that much money on your players you are going to want to maximise the return that you get for that money. GPS tracking systems and similar technologies have been widely adopted across many sports for both

matchday and training, but we anticipate a significant growth in the adoption of technologies (and increasing sophistication of those technologies) that can help those players prepare and perform better, help players spend more time on the pitch and help teams make better decisions. In effect, technologies that can help the team (whatever sport) get maximum return from the players that they are investing in.

2 COVID has shown us how important community is – from zoom calls bringing people together for work to friends watching soccer matches together and runners comparing their times with their friends. There is a much broader trend for community based business models at the moment which has been getting a lot of attention from the venture capital community. However, whilst sport is inherently community driven, in many cases it has been slow to adopt these sorts of community based business models and we think that will change and will be especially noticeable in fan engagement, personal fitness and with the training of elite athletes. We think that there will be a noticeable increase in the usage of technologies that can bring people together around their shared sports and media passions.

3 In the next few years, sports organisations are going to be driving commercial revenues in an increasingly challenging environment. Up until now, many commercial departments have operated on a pretty basic level, but that is going to need to change and they are going to need to become much more sophisticated if they are going to be successful. This can already be seen in the way that rightsholders are having to find ways to “make good” for sponsors as stadiums have been closed to fans – and in almost all cases they are turning to digital. We anticipate a big demand for technologies that can improve the commercial operations within sports organisations – eg ways to think about partnerships so that they demonstrate genuine business cases rather than relying on antiquated equivalent media value metrics, ways to gather and use 1st party data, ways to value fanbases and more innovative ways to approach ticketing. Whilst many commercial departments may have viewed these as “nice to haves” in the past, these sorts of technologies are now going to be viewed as necessities.

4 The coming years are going to see a significant growth in the number of entities distributing content to fans – whether this is teams and leagues developing direct-to-consumer offerings, tech companies buying sports content as new commercial models develop or new content platforms emerging to challenge the current broadcasters. This is going to create significant demand for technologies that can help content owners a) genuinely understand their fanbases and how to market directly to them b) create and distribute high quality content at low cost and c) deliver products that fans will want to engage with and keep coming back to.

5 Participation has long been the poor relation of the professional game, but look at the stats under COVID – running is up, cycling is up and tennis courts are fully booked. At the same time, we expect to be able to measure our performance and compare with our peers, whilst Peloton, Zwift and others have shown that we can do our sports physically on our own. Equally, there is a huge opportunity for clubs and brands to engage with fanbases through coaching and skill improvement. We are especially excited about technologies that can change the way that people talk about their performance – rather than “I scored two goals” as the measure of having had a good game, being able to say “I covered 15% more ground than last week and my pass completion was 20% higher”. We see a clear opportunity for companies that can help participants really understand how well they are playing, compare with others and really change the way that people talk about their performance.

6 “Like a good waiter, this tech and content must rapidly not just know our tastes, but be there when needed and be invisible when it isn’t” – DuBose Cole, Vayner Media. We think this sums up the next stage of personalisation rather well – moving on from trying to push us something through re-targetting ads and beginning to anticipate a need and give us a solution at the right time. In the sports and media sector, where we are deluged with content, there is a huge appetite for additional information and there is masses of data about the audience (even if little is currently done with that data), little has been done above the basics. As demand for personalisation grows and consumers seek to contend with the mass of content available, brands, leagues, teams and broadcasters will be looking for companies that can bring the next generation of personalisation techniques to the sports and media industry.

7 In the past 18 months, we have been repeatedly pitched startups that are focused on fan engagement – but it has been yet another quiz capability or polling game. They had become very repetitive and few stood out. COVID has changed that – with matches being played behind closed doors, the underlying product is weaker and fans are looking for new ways to engage – and once they find platforms and products that they like, they aren’t going to go back to a linear, non-interactive experience. We think that there is going to be a significant growth in the number of fans looking for new ways to engage whilst sat at home and think this provides an opportunity for companies that can deliver ways for broadcasters / teams / leagues to engage fans at scale, can get fans to keep coming back to their products and genuinely enhance the fan experience.

Many of the companies that we will work with at Sports Loft will fit into more than one of these 7 focus areas, and that is fine, but they must fit into at least one. If you run a startup and feel that you fit into at least one of the categories then please do get in touch. Equally, if you are at a sports organisation and this has resonated with you, then please get in touch as we are probably talking with some great technologies that can help you.

COMMITTEE ON INTERNATIONAL SPORTS ORGANIZATIONS



Activity Report 2020

Summary

2020 was an unprecedented year for CISO members and the WFSGI. The year began at pace with preparations for the Tokyo 2020 Olympic Games and Paralympic Games in the final phase and a significant area of new work in relation to World Athletics and the regulation of competition footwear. However, very early on in 2020, as with the rest of the world, CISO's work was significantly changed as a result of the development of the COVID-19 pandemic and the postponement of the Tokyo 2020 Olympic and Paralympic Games to 2021.

Though much of the preparatory work for the two upcoming Olympics Games in Tokyo and Beijing was put on hold until the last quarter of 2020, many of the International Federations took the opportunity created by the enforced break from competition to make amendments to their regulations and to seek feedback from the industry through CISO. WFSGI thanks all those Federations who contacted WFSGI for assistance in this regard and for their good cooperation in considering the industry's feedback. We encourage all International Federations to contact WFSGI should they be interested in obtaining industry feedback on the evolution of their rules and regulations impacting the industry. Please contact our WFSGI Vice President for Strategic and External Affairs Emma Mason emason@wfsgi.org.

Mandate

CISO represents the WFSGI as the industry consensus voice before all sports federations and organizations on a range of issues including advertising and marketing regulations, uniform and equipment regulations, ticketing and accreditations and sport development and innovation. The CISO promotes maximum and equal benefit to all WFSGI members and the sporting goods community at large.

CISO Leadership

As with 2019, the CISO continued to be led by Chair Johan Adamsson (Global Director of Sports Marketing and Sports Licensing, PUMA, SE), supported by two Vice-Chairs: Craig Masback (Senior Director, Global and NA Athletics Sports Marketing, Nike, Inc.) to September 2020 and Jens Jacobsen Jensen (Vice President Global Brand & Sports Marketing, Legal & Business Affairs, adidas, AG). The Chair would like to thank all members of the CISO and, in particular, his Vice-Chairs for their ongoing support and industry solidarity.

IOC Relations

Rule 40

CISO continued to work constructively with the IOC to ensure that clear guidance was provided to WFSGI members on the implementation of the new Rule 40 'Key Principles' and on how the IOC's new submission platform for marketing campaigns would operate in practice. Though this work was temporarily on hold as a result of COVID-19 uncertainties, it re-started in Q4 2020 and WFSGI continues to push for a more holistic and purpose driven relationship between the industry and the Olympic Movement for the benefit of the athletes, the Olympic Games and the industry. This work is particularly important for the industry given the prevalence of sporting goods companies who support athletes and teams present at the Olympic Games: globally, sporting goods companies made up over 50% of the companies who applied to promote athletes by using their images in marketing at the Rio 2016 Olympic Games. By comparison, the next largest industry was the watch industry who made up 3.5%.

Rule 50

WFSGI continues to provide industry input to the IOC in relation to the evolution of Rule 50 in accordance with the MOU between the two organisations. In 2020, there was progress on Rule 50.1 (advertising and marketing) for Tokyo 2020 in 2021 and for the Beijing 2022 Olympic and Paralympic Games which are also quickly closing in. The main changes to Rule 50 for Tokyo 2020 was an announcement from the IOC that face masks and coverings would for all participants (including accredited staff) would need to remain unbranded. At the time of writing, the IOC Athletes Commission was still conducting a review into the application of Rule 50.2 (demonstrations by participants) and aims to 'consult with the athlete community and explore additional ways of how Olympic athletes can express their support for the principles enshrined in the Olympic Charter, including at the time of the Olympic Games, and respecting the Olympic spirit'. A recommendation is expected to be given by the IOC Athletes Commission to the IOC Executive Board in the first quarter of 2021.

NOC Uniform Support Programme

The IOC and CISO continued their solidarity work in 2020, after a COVID-19 enforced break, by progressing the final elements of the NOC Uniform Support Programme for Tokyo 2020 in 2021 and beginning preparations for Beijing 2022. The Tokyo edition of the solidarity initiative will see 11 sporting goods companies provide, at a minimum, free of charge competition apparel to over 300 athletes from 72 NOCs. The athletes involved in the programme would otherwise be unable to compete at the Tokyo 2020 Olympic Games as their NOCs either do not have a sponsor and/or are otherwise unable to procure Rule 50 compliant product. The WFSGI brands supporting this initiative are: adidas, arena, ASICS, Descente, Mizuno, New Balance, Nike, Inc., Orbea, Pentland (Speedo and Canterbury), PUMA, and Under Armour. WFSGI recognises and thanks you for your ongoing support for the athletes and the Olympic Games.



INCOMPARABLE



LINING SHADOW RUNNING SHOES

Ticketing & Technical Accreditations

Through WFSGI's MOU with the IOC, WFSGI was able to provide opportunities to its members to purchase tickets to the Tokyo 2020 Olympic Games. Following the postponement of the Games, WFSGI was also able to offer a full refund to those who requested it. At the time of writing, it is uncertain whether the Tokyo 2020 Olympic Games will offer the opportunity for Technical Accreditations in light of the ongoing COVID-19 restrictions and what ticketing and accreditation opportunities there will be for Beijing 2022. WFSGI will continue to work with the IOC to keep WFSGI members updated on this topic.

IF Relations

World Athletics

At the start of 2020, WFSGI and the industry began work with World Athletics (formerly IAAF) on their new approach to the regulation of competition footwear. Following two iterations of the Rules published in January and April 2020, WFSGI was asked to Co-Chair a Working Group that was tasked with 'scoping and overseeing studies around shoe technology, exploring definitions to provide clarity to athletes about the shoes they are able to compete in, creating a robust certification and control process and providing expert advice and recommendations to the World Athletics Competition Commission on the future direction of World Athletics' Rules and Regulations concerning elite athlete shoes for the long-term which may or may not be different to the current rules. Owing to the volume, intensity and importance of this work to the industry, WFSGI has formed a specific Athletics Committee with the Chair and Vice Chair positions due to be announced in early 2021.

FIFA

As in 2010 and 2016, WFSGI together with the leading football brands worked with FIFA to provide constructive input on an update to its Equipment Regulations. The feedback had a particular focus on improving the usability of the Regulations, allowing for greater product innovation while preserving the integrity of the game, and achieving greater harmonization of the FIFA Equipment Regulations with the Continental Confederations from a practical and sustainability standpoint.

International Handball Federation

WFSGI worked closely with its handball manufacturers and the IHF to clarify the new rules relating to resin-free handballs and the opportunities available to all handball brands. This was a new area of work for WFSGI in 2020 and the industry looks forward to greater engagement with IHF on the implementation of this important new aspect of the handball game and other relevant topics in future.

World Rugby

As with previous years, the industry was represented through WFSGI at the annual manufacturers meeting and there is an ongoing discussion between World Rugby and WFSGI concerning sustainability of their approved products.

On behalf of its members, WFSGI thanks all International Federations it has worked with in 2020 for their willingness to engage the industry in the evolution of their rules and regulations. The industry is a passionate stakeholder in each of their sports and WFSGI looks forward to working more closely with each of these Federations in future on a range of relevant topics for the benefit of the athletes, the sport and the industry.

Chair



Johan Adamsson
Global Director of
Sports Marketing
and Sports
Licensing, PUMA
SE

Vice-Chair



**Jens Jacobsen
Jensen**
Vice President
Global Brand &
Sports Marketing,
Legal & Business
Affairs, adidas AG

Vice-Chair



Craig Masback
Senior Director,
Global & NA
Athletics Sports
Marketing, Nike,
Inc.

Ex Officio

Emma P. Mason
WFSGI Vice
President for
Strategic and
External Affairs

CHECK ALL
COMMITTEE
MEMBERS





By Dr Brian Moore,
CEO, Orreco, Sports
Scientist

RETURN TO PLAY AND THE ELITE ATHLETE, NO SUCH THING AS THE NEW NORMAL

Brian is co-founder and CEO of Orreco. Brian has worked in sports haematology since 1999 when he uncovered patterns in the haematology of elite athletes as part of his doctoral research at Brunel University, London. He has worked directly with multiple World and Olympic medalists, and numerous pro sports teams and athletes competing in MLB, NBA, NHL, PGA Tour, UEFA, America's Cup Sailing and Formula1. An Applied Physiologist and expert in blood biomarker technologies, Brian has an international reputation for using sports science and data science to provide evidence-based actionable analytics to accelerate recovery, optimize performance and prolong the careers of elite athletes.

Orreco helps the best athletes on the planet be ready to perform. From rookie players to veteran pros, the company with offices in Galway, Ireland, London and Los Angeles, helps elite athletes tolerate the physical demands of professional leagues, accelerate recovery and extend playing careers. Orreco uses biomarkers and data science to identify an athlete's individual thresholds and provide personalized strategies to keep athletes in their peak performance zones. The Covid19 pandemic has focused the company on helping players and athletes to maximise their training and performance in difficult circumstances. The importance and power of the immune system is clear for us all to see, and has the attention of the world as we chart our way through these challenging times.

"Orreco is passionate about helping athletes to be the best that they can be on any given day. With Covid 19 our technologies have helped teams and federations to resume playing as quickly and safely as possible. Limited training time and truncated off-seasons are associated with an increase in soft tissue injuries risk as their tolerance to training load is lower, as was seen in the NFL Lockout of 2009 and the rash of achilles tendon ruptures and muscle tears were recorded "

Orreco's Senior Sports Scientist Dr. Georgie Bruinvels has been exceptionally busy in 2020, helping our roster of athletes and players to adapt to the realities of the Covid19 (C19) pandemic and various lockdowns. Georgie is calling attention to the data that suggests Female athletes have been disproportionately hit by the pandemic. We know from Orreco research that the physiological impacts of the lockdown have also been profound as evidenced by disturbances to the menstrual cycle.

As they fight against more limited training opportunities and drastic cuts to their competitive calendars, the challenges are many but there is opportunity too.

"How do they find that extra edge when they have time to kill and can't get to training grounds and tracks?" With a lot of their sports completely cancelled, female athletes have had to learn a lot about themselves this year," says Georgie.

"There has been a monumental shift in understanding about female health in particular. Female sport may be seriously impacted but a negative has been capitalised on and women's sport is slowly recovering," she says.

Orreco reacted to the C19 pandemic by doing what it does best – making available to its clients an evidence-based treasure trove of expert knowledge and insights about athlete's performance and physiology. We organised a series of webinars and online conference for athletes, coaches, physios and sports practitioners.

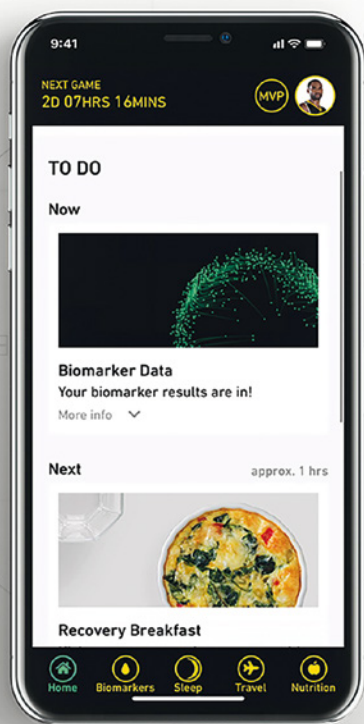
Where possible, we use our 15 years of expertise in biomarkers to gain more context. So, in many ways our response to C19 has been an agile but natural evolution of our work rather than a sudden pivot or forced reaction.

So how have we helped female athletes and players in particular?

In response to C19, we ran an online series with physicians and scientists on the impacts. These had contributions from NASA immunology, Harvard MGH, UCL, medical directors of EPL teams, team physicians and scientists and athletes from NBA, MLB, Olympic Sport, NCAA, F1, PGA tour, ATP, WTA, FIFA and our Wasserman roster.

With schedules disrupted and compromised, we deployed our experts and our bespoke suite of female athlete consultancy tools including the acclaimed FitrWoman to advise on training and competition in difficult circumstances.





This year has seen sports teams everywhere investing heavily in the health, well-being and longevity of their athletes and players. At Orreco, we've doubled down and accelerated the development of our cutting-edge data products.

Orreco Chief Science Officer Dr. Charles Pedlar says: "Never before has the awareness of health and well-being, particularly among elite athletes, been so heightened. Everyone wants to look after themselves and looking after people is Orreco's business."

For 15 years, our goal has always been to use evidence-based data to help elite athletes to perform better – to help them find that extra edge that puts them on the winning podium, that helps them be the first over the line, or the best on the pitch.

We have worked with athletes on how to align and maximise their performances, and manage their menstrual cycles, while minimising the risks of injuries associated with relative inactivity and the resumption of training loads, such as soft-tissue injuries.

Our individualised training programmes are delivered and monitored with our platforms that have powerful AI engines built by our technologists. These include not only FitrWoman but FitrCoach, a new Covid 19 Symptom Tracker and an exciting new Orreco platform that we call @thlete.

This suite of products will be to the fore in 2021 in helping our athletes and teams return to winning ways. Georgie adds: "So many people get pleasure from sport and from a female athlete perspective, it is essential that things get back up and running – with the Tokyo Olympics (2021) and other marquee sports events looming."

Georgie participated in Nike's Trained podcast, demonstrating that the menstrual cycle can serve as a guide for planning how you train, eat and recover to get more out of all three.

She outlined a plan for each of the cycle's distinct phases; discussed the long, hard fight for gender equality in research and debunked some enduring myths.

Among the Orreco tools that can help them maximise performances is @thlete, which we like to say acts as 'the coach in your pocket'. It has the ability to crunch and analyse multiple streams of data. @thlete gives athletes and players the best possible chance to protect health and wellbeing, perform optimally in their next game and, ultimately, prolong their careers.

Built by a team of 17 Orreco Phd scientists, the platform is being used by female athletes, in the NBA by the Dallas Mavericks and Atlanta Hawks and also by players such as the Toronto Raptors' Pascal Siakam. In the UK, @thlete will be deployed by Premier League soccer teams including Newcastle United FC and Tottenham Hotspur FC as well as by Chelsea FC. Women in the WSL.

So what does it do?

@thlete uses powerful AI to compute key data and give player-personalised insights drawn from performance metrics and daily wellness signals such as energy, muscle soreness. @thlete can suggest appropriate pre-game or pre-training meals and other nutrition actions on non-game days. It even applies metrics to a player's contract value and calculates values based on current performance.

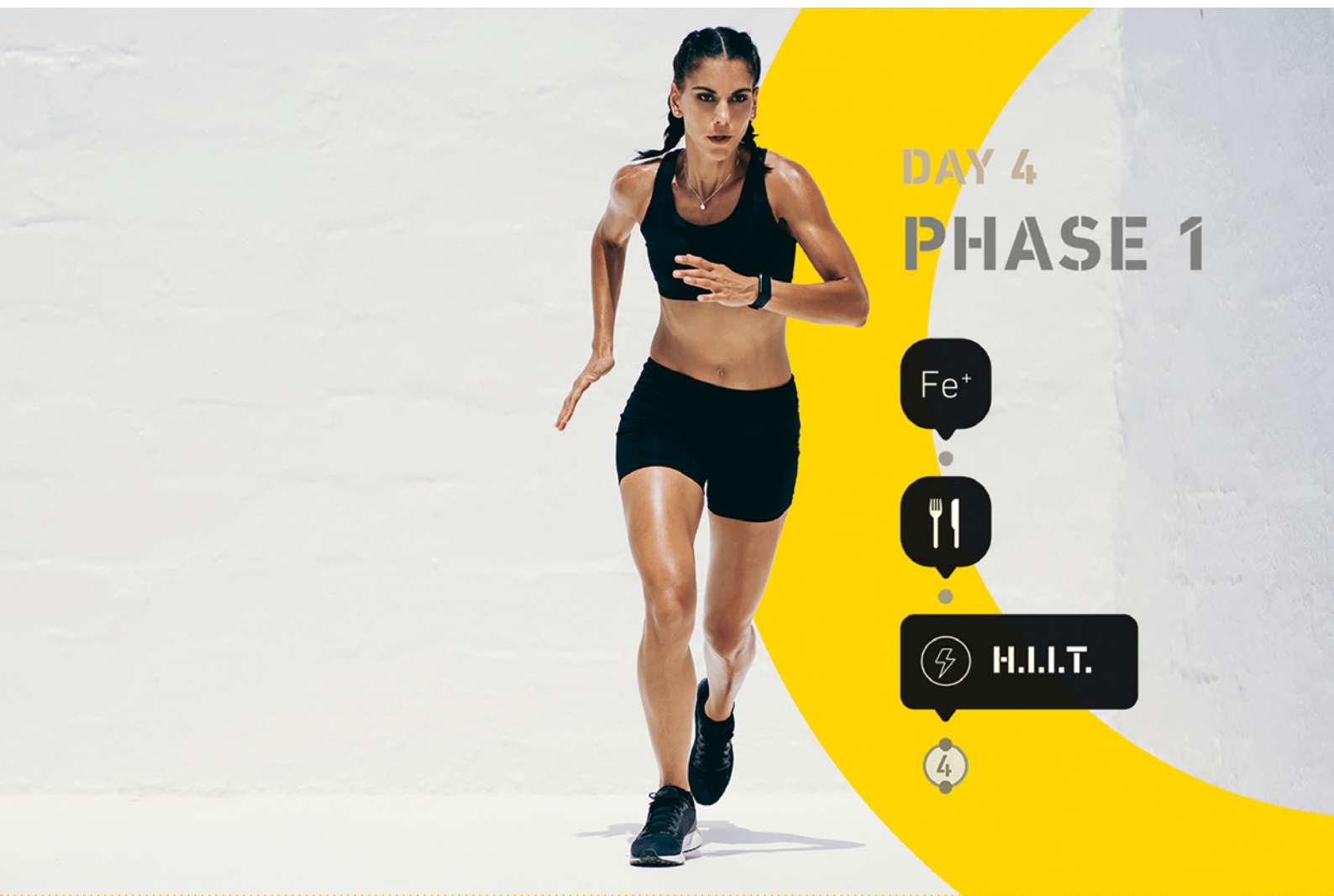
Remarkably, @thlete offers individualised game and performance data including a heatmap of successful and unsuccessful shots, fouls and even how players measure up against named opponents. It also analyses sleep patterns and travel schedules to maximise performance. We have adapted @thlete for female athletes to help monitor the menstrual cycle and maximise performance

All of this sounds like the realm of science fiction, but we at Orreco are pleased to say that our platforms are in demand and becoming more sophisticated every week with ever more precise data. In 2020, we identified the need for a reliable tool that could help athletes, teams and coaches to monitor and pre-empt problems with C19. Our team, in a rapid turnaround, developed a trusted app called the Covid Symptom Tracker. It is in use by 30pc of EPL teams and also in the NBA. On training and game days, players can use the app installed on their phone to

identify C19 symptoms and check temperature and other daily wellness signals. If they receive a red warning, the app tells them 'Contact your team doctor and do not enter the training facility' - a warning that is received in real time by the coach and club.

For the year ahead, I am excited that we will continue to build on our success as athletes and teams continue to invest in services that can protect and enhance their health and well-being. We will continue to innovate with our female athletes.

The next steps are ones that I anticipate with excitement. One day our science and tech will be available to people everywhere, protecting health and wellbeing, maximising performance and guarding against injury.



AQUATICS COMMITTEE



Activity Report 2020

Summary

2020 was a busy and challenging year for the Aquatics Committee and its members. As with many sports, the Aquatics industry was confronted by the restrictions placed on retail and on swimming pools and aquatics facilities globally which have placed a strain on business and the athletes they support. During the peak of the pandemic, the Committee, in cooperation with the International Health, Racketsports and Sportsclub Association (IHRSA), pivoted its work to focus on advocacy and deliver global recommendations for the re-opening of gyms and fitness facilities including swimming pools ([click here](#)). As the year progressed and business and sport started to recover, the Committee were able to re-focus their resources into more traditional work areas including FINA swimwear regulations and contributed to a joint FESI paper concerning the classification of surface wetsuits as PPE Category II.

Mandate

The Aquatics Committee is the aquatics-specific industry representative body towards the Fédération Internationale de Natation (FINA), organizers of major aquatics events, international standards institutions and Non-Governmental Organizations with the intention of fostering the general development of aquatic sports with an eye on athlete safety in aquatic sports.

Aquatics Committee Leadership

The Aquatics Committee continues to be led by Chair Greg Steyger (Global Product Category Manager for Arena). Greg is supported in his role by two Vice-Chairs Franck Horter (Président chez TYR Europe SAS) and Jonathon Highman (Brand Manager Speedo International (Pentland Brands Ltd.)). The Chair would like to thank all Committee members for their hard work and industry solidarity in 2020 and, in particular, to his Vice-Chairs for their ongoing support and challenge.

Update on Activities

In 2020, the Aquatics Committee focussed on the following specific activities:

Key Considerations for Sports, Fitness, Aquatics and Ancillary Facilities in the Context of COVID-19

– The Committee provided key input to the development of the Key Considerations document which was a joint collaboration between industry federations to adapt WHO guidance led by IHRSA. The document was shared with FINA and WFSGI's stakeholders with the overriding aim to provide aquatics facility providers with a set of minimum guidelines that could be used to advocate for their re-opening (in conjunction with applicable local laws and regulations).

ISO Goggle Standard – the Committee continues to support the development of a new ISO Goggle Standard and is represented on the ISO Working Group by Neil McConnochie of Zoggs. The new ISO Goggle Standard both updates an out of date British Standard and establishes a global benchmark to a core product category which is one of the world's top 3 lifestyle and fitness activities. At the time of writing, the draft standard had received unanimous support and was moving into the final draft stage pre-publication. The standard will be part 3 of ISO18527 which also covers Sunglasses, Sport Protection Eyewear, Ski & Snow Boarding goggles.

FINA Relations – the Committee continued its constructive relations with FINA and, in particular, with Pavel Medvedev, FINA's General Project Manager and the FINA SAC. The Committee provided several written proposals to the FINA SAC concerning updates to the swimwear regulations. These included a proposal to change the submission, approval and publication timeline so that the approved suit list would be published on 1 September of each year (as opposed to 1 January of each year) so that athletes would have the benefit of new product for the full competitive swim season. The Committee also made proposals to FINA concerning approved labels for swimming caps and goggles and made commitments to improve the quality of swimwear submissions to ensure a smoother process going forward. The Committee thanks FINA for its ongoing cooperation and looks forward to working together in future for the benefit of the athletes, the sport and the industry.

PPE Regulation – the Committee worked in close cooperation with WFSGI's European counterpart, FESI, to produce a joint paper that was submitted to the European Commission outlining the industry's concerns at the approach of certain Member States in classifying surface wetsuits as PPE Category II. The Committee members provided significant scientific and practical commentary to the paper and would like to thank the FESI team for their leadership on this important issue for the membership.

Promotion of Benefits of Aquatics Activities – "In the final quarter of the year, the committee undertook to begin work in 2021 on evaluating the opportunities for the industry to play a greater role in articulating and advocating for the benefits of aquatics activities with the overriding ambition of increasing participation levels and the inclusivity of the sport. The Committee looks forward to reporting on its progress on this critical area in due course."



Chair



Greg Steyger
Product Category
Director, Arena
S.p.A.

Vice-Chair



Jonathon Higham
Brand Manager,
Speedo, Pentland
Brands Ltd.

Vice-Chair



Franck Horter
President, TYR
Sport, Inc.

Ex Officio

Emma P. Mason
WFSGI Vice
President for
Strategic and
External

CHECK ALL
COMMITTEE
MEMBERS



PURPOSE MOVES US.

Our purpose is to unite the world through sport to create a healthy planet, active communities and an equal playing field for all.





By **Mike Diaper**, OBE,
Executive Director of
Children and Young
People, Sport England

SUPPORTING CHILDREN TO BE ACTIVE

Mike joined Sport England in November 2006 from central government where he worked across the Departments for Education and Skills and for Culture, Media and Sport, leading the PE, School Sport and Club Links strategy. During his time at Sport England he has created and led a wide range of highly successful programmes and initiatives. He was awarded an OBE in the 2007 Queen's Birthday Honours for services to school sport.

Sport England is a public body and uses its insight, skills and resources to help people get active and play sport. It invests up to £300 million National Lottery and Government money each year.

It wants everyone in England, regardless of age, background, or level of ability, to feel able to engage in sport and physical activity. That's why a lot of its work is specifically focused on helping people who do no, or very little, physical activity and groups who are typically less active - like women, disabled people and people on lower incomes.

During the Coronavirus pandemic, it has been working closely with government to support the safe return of sport and the reopening of sporting and leisure facilities for public use, and conducting research into how the pandemic has affected the nation's relationship with activity. Mike Diaper, shares how the pandemic has affected the activity levels of children and young people and what is being done to help them get active, and more generally, bring back grassroots sport.

Children by nature want to be active. We see them running around and playing like bundles of energy from the moment they've started walking. Yet our research shows that as they grow up, their activity levels decline even speeding up when they reach their teens. Sport England works alongside government and partners within the sport and physical activity sector and beyond to ensure that youngsters have the opportunity to enjoy being active and hopefully develop good habits for a lifetime.

There is widespread recognition that physical activity is hugely beneficial for young people's physical and mental wellbeing. We know from our research that active children are happier, more resilient and more trusting of others¹. Physically active children are more likely to see improved performance in school too – with teachers saying it has positive benefits on their behaviour, attendance and academic results².

¹ Active Lives Children's survey December 2018

² Secondary School Teacher training survey 2020

Last year, before the Covid-19 pandemic hit, Sport England's research showed that 46.8% (3.3 million) of children in England were meeting CMO guidelines of an average of 60 minutes of physical activity a day, across the week. Up 3.6% on the previous year.

There were also notable inequalities similar to adult activity levels. Girls, youngsters from Black, Asian and Ethnic minority communities and those from lower income families were all less likely to be active than their peers.

When England first went into lockdown there were far fewer opportunities to use facilities and play formal sport, and the number of children getting active dropped significantly.

Our research conducted by ChildWise during lockdown surprisingly showed girls (16%) were more likely than boys (11%) to say they were being more active than usual, despite all the restrictions in place, and also more likely to say they were enjoying being physically active more than usual (16% girls vs 10% of boys), suggesting that the freedom to choose which type of activity they wanted to do had a positive impact.

The findings also reinforced how parents and carers can play a positive role in getting children active.

In 2019, we teamed up with Disney to create dance-along workouts for mums and their kids to get active together. The partnership was with our women's campaign This Girl Can, which was launched in 2015 and has helped over 3.9 million more women and girls to get active.

The Covid-19 pandemic has presented us with never seen before challenges with a third of children telling us that the absence of school during the height of the pandemic had a major impact on their ability to be active.

Research also showed that teen girls, Black, Asian and poorer children rely more than others on 'at school' provision to be physically active. Schools play a vital role in supporting children - especially those that need most help - to take part in sport and physical activity.

In September the reopening of schools provided an important moment to help the nation's children to increase how much sport and physical activity they are doing.



We've invested into school settings, working with government on the School Sport and Activity Action plan³, and the PE and Sport Premium, and supporting teachers to promote physical activity in schools, introducing programmes like the Daily Mile, or delivering PE sessions that children want and enjoy.

Some £13.5m has gone into a secondary teacher training programme, offering professional development opportunities to staff in over 2,000 schools across England. The aim is to help put pupil's needs and enjoyment at the heart of PE and school sport. We also invest around £26million into what we call Satellite Clubs, which engage children and young people in sport outside the school day, and invest another £16million to put on a nationwide School Games competition for schools.

In December 2018 we launched a world-leading piece of research, the Active Lives Children and Young People Attitudes Survey, which is the largest survey of its kind. It asked children about their attitudes towards sport and physical activity and the results prove for the first time that children's physical literacy impacts not only the amount of activity they do (twice as much), but also how much the benefit from this activity.

Physical literacy means that children have a positive attitude towards five elements of taking part in sport and physical activity: enjoyment, confidence, competence (how easy they find it), understanding (that it is beneficial) and knowledge (knowing how to get involved and improve).

Crucially, we found that enjoyment is the biggest driver of activity levels.

During the pandemic, the UK government prioritised exercise as an essential activity for our health. Working alongside of them, Sport England launched the Join the Movement campaign that inspired people to be active, complimented by a website packed with a wide-range of home workout content for all ages and abilities that could be done with little equipment or in a small environment. Research showed that the number of people doing home workouts increased during lockdown, with walking and running two of the other most popular activities.

As lockdown eased, Sport England worked alongside of government to support the sport and physical activity sector to open safely. We compiled advice and guidance on how they could introduce Covid-19 hygiene measures and sports then submitted their own procedures to government to be signed off as 'Covid-secure'. This gave the public confidence to know that the opportunities that were open were following social distancing guidelines. As lockdown measures continue to respond to changing infection rates, at both a national and local level, we are continuing our Join the Movement campaign, and also working with Local Authorities to help them promote physical activity to support the public's mental and physical health. Like many countries though, England's sport and physical activity sector has been hit hard by the pandemic with many struggling financially. Alongside of government, we have launched numerous support packages, and at the time of writing, have supported the sector with over £220 million to get it back on its feet.

We know that many people do have a desire to be active, and the pandemic has given people a newfound appreciation of how it benefits their wellbeing. As restrictions change and evolve in the coming months, it is important that are able to offer people choice so they can find something they enjoy in a safe environment.



³ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/848082/School_sport_and_activity_action_plan.pdf



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By Carron Manning,
Co-Founder, EXi

BUILDING RESILIENCE TO COVID-19 THROUGH PHYSICAL ACTIVITY

Carron is a physiotherapist who has a great deal of experience in prescribing exercise to those who most need it and has seen first-hand the dramatic effects this has on people's lives. She co-founded EXi with her husband Lewis, also a physio, to create a product which could help everyone, regardless of age, disease status or current fitness level, to get active and improve their health.

Improving our physical fitness can make the difference in our fight against COVID-19 and this message needs to be pushed out by healthcare systems worldwide. This article discusses how increasing our levels of physical activity and reducing our risk for long term health conditions, will improve our resilience to the coronavirus. It's more important than ever that we take control of our own health, and that we give people the tools and support to help them get active.

There has never been a time in modern history where it has been more important for us to stay fit and healthy. COVID-19, whilst it continues to dramatically affect our way of life, has caused the most suffering to those with underlying health conditions and has highlighted the huge disparities that exist in health. While we await a vaccination everyone should question what they can do to increase their resilience to the dreaded virus, but also how they can protect their health, and their future health from long-term conditions, and exercise should be at the top of the list.

If exercise were a drug, it would be a pharmaceutical blockbuster, said Simon Stevens, CEO of the NHS. A recent study at Stanford University described an acute bout of exercise as causing a 'molecular explosion' in the blood, altering thousands of molecules with each exercise session. It is relatively unknown that in clinical trials, exercise is shown to have the similar effects as drugs when put side by side. A report in 2015 by the Academy of Medical Royal Colleges pointed to exercise as being the "miracle cure" for a host of diseases, stating that "regular

exercise can help to prevent dementia, type-2 diabetes, some cancers, depression, heart disease and other serious common conditions – reducing the risk of each by at least 30%." There is no known medication which produces the same wide ranging and potent effects as exercise.

Yet we have become the victims of our own success when it comes to medical advances over the past 50 years. It has become easier to pop a pill, to deal with our rising blood pressure or elevated blood sugars, rather than dealing with the underlying causes. Our lives are becoming more sedentary and convenient than ever: Here in the UK for example, 40% of the adult population do not meet the recommended levels of physical activity (this is estimated to be as high as 76% in the US). The knock-on effect of this is that we are seeing increasing rates of chronic diseases: Almost 10% of the UK adult population now has type 2 diabetes, and this statistic is replicated in most nations of the developed world. The situation is predicted to get much worse over the next few years, and our healthcare systems are already struggling to cope with this – things need to change, and the fitness world needs to move closer to healthcare to take this challenge on.

Whilst there is no scientific data yet on how physical activity may enhance the immune response against COVID-19, we certainly do have enough evidence to make some assumptions. We know that a single exercise session will mobilise your immune cells or lymphocytes, increasing your immune surveillance, so they are ready to minimise the impact of an invading virus. We also know that people who have higher cardiorespiratory fitness levels generally have improved immune responses and may be less likely to report symptoms of specific viral illnesses. So when it comes to the coronavirus, your level of physical fitness will not stop you from becoming infected, but the available scientific evidence from research in other viral infections would indicate that physically active people will have less severe symptoms, shorter recovery times, and they may be less likely to infect others they come into contact with.

The statistics from the coronavirus pandemic have been stark: We know that the main non-modifiable risk factors for death following a COVID-19 infection are older age and being male. People from BAME communities are also at higher risk, although there is some debate as to whether this is due to ethnicity, or because they are more likely to be disproportionately affected by multiple stressors during the pandemic.

When we look at the more modifiable risk factors, almost all of which can be positively influenced by physical activity. Obesity has emerged as a major consideration:



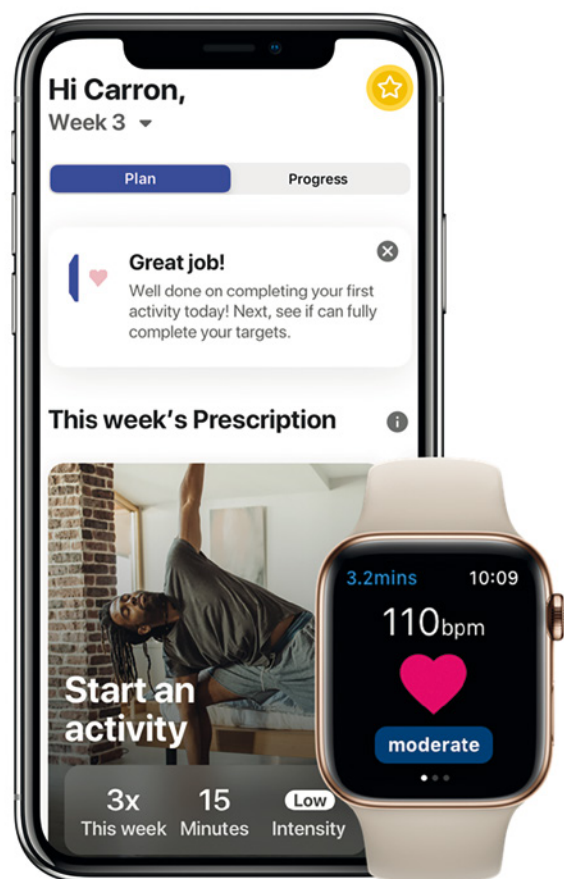
Obese patients also have a 33% greater risk of dying from a COVID infection. Diabetes has also featured heavily: 27% of all people who died from COVID in England between March and May had diabetes. A recent study of 20,133 UK patients in hospital with Covid-19 found that 31% had heart disease. About 90% of people who die from COVID-19 have at least one underlying health condition, and this grim statistic will have to be addressed, particularly if we ever experience a pandemic such as this again.

In the UK, Public Health England have called for action on obesity in the COVID-19 fight, and have said that your risk of hospitalisation, requiring transfer to ITU/being ventilated, and finally death, will all progressively increase with increasing BMI. They have also released up to date obesity figures, and 63% of adults in England are now classified as overweight or obese – a rise of 10% since 1993. Another hugely important factor is that periods of isolation and confinement may cause an elevation of stress hormones such as cortisol, which can inhibit many critical functions of our immune system – physical activity is known to counteract this. The effects of exercise on mental wellbeing are well known, and whilst the effects of lockdown on mental health have not yet been fully documented, one would assume that this will be profound. So how do we get exercise to the people who most need it? How do we ensure that every single person knows exactly how much activity they should do to improve their fitness, improve their resilience, and improve their health based on the analysis of their individual situation? How do we increase the opinion of exercise as being essential to normal human function (and an essential component of medical care) rather than simply a leisure activity enjoyed by those who can afford it? And how can we empower people to take control of their own health?

“There is now more focus than ever on health,” said Dr Harpreet Sood who is working with EXi. “What we need is a complete mind shift with regards to the value of physical activity. People with chronic conditions need to understand how everyday movement can help them to manage, and sometimes even cure their conditions. Simply telling patients what to do is not enough – long-term behaviour change is extremely hard and requires ongoing support and access to resources over time. What we want to see is the normalisation of exercise prescription at the point of care.”

Sir Muir Gray, a renowned British physician, has been working with the team at EXi, the award-winning evidence-based exercise prescription app. He explains: “If the physical benefits of exercise could be distilled into a pill, it would be labelled a miracle cure. Because being active is a better recipe for good health than any drug. The fact is there is no single medical condition that will be made worse by moderate intensity exercise, and it really can bring dramatic results.”

At EXi (<https://exi.life/>) we believe that everyone should have access to their own personalised exercise prescription, that is set at exactly the right level for them and is scalable to all. We believe that exercise should be considered as important as drugs when it comes to both preventing disease but also when managing many long-term health conditions. There exists an opportunity now to vastly improve our health both for our current situation and improving resilience to COVID-19, but also to prevent chronic diseases for the future: Exercise and fitness should play the greatest role in that.





By Cesar Carvalho,
Co-Founder & CEO,
Gympass

HOW THE PANDEMIC HAS ACCELERATED THE OMNICHANNEL FUTURE OF THE FITNESS INDUSTRY

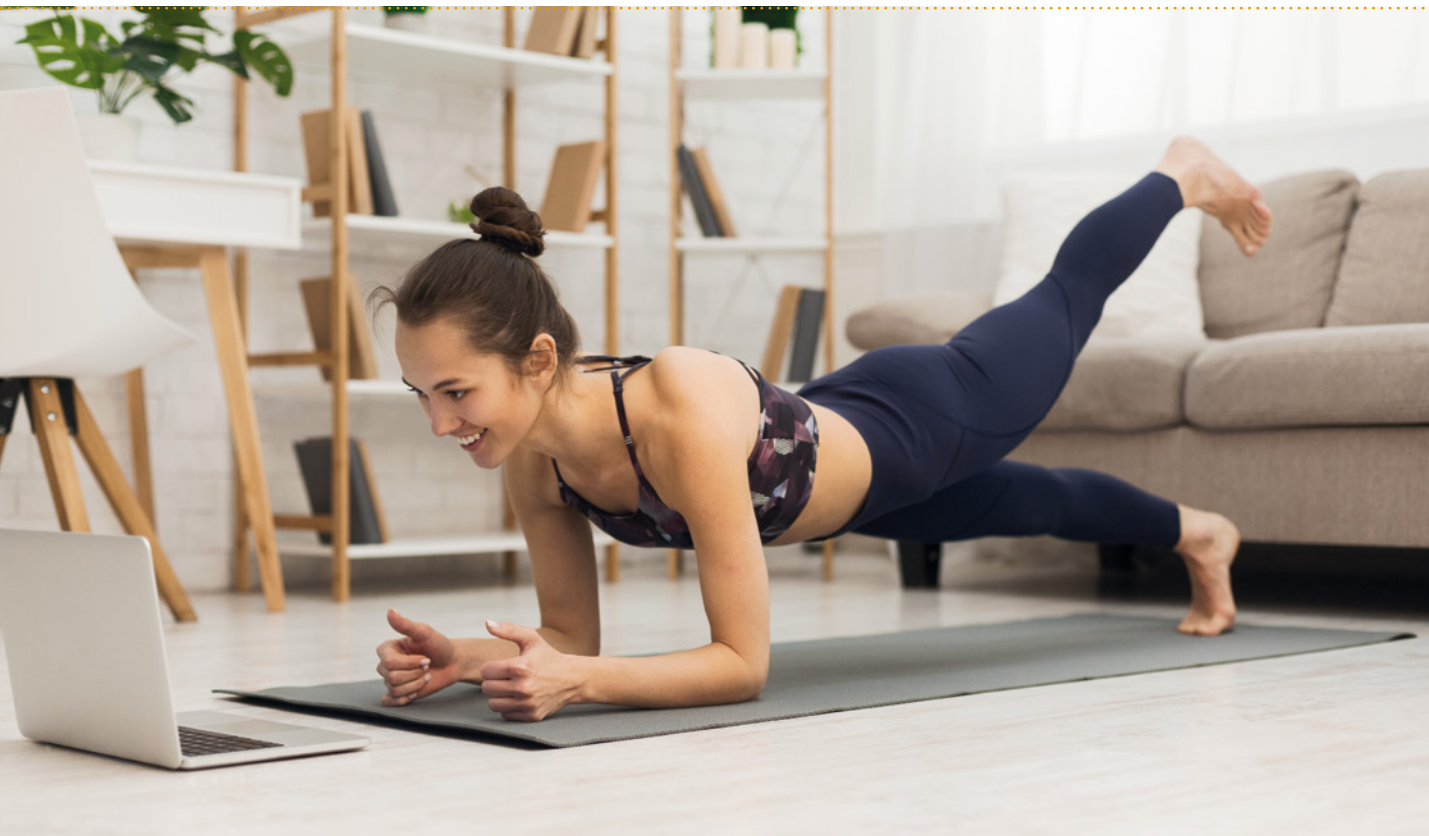
Based out of Gympass' headquarters in New York, **Cesar** oversees worldwide operations implementing the company's strategy. Cesar has more than ten years of business management experience, having previously worked at top firms including CVC, McKinsey & Company and AC Nielsen. Originally hailing from Minas Gerais in Brazil, Cesar attended Harvard Business School before dropping out to found Gympass.

With the pandemic, we saw a complete shakeup of the fitness and wellness industry, with gyms closing rapidly and user experiences turning to digital. The industry had to adapt to these changes quickly to continue operating sustainable businesses, pivoting to digital to usher in a new wave of fitness. After the pandemic subsides, a hybrid omnichannel of both in-person and digital fitness experiences will be the new face of fitness and wellness.

As a result of the pandemic, we have experienced a rapid shift in the types of products available on the fitness scene, shining a spotlight on so many new and different ways to stay well. In fact, the pandemic has made it evident that as an industry, a one-size fits all approach won't work moving forward.

With the introduction of new technology and innovation the fitness industry has witnessed a number of changes throughout the years, but the pandemic has accelerated those timelines over the past seven months. Prior to the pandemic, Gympass operated as a corporate wellness benefit that purely offered in-person fitness solutions. We focused on in-person experiences at gyms and studios but we quickly learned that there was an incredible need to be more adaptable. In fact, we learned from a recent survey that 71.2% of people feel more productive on the days you've worked out or been active, helping nearly half (45%) feel motivated as well. In order to continue to be a sustainable business, we had to quickly mobilize and evolve our business model. We had to pivot not only ourselves, but also help our entire ecosystem of partners and clients to a new and sustainable digital model in just two weeks.





We did this by launching two new features and expanding our offering to more than just fitness by offering virtual Live Classes and access to an array of wellbeing apps. Our goal by partnering with wellbeing apps was to give all users and their family members access to a broad array of resources during these difficult times. We now have the biggest, exclusive collection of over 50 wellness apps, such as Calm, NEOU, Nootric, Healing Clouds, and Moneyed, all available for no additional cost to our members. In addition to fitness, these apps tackle mindfulness, nutrition, meditation, therapy, financial wellbeing, and activities for kids.

With the launch of these two new products, we wanted to provide flexibility and accessibility to our customers. This shift also helped us to support the growing needs of our clients, as we noticed their increasing focus on investing more in the health and wellness of their employees. This was a proofpoint for us, because if there is anything we have learned during this time, it's that it is incredibly important to provide holistic options to create a more affordable and accessible wellness journey for users. Our goal at Gympass is to do just that.

Through our research and platform data we have seen that users are craving a more omnichannel approach to fitness - especially now that some gyms are starting to reopen. In fact, in a recent survey we conducted we learned that a majority (82.8%) of Americans are willing to work out virtually post-pandemic. This only proves that virtual fitness will continue to be of interest to users even as gyms reopen, showing the need for diverse offerings in how we approach fitness.

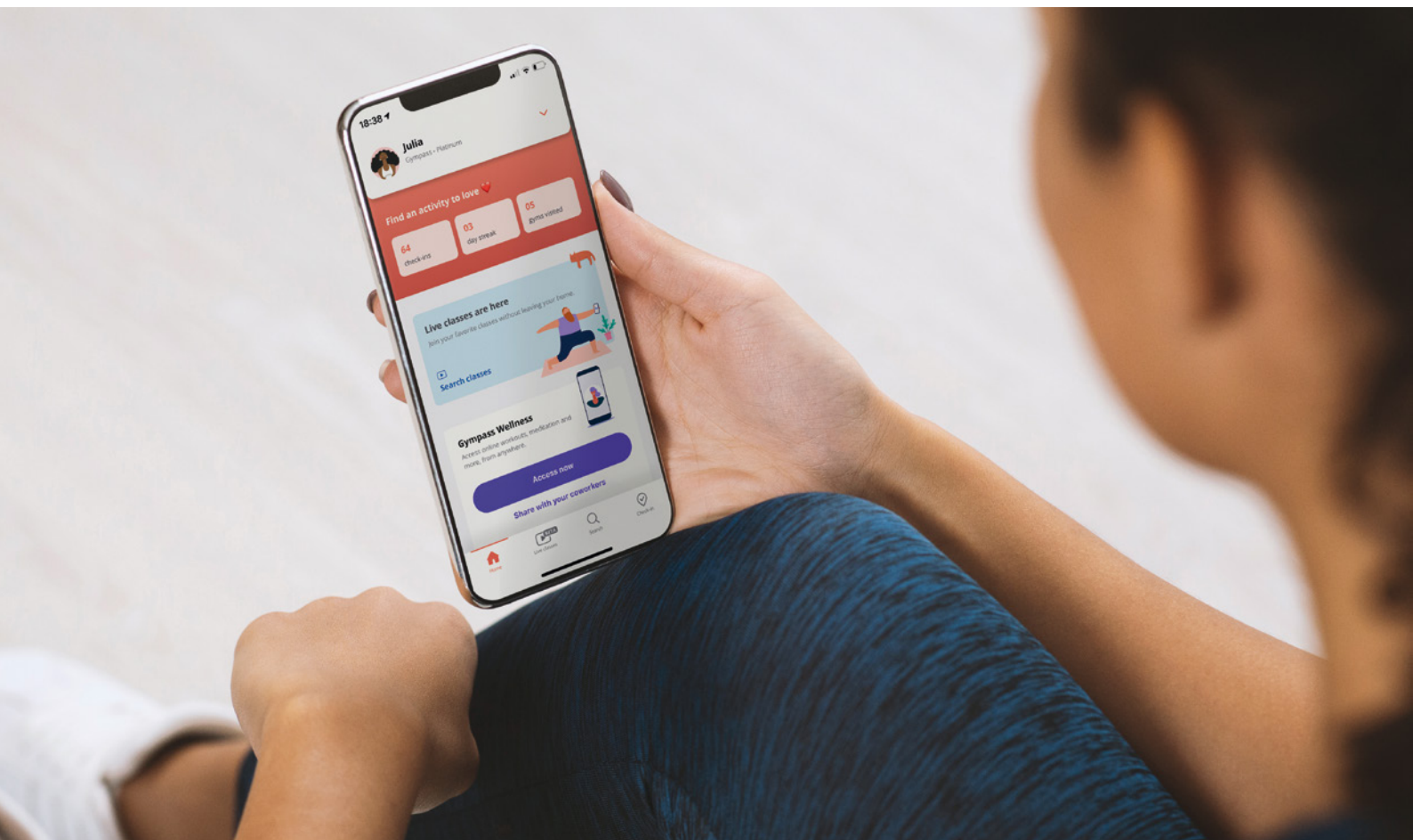
I think that while in-person experiences will continue as people crave interaction outside of their homes, omnichannel wellness will become the norm as users get used to being able to continue their wellness routines wherever and whenever they want. The fitness industry will emerge as a mixed world, with a combination of physical visits complemented by online classes. In these new times, more people will continue to be working from home and will have more flexibility to exercise and stay active. There is also a greater need for expanded wellness services - beyond physical fitness. Nutrition, mental health, and financial health will all be in demand and needed for consumers.

With this, I think we'll see more innovative experiences as entrepreneurial operators are forced to think in new and creative ways given the constraints of capacity and those new blurred digital and IRL lines -- this is what excites me most, whether gamification, social layers, or all-new. We're going to see a new wave of wellbeing come to market. While it's hard to predict what the future might look like, we believe that virtual wellbeing solutions are here to stay.



We will continue to support our partners throughout this digital transformation providing virtual options to retain members and support as they reopen. For users, we will continue to provide virtual options for those who do not feel comfortable going to the gym, but also provide education and support to those who would like to return when it is safe.

At Gympass, we aim to help people feel good - mind, body, and mood. Providing our users and clients with a variety of options will enable us to support their lifestyles and choices more conscientiously. We believe that in time, we'll start to see users doing a combination of both, virtual and in-person classes, depending what works best with their schedules and fitness regimens.



PHYSICAL ACTIVITY COMMITTEE



Activity Report 2020

Summary

Physical activity and its health, economic and community benefits were elevated in the global consciousness during 2020. As the COVID-19 pandemic spread and government intervention into our daily lives became the norm rather than the exception, the World Health Organization (WHO), WFSGI and its members, and health authorities round the world used their respective platforms to advocate for the importance of people remaining as active as possible during the pandemic. In collaboration with WHO, WFSGI members created, adapted and made available multiple free resources suitable for use in COVID-19 circumstances by children, adults and families in a range of languages, sports and activities, and formats. WFSGI thanks all of its members who contributed to this significant collective effort that underlined the industry's important and ongoing commitment to increase levels of physical activity and sports participation, especially among children.

2020 was also the year, however, in which pre-existing inequalities in individual and community opportunity and ability to be active were clearly highlighted. Though data on the impact of COVID-19 on global physical activity levels is yet to be fully analysed, it is expected that income, sex, race and location will play a significant role in whether an individual was able to stay or become active during 2020. In that respect, WFSGI looks forward to receiving the first Global Status Report on Physical Activity that is expected to be published by WHO in late 2020.

Mandate

The PAC's mission is to promote physical activity on a global level. The Committee also seeks to foster and encourage the participation of citizens of all countries in healthy sporting activities.

The PAC coordinates the industry's joint response to the global physical inactivity epidemic by focusing on the following areas:

- 1 Working with the United Nations Agencies and other multi-lateral organisations to prioritize physical activity on the global development agenda.
- 2 Providing a global forum for WFSGI members to share best practices and lessons learned on approaches that increase participation in sport and physical activity.
- 3 Supporting global, regional and national level advocacy work to promote physical activity and sport.

Committee Leadership

In 2020, the PAC continued to be chaired by Sarah Cannon (Senior Director, Communications and Partnership, Social and Community Impact, Nike, Inc.). The Chair is supported by three Vice-Chairs: Kathleen Tullie (Senior Director of Corporate Social Responsibility at Reebok International, Founder and Executive Director of BOKS [Build Our Kids' Success]); Lars Wiskum (CEO and International Strategic Advisor, SportVenture Consulting); and Nathalie Coulomb (Corporate Responsibility Business Partner, Pentland International). The Chair thanks all PAC members for their contributions throughout the year and, in particular, to the PAC Vice-Chairs and Elena Korf (Director, Social and Community Impact, EMEA, Nike, Inc.) for their ongoing support and counsel.

Committee Activity Update

During 2020, the Committee focussed its work on the following activities:

WHO Relations – the WFSGI participated in the fourth sport sector dialogue between the WHO and the private sport sector concerning the implementation of the GAPPA. The fourth dialogue was held virtually owing to COVID-19. In 2020, the PAC and WHO cooperated on the following initiatives to raise awareness of the benefits of physical activity and increase physical activity levels on a global basis:

Register of Commitments – the WFSGI PAC provided detailed feedback to WHO on the development of the public register that will publish and track voluntary commitments from representatives of the private sector and the wider global community that help elevate levels of physical activity (and therefore support the vision of the GAPPA and Sustainable Development Goal 3.4).

Free Physical Activity Resources – in March 2020, the WFSGI PAC and WFSGI membership supported the WHO in creating, adapting and making available a broad range of physical activity resources suitable for COVID-19 circumstances for use by children, adults and families in a range of languages, sports and activities, and formats. The resources were distributed to WFSGI's broader stakeholder community and the general public as well as being made available on WFSGI's and certain WFSGI member websites.

Support for #HealthyAtHome & WalkTheTalk – via press release and social media promotion, WFSGI and its members supported the WHO's #HealthyAtHome campaign and the third global WalkTheTalk challenge. WFSGI member support included integration into brand communication and several athlete ambassadors supporting the initiative on their own platforms.

The PAC would like to register its thanks to the WHO and, in particular, to Dr. Fiona Bull MBE (the Programme Manager at the WHO for the Department of Prevention of Noncommunicable Diseases) and her colleague Ulrike Schwerdtfeger for their continuing willingness to engage and include the private sport sector in the GAPPA implementation framework. The PAC is certain that the physical inactivity pandemic can only be resolved through multi-stakeholder cooperation.

UNESCO CIGEPS Relations – WFSGI is a designated consultative member of the Committee for Physical Education and Sport (CIGEPS).

CIGEPS Ordinary Session - In 2020, WFSGI was represented at the CIGEPS ordinary session and made an intervention requesting that CIGEPS ensure that the full scope of Action 1 of the Kazan Action Plan (setting out five actions as catalysts for multi-stakeholder cooperation at the national and international level) namely that an advocacy tool be created that presents evidence based arguments for investments in physical education, physical activity and sport. WFSGI has also committed to contributing to UNESCO's Working Group on 'Enhancing the Evidence-base to increase Investments in Physical Education and Sport'.

Physical Activity and Physical Education in Schools – through the WFSGI PAC, the industry provided financial support to UNESCO and the WHO to assist with the development of the global survey on physical education in schools being delivered at the policy and implementation level. WFSGI looks forward to seeing the results of this survey given the importance of physical education to children and to their future development.



WFSGI & McKinsey Global Sporting Goods Industry Report 2021 – the new partnership between WFSGI and McKinsey & Company aims to develop the gold standard annual report setting out the state of the industry and a series of actionable recommendations. WFSGI has ensured that physical activity will be covered within the report and would like to thank the Chair and Vice-Chairs of the PAC for contributing to a expert focus group on the topic the output of which added significant value to the report.

IOC Relations – in 2020, the WFSGI PAC expanded on its collaboration with the IOC through the following initiatives:

IOC Sport and Active Society Toolkit – several WFSGI members providing case study examples to the IOC for its Sport and Active Society Toolkit.

IOC Sport and Active Society Commission – in 2019, the WFSGI President & CEO, Robbert de Kock as appointed by the IOC President to its Sport and Active Society Commission. WFSGI was represented at two IOC Sport and Active Society Commission meetings during 2020. WFSGI delivered updates on the work of the PAC and urged the Commission members to look for opportunities to help the IOC harness its position as the centre of the Olympic Movement to elevate advocacy for the benefits of grassroots sport.

PAC Advocacy and Communications – during 2020, the WFSGI Secretariat significantly increased the number of communications WFSGI published relating to physical activity. WFSGI now publishes a weekly social media post and regular physical activity newsletters for the membership containing relevant scientific research, conferences and webinars together with details of the WFSGI PAC's work areas. Finally, the WFSGI PAC was delighted to be able to provide the WFSGI membership with two expert webinars:

The International Cycling Federation (UCI) – following the significant increase in cycling during the COVID-19 pandemic for leisure, fitness and transportation, the UCI delivered an exclusive webinar to the WFSGI membership setting out their strategy for ensuring the sustainable development of cycling and seeking industry input on collaboration opportunities.

UNESCO – as a result of WFSGI's ongoing collaboration with UNESCO, the WFSGI membership were given the opportunity to hear from UNESCO's Executive Director for Sport, Philipp Muller-Wirth, and Senior Consultant, Nancy McLennan, on the progress of the Quality Physical Education agenda and the development of UNESCO's new Sport Education Partnerships.

Chair



Sarah McLean Cannon
Senior Director, Communications and Partnerships, Social and Community Impact, Nike, Inc.

Vice-Chair



Kathleen Tullie
Senior Director, Social Purpose, Reebok and Founder and Executive Director, BOKS

Vice-Chair



Lars Wiskum
CEO, Owner and Senior Consultant, SportVenture

Vice-Chair



Nathalie Coulomb
Corporate Responsibility Business Partner, Pentland Brands Ltd.

Ex Officio

Emma P. Mason
WFSGI Vice President for Strategic and External Affairs

CHECK ALL
COMMITTEE
MEMBERS



READY FOR SPORT

OPPORTUNITIES WILL
COME AND WE MUST
BE READY



SIYA KOLISI



[ADIDAS.COM/READYFORSPORT](https://adidas.com/readyforsport)



By Randy Rankin,
Global Client Development Director,
North America Eurofins Consumer
Products Assurance

SUPPLY CHAIN SOCIAL COMPLIANCE AFTER COVID-19

What has been learned and how do we move forward sensibly?

Randy is the Global Client Development Director, North America for Consumer Products Assurance at Eurofins. In this role, Randy is responsible for developing client relationships and leading service teams responsible for supporting client efforts to identify and mitigate risks in the supply chain considering technical, social, environmental and security risks. Recently named to the Assent Compliance 2020 Top 100 CSR influences, Randy has over 25 years of experience in the social compliance market.

In the opinion of several observers of the retail industry and consumer behavior – social and environmental performance will be an area of increased focus for consumers in the post-COVID environment, making managing social compliance more important than ever.

Over the past seven months, there have been many lessons learned in the supply chain space. Specifically with respect to managing risks related to working conditions in the supply chain, there are changes in and challenges related to program parameters and requirements resulting from the COVID-19 pandemic. Finally, the response to the COVID-19 pandemic and emerging issues in key sourcing markets as well as re-shoring have impacted the audit element of social compliance programs.

2020 has been a year of generational change. Not unlike World Wars or the Great Depression, the COVID-19 pandemic has fundamentally challenged and changed most aspects of life and business for the current and possibly future generations—including supply chain relationships and management.

Lessons Learned

When COVID-19 started breaking out around the beginning of this year, there was recognition of the potential business and supply chain impact of a disease that would ultimately be a global pandemic. As companies considered managing the potential impacts of losing sources of final products from China; to managing the impact of materials shortages in other geographies – particularly where the source market for those materials and components was China; to managing the elimination of demand with effective closure of retail in key markets including the US and Europe – there were some key lessons learned.

One key lesson from the early stages of the pandemic related to having a real understanding of the supply chain, particularly beyond the first tier. This understanding includes insights into the nature and scope of the operations deeper in the supply chain. Having a sense of critical components and materials – which essentially create production dependencies for the final product – was a step, but knowing where and from whom those elements were sourced coupled with workable strategies for alternate sources of supply for particularly critical or scarce elements was a key lesson from earlier in 2020.

In today's just-in-time manufacturing environment – elements, including critical components and materials, were quickly not available. In some cases, this was a product of the current situation for the sub-suppliers including the effects of the pandemic such as local lockdowns; materials shortages; halting of transportation and logistics; production demands from other, larger customers; and financial failures due to the negative impacts of the virus. This situation highlighted the need to ensure that beyond knowing the identity of key nodes in the supply chain – an understanding beyond the traditional considerations of capability; technical competency; capacity must be developed. Importantly, knowledge of the deeper nodes in the supply chain also creates expectations related to application of requirements for a company's social compliance program to those operations. Finally, there was also an identified need to develop some mechanism to maintain current perspective throughout the value chain in response to the dynamic environment during the pandemic.

New Requirements

As cases of COVID-19 begin to subside and economies restart, there are new requirements that will become a component of supply chain relationships and social compliance programs. In many cases, the new requirements can be linked to emerging statutory requirements and considered through broader program parameters. With that said, there is clearly a need to ensure that programs consider health, safety and hygiene requirements directed at preventing, detecting and managing cases of infectious diseases – like COVID-19. These elements, which should be specifically identified and not left for consideration under a broad view of safe and healthy environment in accordance with legal requirements, will logically include consideration of screening employees and visitors; use of personal protective equipment such as masks; hand and surface sanitizing; social distancing; testing; and contact tracing. Beyond health and hygiene, there will also be new, transitional requirements related to benefits that will logically require consideration within the frame of social compliance programs. Specifically, there is a need to ensure that any statutory benefits during the pandemic – such as mandated furlough compensation – were properly provided. Given the very difficult economic environment, there is a real risk that some operators will look to minimize costs and not provide owed benefits to workers. Finally, new requirements related to social services and leave – including access to public testing and quarantine leave – will need to be considered in post-COVID social compliance programs.



Beyond the new requirements, there is equally a critical concern with respect to changes in requirements – which in some cases could create disadvantage for workers. Under the guise of supporting economic recovery, there have been efforts in several jurisdictions – most notably in India and Indonesia – to suspend laws and regulations that protect workers. These changes include elements such as reductions or elimination of minimum wage; suspension of protections of related to right to organize; and relaxing of safety statutes. Historically, companies have largely driven the requirements of social compliance programs based on the applicable local laws – requiring adherence to statutory requirements in order to avoid the perceived imposition of developed country requirements and norms in production geographies. In most cases, there are applicable laws and regulations – which are generally aligned with the values and expectations of market region companies. With limited exceptions – most notably the use of legal pregnancy tests in the employment process and the imposition of monetary fines as a form of discipline in certain geographies at points in the past – social compliance programs have been limited to statutory compliance. With the potential for a ‘roll back’ of requirements, companies will be challenged to consider the appropriate approach. Conceptually, the existing protections and requirements were both appropriate and attainable prior to the pandemic – and while there is certainly a changed business environment, many would suggest that to require workers to shoulder the associated burdens through more tenuous employment relationships with reduced benefits and protections is not logical and any reduction in requirements should not be incorporated into social compliance programs. Should the proposed statutory changes be enacted and companies take the position that previously established statutory requirements should prevail, it will be critically important that this is clearly and effectively communicated.

Audit Implications

The process of verifying performance and adherence to the requirements under a company's social compliance program is a critical element of any successful program. While measurement does not improve or guarantee performance – absent effective measurement, there is no mechanism to properly understand the impact of efforts and the actual conditions in production environments. Audit efforts – as the most effective measurement mechanism available in the current environment – are also evolving through the COVID-19 pandemic and beyond.

Given the nature of issues and experiences related to the pandemic, it is more critical than ever that companies with credible social compliance program efforts obtain and understand the perspective and experiences of workers in production facilities. While the pandemic has created real challenges for all parties engaged in the audit process, on-site engagement to include interaction with workers is critically important. Restrictions on travel will require audit service providers to have a local presence in the markets where factories are located. More importantly, audit service providers must have the ability to demonstrate to interested parties – including factories reluctant to have outsiders into facilities in response to risks of infection – that appropriate steps are taken to address risks related to exposure and infection. Fundamentally, these processes and practices exist with respect to other product quality interventions – as companies have not defaulted to simply accepting shipments of product without any type of product inspection. As such, there should be an expectation that the 'risks' of a social compliance audit can also be managed.

Finally, audit efforts related to social compliance programs must be aligned with new and evolving requirements as outlined above. In the post-COVID environment, the audit should consider the new elements related to health and hygiene and other pandemic related benefits and experiences. After appropriate communication of expectations related to these requirements – there should be effective consideration no different than other key concerns.

COVID-19 has had a dramatic effect on supply chains and social compliance program efforts. In an environment where the consumer may have an even keener sensitivity to social performance of companies – not necessarily limiting to high profile retailers and brands, there is a need to continue to evolve and expand efforts. Through effective understanding, defining and measuring performance related to the evolving requirements and expectations for the supply chain – companies can manage risks, demonstrate commitment, improve the lives and experiences of the people within their supply chains, and ultimately create brand value with the public and consumers that benefit more sustainable and robust run of the businesses.





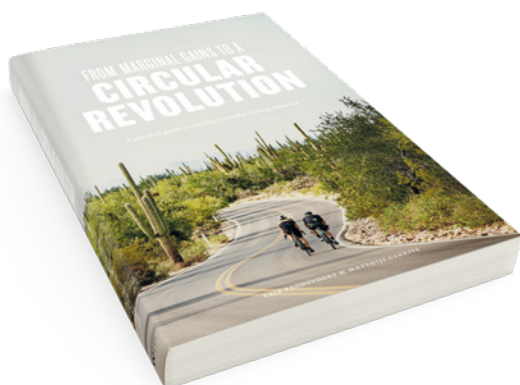
By Erik Bronsvoot MSc,
Freelance Innovation Manager,
Trainer and Author. Co-founder,
Circular Cycling.

SUSTAINABILITY IN SPORTS: FROM MARGINAL GAINS TO A CIRCULAR REVOLUTION

Optimistic cycling freak with a drive to make our planet a better place. **Erik** managed innovation projects in the construction industry until 2009. Then decided to dedicate his time to sustainability as he realised that solving climate change and resource scarcity needs a business case. Wrote 'From Marginal Gains to a Circular Revolution' to inspire the cycling industry to act.

Sustainability has not been a part of the strategy of most of the companies in the bicycle industry. With increasing pressure on companies to contribute to tackling climate change, (plastic) waste and pollution, now is the time to change the linear economic business model. The transition to a circular economy offers an enormous opportunity for sports goods brands to make a big step in product design, and in their interaction with customers. It will not be easy, but it will be exciting.

'In 2050, we live well, within the planet's ecological limits. Our prosperity and healthy environment stem from an innovative, circular economy where nothing is wasted and where natural resources are managed sustainably, and biodiversity is protected, valued and restored in ways that enhance our society's resilience. Our low-carbon growth has long been decoupled from resource use, setting the pace for a safe and sustainable global society.' – European Commission, 2020¹



What the European Commission envisages is a wonderful world view. It means we will have solved many, if not all, of the ecological, health and wealth problems that we face today. The effects of climate change will be minimized, and waste and pollution will be a thing of the past – not just in wealthy parts of the world, but everywhere. Realising this circular economy will require a new way of doing business. Current business models, not just in sports industry but almost everywhere, are linear business models. They rely on buying cheap resources, making products at the lowest possible cost, and then selling as many products as possible. Few manufacturers consider what happens with their products after the purchase, let alone think about the waste at the end of the lifetime.

During my work in the construction industry I learned that causing less environmental impact by installing solar panels on top of a concrete building is a good start, but not the solution. Materials are often overlooked in traditional sustainability plans that figure clean energy for the office, cycle to work programs and a reduction of the CO₂-emissions of the company cars. The production of materials like cement, steel and aluminium leave big holes

¹ European Commission, Environment Action Programme to 2020. <https://ec.europa.eu/environment/action-programme/>



**'IN A CIRCULAR CYCLING
WORLD, BIKES WILL BE
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CIRCULAR•CYCLING

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CIRCULAR•CYCLING

**'A CIRCULAR CYCLING
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THAN MARGINAL GAINS,
WE NEED A REVOLUTION'**

CIRCULAR•CYCLING

in the earth where they are extracted, and require vast amounts of fossil fuels to make. Instead of becoming less bad, companies have the opportunity to become a part of the solution. We need to change the way we think about the design of products and how products are offered to users.

What this change looks like depends on the type of product a company offers and its position in the supply chain. I will use the cycling industry as an example in this article because this is the industry I know best. A few years ago, I set up a start-up company called Circular Cycling with a goal to change the industry. We experimented with circular business models in the sports market, building and selling 'new bikes from as many used parts as possible'. We sourced our materials from a box that seems to be present in every cyclist's shed: a box with parts that are too good to throw away, but will never be used again. We ran into the limits of reusing parts that are designed for the linear economy.

Over the last decades, the cycling industry has proven to be a very innovative industry, able to deliver better products every season by teams based all over the world. The supply chains are truly global: design is done all over the world, manufacturing mainly in Asia, customisation closer to the customer. The internet makes it possible for brands to interact directly with consumers, who now no longer rely solely on their local bike shops to buy bikes and parts.

Bike innovation has made a huge difference: road bikes have become more reliable through better component design, testing and manufacturing methods. Shifting and gear ratios have improved, ergonomics of handlebars and saddles have made riding a bike far more comfortable, making the road bike accessible to more and more people across the globe. In fact, the design of the road bike has reached such a high level of maturity that the number of radical breakthroughs has been very limited in recent years. It is no coincidence that the term 'marginal gains' has been introduced in the industry, since there are now a lot of tiny steps needed to make a difference.

However, the industry's focus on standing out by introducing marginal innovations in order to sell more products, and sell them faster, is no longer in line with the goals of a circular economy/ sustainable future. This marketing-based sales approach causes too much waste, as more and more products will cease to be used because they are out-fashioned and eventually discarded before they have reached the end of their technical lifespan.

The new marketing 'thing' in the cycling industry needs to become sustainability and there are three incentives to do this. First, more and more customers will start asking for these products as the outdoor apparel industry already showcases. Second, regulation will start to have an impact on the price of materials that have high ecological impact. Finally, and most important, the transition to a circular economy offers an enormous opportunity for bicycle brands to make a big step in product design and in their interaction with customers with the potential to create new revenue. It requires the introduction of radical innovations, leading to a larger market share for the most innovative companies. The introduction of bicycles for a circular economy will be exciting, with a lot of new products and services to choose from.

'IT WOULD BE A WIN-WIN-WIN SITUATION. CUSTOMERS WIN BECAUSE THEY ARE ABLE TO RIDE MORE RELIABLE PRODUCTS THAT REQUIRE LESS MAINTENANCE. THE INDUSTRY WINS BECAUSE IT CAN CREATE EQUAL OR MORE VALUE WITH LESS MATERIAL. FINALLY, THE PLANET WINS BECAUSE THERE WILL NO LONGER BE ANY WASTE OR POLLUTION, AND NATURE WILL GET A CHANCE TO REGENERATE.'

Imagine a bike that has been made from plant-based materials or recycled and reused parts, and that the material wearing from your tyres or brake pads is biodegradable. The lubrication washing down from your chain no longer pollutes the forest you are riding through, but provides valuable nutrients for the plants in it. Sensors tell your cycling computer about the state of the components and warn you when and how to maintain them. You no longer discard your old bike as if it were a piece of rubbish, but return it to the manufacturer so that parts and materials can be reused to make new bikes; the condition of the components has been monitored by the data sensors and collected in the bike's own bike passport. Or, alternatively, you could plant your old bike in your garden for it to become part of the circle of life again.

There will be successes and there will be failures. Bikes will be better – not just better to ride, but better for our planet and our societies. It is time for the cycling industry to adopt business models like 'pay-for-use' and 'buy-back guarantees' and product designs that no longer deplete natural resources, cause pollution and CO2 emissions, and let so many materials end up in a landfill or an incinerator.

To get to a circular economy, we need much more than marginal gains, we need a revolution.

We do not have all the answers to the questions you might be asking yourself by now – no one does. The transition to a circular economy requires changes in the way we think about our current products, about supply chains, about the interaction between manufacturers and users. This complex global system cannot be forced to make the transition by a single organisation, a small group of people with the right intentions, or by writing a book. It will require all of the stakeholders in the cycling industry to contribute.

Read more about the circular cycling economy, business models and design strategies in the practical guidebook 'From marginal gains to a circular revolution', available worldwide as paperback and Ebook on Amazon. (<https://www.amazon.com/dp/9492004941/>)

<https://www.circularcycling.com>





RESPONSIBLE SPORT INITIATIVE

ONE INDUSTRY // ONE STANDARD

BENEFITS AND IMPLICATIONS

FOR BRANDS

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- Streamlined communication and information exchange
- Audit information sharing
- Equal audit cost sharing
- Optional outsourcing of audit administration
- Cost savings
- Pooled forces increase chances of success - enhance corrective actions

FOR FACTORIES

EFFICIENCY AND LESS AUDITS

- Prevention of audit duplication and fatigue
- One single CoC supporting standard with indicators of compliance
- One single CAP template
- One single grading system
- Harmonized communication, less confusion
- Shared Tools
- Solution to show active commitment

FFC BENEFITS

ALL IN ONE PLACE

- Foster culture of collaboration and continuous improvement
- RSI as neutral place to go
- RSI secretariat as central administration and contact point
- FFC as one-stop shop and central communication hub for companies to communicate with all relevant parties
- Possibility for suppliers to update information autonomously on FFC



DISCOVER
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CORPORATE RESPONSIBILITY COMMITTEE



Activity Report 2020

Summary

Despite the fact that the WFSGI CR Committee has enrolled in a new working mode in 2018 with a focus on ad hoc engagement and cross committee support, a physical meeting was organized during the WFSGI annual meetings in Munich at the beginning of the year. This was not a classical WFSGI CR Committee meeting but a corporate responsibility meeting open to all members regardless of a committee affiliation. The purpose was to have a round table discussion and get an understanding of current important issues in the area of sustainability. This meeting was used to invite the Ellen MacArthur Foundation to provide the attendees with an insight on the increasingly important topic of circular economy.

This pursued the existing projects such as the Communication on Action reporting. In addition, also the CR Heads Up were published throughout the year, even though the frequency of the publications was lower due to the addition WFSGI COVID-19 Support and Resources Newsletter that was issued by the organization.

To replace physical meetings because of the COVID-19 crisis, the WFSGI offered its constituency access to relevant developments through a series of webinars this year. Amongst others, a webinar on the future of auditing was hosted in collaboration with the external expert Randy Rankin, a founding member of APSCA. The purpose was to share expertise with the CR experts on how the pandemic will impact the auditing work of the industry.

The WFSGI is also pursuing its collaboration with FIFA to pledge for FIFA licensees participating in the FIFA Quality Programme. It has been agreed to extend the successful audit verification service provided by the WFSGI to new product categories, amongst others football goals.

The WFSGI has also volunteered to transparently present the industry's corporate responsibility activities in the newly established GAISF sustainability.sport. The purpose of this database is to increase the visibility of sustainability initiatives in the field of sport, promote knowledgesharing and encourage dialogue, coordination and the development of fruitful partnerships. The platform has been initiated by GAISF in collaboration with the International Olympic Committee (IOC) and with the support of the International Union of Conservation of Nature (IUCN), Sport and Sustainability (SandSI) and The Sustainability Report.

Finally, the WFSGI has tightened its collaboration with the Centre for Sports and Human Rights. This center has been launched and established physically in Geneva, Switzerland as a result of the work done by the IHRB – Institute for Human Rights and Business. The latter had developed the Sporting Chance Principles on Sport and Human Rights in 2018 which the WFSGI has formally endorsed.

Since this year, the WFSGI is entitled to participate in the Centre's Mega Sports Event working group to closer involve and brief the SGI on the outcome of that work.

Outlook/Forecast 2021

The WFSGI will follow up on the first exchanges established this year around Responsible Digital Transformation. This topic was taken up in the WFSGI Corporate Responsibility meeting in early 2020 and has gained huge traction due to the pandemic afterwards.

Taking into consideration important developments that took place this year, the WFSGI Board induced to address Diversity and Inclusion and create awareness for this amongst the WFSGI members. First exchanges have taken place and information has been gathered to compile best practice guidance for members.

Beside this, the WFSGI CR Committee will remain available for any request on expertise from other WFSGI working groups and it will continue to raise important developments and bring them to the attention of the WFSGI members.



Chair



Frank Henke
Senior Vice
President
Sustainability,
Global Operations,
adidas AG

Vice-Chair



Sara Brennan
Head of Corporate
Responsibility,
Pentland Brands
Ltd.

Ex Officio

**Marc-Ivar
Magnus**
WFSGI Vice
President Trade,
Corporate
Responsibility and
Legal

**CHECK ALL
COMMITTEE
MEMBERS**



WFSGI AND MCKINSEY & COMPANY

COLLABORATE
ON GLOBAL SPORTING
GOODS INDUSTRY
REPORT 2021

2020, the year of the outbreak of the COVID-19 pandemic, was a special year for the Sporting Goods industry: A year characterized by uncertainty and disruption, leading to opportunities for some and chaos for others. These were the most common words experts used to describe the 2020 Sporting Goods industry in a survey run by McKinsey and WFSGI in September (see exhibit 1). Industry executives had to find answers to problems arising in an untransparent and quickly developing environment, problems they were not prepared for.

To support executives, WFSGI and McKinsey joined forces and created a new Global Expert Webinar format (see exhibit 2). The webinars hosted for WFSGI members provided the industry with latest developments on COVID-19, insights from global consumer sentiment surveys conducted by McKinsey, initial perspectives from McKinsey experts on how players in the Sporting Goods industry could respond and what a “Next Normal” could look like. The webinars were well attended and well received with over 500 participants from Asia, Europe and the Americas.

As it became apparent that COVID-19 would stay with the industry for the foreseeable future, WFSGI and McKinsey decided to expand their collaboration to launch a Global Sporting Goods Industry report. The report will be published in January 2021. The purpose of the report is provide a more comprehensive perspective on Sporting Goods 2020 and trends shaping the industry in 2021.

Insights for the report were obtained through a survey conducted among members of WFSGI and SFIA in September 2020, hour-long interviews with a diverse set of >15 executives representing manufacturers, brands, and retailers, as well as interviews with WFSGI expert panels and McKinsey experts, and research done by McKinsey. The report will put special emphasis on a the major trends shaping the Sporting Goods industry’s next normal.

Exhibit 2: WFSGI + McKinsey GLObal Expert Webinar

The poster features a dark blue background with a woman in profile on the right, wearing a white t-shirt, a black armband, and earbuds, appearing to be running. Above her are two stylized, glowing blue virus particles. The text is in white and yellow. The McKinsey & Company logo is in the top left. The main title is in large, bold, white letters. Below it, 'Global Expert Webinar' is written in a smaller font. Further down, the event details are listed in a small font. The WFSGI logo is in the bottom left, and a confidentiality notice is at the very bottom.

McKinsey
& Company

**Perspective on the
Sporting Goods Industry
post-COVID-19:
Trends, challenges &
opportunities**

Global Expert Webinar

World Federation of the Sporting Goods Industry | McKinsey & Company
July 8th
Slot #1: 9am-10am CET / 3pm-4pm HKG / 3am-4am ET
Slot #2: 5pm-6pm CET / 11pm-12am HKG / 11am-12pm ET

WFSGI
WORLD FEDERATION
OF THE
SPORTING GOODS INDUSTRY

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To give you some early insights, we are pleased to provide you with a preview on the 8 trends we believe will be crucial for Sporting Goods players to find answers to, to succeed in 2021. The themes of these 8 trends are:

1 Athleisure the new default wear and a competitive battleground: Athleisure has been a megatrend before COVID-19, but through the pandemic the lines of work/free time have been blurring, with increasing acceptance of comfortable wear in previously more formal contexts, thereby accelerating the athleisure trend. With fashion brands increasingly enter this segment, SG players should leverage their ability to bring innovation to win over fashion.

2 Leap forward in online enabling and accelerating business model shift to DTC: Ecommerce was already growing pre-COVID, but COVID-19 caused a leap forward in online shopping with many first time users who are likely to stick to these new habits – companies need to transform their business model from wholesale to DTC, which means more than just having an online shop.

3 New digital-enabled ways of exercising & community building: Digital fitness has been on the rise pre-COVID and accelerated with the pandemic, as people found digital replacements for exercising as source of fitness instruction and community; these new tools will be integrated into fitness routines post-COVID. Big winners are connected fitness offerings (e.g. Peloton + Zwift) allowing remote exercising in a community/competitive setting.

4 Retail under pressure to reinvent and renew its purpose: Brick and mortar stores were already under pressure pre-COVID-19, the lockdown measures have further accelerated the crisis for physical stores due to forced closures for long periods, increasing financial pressure. To attract consumers back to the store, retail needs to find new purposes, new experiences, and new convenience that cannot be offered digitally.

5 Volatility and DTC raising the bar on supply chain agility and speed: Shift to faster supply chains was already happening pre-COVID, driven by increasing relevance of DTC retail/eCom models that require faster market responses; COVID-19 accelerated DTC and brought unprecedented unpredictability, expected to stay in 2021; volatility is the trigger to build more agile SCs, with possible solutions being nearshoring and stronger suppliers partnerships.

6 Physical activity inequality increasing through COVID-19: COVID-19 has triggered significant shifts in physical activity levels with large parts of the population decreasing and an equal part increasing physical activity. The current crises will drive more households into lower income groups, which are more vulnerable to reduction of physical activity. A multi-stakeholder approach, including the Sporting Goods industry, will be necessary to tackle this disparity and increase physical inactivity levels especially in those communities left behind.

7 Sustainability the COVID-accelerated “new norm”: Sustainability has been relevant for consumers in recent years and companies have responded by introducing more sustainable products to the market; COVID-19 accelerated the trend. This accelerates the challenge for companies to secure sustainable supply, a challenge that circularity can help overcome starting in 2021.

8 New digital horizons for brand-marketing opened by uncertainty on sports events: With increasing online relevance, digital marketing spend has increased already pre-COVID, but was traditionally focused more on ROI-driven performance marketing; COVID-19 increased time spent online and negatively affected sports events (a traditional channel for brand marketing) – in response, brands need to find new ways to engage in brand marketing online; here individual athletes play a pivotal role and become the communication channel to align brand-athlete-consumer values.

In the report, we will provide a detailed perspective on these trends including descriptions of their status pre-COVID-19, analyses on the effect COVID-19 had on them, perspectives on their expected evolution in 2021 and recommendations for Sporting Goods players.

*We are very much looking forward to sharing the report with you in January!
In the meantime, please feel encouraged to reach out with any comments or questions to Alexander_Thiel@McKinsey.com*



By Sebastian Schulze,
Founder and Managing
Director, Fit Analytics
GmbH

SPORTSWEAR

ADAPTATION OF SIZING TECHNOLOGY BEFORE AND AFTER COVID-19

Sizing technology has transformed from a nice-to-have to a necessity for companies selling apparel online. The sports and outdoor industries were among the first to leverage sizing and personalization technologies to level the playing field between the in-store and online shopping experiences. In this Q&A we explore how sports retailers adapted sizing technologies, pre and post COVID-19, with Fit Analytics' Founder, Sebastian Schulze.

The world's top apparel companies use Fit Analytics' data solutions to connect clothing to customers, boost conversions, slash returns, and make better business decisions. Fit Analytics delivers over a billion monthly sizing recommendations to apparel retailers such as Footlocker, JD Sports, Decathlon, Helly Hansen, Snipes, Icebreaker, Boohoo and more.

The virtual sizing industry has made incredible progress over the last 10 years. Sports and outdoor retailers have shown a keen awareness of the need to provide shoppers with an equivalent online shopping experience to the traditional brick and mortar stores. After the initial shockwave of the COVID-19 pandemic, Fit Analytics saw an influx of companies considering sizing technology to support pivots in their online strategies. In the following Q&A, we explore how sports retailers have adapted sizing technologies before and after COVID-19.

As someone who has been keeping an eye on the interplay between fashion and technology, why should the sportswear retail industry consider available sizing technologies?

Though sports retailers do have a good ecommerce technology adaptation rate, there is still work to be done to normalize the consumer use of integrated online size advisors. Shoppers are still confused and sometimes distrusting of online shopping, and this can negatively affect profits.

Among sports retailers, one of the issues we see is the discrepancy between sizes for clothing based on its purpose. There is considerable room for sizing mistakes unless a shopper knows the apparel sizing differences for various activities. Avid cyclists are familiar with the tighter fit of a jersey or cycling shorts. A recreational athlete

shopping online to gear up for a triathlon might order a medium in both cycling and running clothes and be disappointed when the cycling shorts are too snug and the running pants a bit too loose. These issues would normally be handled by retail staff, but online shoppers are left to figure it out alone. These are the scenarios we address with our sizing technologies. Implementing sizing and other personalization technologies will increase customer confidence and trust in brands, which has been proven to increase conversions and reduce returns in numerous tests we've conducted.

How have technological advances helped shift consumer shopping behaviors?

Tech advances have increased the entry points for consumers to shop. In addition to the overall growth of e-commerce, increased smartphone and native app usage have driven more people to shop online and on mobile devices. What was once strolling in a shopping center or department store on a Saturday, is now scrolling through a catalogue on a smartphone while commuting. Today, people are able to shop any time, day or night - and they do.

Imagine the sprawling layout of a major sportswear store. Shoppers used to have thousands of square meters to browse various garments and gear. Rows of shelves have been reduced to the size of a screen. Instead of aisles overflowing with apparel ready to be discovered, shoppers now search vast catalogues using specific terms on a comparatively miniscule piece of "real estate." Today brands have to make sure people see the most relevant, satisfying items right away or they will simply go to another site. Today's equivalent of entering the URL of another online store is much easier than yesterday's need to drive 25 kilometers to the next sporting goods store.

When shopping online, the faster a customer is set up with the correctly fitting clothes for their needs, the happier they will be and the more likely they will be to shop with that retailer or brand in the future. Trust is built. As the technology is normalized and people come to expect it, there is less hesitation to seek size advice as opposed to referring to an outdated size chart.

How did COVID-19 affect sportswear retailers?

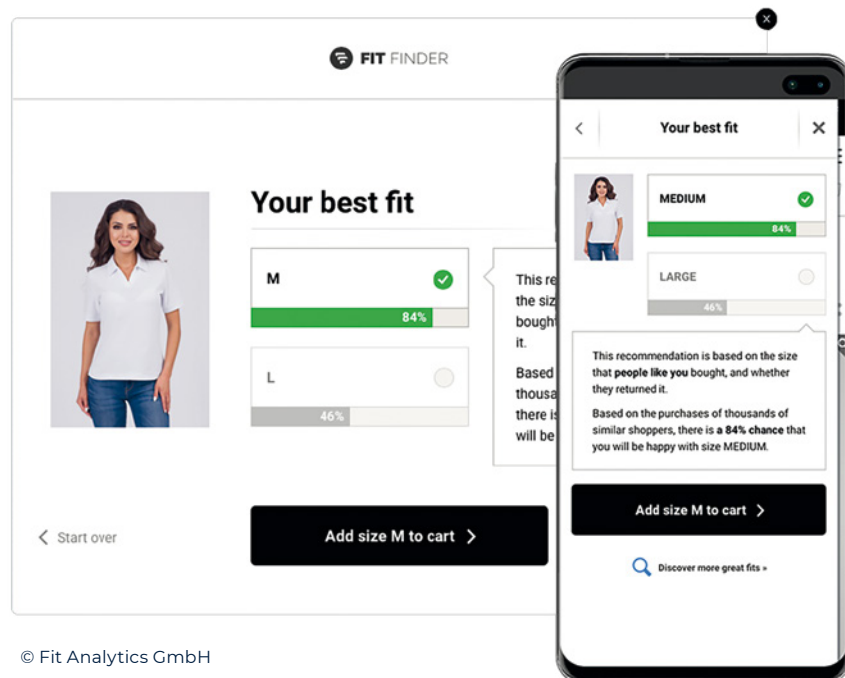
Sports and outdoor clothing has fared relatively well during the COVID pandemic. Shoppers stuck at home have traded more formal business attire for sports and athleisure apparel. Where luxury and lifestyle clothing has taken a hit, sportswear has remained fairly steady throughout 2020. We did see a slight drop in purchases in March 2020 at the beginning of the COVID crisis, but in general, we have seen an increase in user engagement over the same time period last year.

How have your sports retail and brand partners fared during the pandemic?

Unable to shop in stores due to COVID closures, more consumers sought size advice after being compelled to shop online. Analysis of our records showed that in the three months after lockdown, Fit Finder generated size recommendations jumped by just over 25% for our partner sports retailers and brands when compared to the three months before global shelter in place measures took effect. Companies benefited from both fewer returns and multi-size orders in the three months post lockdown. Overall return rates also dropped by 45%.

In some areas, sports retailers - those who carry several sports brands - fared a bit better than individual sports brands. Both saw an increase in online purchases after the lockdowns started. However, in the three months after lockdown, total purchases increased by almost 48% for sports retailers when compared to the first three months of 2020, while sports brands only saw an increase in total purchases of just over 19% during the same period. In addition, sports brands had fewer shoppers seeking size advice with an 11% drop in size recommendations when compared to the first three months of 2020, while sports retailers experienced a 33.67% increase in size recommendations for shoppers using the Fit Finder size advisor.

While both sports retailers and brands had more online shoppers at the beginning of COVID lockdowns, customers chose retailers over brands to meet their apparel needs.



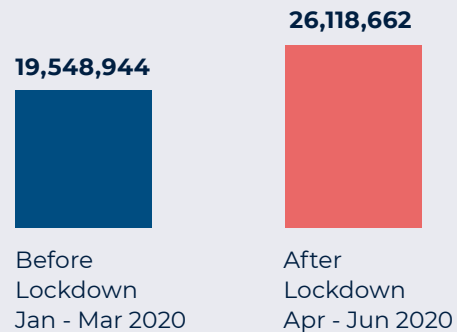
How do you think the apparel retail industry will change moving forward?

COVID-19 has compelled shoppers to rely on online shopping even more. Those who may have been hesitant and preferred the in-store experience have gotten more used to shopping online. Retailers have had to adjust to an increased load on their e-commerce operations, with a particular focus on prioritizing a seamless user experience that eliminates as much uncertainty for the customer as possible. Physical stores will become less about shopping and more about the experience of being there - more events, special guests, in-store cafes - community built around a brand.

How will these changes affect the sports apparel industry's approach to technology?

The sports apparel industry will continue the shift from brick and mortar to online. The special profile of sports apparel with its inherent functional nature will lead to technological innovations to help customers based on how they are going to use specific clothing. There will be an increase of solutions offering highly personalized size, style, and functionality recommendations.

Total number of size recommendations for Sports Retailers and Brands



© Fit Analytics GmbH



By Prof. Dr. Ing.
Christian Kaiser,
Albstadt-Sigmaringen
University

STUDENTS

AT THE CUTTING EDGE OF DIGITAL PRODUCT DEVELOPMENT

Christian is Professor at Albstadt-Sigmaringen University. His research contributions lie in digital process chains, simulation based assessment of fit for garments as well as virtual sampling and small series production, especially Microfactory concepts. Having studied Technical Cybernetics at the University of Stuttgart, he strongly focusses on approaches on system-level.

Students from Albstadt-Sigmaringen University of Applied Sciences and TTK University of Applied Science Tallinn have created a completely virtual collection - from the initial idea to photo-realistic 3D visualisations. At times of corona lockdown, 100 percent in home office. Their work gives a detailed impression, how the textile industry might change due to digitalisation.

Importance of digital design

The advantages of digital development and design of 3D clothing are obvious: Prototypes can be adapted quickly and misunderstandings between designer, developer and producer can be reduced significantly. The data can be shared easily for example via cloud. Different colours, patterns and structures can be tested nearly effortlessly. Additionally, the garments can be visualized in detail. Fitting with human models might lose weight, as simulation programs can visualize body distances and other technical parameters, which helps to digitally assess fit. Cost and CO2 emissions can be saved by digital communication as the reduction of physical prototypes saves money, resources, space and leads to less waste.

Furthermore, 3D presentation concepts are getting more and more important. Photo shootings can be replaced by renderings and salesman samples can be reduced by digital showrooms, and high-end 3D visualization.

Special tools like augmented reality and interactive storefronts lead to special shopping experiences: In the near future, it might be even possible to see the virtual garment on your personal avatar.

Corona situation as trigger for digital collaboration

Due to the COVID-19 situation, the industrial project course took place exclusively online. To train the students within thirteen weeks from starters to skilled users of 3D simulation software and rendering software the inverted classroom concept was used. Therefore, video tutorial playlists connected to training data bases were provided to the students with increasing skill level. Questions were discussed on video conference tools and the tutorial playlists improved based on these sessions. Team meetings for project management were also exclusively held on video conference tools. The students were additionally granted access to a fleet of remote workstations sited at Albstadt-Sigmaringen University, as each software used within the project was highly demanding in terms of computational power.

Finally, the course was divided into four groups, which worked in the categories casual wear, business and knitwear, accessories, and sports.

Aim of the project

Aim of the project was to intensively test the interaction of 3D garment simulation software with rendering software. In this context the achievable quality at rendering garment simulations as well as limitations were investigated. In detail the rendering software KeyShot was used in combination with the pattern and 3D simulation programs Vidya and CLO 3D. The aspired results were high-end renderings, what means that the simulated garments should look as realistic as possible.

Lessons learned were that the choice of fabrics and the availability of maps dramatically influence the visual impact of rendered garments. Thus, students generated and used settings for structures, transparency, colours, roughness or shininess. Further findings are that realistic simulations of details like buttons or zippers are important to get a good result as well as avoiding artefacts imposed by too rough triangulation of the garment pieces within the simulation tools.

Workflow

Within thirteen weeks 29 students of the University of Applied Sciences Albstadt-Sigmaringen and the TTK University of Applied Science Tallinn learned how to work with the simulation and rendering programs and acquired skills of agile project management. Each student should invest approximately 20 hours of work per week on the project. As already introduced, the course was divided into four groups, which worked in the categories casual wear, business and knitwear, accessories, and sports. While for all categories LECTRA Modaris was used as CAD system, depending on the product category Cad.Assyst or CLO 3D were used as additional pattern systems. Reason was to train students in data transformation and to give them a better understanding of the individual strengths of the used systems. The same principle was applied for the 3D simulation of the garments and accessories. Sourcing and development of textures, hardware and trims and further ingredients was jointly performed for both workflows that are shown in Figure 2.



Figure 1: Avatars in front of boxes © University of Albstadt-Sigmaringen (Source: Levi Kischkel)

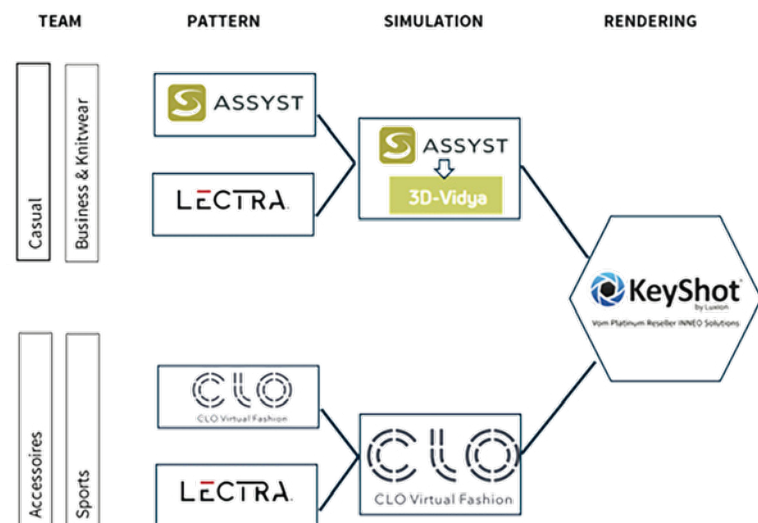


Figure 2: Students' workflow

Hard to distinguish from product photography

Thanks to the cooperation with INNEO Solution GmbH, the students were able to present their product ideas on a completely new level. The simulations were rendered using the KeyShot programme. This means a transformation from conventional model designs into amazingly realistic images that are difficult to distinguish from a product photography as it can be seen in Figure 3. With the help of self-developed textile textures and settings, various sceneries were visualised, which could easily be printed in a product catalogue and used for B2C. With this knowledge, the generation of images for catalogues and online shops will change.

Potential for the fashion and sports industry

After thirteen weeks of intensive working with the 3D simulation programs Vidya and CLO 3D and the rendering software KeyShot the students totally agree that 3D garment simulation and high-end rendering are key technologies in the future of fashion and sportswear. We think the achieved digital visualization of garments show the upcoming revolution in production and creative as well as sales processes.

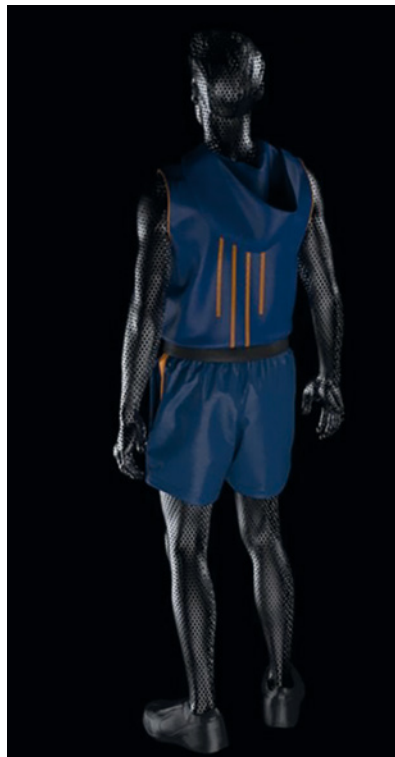


Figure 3: Back pack (Source: Julia Le) and sports bag (Source: Melanie Frick & Sarah Kaub) © University of Albstadt-Sigmaringen

Figure 4: Sportwear outfit boxes © University of Albstadt-Sigmaringen (Source: Verena Hipp)

As this project shows, people who have practically no experience with 3D simulation and rendering – the students were just starters – can quickly learn the programs and achieve very good results after a short time if boundary conditions as training materials, precise understanding and definition of software workflows are available as well as the motivation of the people involved is high.

Preproduction samples and photo shootings can then be replaced by simulation and rendering gradually as the renderings in Figure 4 show. Furthermore, there will be more and more young professionals, which can bring product development with the help of 3D visualization to the next level.



In our case we needed to find suitable materials and trims and adjust camera and lighting settings which matched our categories and visions additionally to the patterns and fabrics. Therefore, we needed a lot of time to experiment. For industrial purposes, the visualization process can be fastened if there are company-specific databases for the textiles, trims like zippers and labels, scene settings and light settings. In this case the employees will primarily have to define the designs in a 3D program. If a rework of the fit is necessary, an employee can edit the pattern rapidly. Afterwards the simulation can be processed in a rendering software to make it photorealistic. With lighting and scene presets and fast computer workstations, there is little time required for the rendering.

"In addition to the important practical experience, the students learned future-oriented skills for their professional life. They experience first-hand in how far our industry is changing due to digitalisation and where the opportunities for future textile and clothing engineers lie. And even more impressive, what is possible from the home office."

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Sustainability
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High-tech Manufacturing

MANUFACTURING COMMITTEE



Activity Report 2020

2020 should have been the first year where the WFSGI Manufacturing Committee was welcoming not only representatives of manufacturing companies but also of brand and retail companies. Unfortunately, the pandemic was not allowing for physical gatherings of this newly established working group.

The WFSGI Manufacturing Committee quickly identified the Covid-19 pandemic to have a serious impact on the sporting goods suppliers.

The striking challenges caused by the pandemic, was the uncertainty and lack of insights about the near future. This made it very difficult for manufacturing companies to plan ahead production, anticipate orders and material supply.

That's why the group decided to tackle this issue and investigate how to best provide at least some transparency and outlook. It was agreed that a survey conducted amongst sporting goods industry players would be the most promising way to gather necessary information.

After the first very successful edition of this survey, the WFSGI continued to conduct it on a monthly basis. After each month a closing report was drafted based on the results of the survey. This report was very well received, even beyond the sporting goods industry.

Throughout the pandemic the WFSGI Manufacturing Committee will pursue its efforts to support manufacturing companies with relevant data and information. To do so, the survey will be reviewed and adopted whenever necessary and the situations requests to do so.

Chair



Colin Browne
Chief Operating Officer, Under Armour, Inc.



Simon Cheng
VP, Strategy and Operation, Apache Footwear Ltd.



Rakhil Hirdaramani
Director, Hirdaramani Intl. Exports (Pvt.) Ltd.



Duncan Scott
Vice President External Products, New Balance Athletics, Inc.



Charles Yang
COO, Victory Group Ltd.

Ex Officio

Marc-Ivar Magnus
WFSGI Vice President Trade, Corporate Responsibility and Legal

CHECK ALL
COMMITTEE
MEMBERS





By **Marc-Ivar Magnus**, Vice President, Trade, Corporate Responsibility, Legal, WFSGI

HELPING THE INDUSTRY TO FEEL THE PULSE – THE WFSGI COVID-19 SURVEY

Marc-Ivar Magnus (37) from Fribourg, Switzerland is the WFSGI Vice President for Trade, Corporate Responsibility and Legal since March 2017. Marc started with the WFSGI as an intern in 2010 during his final academic year. Thereafter he coordinated the WFSGI CR Committee's work and later, he took care of the federation's activities in the field of international trade too. Recently he also took over the responsibility of the coordinated manufacturing activities under the WFSGI umbrella. Marc also managed the development of the RSI – Responsible Sport Initiative, which is a verification solution for companies who are jointly auditing their shared suppliers. Marc is a member of the board of directors of the FFC – Fair Factories Clearinghouse. He holds a Master in Law with international, European and penal law as areas of specialization.

The Covid-19 pandemic affected the entire sporting goods industry. Beside the multitude of new challenges arising, the consistent uncertainty about the near future was an omnipresent issue that made it difficult for SGI companies to forward plan.

The topic was discussed with the members of the WFSGI Manufacturing Committee, a unique blend of brands and manufacturers. At the beginning of the pandemic, the manufacturing companies were at the front line of the challenge. It became clear that there was no central information source for the sporting goods industry providing information on the situation in the different regions and trying to predict short term developments.

Therefore, the WFSGI and its Manufacturing Committee developed a survey designed to gather relevant information on the emerging key trends for the sporting goods industry in relation to the pandemic and where the problems continued to lie.

To provide meaningful feedback to the respondents of the survey, it was crucial that the survey was not a 'one-off' but was able to track closely how those trends evolved. For this reason, it was decided to conduct the survey on monthly basis and compare the results over time.

This also gave the WFSGI the opportunity to update the survey progressively according to feedbacks received.

At the end of every month, the results were compiled, analysed, and compared to the ones from the previous months. The analysis was showcased on a graph showcasing the monthly changes together with some explanatory notes and shared with the full WFSGI membership.

The WFSGI monthly survey was constructed and executed with the sole purpose of providing its members with a consistent source of comparable information that might be of assistance in their decision-making processes.

After all, the survey also showed in an obvious manner, that the sporting goods companies are quickly adapting and very responsive to find solutions to arising challenges. Whereas the beginning of the pandemic was scarred by supply chain disruption, material shortage, etc. These issues were less of a problem the longer the pandemic persisted.

Even though this was the first time that the WFSGI conducted such a repetitive survey to gather data, it was very well received from the WFSGI membership. In addition, the data also provided a useful resource for sporting goods and non-sporting goods media in evaluating the impact of COVID-19.

With that said and taking the feedbacks and the active contribution of the companies into account, the WFSGI will in the future further monitor the industry's need for specific information and data. Based on the experiences made, the WFSGI will quickly be ready to implement new surveys to serve its members with the necessary insights and relevant data from the sector.

PARTY IN MIAMI

**LOOK WHO JUST LAUNCHED...
AND THIS AMAZING PACKAGING!**





By **Fatima Hussain**,
LL.M., Legal Counsel,
AUDI AG in Ingolstadt,
Germany

LEGAL TECH – THE LEGAL DEPARTMENT'S FIRST-AIDER DURING A PANDEMIC¹

Fatima, is Legal Counsel at AUDI AG and advises on legal matters regarding product liability in the context of digitization of vehicle technologies and platforms. She advises on global litigation in the US, Canada and Germany and eDiscovery matters worldwide. Previously she was a research associate at Freshfields Bruckhaus Deringer in the Dispute Resolution team in Frankfurt, Germany.

The COVID-19 pandemic has made it clear how important a functioning digital infrastructure is. Companies and Legal Departments that pioneer in terms of technical developments in their IT infrastructure were able to maintain their company's working apparatus with little or no loss of efficiency and cope with the complex situation more easily. Implementing the necessary tools and following the relevant steps allows in-house counsel to hit the ground running in such unusual circumstances.

Benefiting from the implemented legal tech tools in unusual situation requires initial effort of many parties within a company. Many time consuming and complex steps need to be taken in order to introduce a legal tech tool to the IT infrastructure of a legal department. Is it all worth it? Yes.

As the era of the eMail approaches its end and the tasks of the legal department have become much more complex, legal tech tools are necessary to ensure an effective use of the limited time of in-house counsel. In general and specifically in times of a global pandemic, the following three tools are essential to keep the legal business running and therefore should be in your first aid kit.

Tools for project management

Effective project management is inevitable for the success of projects. When using legal tech tools for a proper management of projects, the legal departments will be able to track the status of the project, view and edit relevant documents (e.g. framework agreements) and raise legal questions to the relevant project teams digitally. Especially when dealing with large-scale projects, it allows many project owners to move forward without being distracted by sending relevant documents and new developments to every involved colleague by eMail.

It is crucial that to include all involved parties in a coherent process to avoid the duplication of work and to ensure that the project team has a uniform standard of knowledge.

Tools for standard legal questions

Dealing with standard legal questions can be time consuming and compromises valuable time of in-house counsel at the expense of internal clients requiring legal advice for specific legal questions.

In this context, chatbots² can be extremely helpful as they provide 24/7 legal advice on specific questions that do not require an assessment on a case-by-case-basis.

They can be used for any legal standard question and are a quick and economical tool to free up capacities of in-house counsel. While implementing a chatbot may require a large onetime investment, it provides a great and swift flexibility regarding its use in different situations, expanding the spectrum of standard legal questions and their answers and changing main focuses of legal advice, at a minimal cost.

¹ The views expressed in this article are those of the author and do not necessarily reflect those of the AUDI AG.

² A chatbot is a software application used to conduct an on-line chat conversation via text or text-to-speech, in lieu of providing direct contact with a live human agent.

Therefore especially, during a pandemic or similar exceptional circumstances when there is a need to communicate accurate legal advice at large scale in a quick way, such tools can be utilized to answer a great amount of questions of internal clients. These can include questions regarding short-time work, timekeeping and permitted and prohibited business tools (e.g. such as specific video conferencing tools). Nonetheless in-house counsel must be available for specific questions and provide a case-by-case legal assessment, where needed.

Tools for file management

Proper file management is crucial to ensure a documented and transparent legal advice within the legal department. However, it can be very time consuming to sort documents, eMails, memorandums and other information into their specific file. Legal tech tools analyze the document, classify it and sort it into the correct file without needing in-house counsel's efforts. In case of a situation where home office is obligatory for in-house counsel from one day to the next, easy access to these files is essential to maintain the daily business of the legal department. Therefore files need to be accessible from everywhere and, ideally, are automatically sorted and comprehensive. This saves valuable time and efforts and allows in-house counsel to keep up with the ongoing advice to internal clients.

Five essential steps need to be taken to ensure a successful introduction of a legal tech tool, regardless from the specific function.

1 Know your needs

The first step to encounter a successful digitalization in the legal department is to know what you need. The legal tech market provides many tools, from contract review, electronic files, search masks to chatbots, only to name a few. Analyzing your needs can be based on interviews, feedback from your colleagues, internal clients, reviewing workflows, and processes in your daily work. The tool should serve your goals and needs.

2 Talk to your IT-department

Before looking into different tools and vendors, check with your IT-department whether your company already has a tool that you can utilize or amend to your needs. This can lead to financial and time savings and accelerates the process. If such tools do not exist within your company, discuss the basic conditions with your IT-department to be able to communicate these towards a potential vendor.

3 Ask for the big picture

If you know your needs and the basic conditions of your IT-department and company, do ask your vendor for the extended background and functioning of the tool. Include IT-colleagues, where necessary, in order to understand the technical background and use this to assess possible legal challenges that might be linked to the tool.

4 Legal check

Check the tool regarding legal aspects such as trade secrets, data privacy and eDiscovery. Make sure that the tool not only addresses the intended goal of digitalization, but also your legal needs. Ask for modifications, where necessary, especially regarding data privacy and eDiscovery risks when operation in an international environment. Regarding data privacy this is of particular interest, since data privacy standards can differ significantly depending on their area of validity (e.g. US data privacy standards vs. EU data privacy standards). While eDiscovery can be of minor relevance in some markets, it can have an enormous relevance in other markets, such as the US, the UK and Australia and therefore requires increased attention.

5 Integrate and migrate – monitor and adapt

Make sure that the tool can be integrated into your IT infrastructure and that existing data can be easily migrated to the new tool. Monitor the tool closely and take measures if users need trainings, the tool needs further modifications and make use of the valuable user feedback. Schedule regular lessons learned sessions with your colleagues from the legal and IT department, analyze the demand and assess whether additional standardization of legal advice is beneficial.

Legal tech tools can be a first-aider during a pandemic, since they allow the legal department to keep up its work and provide legal advice to the internal clients in an efficient way. In-house counsel can concentrate on legal matters that require a case-by-case assessment and delegate standard tasks to legal tech tools without compromising the quality of legal advice. However, it is necessary that such tools are selected carefully, comprehensively verified from a legal point of view, and add value to the legal department and the company.

DO'S:

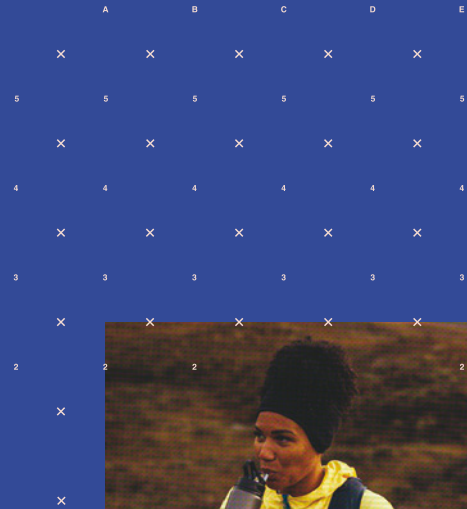


- Discuss your needs regarding a legal tech tool within your legal department.
- Take into account different expectations and necessities.
- Review the tool in advance and considering all relevant parties.
- Think about the integration and migration of the tool in your existing IT-infrastructure.
- Value user feedback, every tool is only as good as its acceptance.

DON'TS:



- Don't delay digitalizing your legal department. It is crucial for its success.
- Don't forget to schedule lessons learned-sessions with your legal and IT-department.
- Don't purchase a tool which does not meet your individual requirements.



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LEGAL COMMITTEE



Activity Report 2020

It comes certainly as no surprise when this 2020 report starts with the statement that this previous year brought for all of us extraordinary and entirely unexpected new challenges in view of the COVID-19 pandemic crisis. The first signs were already written on the wall, when the WFSGI's Legal Committee ("LC") held its physical meeting during the ISPO trade fair in Munich on January 27, 2020, which later on turned out to be the one and only platform, where our members could personally get together, exchange their views and network in a 'real-world environment and where we got the first disturbing news from a new virus spreading in Wuhan/China.

New avenues of work in the context of the pandemic

Some projects had to be temporarily set aside for certain time period due to the COVID-19 crisis (e.g. WFSGI group action against counterfeits in physical shops during the lockdown), no physical midyear meeting could take place, but we kept in touch with our members and even more so, at the same time new legal opportunities/trends emerged (i.e. e-commerce boom, digital transformation). COVID-19 has reshaping the global business environment and has undoubtedly paved the way for digital transformation. In this light, certain legal topics became even more relevant throughout these months, such as:

Creation of the digital working group

The creation of the new WFSGI "Digitization of Product Information" task force, aiming at finding concrete solutions to push for digital labelling and at sharing best practices among the Sporting Goods Industry. To address this prominent challenge, two high-profile and knowledgeable companies, namely Decathlon and VF Corporation will co-chair and lead this working group.

The sharing of expertise and know-how on the regulatory trends in a post lockdown market, focusing on what compliance teams need to know in sports, fashion and textiles. Following the COVID-19 pandemic, with many teams still working remotely and some businesses returning to work, staying on top of regulatory changes, updates and trends has never been so important.

Concrete support was provided to members in cooperation with our partners Compliance and Risks (C&R) by reviewing the market trends, response strategies, key regulatory trends and dates, and Personal Protective Equipment (PPE) enforcement, along with the growth opportunities of e-commerce in new international markets as companies become accustomed to the "new normal".



As online shopping has boomed due to social distancing and restrictions on movement it has never been more important to ensure that companies are aware of and compliant with online trade regulations, and for businesses that operate across multiple jurisdictions, getting it right in each country is critical.

Through the DLA Piper global consumer goods sector team's expertise, the WFSGI gave insights from across Europe, China, Japan and the US on the nuances that its members need to be aware of in each area so that companies remain compliant in each. The famous global law firm DLA Piper touched upon several subjects such as, the growth of e-commerce in the last decade, the importance of consumer protection and how it looks across each jurisdiction, how the customer journey takes shape.

In the context of its partnership with gominga eServices GmbH, a service provider which is proactively dealing with online product reviews on diverse platforms at global level, the WFSGI highlighted the

The following contains a short summary of specific ongoing and new activities in 2020:

An emphasis has been put on making the Database (which is jointly owned by Compliance & Risks and the WFSGI) more user-friendly by creating new functionalities. In this context webinars were conducted in May for collecting the feedbacks from leading WFSGI member companies and in August to undergo a validation exercise with C&R. It is also a positive development that new subscribers could be gained, i.e. new members from the fashion industry (companies Tory Burch, Burberry, Fenix, PVH), but also Shimano Textile, Head, Sport 2000, Puma or very recently Buff. In 2021 the cooperation agreement between C&R and the WFSGI are up to renewal and the corresponding talks and negotiations are about to start.



Intellectual Property Rights (IPR)

WFSGI Collective Group Action against counterfeits in South East Asia

A first raid has been successfully conducted in Southeast Asia in the first half of 2020 and a second raid is planned to take place soon when the global health situation allows.

Multiple benefits are created, when brands, who are highly exposed to on the ground counterfeit activities get together: 1) a collective effort of several well-known, if most famous brands in this area is taken much more serious by local enforcement activities compared to individual actions 2) counterfeiters are more massively hit, when they are attacked by a group of IP rights holders; and 3) last but not least such collective efforts have substantial scaling cost saving effects.

Ongoing tools to support members in the fight against IPR abuses

The WFSGI IP Contacts Database, which provides valuable information on experts in the IP enforcement area for WFSGI member companies (with restricted access limited to those in-house persons at member company level working in this field);

The WFSGI/Convey takedown and IP enforcement services of illegal offerings on websites at global level.

WFSGI Product Safety Working Group

It had been decided to first build up a database for experts working in this field, but we are still waiting to receive some missing specific information from our member companies.

External speakers

Guest Speaker Presentations at the LC ISPO Munich Meeting:

Valuable insights were provided by a representative from the German company Ortlieb how to deal with online channel issues and in particular with certain challenges in the area of Internet sales on the Amazon platform;

Russia has introduced a new very peculiar labelling scheme for footwear in 2020, which poses a number of challenges for those WFSGI member companies with an established Russian business in this area. Joint efforts have been made subsequently in close cooperation with the European Sporting Goods Industry Federation FESI and with the WFSGI's Trade Committee with the aim to either abolish this new scheme or to at least change it from a mandatory to a voluntary requirement.

A representative from the German automotive maker AUDI AG provided the LC member companies with best practice insights also in terms of working tools and methods in the area of legal tech and artificial intelligence.

Conclusion

Finally, in my capacity as the WFSGI's Legal Counsel and Chair of the LC I may express the hope that we will be able to return in 2021 to a mixed set of virtual and personal communication again and overcome what is commonly referred to as being the 'new normal', but which in my personal opinion and according to my taste has been anything else but normal in 2020.

Chair



Jochen Schäfer
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Dr. Markus A. Kürten
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WFSGI Head of
Legal

CHECK ALL
COMMITTEE
MEMBERS





By **Petros C. Mavroidis**,
Professor of Law,
Columbia Law School

THE WTO IS IN CRISES, NOT CRISIS

COVID-19 came at the most inopportune moment for the WTO, and piled on a series of existential problems that the organization has been facing in recent years. While the denouement of the current ordeal is not in sight, the trading community needs to reflect upon the cost of non-WTO, and act accordingly

Petros is the Edwin B Parker Professor of Law at Columbia Law School, New York. His latest publication is "China and the WTO: Why Multilateralism Matters", with André Sapir, Princeton University Press, 2021.

1 Ordeal

COVID-19 found the world community totally unprepared. The WTO was no exception. The volume of trade was heavily reduced, and the WTO would have to count on instruments that it had outlawed or castigated at the very least (like subsidies), to see (some) resurgence of trade in the short run. It came at a bad moment.

The WTO had been exhibiting a moribund legislative function, and has not managed to add much to its legislative arsenal since 1995. Heterogeneity of membership had affected it a lot, as like-minded players turned into free-trade areas to integrate markets.

The financial crisis of 2008, did not help either. Trade flows were reduced significantly, and various measures of dubious consistency with the WTO appeared worldwide.

The WTO judiciary function had already been dealt a severe blow, when the Trump Administration undermined its monopoly to adjudicate multilateral trade disputes. The Appellate Body of the WTO, the much revered second instance court of the world trading regime, is de facto non-operational for any dispute submitted to it after December 2019, when the term for two of its last three remaining members expired.

China proved to be more than what the WTO membership had bargained for, when opening the door to the Asian behemoth in 2001, and complaints about its behavior, both justified as well as unjustified, have multiplied. Alas, the trading community did not manage to address complaints in lawful manner, by litigating, for example, before the WTO, or by adding to the existing multilateral legislative framework.

And when the trading community had thought that it had seen it all in a short time-span, DG Roberto Azevedo became the first head of the institution to quit out of the blue, before the end of his mandate. His departure, originally at least, could be likened to that of a captain abandoning first a sinking ship. This is not what captains, not even first mates, want to be remembered for. His legacy will be forever tainted for his decision to leave early.

2 Looking For Denouement

The trading community should think of the cost of non-WTO. Free-trade areas are no substitute to multilateralism, and while they can help some integrate faster, they should not approach them as a zero-sum game vis-à-vis the WTO. The future of the world trading system hinges upon the (missing so far) equilibrium, between keeping the 164 current members of the WTO under the same roof, while allowing those who want to integrate further, faster, to do so, while minimizing negative external effects for non-participants. For this to happen, the political will of the major stakeholders from D.C to Beijing to invest in multilateralism, is a prerequisite.

TRADE COMMITTEE



Activity Report 2020

In its only physical meeting in 2020, the WFSGI Trade Committee exchanged information on the deteriorating trade relations between the United States and China. Of concern was the imposition by the United States of additional tariffs on imported footwear and apparel from China under Lists 3 and 4a of the US Section 301 action. The Trade Committee also received a detailed briefing on the mandatory Russian labeling regulation. As a result, a cross committee working group was established with the WFSGI Legal Committee. This working group exchanged and updated information and action plans during several conference calls throughout the year.

As every year, the Committee also finalized a submission for this year's WTO Public Forum. Unfortunately, the WTO announced just a few days before the deadline for registration that the forum will not be held due to the pandemic. The WFSGI Trade Committee discussed the idea of assessing other means to publicly advance the industry's global trade positions. The group will keep on the radar alternatives offered such as webinar forums in the next year in case the pandemic would not allow for physical meetings.

Another active discussion led to the exchange with the Brazilian Sporting Goods Industry Association APICE on the review of the Brazilian anti-dumping duties on

footwear imports from China that will begin in 2021. Several conference calls took place to discuss this significant trade case, the format of collaboration, and the involvement of the WFSGI Trade Committee. It remains crucial that the industry continue to raise its voice and actively participating in the review in order to defend its position for free and fair trade.

Finally, the WFSGI Trade Committee has decided to engage actively in a new trade case. Indonesia initiated on 1 October 2020 a safeguard investigation on articles of apparel and clothing accessories. The applicant for the case in Indonesia is the Indonesian Textile Association (API). Since this safeguard case is of importance to sporting goods companies, the WFSGI Trade Committee has decided to actively participate by registering as interested parties the WFSGI. A number of individual WFSGI member companies with interest in the Indonesian market also registered as interested parties.

The activity of the Trade Committee in 2021 will continue to focus on many of these same issues. The focus will be on the Brazilian anti-dumping review and the Indonesian safeguard measures. Following the elections in the United States, the Trade Committee will also monitor closely changes in US trade policy that affects the sporting goods industry.

Chair



Jeff Whalen
Senior Counsel, Customs and International Trade, Legal Department, Nike, Inc.

Vice-Chair



Manuel Pauser
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Ex Officio

Marc-Ivar Magnus
WFSGI Vice President, Trade, Corporate Responsibility and Legal

Edwin Vermulst
WFSGI Trade Counsel

CHECK ALL
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By Manuel Marsilio,
General Manager,
CONEBI

A NEW ERA FOR CYCLING IN THE POST COVID-19 OUTBREAK:

Booming sales between governmental initiatives and changes in consumer behavior

The outbreak of COVID-19 all over the world has undoubtedly represented the most unexpected disruption of the year. When taking into consideration the growing sentiment and perplexities related to the Urban Mobility ecosystem in Europe, it is not surprising to see that COVID-19 has given a boost to Cycling: what is astounding is the dimension of such a boost.

More than 2,300km of cycling infrastructures have been announced in Europe since the beginning of the pandemic and over 1 billion Euro has already been spent on Cycling by local authorities at national level. New cycling lanes, but also incentive schemes to purchase bicycles and e-bikes as well as lower speed limits in inner cities have proved to be a consistent mix of triggering factors that politics has used to provide city dwellers with an alternative feasible solution to public transport.

On the other side, policy makers have to deal with the worrisome rates of air pollution. At European level, Road Transport is responsible for 70% of all Transport emissions and the transition towards more sustainability means real support for affordable, accessible, healthier and cleaner alternatives to the current general mobility habits: that is why the European Commission has adopted a strategy for sustainable and smart mobility in its proposal for a EU Green Deal and the words of the European Commission's Vice President Frans Timmermans during his press conference in May 2020 about a 20 billion Euro fund for Urban Mobility in Europe mentioned Cycling as one of the mobility segments to be funded.

Alongside the increasing number of initiatives in Europe to support Cycling and the opportunities that will derive from the implementation of the EU Green Deal, Consumer behaviour seems to be part of the ongoing "revolution" too: the attention on health definitely means distancing to avoid crowded transportation but also a stronger focus on active mobility, with a higher convergence between physical activity and commuting in comparison with the past. Moreover, International travel restrictions – together with the

Manuel is the General Manager of CONEBI – the Confederation of the European Bicycle Industry. Based in Brussels, CONEBI represents the interests of the Bicycle, Pedal-Assist E-Bike and Parts & Accessories Industries before the EU Institutions. Expert of the EU legislative process and involved in several European Commission's platforms - from the one responsible for the E-Bike regulations in the EU to the one that is in charge of the European guidelines towards the future of Cooperative, Connected and Autonomous Mobility – Manuel is also a representative of WBIA (World Bicycle Industry Association) in the context of the World Forum for the Harmonization of Vehicle Regulations, the Working Party on Transport Economics & Trends and the Global Forum for Road Traffic Safety – all organised by the United Nations. Involved with his colleagues in the work of the Transport, Health and Environment Pan-European Programme – led by the World Health Organization and the United Nations – he recently contributed to a report of the United Nations on Mobility as a Service that analyses the role of digital platforms in multimodal transportation. Manuel holds a Master's Degree in Political Science and International Relations from the University of Trieste (Italy).

economic impact of COVID-19 on jobs and growth - are making long-haul trips very difficult or less attractive, with positive repercussions for local Bike tourism: a Green industry that is valued 44 billion euros a year.

Sales are booming in Europe: bicycle sales, which were slightly decreasing before the COVID-19 outbreak, are now on the rise again and the e-bike phenomenon sees a double-digit growth on a yearly basis that is very likely to continue in the years to come.

In 2019, the total joint sales of bicycles and e-bikes remained similar to the previous year, amounting to around 20 million units sold, while the overall sales value continued to increase: that was due to the pedal assist

e-bikes sold, which grew by 23% from 2018 to 2019, surpassing the mark of 3 million units sold annually for the first time and representing 17% of the total bicycle sales. Estimates show that e-city and e-mountain bikes accounted for around 70% of the e-bike market, with a 30% share for the latter.

With regard to the first half of 2020, the demand in Europe has increased over 50% in comparison with the first half of 2019: from the Industry standpoint, EU factories are working hard to respond to the unprecedented increased demand. What has mitigated the disruptions caused by such a sudden and steep growth is the fact that the capillary distribution of the Industry in Europe - composed

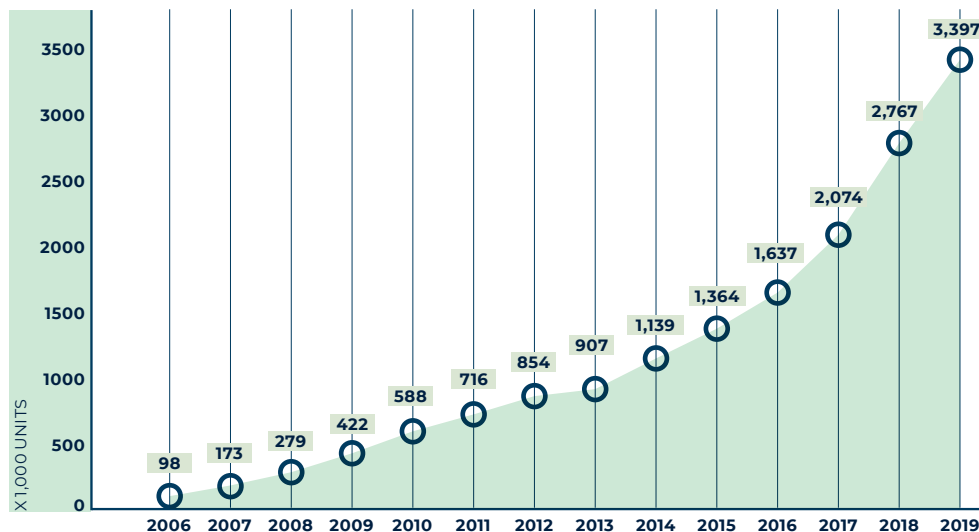
2020 EDITION (2019 STATISTICS) / SALES

EUROPEAN BICYCLE AND EPAC SALES (EU28) (X MILLION UNITS) 2000 - 2019

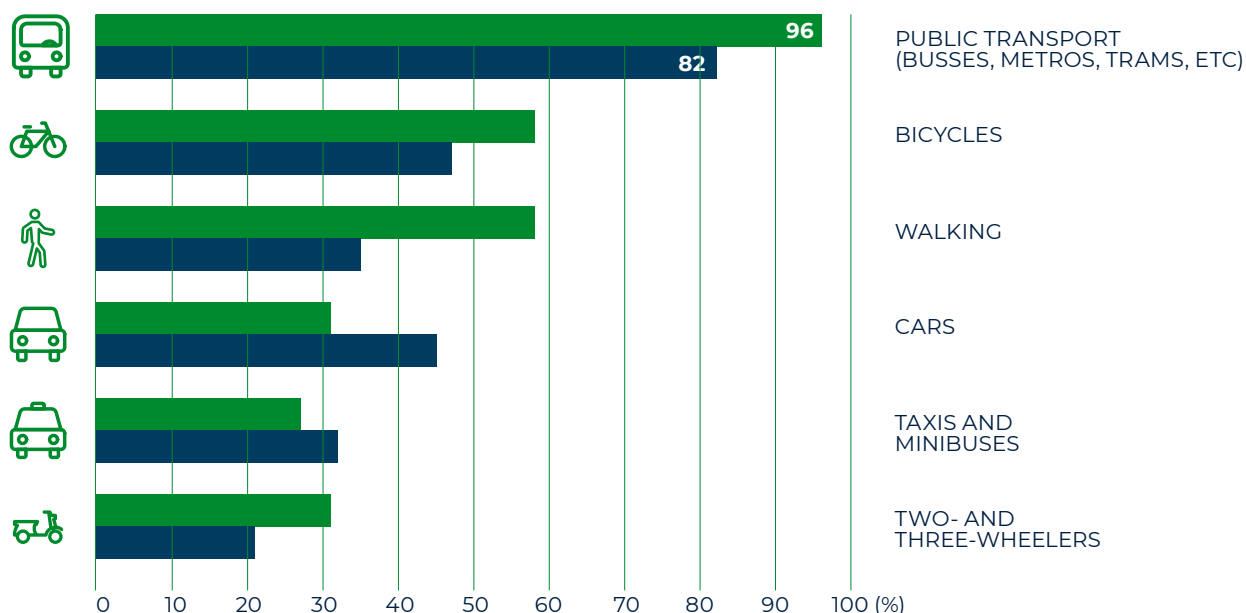


2020 EDITION (2019 STATISTICS) / SALES

EUROPEAN EPAC SALES* (EU28) (X MILLION UNITS) 2006 - 2019



DAC/ODA-COUNTRIES VS. NON-DAC/ODA-COUNTRIES



of more than 900 manufacturing companies (most of them SMEs) in 24 out of 27 EU countries and 120,000 green jobs – allowed for a prompt and flexible reaction.

■ DAC/ODA-COUNTRIES
■ NON-DAC/ODA-COUNTRIES

When thinking about the future of Urban Mobility, The International Energy Agency states that a key question is whether changes to transport behaviours during the crisis may result in a permanent change in behaviours or if transport patterns will revert to ‘business as usual’ when the crisis ends. Research has shown that disruptions can be a catalyst for shifts towards more sustainable transport and a recent study supported – among others - by the World Economic Forum, highlights a remarkable growing usage of bicycles and e-bikes by mid-century:

A 2019 analysis by Deloitte predicts that tens of billions of additional bicycle trips per year will take place in 2022 over 2019 levels: this increase in Cycling will double the number of bicycle users in many major cities around the world where cycling to work is still uncommon. In addition, Deloitte foresees as well a high increase in usage as a consequence of the prominent role that digitalisation will have in making Cycling Safer and Smarter.

With regard to the former, one of the main reasons why people do not ride bikes is because of road safety concerns related to the lack of appropriate cycling infrastructures and presence of motorized vehicles in mixed traffic. The ongoing developments of global regulations by the United Nations on Blind Spot Information Systems for trucks and buses, on avoidance of Car Dooring accidents with cyclists

and on Vulnerable Road User detection via vehicle communication (B2V) will save lives in the future and will bring a much wider spectrum of new potential users to embrace Cycling.

With regard to Smarter Mobility, the digital world is already bringing mobility to a new dimension also by providing simple and immediate information related to localization and routes. Solutions via Big Data analytics are enabling city mobility managers to improve the multimodal offer to the community and thus reinforcing the rationale behind digital platforms for multimodal transportation – called Mobility as a Service (MaaS): in other words, the combination of bicycles and e-bikes with other means of transportation is becoming a widely adopted practice around Europe, despite differences in the levels of MaaS adoption and implementation among EU countries.

In conclusion, COVID-19 undoubtedly marks a cleavage between “before” and “after”, but the trend in terms of Cycling rates and sales is the result of a complex change in political decisions, environmental challenges, consumer awareness and technological innovation that started far before the pandemic. The future is bright, but it is up to us to keep it that way.



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BICYCLE COMMITTEE



Activity Report 2020

2020 was no ordinary year for the bicycle industry. Due to the global pandemic and the impact it caused, we have seen a surge in demand for bicycles and cycling. Many countries entered a period of lockdown, with staff placed on shorter working hours. It became apparent that the demand for bicycles and all things cycling was surging around the world. Many countries reported an increased demand, quickly selling out on all available product. The industry quickly encountered production and supply chain challenges which many of our members are absorbed with addressing.

The role of WFSGI in this situation became one of collecting and sharing information and data. We have worked closely with several bicycle related industry bodies to gather and disseminate information that would be helpful to our bicycle members. As the situation continued, we also embraced the role of sharing the various initiatives around the world that were stimulating demand for bicycle, bicycle parts and cycling. There were schemes across Europe all generating a demand for a stretch supply chain. We have gathered and shared information of schemes to encourage bicycle use either for active leisure or for transport and it is clear that the bicycle and cycling have made a positive situation out of a terrible circumstance with demand for new bicycles at levels not seen for many years.

An opportunity has generated for cycling during the time, through the online and virtual cycling world. The WFSGI has committed reaching out to platform and hardware providers to establish a group within our organisation. The conditions of this year have accelerated this proposal and in result, accelerated the profile of this part of the bicycle world. This ongoing work has the potential to increase its reach of cycling and increase the bicycle committee within the WFSGI. Our objectives are to help increase activity and ensure that the development on competition within online cycling continues to develop in a credible and sustainable way.

Meetings

As with all such gathering the bicycle function of the WFSGI continued virtually for most of 2020. In April 2020 we had planned to attend the BLC and SEA OTTER CLASSIC to host the first set of WFSGI Bicycle meetings in the USA. This exciting prospect was designed to reach out to our US members and to new members in the USA to spread the message of our areas of activity. Naturally, this meeting, which was planned for April was cancelled but we engaged with the BLC online in September and continue to work closely and collaboratively with People for Bikes in the USA with monthly meetings.

We also work closely with CIE and have attended many of the online seminars they have organized specifically since the end of February. Partnerships with organisations such as this assist us in gathering and sharing information to our members

We have continued with our own Bicycle Committee meetings and we have held meetings of the following groups online on several occasions

Bicycle Technical Committee

We covered several topics including reports from the other committees and working groups and feedback on bicycle weight limits, discussions on Ebike standards and a discussion on the specific measurement of CX tyres.

Design Working Group

The design working group had been very busy both inside and outside of meetings creating proposals to amend UCI rules. We have again been successful with a rule amendment in September and have plans to create a greater degree of innovation in terms of design constraints and simplicity in regulations

E-bike Committee

Initially discussing the regulations governing the Pedelec 25 category and its influence of road Ebike this group latterly focused on the UCI Ebike MTB world championships in October which was held in challenging circumstances and using an amended protocol based on 2019. This group also continues to work with the UCI on the long-term solution for E-bike racing and the tracking unit that all feel is necessary to progress this in an ethical and safe way.

Wheel and Tyre Committee

Frequently used to communicate the progress between ETRTO and ISO this group has also looked at other issues during 2020 including the measurement of CX tires and tyre and rim interaction.

We have made these meetings open to all bicycle members and have shared the information and outputs of these meetings across the bicycle membership to help increase awareness and understanding of the activities

Representation

The WFSGI continues to strive to ensure that our members and the needs of the bicycle industry are well represented. This includes working closely with the following organisations: Union Cycliste Internationale (UCI), International Triathlon Union (ITU), and the International Olympic Committee (IOC).

We also stay in touch with the organisations involved in the promotion of the use of the bicycle for health and transport and we work with event organizers in the emerging Ebike market and those promoters of expo opportunities around the world.

In conclusion 2020 has not been a normal year for the bicycle industry. Partly because of the challenges facing the planet and its population but partly because of a bicycle boom that is gripping many parts of the world and creating opportunities and challenges for our members and the cycling industry.

Chair Bicycle Steering Committee



Jeroen Snijders Blok
External Affairs Accell
Group (WFSGI and
EBMA)

Chair Bicycle Wheel and Tyre Committee



Tim Gerrits
Product Manager,
Shimano, Inc.

Vice-Chair Bicycle Wheel and Tyre Committee



**Pierre-Jean
Martin**
CEO, Corima

Vice-Chair Bicycle Wheel and Tyre Committee



Martin Walthert
Vice-President,
Chief Technical
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Chair Bicycle Technical Committee



**Bernhard
Johanni**
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Vice-Chair Bicycle Technical Committee



Claudio Marra
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David Bunce
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Vice-Chair Bicycle Saddle Committee



**Piet Van der
Velde**
CEO, ERE
Research

Ex Officio

Mark Barfield
WFSGI Head of
Bicycle

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By Lisa Kurbiel,
Head of the Joint SDG
Fund Secretariat,
United Nations

INVESTING IN THE SDGS IN A POST COVID WORLD

Lisa, an international lawyer who spent decades in development and humanitarian work in Africa, heads the UN's Joint SDG Fund. Currently capitalized to \$US275m, it promotes impact investments through innovative financing to accelerate the SDGs. The Fund is sponsoring UN backed and de-risked sustainable investments to help countries recover from COVID-19 impacts and defeat inequality.



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Since COVID-19 changed our world forever, expressions of alarm and fear have comingled with optimism and hope. Across our planet, our global community has adapted to new social norms, suffered extreme losses and braces for the medium to long-term impacts of a drastic economic crisis. Yet, from the earliest days of quarantine, there has been a rallying call for greater national and international solidarity and to see this as a unique opportunity to build back better – and hence be in a much better position for effectively addressing the even more existential challenge of climate change. New role models of competent, empathetic and decisive leadership stood out brightest while arguably old passions and commitments, to social protection, to essential health care, to climate change, were reignited and strengthened.

World leaders heard the call and the response from Governments, the Member States of the United Nations, was often unprecedented. Trillions of dollars were made available through financial packages focusing on the most vulnerable, on the elderly, the sick, the unemployed. Our frontline health workers became a top priority.

Still, the devastating impact of COVID-19 on the speed and likelihood of achieving the Sustainable Development Goals cannot be overestimated. The World Bank estimates that 70 to 100 million people will fall into extreme poverty due to COVID-19, while the UN estimates the pandemic could force almost 490 million people in 70 countries back into poverty as defined more broadly as those who lack basic shelter or clean water and children who go hungry. Overall, that could reverse almost a decade of progress.

The UN's Human Development Index similarly forecasts a decline in 2020 - the first time since the Index was created. Inequality is on the rise, there is now a "COVID-crater" - one where those lacking in education and skills, as well as access to technology, are the first to slip deeper into poverty and find it more difficult to climb back to where they were before the pandemic.

This is further compounded by the unequal fiscal response. As a recent issue of *The Economist* highlights, governments in rich countries have spent over 10% of GDP to help ease the economic pain. Emerging economies have spent just 3% and the poorest nations less than 1% - of significantly lower budgets.

The COVID 19 crisis has propelled public finance into the spotlight and has underlined the need for enhanced public investments. But, in particular, it has also highlighted the need for more joined up collaboration across the public and private sector – most notably, in the race to produce effective vaccines that can protect us all.

While many challenges remain with COVID-19, if the world is to “build back better” – and get back on a trajectory towards the SDGs – we need to get the right policies in place and mobilise the financing required to bring those policies to scale as soon as possible. This requires dynamic partnerships and collaboration across the public and private sector to continue to grow and deepen. At the UN, we want to do our part in channeling the support of our Member States and partners to act together with the financial sector in closing the gap to achieve the 2030 agenda.

Enter the United Nations Joint SDG Fund. The Joint SDG Fund was inspired by the Secretary-General’s reform of the United Nations development system. The Fund supports countries to fast-track achievement of the Sustainable Development Goals progress through a combination of integrated policy, strategic financing and smart investments.

Simply put, the Joint SDG Fund’s dream is to bring together “Wall Street” and the corporate world – and the rapidly increasing focus on ESG, impact investing and investor excitement surrounding the SDGs - with the actual needs of countries who are currently off the radar of asset and portfolio managers. We know that effective matching is not always possible. Yet, we also know we have only just begun to connect real country-level demand with innovative financing solutions. In the next few months, the UN system, through the Joint SDG Fund, will work with partners to scan the horizon of what can be done, from creating green municipal bond markets to issuing blue sukuk and bonds, to adapting innovative lending schemes that can revert social and environmental negative externalities and fund rural health outposts.



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The Fund has committed an initial \$US 100 million to reinforce the SDG financing architecture in developing countries and catalyze strategic investments that leverage public and private financing in order to advance the SDGs. These efforts are guided by the Secretary-General's Strategy and Roadmap for Financing the 2030 Agenda and is framed around two intertwined action agendas. The first aims to create the right conditions and enabling environment for increased and better-quality financing for the SDGs. The second is about investing in key initiatives that leverage public and private financing to advance the SDGs.

We seek to set out the business case for SDG investments and then multiply the successes across geographies, thereby growing a “web” of UN initiatives aimed at reorienting public and private capital towards the SDGs. In the context of constrained public resources, our catalytic pipeline of investments needs to demonstrate that different forms of capital can be accessed for the purpose of the SDGs and being progressively aligned with them is fundamental.

The UN Joint SDG Fund provides catalytic grants to unblock SDG investment opportunities to accelerate countries toward the SDGs. Essentially serving as a buffer against unpredictable risks considered common in frontier or emerging markets, grants are provided to countries to demonstrate investment concepts while support is provided by a consortia of UN agencies, development banks and public and private investors. In addition to financial support, the UN supports the development of the enabling environment for more

effective SDG investment at country level while empowering national political and business leadership to drive the agenda. Through UN country teams and partners in country, our grants support financial and political de-risking. We also provide parallel funding to support creation of the wider policy and legislative ecosystem for investments and provide technical assistance.





Joint SDG Fund partners will then manage and capitalise impact funds, issue thematic bonds, co-manage enterprise innovations and challenge funds. They will run accelerators for impact enterprises. We will blend these investments with smart public subsidies, serving as a buffer to de-risk the investments, and to introduce novel SDG-aligned financial products.

The Joint SDG Fund's catalytic grant capital will help unlock these opportunities, and therefore, targeted investments will lead to replication and scaling up, even in the most difficult contexts, such as the Least Developed Countries, Small Island Developing States, or fragile states. For example, in Malawi, the Fund will host a financing vehicle to provide long term equity to small and medium enterprises that need capital to grow their business and expand employment. In Rwanda, a social impact bond will finance the creation of 1,000 new solarized health posts and in Fiji, an innovative debt-for- reef swap will leverage philanthropic and public resources to mobilise private loan guarantees. Ecotourism, waste management and sustainable fishing revenues from local communities will repay the debt while protecting our ocean.



Imagine a Fund that balances private sector demands for a return with an equal demand for poverty reduction and women's empowerment. Imagine multiplying revenue across blue and green investments, across sustainable agriculture and fintech for women's health. Imagine you work for a company social investment strategic plan aligning with the United Nations and investing in the Joint SDG Fund's portfolio. I can. We are determined to make the impossible - possible. Join us.

Learn more at www.jointsdgfund.org



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Time after time you rise up
Facing adversity head on
To exceed your goals and achieve your dreams

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We will be here to support you
To seize the moment and surpass expectations

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A close-up photograph of a hand resting on a running track, with white lane lines visible. The image is overlaid with a semi-transparent teal rectangle containing text.

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