



UEFA GROW

LEADING AND SUPPORTING
THE GROWTH OF EUROPEAN FOOTBALL



FOOTBALL FEDERATIONS
OF THE FUTURE



Contents

Preface	5
Introduction	9
UEFA GROW	10
Football Federations of the Future	14
Football Federations of the Future pillar plans	14
Pillar 1 Strategic planning	18
Pillar 2 Participation	26
Pillar 3 Engagement	36
Pillar 4 Revenues	46
Pillar 5 Image	54
Pillar 6 Public affairs	62
Pillar 7 Insights	70
Pillar 8 Brand	78
Pillar 9 Communications	86
Pillar 10 IT	94
Pillar 11 Education	102
Pillar 12 Media rights and content	110
Pillar 13 Financial sustainability	120
Pillar 14 Governance	130

Preface



Aleksander Čeferin – UEFA president

The world is changing and football must adapt to these changes if it is to satisfy the future needs of its many stakeholders.

To achieve this, we must be bold and adventurous in our thinking. We must possess a clarity of purpose that will enable us to establish a vision that defines and articulates our ambition for the future of football across Europe.

In doing so, we will be able to reach even greater heights and further strengthen football's place within European society.

I am therefore delighted that UEFA has developed Football Federations of the Future. Its purpose is to provide each and every national association with a framework through which it can determine and define its own vision for the future of football in its country, based on its unique circumstances and strategic priorities.

In establishing this vision, the national associations provide UEFA with a greater understanding of how we can best support them in their journey and ensure they have at their disposal every resource required to enable them to grow football and provide more people with the opportunity to play, watch, follow and ultimately fall in love with our beautiful game.

It is my belief that Football Federations of the Future will play an essential role in helping shape the future of football across Europe for many years to come.



Theodore Theodoridis - UEFA general secretary

Football Federations of the Future has been developed in partnership with all UEFA national associations as well as leading industry experts from across the business, corporate and sporting worlds.

Its purpose is to provide each and every national association with the ability to establish a vision that defines how it will advance across 14 core development pillars, so that it can successfully deliver against its long-term strategic goals.

Football Federations of the Future is built around a principle of self-assessment. Each national association is able to determine its current status across individual development pillars and use this to plot a path that identifies where they wish to be by 2024, across each area of the organisation.

This approach provides everyone at all levels of the national association with clarity of purpose. It enables senior executives to prioritise planning and focus activation around those areas of its operations that will help the organisation to achieve its vision.



Zoran Laković - UEFA director of national associations

National associations are the driving force behind the growth of the game.

Our role at UEFA is to work with national associations to help facilitate this by providing them with the resources and knowledge required to stimulate, accelerate or maintain growth.

We do this through a comprehensive range of programmes that are designed to offer the appropriate support to each national association. Football Federations of the Future will enable national associations to establish a vision across 14 core business development pillars. UEFA GROW will help them deliver it.



Noel Mooney - UEFA head of national associations business development

We have seen throughout our work with the UEFA GROW programme the passion and commitment that exists within all national associations to grow and develop football.

Football Federations of the Future offers us an ambitious vision to take this to a new level.

It has been developed by UEFA, in collaboration with national associations, to provide us all with the vision that describes where football and national associations should focus over the next five years.



Introduction

Football Federations of the Future is a blueprint that enables each national association to establish a clear vision and strategic direction for the future of football in its own country.

It is based on the realisation that football's stakeholders are themselves changing; not only in terms of how they want to engage and experience the sport, but also in terms of the standard of customer service and breadth of product offering they expect from the organisations responsible for governing and administering the game.

For football to continue to grow across Europe, it is essential that national associations understand how they themselves must adapt in order to overcome the challenges and take advantage of the opportunities in this ever-evolving and increasingly competitive environment.

Football Federations of the Future provides them with a framework to achieve this.

It enables each national association to understand how it must develop across 14 core business development pillars, to ensure it has the necessary knowledge, expertise and skills to be able to continue to grow and develop football over the coming five-year period.

Football Federations of the Future is built around the basic principle that each national association is unique. It is designed to be

equally applicable and beneficial to all, irrespective of their size, resources, individual strategic priorities or the wider socio-economic and cultural environment in which they operate.

It has been developed in collaboration with all 55 UEFA member associations and with input from over 40 industry representatives and a similar number of external consultants from the across the business, corporate and sporting worlds.

Football Federations of the Future is, in essence, the long-term sustainable vision for the existing UEFA GROW programme, which was established in 2015 with the aim of systematically and strategically growing European football in partnership with national associations.

UEFA GROW is now collaborating with all UEFA member associations and offers tailor-made consultation services in the areas that are most relevant for football organisations, from building a better image of football, to engaging with the entire football community, to increasing revenue opportunities and getting more people, from more parts of society to play, follow and fall in love with the game.

Football Federations of the Future builds on this by creating a clear, easy to follow framework for how national associations can best grow football in their country.



UEFA GROW

Promoting and developing football across Europe is a key objective for UEFA and its 55 member associations.

This is at the very core of UEFA GROW, a programme that was launched in 2015 with the aim of systematically and strategically growing European football by inspiring and collaborating with our national associations in order to ensure they are able to maximise their full potential both on and off the pitch.

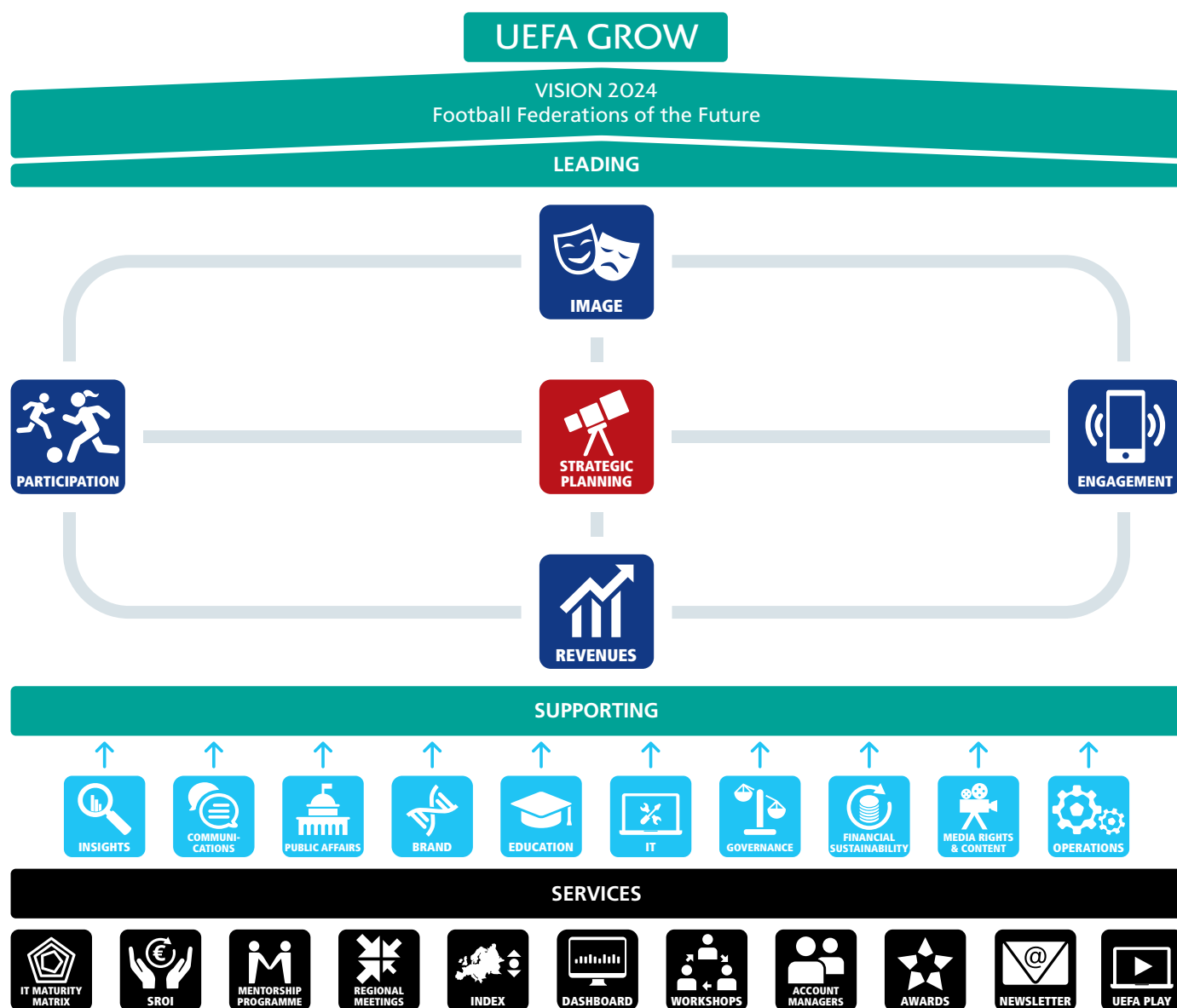
UEFA GROW was introduced following a thorough review of the European football landscape as well as analysing statistics and industry trends. While football is the most followed sport across the majority of Europe, this review showed there were areas where there was room for improvement such as trying to increase participation rates and revenues in certain markets. This is something that UEFA GROW is actively looking to help our national associations to address.

In the summer of 2015, UEFA GROW launched six pilot projects with the football associations of Azerbaijan, Finland, Malta, Northern Ireland, Portugal and Slovenia. Following a successful test phase, the presidents and general secretaries of all UEFA member associations came together in Malta in September 2015 and gave the go-ahead for the project to be rolled out across Europe.

How does UEFA GROW work and what support do the national associations get?

The mission of UEFA GROW is to lead and support the growth of football across Europe. This is achieved through collaboration with national associations and by using fact-based research, market intelligence and industry experts to build strategic plans for growing the game.

UEFA GROW focuses on providing individual assistance to each national association through a series of workshops and additional follow-up support. The workshops are always tailored to meet the respective associations' needs and take into account local challenges. However, the UEFA GROW framework has the same underlying purpose across Europe – to ensure that national associations are able to maximise their potential both on and off the pitch.



“UEFA GROW is our central business development support programme to nurture football across Europe. UEFA GROW offers tailor-made consultation services to our national associations in the areas that are most relevant for football organisations, from building a better image of football, to increasing revenue opportunities and getting more people to play our beautiful game.”

Zoran Laković, UEFA director of national associations

There are five main areas of growth identified as part of the UEFA GROW programme. The respective benefits of these are as follows:



Strategic planning sits at the very heart of UEFA GROW. It supports national associations to develop a strategic plan for the whole organisation, painting a clear picture of where the organisation is going and defining clear and strategic medium to long-term objectives.



Image: UEFA gives national associations access to independent research looking into the current state of football in their respective markets. This data covers a number of different topics, including the general popularity of the sport, the perception of the various national teams, and the image of the governing body itself. This independent review forms the basis for setting up an action plan to address the issues identified through research.



Participation: Following a thorough review of existing data, UEFA GROW supports the national association in drafting a growth plan for participation and retention, which includes the definition of clear yearly targets for different age categories for both men's and women's football. The plan also details the corresponding responsibilities and required programmes and budgets.



Engagement: All national associations use digital channels and social media to communicate with their key audiences. Under the Engagement pillar, UEFA GROW is helping national associations to develop a universal digital marketing and FRM (football relationship management) strategy with clearly defined targets for reach and engagement.



Revenues: National associations need to have sufficient funds in order to invest in football development and thus be able to grow the game. UEFA GROW supports the associations in setting up a clear commercial strategy and five-year commercial plan with key performance indicators and timings to develop all areas of the commercial strategy.

All of UEFA GROW's pillars are intrinsically linked. If an association has a good reputation in its country, more people are likely to play, attend or watch the sport. This could ultimately lead to increased revenue possibilities and digital engagement opportunities.

Following discussions with the national associations, it became clear that UEFA GROW could offer assistance and expertise in other areas of football development. Therefore a decision was taken in 2016 to add supporting pillars in order to address areas such as brand management and how the association communicates with its audiences at all levels.

Additional pillars offer support across the following domains:



Communications: This pillar is about helping to create a clear strategic communications plan that looks to improve the image of the association and helps it deliver the right messages to the right stakeholders.



Insights: The field of data and insights is becoming increasingly relevant for national associations. UEFA GROW provides a number of different services, including giving access to data, sharing best practices and providing benchmarking information. The overall objective is to help national associations become more insight and data-driven organisations.



Brand: A brand is much more than just a logo and as such, an increasing number of national associations are requesting support from UEFA GROW to help them optimise their potential or to help them with other (re)branding projects. Creating a clear brand position for each product will increase the value and revenues that can be derived from the brands.



Public Affairs: This pillar focuses on assisting national associations in developing clear strategies for how to form partnerships with government and other public authorities. This is becoming increasingly important as football widens its societal role and scope.



Education: An education programme linked to the national association's strategy ensures all staff are equipped with the skillsets and knowledge to achieve the organisation's goals.



IT: It is important that national associations understand their IT capabilities and needs, so that they can not only put in place the necessary services, systems and people to function effectively, but are also aware and flexible enough to adapt to future trends.



Media Rights and Content: Through a well structured media rights and distribution strategy, national associations are able to achieve the optimum balance between reaching new and existing audiences and driving revenue across multiple platforms.



Governance: Effective governance is a key element in ensuring that national associations function properly, are transparent in their operations and accountable for their actions.



Financial Sustainability: By putting in place the necessary regulatory framework, national associations are able to protect the long-term viability and stability of club football for the benefit of future generations.



The Football Federations of the Future

Owing to their own development plans or strategic priorities, national associations will not necessarily be at the same stage of evolution across all areas of their business operations. They may be advanced in some areas and developed or developing in others.

Individual Football Federations of the Future pillar plans are designed to enable each national association to select the cluster (advanced, developed or developing) that best describes its current status and use this to establish a clear vision, which outlines how, and in what ways, it should develop over the coming years in line with its overall strategic priorities.

Football Federations of the Future pillar plans

The Football Federations of the Future is built around the principle of self-assessment. Below is a step-by-step guide to ensure national associations are able to get the maximum value from each pillar. Each pillar plan should be read individually and decisions should be taken in isolation of those made across other pillars.

Step 1: Read the overview of the current status of each of the 14 pillars.

Step 2: From the three cluster descriptions provided (advanced, developed and developing), select the one that most accurately describes the national association's current status.

Step 3: Read the overall vision for all national associations to identify the opportunities and understand how far, in broad terms, the association should develop this area of its business operations over the next five years.

Step 4: Select the most appropriate vision cluster to enable the national association to deliver against its long-term strategic goals.

This is designed to be flexible and enable each national association to plot a future vision that best supports its individual business objectives. It can work in one of two ways:

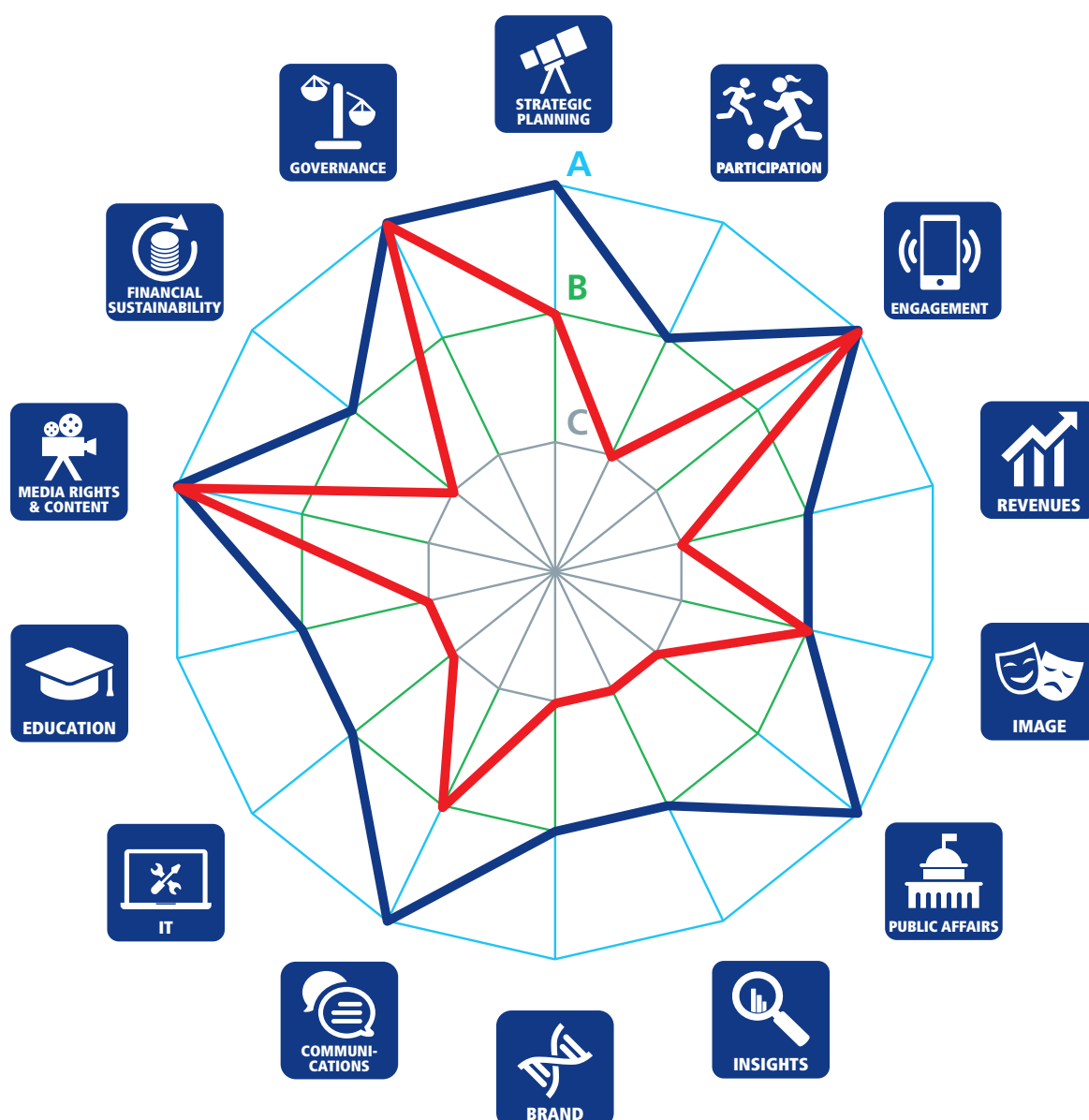
- Having identified its current cluster status within a particular pillar, the national association could simply select the corresponding vision cluster, e.g. both developed.
- Alternatively, if significant development is required across this area of its business operations to enable it to deliver against specific organisational objectives, the national association might decide to work towards achieving a higher vision cluster e.g. developed status and advanced vision.

Step 5: Review the recommended steps in order to develop a detailed plan that will enable the national association to achieve its vision within this particular pillar over the next five years.

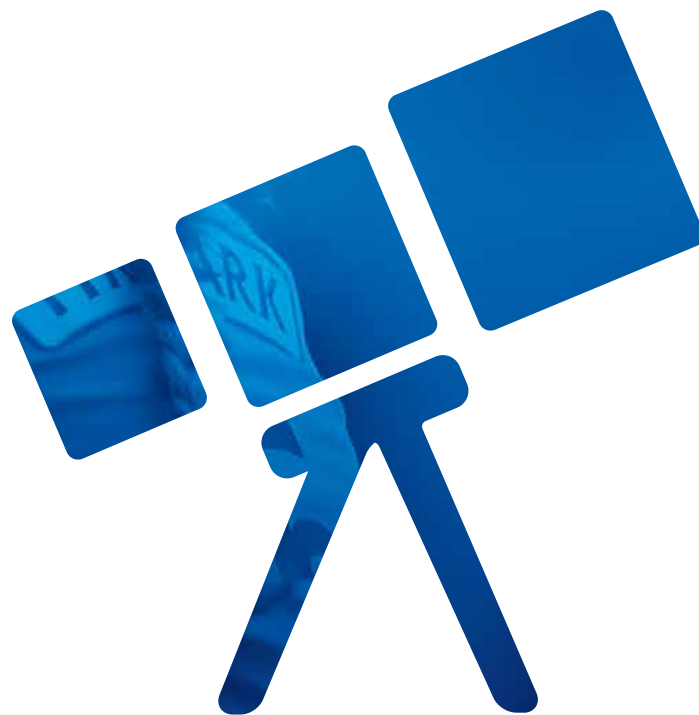
The Football Federations of the Future cluster model shows how a national association can assess its current status across each of the 14 individual pillars.

The vision has been determined based on how, and to what extent, the national association needs to develop its capability across each of the 14 individual pillars, in order to be able to deliver against each of its organisational objectives.

- CURRENT STATUS
- VISION STATUS
- ADVANCED A
- DEVELOPED B
- DEVELOPING C







STRATEGIC PLANNING

Strategic planning

Overview of the current status of strategic planning for all national associations

Many national associations have some sort of overarching strategy with a mission and/or vision, which sets out its aims and objectives. Some have only established their first strategy recently; others have had several strategies over the years and have refined and improved them each time. UEFA's work with the national associations clearly shows that there has been a welcome and increased focus on having a strategic plan, and on the importance of having a robust planning process in order to create the strategy.

The benefits of a strategy: National associations recognise the benefit of having a strategy as it provides a clear, coordinated and prioritised focus and direction for everyone involved in the organisation as well as external stakeholders.

Creating the strategy: Some, but not all, national associations go through a formal process of analysing their current situation (external and internal analysis) together with a wide-ranging consultation process to create their strategy (both with internal staff and external stakeholders). Few carry out detailed and extensive data-driven research or seek other insights to help them develop their strategy.

Implementing the strategy: Some, but not all, national associations create clear implementation plans, which are typically set out in annual business plans and related financial plans. Few then break these annual business plans down into departmental plans and also into individual objectives for their staff and coordinate this with a set of values (culture) and/or a behavioural framework to ensure the implementation is as effective as possible.

Monitoring and reporting on the strategy: Most national associations monitor progress against their strategies and issue some form of report on it internally and externally, but only a few have a robust method for doing this regularly against a set of specific, measurable, actionable, relevant and time-bound (SMART) objectives.

Select the cluster which best describes the current status of strategic planning within the national association

A

ADVANCED

The national association has a long-term strategic plan and may have an implementation plan (including an annual business plan) with some SMART objectives, which ensures that it is working towards its strategic aims.

It carries out a consultation process to develop its strategy; this includes some sort of consultation internally with its staff as well as with external stakeholders, in order to get their input and buy-in to what the national association wants to do. It may also carry out some data research or seek other insights to inform it as it develops the strategy.

The national association receives support from, and works with, stakeholders, where appropriate, in order to achieve its strategic aims.

The strategy is monitored and reviewed regularly by the senior executive team and board/executive committee, with improvements and investments being made as and when required. The national association recognises that the strategy is a living document that requires a fuller review and update every few years.

B

DEVELOPED

The national association has an overarching strategy, but it recognises that improvements can be made.

While it may produce an annual budget, it may not have a clear and priority-based implementation plan (or annual business plan) for the strategy, with SMART objectives across all levels of the organisation.

In developing the strategy there may have been some consultation, but it was not as wide-ranging as it could have been and the national association

has not yet fully embraced the use of data, research and insights to help it develop its strategy.

There may be some monitoring of progress against the strategy, but it is not as detailed or robust as it could be and the senior executive team and/or the board/executive committee may not be involved in the monitoring on a regular basis.

C

DEVELOPING

The national association does not have a clear strategic plan for all of the organisation's activities, so much of the activity is driven by short-term issues and dealing with what the association faces on a day-to-day basis, without having a longer-term view.

The national association delivers projects and individual strategies may exist for certain projects, but they are not aligned with an overriding strategy and there is little prioritisation or coordination of overall activity.

Investment and resources could be better aligned with the strategic aims and objectives.

Progress against the national association's objectives is not monitored in a formal way, but there may be an annual report summarising the key activities undertaken that year and setting out the current financial situation.

Support from stakeholders is more ad hoc and/or on a project-by-project basis. The national association could provide a clearer explanation for stakeholders of what it is trying to achieve as an organisation.

Vision 2024

Overall strategic planning vision for all national associations

Football federations of the future have robust and well-researched strategic plans that have undergone consultation, helping to direct, focus and prioritise their activities in a coordinated and properly resourced way, and they have the confidence to monitor, review and report on progress against their strategies.

The benefits of a strategy: National associations understand the need for a long-term strategy with a vision for the future, clear aims and SMART objectives, and that a strategy provides a clear, coordinated and prioritised focus and direction for the organisation. They further understand that this helps to guide and motivate their staff by providing a clear direction and purpose for each department and each person.

Creating the strategy: There is an understanding that in order to achieve this, national associations need to go through a formal process of analysing their current situation (external and internal analysis) including a wide-ranging consultation process, which uses data, insights and analysis, together with targeted research, to help develop a clear strategy. The national association's strategy has a clear purpose, vision, aims and SMART objectives.

Implementing the strategy: There is a robust implementation plan to deliver the strategy through annual business plans with a coordinated budget and financial planning process. Furthermore, this is broken down into departmental and individual plans and objectives. The implementation plan also has a set of values/culture and/or a behavioural framework that ensures the implementation is as effective as possible.

Monitoring and reporting on the strategy: Progress against the strategic goals and its SMART objectives is monitored on a regular basis and the strategy is periodically reviewed and treated as a 'living document'. National associations also openly and regularly communicate their strategy and progress internally and externally.

Select the vision cluster which best defines how strategic planning will help the national association to achieve its strategic goals

A

ADVANCED

The national association has a clear long-term strategy and a robust implementation plan involving annual business and related financial planning that ensure that it is working towards its strategic aims.

It carries out a wide-ranging consultation process (internal and external) to develop its strategy in order to achieve buy-in and understanding from its stakeholders. It also carries out good data analysis and targeted research to inform it as it develops the strategy.

The strategy and its implementation are embedded across all relevant business functions at the national association, so that all staff understand the plan. This includes setting clear aims and SMART objectives, which are broken down into departmental and individual KPIs for each member of staff, led by the relevant senior executive for each business function.

The strategy is monitored and reviewed robustly and regularly against the SMART objectives and the KPIs that have been set. This is led by the senior executive team and the board/executive committee. The national association recognises that the strategy is a living document that requires a fuller review and update every few years.

It reports openly on the progress it is making and any challenges it has faced.

The national association has a set of values/culture and/or a behavioural framework that help it operate as a high-performing organisation and ensure the strategy is implemented as effectively as possible.

B

DEVELOPED

The national association has an overarching long-term strategy, but it recognises there are some areas where improvements can be made and there is a plan to implement these over a set timeframe.

In developing the strategy there is some internal and external consultation. The national association uses some data, research, insights and analysis and is keen to broaden its consultation process and extend its use further.

The national association produces an annual budget and business plan for the organisation

as a whole. It is considering introducing a more detailed implementation plan, breaking down the annual organisational plan into departmental plans and individual objectives and ensuring its objectives are as SMART as possible.

There is occasional monitoring of progress against the plan by the senior executive team and the board/executive committee, and the national association reports on the progress it is making more than once a year, both in its annual report and at the annual congress.

C

DEVELOPING

The national association has created a straightforward long-term strategy for its activities and may have done a little internal consultation and/or research to help develop its strategy.

It considers how to deliver its strategy as part of its annual budgeting process; it is considering having a more detailed and

formal implementation plan (e.g. with clear departmental plans and individual objectives). There may be some headline strategic targets, which in part link directly to the strategy.

Progress against the strategy is considered from time to time during the year and there is an annual update as part of the annual financial report, which is presented at the annual congress.

How a national association can achieve its vision

- Recognise and believe in the need for a sustainable strategic plan led by the executive committee and senior executive team.
- Appreciate the benefits of creating a strategic plan, e.g. clearer focus, prioritisation, motivation for staff and improved communications.
- Adopt a robust process to create the strategy by analysing the current situation (both internally and externally), using data/research/insights to provide information on where things stand, consulting internally and externally with a wide range of stakeholders (e.g. clubs, leagues, players, coaches, referees, fans, regions, government, local authorities, sponsors) to get feedback and buy-in.
- Have a dedicated person/team to help the leadership with the process, asking tough questions and coordinating the process across the organisation.
- Be clear about the national association's purpose; have a time-bound vision supported by clear strategic aims, SMART strategic objectives and an implementation/action plan to achieve the goals and objectives.
- In carrying out this process, recognise the importance of prioritising what the organisation already does, what it should stop doing and what it should start doing. Prioritisation involves looking for easy wins where possible in order to create some momentum.
- Translate the strategy into implementation/action plans outlining what everyone in the national association has to do, so that there is an overarching strategy with departmental plans, and individual objectives aligned to those plans.
- Make sure the organisational structure and its resources, both financial and human, match the action plan. This is an essential part of the implementation and action plan process.
- Create a culture/set of values and a high-performing behavioural framework to help everyone at the national association understand how the organisation delivers its strategy, and consider including some sort of performance-related reward system to motivate everyone to deliver.
- Introduce a system for monitoring progress against the strategy and reviewing the implementation/action plans, e.g. quarterly RAG status review (red, amber, green), with a full annual review and report on progress.
- Notify stakeholders of the strategy and implementation/action plans and update them on progress.







PARTICIPATION

Participation

Overview of the current status of participation for all national associations

Across Europe UEFA saw an overall decrease in the number of registered players from 23.6 million in 2010 to 16.1 million in 2015. UEFA is committed to working with the national associations to address this decline. In doing so, it recognises enormous variances between the national associations. The northern and western associations have a tradition of stronger regions, more clubs with a community ethos, greater links with government funding and a culture of volunteerism, resulting in a strong participation base. Eastern and southern national associations have traditionally focused more on elite player development, meaning mass participation does not have the support of the national association or its regional associations. The challenge is to increase participation in all national associations and to register players for the benefit of the whole organisation. The UEFA Grassroots Charter has set a standard that has led to many significant developments over the past 15 years. Additionally, the Women's Football Development Programme, the Study Group Scheme, the Grassroots Conferences and the Grassroots Awards have brought about many significant developments in our sport. The aim of Football Federations of the Future is to build on the good work already done, by broadening and deepening our vision for participation.

Commercial small-sided games (SSGs): Pay-to-play opportunities have seen enormous growth over the past three decades. Research has shown that, on average, 90% of regular participation belongs to this category and the major issue is that national associations are not connected to this side of the game. There are challenges also for player development because private academies are focused on elite performance, which results in enormous participation drop-offs and a talent drain to other sports.

Community club development: Great work has been done via club licencing to develop clubs at the professional end of the game. Some national associations have cascaded this down to grassroots levels. More recently, through the Study Group Scheme, the topic of club development has come to the fore. There is a need to develop a general support programme to further develop the local club into a sustainable and effective provider of football opportunities. Fewer opportunities and poorly run clubs mean fewer registered players, less development of talented players, less compensation from training and solidarity and, in particular, fewer opportunities for women and girls. The club is also the key to the integration of ethnic minorities and the provision of opportunities for disabled players.

Digital: Advances in IT have meant better management of competitions and players. That said, many national associations still struggle to register all affiliated football. Coupled with a lack of meaningful engagement or services offered via modern technology, national associations are disconnected from digital natives, i.e. young people who have been interacting with technology since childhood. The result is that plans are made without insights, commercial opportunities with key groups are not exploited, and national associations fail to understand and respond to critical segments as they leave the game in their masses.





Futsal: The multiple benefits that futsal has in terms of technical development, enjoyment, ease of organisation and set-up, social inclusion, and especially its attractiveness to women and girls are beyond question. It also ties in with the fact that modern lifestyles require us to offer opportunities that are flexible to the needs of individuals. We recommend futsal as the default small-sided game. Good specialised coaches are required in this context. UEFA has developed a basic coaching licence which needs to be implemented by all associations.

Grassroots coach education: Enormous improvements in coach education have been made at the higher levels through the UEFA Coaching Convention and Conferences. The content, methodology and assessment of UEFA Pro to B licences, including specialist qualifications, are of the highest standards in sports education. There is also a clear link to the UEFA Grassroots Charter with the establishment of UEFA Grassroots C licences and Grassroots Leader Certificates. However, at these lower levels, there is more to be done in terms of provision, content and monitoring of the most critical aspect of participation – the experiential factor. It is here that children gain their love for the game and the self-motivation to improve and remain in the sport. Experts have identified the environment set by the coach as the most important factor in growing participation and encouraging high performance.

Infrastructure: Most national associations speak of a lack of facilities and this would seem to be the case. However, with almost a complete lack of information on the quantity, quality, type and usage of facilities (e.g. public, private, and/or affiliate owned), there is no evidence with which to develop a business case for investment. Linked to partnerships, club development and regional development, this key issue needs more attention to understand its importance and in turn to grow the sport.

Monitoring, evaluation and insights: Very few national associations are set up properly for this. Linked to poor digital processes and a disconnect with local clubs, there is an absence of facts, trends, insights and evaluation. Without basic insights into the effectiveness of programmes, national associations continue to structure their resources and investment in a manner that does not understand the return on investment/return on opportunity of participation vis-à-vis society, or the impact on elite player development.

Partnerships: Many national associations have developed strong relationships with their respective national governments. However, these relationships are often built on personal contacts at the highest levels and are not informed by mutual strategic priorities. Without formal engagement with other partners (e.g. local government, commercial sector, academia, professional clubs) national associations are not maximising their potential to grow participation or achieve mutual goals.

Regional development: With its strong links to community club development and grassroots coach education, the need for regional development is critical. National associations implement national strategies via these key partners. Without sufficient engagement, investment and education to support this implementation, regional associations struggle to deliver football opportunities in a flexible format that meets the needs of individuals today.

Schools football: The importance of football in schools is reflected in all national associations and in the UEFA Grassroots Charter. Pressure on curriculums has created challenges and opportunities for football. Formal links with ministers of education and teacher education institutions are fundamental steps towards ensuring schools provide equal and quality opportunities for all abilities to play our sport. The links to community and professional clubs and teacher education are also key requirements here. As of 2020, all associations will be eligible to request additional earmarked funding to develop schools football via the HatTrick incentive payments.

Women and girls: All the preceding themes need to create opportunities for women and girls to play football. It is inconceivable to think that a modern national association would be unconcerned about the historic inequalities and the future opportunities that reside in this part of the game. Each aspect of our sport needs to be reviewed to address the barriers and support structures for an increase in playing opportunities for girls and women. The new UEFA Women's Football Strategy provides a vision and a methodology that should serve to challenge and motivate all members of the football community.

Select the cluster which best describes the current status of participation within the national association

A

ADVANCED

There are many strong community clubs and an accreditation and support programme in place from the national association or national government.

There is a football management system (FMS) that captures competitions, registered players and coaches and enables communication with everyone.

There is large-scale delivery of grassroots coach education.

The national association has multiple partners delivering opportunities for mass participation.

Involving the regional associations in this is common practice.

There is a schools programme that caters for boys and girls, and is focused on participation as opposed to individual players.

The national association has an understanding of the main providers of commercial small-sided games and has service level agreements (SLAs) in place with some third-party providers.

The national association takes its social responsibility for inclusion, integration, disability football and access seriously.

B

DEVELOPED

There are some community clubs, but their focus is primarily on individual players and development. There are very few women's and girls' clubs.

Players are registered via a football management system (FMS).

There are annual courses for grassroots coach education, but the volume of participants is low as it is seen as a pathway to become an elite coach.

The regional associations are not as developed, but still play an important role in supporting the national association to deliver mass participation

opportunities for all, not just the organisation of competitions for elite male youth and adult players.

There are activities in schools but they are less regular and have a heavy focus on individual players. They are not equal from a gender perspective.

Commercial football is disconnected from the association.

C

DEVELOPING

The elite clubs follow licensing criteria but there are no development programmes for amateur clubs.

The elite and some amateur clubs/teams are registered with the association but not all participation is under the auspices of the association.

Coach education focuses on the delivery of higher-level courses.

The national association delivers some participation initiatives to satisfy the Grassroots Charter criteria.

Regional associations manage competitions and player registrations.

School competitions are knockout style and primarily for boys only.

There are some partnerships with NGOs to deliver social inclusion and disability football.



PARTICIPATION

Vision 2024

Overall participation vision for all national associations

Football federations of the future are resourced appropriately to implement strategies to grow participation. Specific attention is given to women and girls and the registration of all players falls to the national associations. Participation data is captured and collated to help inform future decisions and support other business functions. National associations are able to monitor and evaluate the impact that participation has on society and are key actors in development issues in society. They are continuously developing new programmes that are attractive and relevant to changing demographics.

Commercial small-sided games (SSGs): National associations have accurate figures in terms of participants and providers of small-sided games and enhance the connection with this audience via clubs, private academies, partners, competitions, quality assurance and safety. There is recognition that football offerings to different target groups (youth, elderly) needs to be flexible and consumer-focused.

Community club development: Community clubs are financially sustainable and strategic in the way they deliver opportunities for all in local communities. There is a balance between on-field and off-field development.

Digital: National associations capture accurate data on participants and communicate with them in an effective manner with the intention of greater engagement and player retention.

Futsal: Futsal is a key component within national associations' overall participation strategy, with programmes developed to stimulate and respond to increased levels of demand.

Grassroots coach education: High-quality education opportunities have been established for grassroots coaches, teachers and parents, with a focus on providing the skills and knowledge to create an empowering environment for all players.

Infrastructure: National associations have an overview of the infrastructure available and can develop a facilities plan aimed at government investment.

Monitoring, evaluation and insights: Participation programmes are designed with evaluation and insights as an output and feed into a social return on investment (SROI) model.

Partnerships: National associations work closely with key long-term partners (commercial, government, educational, NGOs) in the development, delivery and evaluation of participation programmes.

Regional development: Across all national associations, every regional association has the support required to deliver participation opportunities for much wider segments of the local community. They are also a key actor in cascading education, support and strategic objectives to clubs.

Schools football: National associations implement a modern schools programme reflective of gender equality, curriculum pressures and community clubs, while upskilling teachers.

Women and girls: Greater priority to women's and girls' football ensures there is an equality of opportunity to play football, irrespective of gender. There is also the recognition that a copy-and-paste approach from men's football is not the best solution for growing this critical aspect of our game and that there are more and better revenue opportunities as the game develops.



PARTICIPATION



Select the vision cluster which best defines how participation will help the national association to achieve its strategic goals

A

ADVANCED

There is a single customer view of the entire football community, which enables insights to be used to drive greater understanding of the nature of consumer demand.

The national association is engaged in a long-term facilities plan with local and national government.

All programmes are monitored and evaluated as to their impact on growth and retention, but also in terms of their social development capabilities. The social return on investment (SROI) model is used to evaluate football's economic footprint.

There is either a dedicated unit for grassroots women's and girls' football that is supported fully by all business functions, or women's and girls' football is fully integrated into the organisation.

The national association works with its regional associations to provide them with access to mentoring and education programmes, which support club development and grassroots coach education.

The national association has a team responsible for managing the partnerships and programmes with the commercial small-sided game providers.

B

DEVELOPED

The national association has implemented a football management system (FMS) that captures data on all players and coaches, which enables insights to be used to drive greater understanding of the nature of consumer demand.

The national association has audited its existing football facilities.

A club and league development programme has been implemented and is based on quality measures and covers coach education and business development.

The national association has a dedicated unit for grassroots women's and girls' football that is supported fully by all business functions.

There is a nationwide grassroots coach education plan being delivered, which focuses on targeting teachers.

Mass participation opportunities are delivered across all primary schools.

Strategic partnerships have been developed with other third-party providers, including commercial small-sided games, local authorities and NGOs.

C

DEVELOPING

The association has implemented a football management system (FMS) that captures data on amateur players and coaches, which enables insights to be used to drive greater understanding of the nature of consumer demand.

The national association has audited sports facilities along with other sports and government support.

A club and league development programme is piloted in selected regions to assess the impact

of programmes on mass participation and player development.

The national association has a dedicated person responsible for the growth of participation opportunities for women and girls.

Grassroots coach education and mentoring is delivered in selected pilot regions.

The national association has established mass participation opportunities for all primary schools.

How a national association can achieve its vision

- Prioritise the themes in terms of the potential for increasing registered and recreational players in the national association's football management system (FMS), and develop targets and an annual action plan based on the themes.
- Ensure participation is intergrated in daily business and linked to other pillar objectives across the entire national association (involving staff at national and regional level, board and senior executives) to ensure tasks benefit the whole organisation, i.e. collection of data, improved image via communications, etc.
- Align structures and resources, both existing and new, so that prioritisation is supported with the power to implement.
- Involve key partners in planning, executing and evaluating the actions aimed at increasing participation. Critically important here are regions, community clubs, schools and universities, local and national government and professional clubs.
- Utilise futsal as the core small-sided game for all activities with children and young people.







ENGAGEMENT

Engagement

Overview of the current status of engagement for all national associations

National associations believe that the ability to engage fans, players and all other members of the football community is essential to the growth of football participation, audiences and revenue.

However, most do not have a dedicated fan engagement department. Despite being aware of the importance of this area, engagement is currently split across communications, marketing and commercial departments and this means that the skills, its management and its measurement are fragmented.

Some national associations are experimenting with ground-breaking engagement projects and are having significant successes. But even these are not delivered as part of an overarching coordinated approach to engagement.

Organisation: There is currently no clearly defined understanding of the return on investment (ROI) and attribution of value to engagement, which has resulted in a lack of focus, resources and support from senior management.

Audience: Most national associations do not have the skills or resources required to understand the complex and demanding needs of the wide range of members of the football community or how to connect with them.

Identity: Engaging with audiences requires clarity on brand identity and how it is communicated across many different channels to many different audiences. Currently, this level of clarity rarely exists within national associations.

Planning: Most national associations do not have a centralised planning capability and so strategic coordination is difficult.

Metrics: UEFA provides support to most national associations on high-level engagement metrics, but detailed performance standards both online and offline need greater development.

Resources: Because of the lack of a clear understanding of the ROI, engagement is broadly under-resourced. There are pockets of excellence, but standards need raising and resources, both human and technological, need refreshing. In general, national associations are restricted in their ability to use their greatest asset, the men's national team, for engagement purposes because there is limited buy-in from the football side of the organisation. Access to other teams is more likely, but less powerful in terms of audience reach and engagement. Some associations are capitalising on user-generated content (UGC) to engage fans, but it is sporadic and there is room for growth.

Data/Fan Relationship Management (FRM): Very few national associations are operating to a standard seen in the wider business world, though there has been good progress in recent years. A greater level of understanding will create a much improved approach to engagement.



ENGAGEMENT

Select the cluster which best describes the current status of engagement within the national association

A

ADVANCED

Marketing and communications teams have combined to create an engagement plan, which covers the broad range of types of engagement, both online and offline. But, without clear ROI in every case, budgets are not identified as supporting engagement.

There is an understanding among senior management of the potential for engagement to deliver business benefit.

The national association is aware that it needs to move from a business-to-business-to-consumer (B2B2C) approach to become a business-to-consumer (B2C) focused organisation and that it must be agile in order to benefit from the opportunities of engagement, both online and offline.

It recognises that it must go through a digital transformation process in order to succeed in this area and is taking steps to train staff internally, with some use of external expertise.

There are product managers across each of the main engagement platforms, responsible for driving development and managing day-to-day delivery of output.

The national association is developing an in-house media style and is highly aware of the need to interact with all the football community

members. However, it may not have the dedicated resources to do so.

It is aware of the power of partnership and proactively works to maximise the value of its 'engagement ecosystem', including using players, sponsors, digital platforms and sports/entertainment media.

The national association uses data as the basis of its decision-making and has an advanced capability to handle fan relationship management (FRM) services, while developing its ability to use analysis of omni-channel analytics.

Metrics and planning are being developed. However, this requires greater resources and expertise to deliver their full value and to support the strategic vision.

The national association performs well across the main digital platforms and social media channels to engage with audiences, build communities, amplify messages via social influencers and gain a better understanding of public opinion on key issues. But, it may currently lack the ability to do so across a wider range of more niche groups and channels.

B

DEVELOPED

Marketing and communications teams are aware of the importance of engagement, but it currently falls between departments and as such does not have a bespoke plan or associated budget.

The focus of activity remains on B2B2C. There is an awareness of the need to communicate directly with consumers, but the association's ability to prioritise online and offline engagement is restricted by available resources.

This is often due to a general lack of understanding and comprehension among senior executives as to the benefit that a comprehensive and fully resourced engagement strategy can bring to a national association.

There is a content production capability, but this is focused on communications-style broadcasts or press releases rather than publications, syndications or interactions.

The national association is aware of the power of partnership and is using the 'engagement ecosystem' to derive value from sponsors and digital or broadcast partners, but on a limited basis.

It uses some data in its decision-making, but due to limited dedicated resources is unable to provide comprehensive fan relationship management (FRM), or physical or digital analytics.

Metrics and planning are limited to developing KPI reporting and short-term planning.

The national association operates to a high standard across the main digital platforms and social media channels. But, there is only limited focus on building communities, amplifying messages via social influencers or using digital channels to gain a better understanding of public opinion on key issues.



**DEVELOPING**

Marketing and communications staff have little or no dedicated time available for engagement, either online or offline. Their focus is on communicating national association messages to the media, promoting ticket sales and fulfilling contractual sponsorship requirements. As such, there is no specific engagement plan, identified ROI, resources or budget.

The national association works almost exclusively through partners, such as the media, while its primary focus is on the distribution of corporate communications focused messages. Its only interaction with fans is to publish messages across digital media channels. However, no real interaction or engagement takes place.

This is often due to a general lack of understanding and comprehension among senior executives as to the benefit that a comprehensive, and fully resourced engagement strategy can bring to a national association, so the ability to grow internal capability is limited.

There is a limited content production capability that is focused on communications-style broadcasts or press releases rather than publications, syndications or interactions.

Its dealings with partners are limited to the facilitation of contractual obligations on behalf of sponsors and media partners, on an ad hoc basis.

Due to a lack of direct consumer engagement there is no opportunity to utilise data or insights to understand the needs of key audiences.

Metrics and planning are very short term and limited. If there is any measurement it is based around activity, rather than clearly defined KPIs.

The national association's ability to publish content across its main digital platforms and social media channels is limited. But, it can do more to build communities, amplify messages via social influencers and gain a better understanding of public opinion on key issues. Operations are tactical rather than strategic.



Vision 2024

Overall engagement vision for all national associations

Football federations of the future have market-leading in-house engagement capabilities, which foster a non-transactional sense of belonging to the football community, promoting common values and a shared purpose, which supports thriving communities of football fans, domestically and internationally, who are engaged with playing, attending and following football.

Organisation needs: Each national association has a clear and documented engagement strategy and business plan that details quantified ROI and includes clear KPIs, which have been signed off by the senior management team. This includes:

- a culture that demonstrates a start-up business mindset, particularly with regard to technical innovation;
- lifetime fan/player/organiser experience mapping with associated attribution of value and appropriate investment;
- implementing a cross-departmental approach to online and offline experience;
- building a reputation for leading the sports industry in engagement experience;
- becoming a B2C organisation with fan experience at its centre;
- a clear sense of the standards required to achieve excellence, and an understanding of what an association can do to meet those standards.

Audience needs: National associations have an excellent understanding of the full range of fan/player/referee/coach/parent/volunteer experience across all ages, genders and niches – and they can use this data and insight to enable rapid replication and improvement of services and delivery of revenue. They are appropriately resourced and use external sources to ensure a market-leading approach.

Identity: There is a clear brand identity, all the way down to editorial or graphical style, across all channels. National association have a strong reputation for being open, transparent and interactive organisations.

Planning and metrics: There are centralised, pan-organisation business information management and planning capabilities in place, which are used to assess all online and offline channels. This is supported by relevant expertise internally and/or externally as and when required.

Resources: All levels of organisation are enthusiastic and educated about engagement, including the executive committee. A network of external resources is established and provides appropriate support in a cost-effective way. Utilising players from all national teams will be commonplace, contractual and supported by the team management.

Data/Fan Relationship Management (FRM): National associations are operating at a high level, using data from all fan experiences, both online and offline, as a basis of the decision-making process.



Select the vision cluster which best defines how engagement will help the national association to achieve its strategic goals

A

ADVANCED

There is an engagement function, which is staffed by specialists and has a senior team member directly responsible for fan and player engagement. The team is enthusiastic, educated and there is a culture of ongoing professional development on engagement topics. They know when to use external resources and have an established network of agencies.

A comprehensive engagement plan is in place, documented and distributed to the whole organisation, to players and to external partners, with SMART goals and KPIs, and the creation of value created clearly defined and stated (revenue, other ROI, etc.). The plan is refreshed on a regular basis and is appropriately budgeted and resourced.

The national association has become a B2C focused organisation with in-house content, analytics, interaction/customer services and

other engagement teams. It also knows how to maximise value from its engagement ecosystem (players, clubs and partners).

The executive committee has successfully guided the organisation through a digital transformation process and it is now reactive and agile when dealing with the opportunities that technology offers.

The national association uses data as the cornerstone of decision-making and has an advanced capability to handle FRM services, while also employing omni-channel analytics. Data is used for regular benchmarking within UEFA and across market sectors.

Offline and online fan experiences across a wide range of niches or platforms are excellent and football communities thrive as a result, giving valuable and ongoing feedback to the organisation.

B

DEVELOPED

There is an engagement function, which is staffed by professionals across multiple departments, with a senior team member directly responsible for fan and player engagement. These team members are enthusiastic and educated and there is a culture of ongoing professional development on engagement topics. They use external expertise to support local activation across specific areas, as and when required.

An engagement plan is in place, documented and distributed to the whole organisation, to players and to external partners, with SMART goals and KPIs, and in particular with revenue and other ROI attribution of value clearly stated. The plan is refreshed once a year and is appropriately budgeted and resourced.

The national association has made good strides towards becoming a B2C organisation with in-house content, analytics, interaction/

customer services and other engagement teams. It also knows how to maximise value from its engagement ecosystem (players, clubs and partners).

The senior executive team has successfully guided the organisation through a digital transformation process and it is now able to be reactive and agile when dealing with the opportunities that technology offers.

The national association uses data to inform decision-making and has good capability to handle FRM services, while also employing omni-channel analytics. Data is used for yearly benchmarking within UEFA and across market sectors.

Offline and online fan experiences across a wide range of niches or platforms are improving and football communities thrive as a result, giving valuable and ongoing feedback to the organisation.



**DEVELOPING**

There is an established engagement function, which is staffed across multiple departments by professionals. There is a senior team member directly responsible for fan and player engagement. There is an understanding of the importance of a culture of ongoing professional development on engagement topics. They rely upon external expertise to support locally and internationally.

An engagement plan is in place and it has SMART goals and KPIs, and in particular states revenue and other ROI attribution of value. The plan is refreshed once a year and is appropriately budgeted/resourced.

The national association still primarily communicates through partners, but is developing its consumer-facing capability. There is an in-house content team, with analytics and interaction/customer services.

The organisation is working out how to be reactive and agile when dealing with the opportunities that technology offers – and it makes active use of a partner/influencer ecosystem to engage and monetise more widely.

The national association uses data to inform decision-making and is developing its capability to handle FRM services, while also using external expertise or junior team members to employ omni-channel analytics. Data is used for yearly benchmarking within UEFA.

Offline and online fan experiences for the main audiences and platforms are improving and football communities see growing engagement as a result, giving valuable and ongoing feedback to the organisation.

How a national association can achieve its vision

- Generate greater awareness and support within the organisation of the business benefits that good engagement delivers, with clear ROI and business planning.
- Consciously address the digital transformation challenge as a formal and well-established business process and resource it appropriately.
- Become fan-focused in terms of understanding, using data and standards, user journeys and fan experiences. This needs to be converted to individual goals and actions for members of the national association at all levels.
- Introduce a supporter liaison officer and consider ensuring there is fan representation on the board.
- At the board level, support investment in resources throughout the organisation to develop the specialist skills required to deliver audience growth, engagement and revenue.
- Implement tools to encourage cross-departmental cooperation and coordination, e.g. on planning or metrics management.
- Become comfortable with all digital and real-life platforms for engagement, to enable a focus on the fan/player interaction rather than solely the relationship with the platform.
- Invest in the people and technology to become agile, innovative, strong in FRM and analytics, a strong IT infrastructure – for example, to maximise the value from stadium connectivity where it is available.
- Implement minimum standards of connectivity at stadiums and events, e.g. fan zones.
- Make partnerships with sponsors, media and local/international fan engagement services part of everyday business.
- Make benchmarking and comparison inside and outside sport and learning from others standard practice and something that is commonplace in all communications, technology, marketing and commercial teams.
- Put greater focus on the women's game as a route to engaging different audiences but also to creating a new fan experience and improved brand support.
- Recognise the need to make the organisation more representative of those with whom it is looking to engage in order to engage effectively with the diverse range of people in the sport.







REVENUES

Revenues

Overview of the current status of revenues for all national associations

There are clear distinctions in respect of the maturity of commercial development and implementation across the 55 national associations. While commercial success is clearly influenced by the national team's sporting success, the strength of the domestic elite competition and the size/state of the economy/population, national associations have varying approaches to commercial planning, implementation and ongoing monitoring.

Fan/customer focus: The majority of national associations haven't yet transitioned to being a 'fan/customer first' organisation and as such do not have a comprehensive understanding of their customer base. From the perspective of revenue optimisation this means they are not maximising the opportunity to sell through direct channels, while the lack of customer segmentation and insight has prevented them from being able to secure partnership deals with commercial partners wanting to use their communications channels to access audiences and promote their own goods and services.

Media landscape and content creation: Aside from broadcasting international matches, only a small percentage of national associations currently have a clear understanding of the domestic and international media place. This prevents them from developing an effective strategy to derive additional subscription, advertising and sponsorship revenue through the creation of non-match-related content. For the majority, content is created on an ad hoc tactical basis and used solely for promotional, and not for commercial, purposes.



Select the cluster which best describes the current status of revenues within the national association

A

ADVANCED

There is a long-term strategic vision and plan in place, which is clearly communicated across all departments within the national association.

This is supported by a highly developed commercial strategy, which is aligned to the wider strategic aims of the organisation.

Data and insights are acknowledged as key to enhancing commercial activities and the national association employs extensive methods or is currently in the process of adopting an insight-led strategy.

It has invested in developing a number of brand pillars to support the development of football. However, it recognises the need to continue to add value and innovate in order to maintain a competitive advantage.

There is limited reliance on funding from UEFA as the national association has the ability and internal resources to generate significant, sustainable income.



B

DEVELOPED

The national association has an overall strategic plan. However, it may not have clearly detailed the role that the commercial and marketing departments play in delivering the plan.

On the whole, a commercial plan exists, but may not define how it supports the vision, mission and objectives of the association.

The men's national team brand has been fully commercialised from a sponsorship perspective, but assets remain available across other potential revenue channels.

Brand pillars, such as elite domestic competitions, women's football and grassroots football are being developed but are not fully realised commercially.

The national association has not yet fully embraced the use of business intelligence, insights and data in developing and implementing its commercial strategy.

The association is still reliant on UEFA funding, support and expertise to activate key programmes across the organisation.

C

DEVELOPING

There is currently no clear overall strategic plan across the organisation and either a limited or complete absence of a commercial strategy in place.

Some sponsorship deals have been secured, but these are almost exclusively linked to the men's national team.

More generally, the national association lacks a clear sponsorship structure and no packaging or

rights valuation has been developed.

Some matchday revenues are being generated. However, other revenue channels are yet to be exploited.

Internal expertise and resources are limited, resulting in heavy reliance on UEFA funding, support and expertise to deliver key aspects of the organisation's day-to-day operations.

Vision 2024

Overall revenues vision for all national associations

Football federations of the future have robust commercial strategies and a comprehensive understanding of available assets, product and brand positioning, rights packaging and valuation, which is supported by clear commercial revenue targets and defined KPIs. This creates a platform from which they monetise a variety of revenue channels, in order to build self-sustainable futures that enable them to achieve their wider strategic goals.

Fan/customer-focus: Through the development of an engagement and insights strategy, coupled with a wide understanding of FRM in different departments and an investment in FRM technology solutions, the national association gains a comprehensive understanding of its customer base across all major touch points and is able to segment this into individual audiences. This creates a platform through which it can increase direct sales of its products and services and secure additional value from third parties wanting to utilise the national association's channels to gain access to its audiences.

Media landscape and content creation: The national association has a clear understanding of both its domestic and international media marketplace, which enables it to understand what types of content it should create and how best to monetise them, either through direct or third-party channels or through the creation of sponsorship opportunities related to specific digital content.



Select the vision cluster which best defines how revenues will help the national association to achieve its strategic goals

A

ADVANCED

There is a clear long-term commercial plan in place that is fully integrated into the wider organisational strategic plan.

This is supported by a wide-ranging consultation process, which harnesses audience and fan data as well as market benchmarking, to establish business intelligence and insights.

The national association has a fully developed brand pillar programme, across all national teams, domestic competitions, women's football, grassroots and facilities, with the majority of available inventory sold to commercial partners.

It has fully exploited a wide array of revenue channels and regularly explores innovative approaches to enhancing its propositions and new business opportunities.

The commercial strategy is monitored and reviewed regularly against objectives and KPIs that have been set out in the commercial plan and signed off by the senior executive team.

There is a recognition that the commercial strategy is a living document and it is reviewed and updated midway through and at the end of each commercial cycle.

The national association generates a significant amount of total income through self-generated revenues.

Members of the senior and middle management teams allocate time to support other national associations that are considered to still be developing in this area, either through ongoing mentoring or through direct consultation on specific initiatives.

B

DEVELOPED

There is a clear long-term commercial plan that recognises the importance of being integrated into the wider strategic plan. The commercial strategy also supports the overall vision and mission of the organisation.

The national association aims to improve its data, insight and benchmarking activities, in order to enhance its commercial plan and implementation strategies.

It has a fully developed brand and commercial programme for its national teams and elite competitions, with the majority of these assets sold to commercial partners. It is also in the process of further developing and commercialising its grassroots programmes,

women's football and other areas, such as naming rights for facilities.

It has fully exploited a number of key revenue channels, such as ticketing, hospitality and sponsorship. However, it recognises that further development of media and broadcast, digital, licensing and merchandising and a membership programme is required.

The commercial plan is reviewed on a regular basis and updates are communicated internally on an ongoing basis.

The national association secures a significant proportion of its total income through self-generated revenues.

C

DEVELOPING

The national association has a straightforward commercial plan that has been communicated and agreed with all internal stakeholders.

It gathers basic benchmarking, business intelligence and audience data, in order to support its commercial plan and implementation strategies.

The national association has developed its national team brand with a reasonable amount of inventory sold to commercial partners.

It exploits key revenue channels, such as ticketing, hospitality and sponsorship and is actively looking to expand its activities across other areas, including licensing and merchandising.

To do this it recognises the need to develop the brand and commercial offering of its elite domestic competitions, grassroots and women's football. The national association is actively working to achieve this, with support from the marketing team.

The commercial plan is reviewed on a regular basis and updates are communicated internally on an ongoing basis.

The national association generates a growing amount of total income from self-generated revenues, which are increasing each year.



How a national association can achieve its vision

- The senior executive team recognises and believes in the need to develop a long-term and sustainable strategic business plan, which details the vision, mission/purpose and implementation/delivery road map.
- From this, create a platform on which the national association can understand how commercial and marketing activities can and should support the organisation's wider vision.
- Adopt a robust process to create a commercial strategy. This involves analysing the current situation, both internally and externally, using data, research and insights to help substantiate decision-making, and consulting internally and externally with stakeholders to get feedback and buy-in.
- Organise regular regional and/or subject-related working group sessions with other national associations facing similar challenges to share best practices.







IMAGE

Image

Overview of the current status of image for all national associations

Research conducted by UEFA across 36 European countries found that 86% of people had a positive image of football while, on average, only 39% had a positive perception of the national association. This shows that while the image of the game is strong, there is no love for national associations.

Understanding the business value of a positive image:

- While national associations acknowledge that a good image is important, there is sometimes a lack of appreciation about the real impact it can have in helping them achieve their overall strategic goals.
- Research conducted by UEFA has found that people who have a positive image of a national association are more likely to attend a football match, watch a game on TV or actively encourage their children to play football.

Use of research, data and insights: The continual use of research and data is growing, but few national associations use this intelligence to gain a deeper understanding of audience perception on key issues affecting the organisation and the wider game. Even fewer are actively using qualitative or data-driven insights to understand the root cause of image-related issues and develop strategic communications plans, which would overcome these negative issues relating to perception.

Understanding the role of a national association:

- There is an extremely low level of understanding about what national associations do. This is having a direct impact on the image of associations, as people incorrectly believe they are responsible for things they are not and conversely do not necessarily realise they are responsible for many successes.
- This is borne out by the research: when asked 'How confident are you that you know what the national association does in leading, managing and overseeing football in this country?' 80% of people said they were either 'not at all confident' or 'not very confident'. Only 6% said they were confident of being able to answer the question accurately.

Awareness of areas of national association responsibility: While there is widespread awareness across the general population that a national association is responsible for the men's national team (60%), there is very limited appreciation of the wider role of the organisation in managing and facilitating other aspects of football. Awareness of domestic women's football (19%) and youth and grassroots football (21%) is particularly low.

Perception of national association success: The research shows that, among those surveyed, only 36% would say their national association is a successful organisation. The same figure (36%) believe it is not successful and 28% don't know.

Values currently associated with national associations:

- Among all those surveyed across all countries, the three most common words or phrases used to describe a national association were commercial (23%), political (20%) and slow to react (20%).
- Among football fans the research found a similar trend, with the most common descriptions also being commercial (25%), slow to react (24%) and political (24%).

The role of communications: Most national associations have some form of communications planning in place. However, for the majority, the focus is on short-term reactive or tactical activity and not on developing a long-term strategic communications plan, which would enable it to take a more proactive approach to managing its image on an ongoing basis.



IMAGE

Select the cluster which best describes the current status of image within the national association

A

ADVANCED

There is an understanding across the national association of the value a positive image can have in enabling the organisation to achieve its strategic goals.

It has developed a vision, mission and purpose statement, which is articulated clearly and consistently to all stakeholders.

The association has identified a clear set of values, which it uses to help inform its strategic planning and goals.

The national association uses data, research and insights to help provide a clear and accurate understanding of the perception of key stakeholders in relation to all aspects of the national association.

The national association has a defined and consistent approach to using data, research and insights to measure the organisation's image on a regular basis. All campaigns have clear predefined KPIs, which enable the association to measure impact in terms of being able to deliver on its goals.

The national association has established, and is actively using, a number of direct-to-consumer channels to communicate targeted messages to specific stakeholder groups on an ongoing basis. It works proactively with partners, such as commercial and broadcast partners, to communicate key messages. It has developed relationships with key football media channels and publications and works with them on a formal and informal basis to communicate messages and influence opinion on key issues.

B

DEVELOPED

The national association is actively looking at how it can enhance its corporate image.

Vision, mission and purpose statements have been created and while some work has been done to communicate these widely, it is not done consistently or on an ongoing basis. Moreover, communication is not used to help inform the development of the national association's strategic goals.

Research is used to help understand the overall perception of the national association, but this does not influence, or is not incorporated, into its strategic communications planning.

As such, while the national association has a communications plan, it is primarily focused on tactical campaigns and day-to-day activity and does not incorporate the wider organisational

vision or purpose statements at its core.

There are no predefined KPIs, so data and research is not used to measure the impact of key campaigns in achieving goals.

The overall image of the national association is negative and the general perception of the association is that it is out of touch, slow to react, too commercial and lacking in transparency.

The national association is developing, and actively managing, some direct-to-consumer channels, which are used to promote key messages directly to relevant stakeholders. But, there is still a strong reliance on working with third parties, such as media publications and broadcast partners, to communicate key messages.

C

DEVELOPING

The national association has not had the resources or time available to invest in creating a clear and coherent corporate identity or establishing a vision statement or set of values across the organisation.

There is very limited use of data and/or research to help inform the national association about its current image.

The national association has no overall strategic plan in place. As a result, a strategic communications plan has not been developed and activity is very tactical and reactive, focusing on issuing press releases, responding to media enquiries or managing media operations around

the men's national team matches. There is no attempt to use communications as a tool to challenge current beliefs, influence opinion or change perception.

There tends to be an overwhelmingly negative perception of the national association and the values typically associated with it are that it has poor leadership, is slow to react, is dominated by money and lacking in transparency.

The national association has limited direct-to-consumer communications channels. Instead, it relies on third parties, such as media publications or broadcast partners, to communicate messages to its target audiences.



Vision 2024

Overall image vision for all national associations

Football federations of the future have a positive image and are seen to be a well-respected, transparent and modern organisation.

Understanding the business value of a positive image:

- National association believe that image plays an essential part in helping them achieve their business goals and they act accordingly. Image supports growth and sustainability and enables the national associations to develop stronger relationships with stakeholders, increase engagement and build trust.
- A good image has a positive impact on the number of people playing, attending and following football.

Use of research, data and insight: Research, data and insights are used extensively to monitor and track reputational progress, both on an organisational level and in relation to specific topics. This enables national associations to have a better understanding of stakeholder views on key issues and take a more proactive approach to managing and enhancing their corporate image.

Understanding of the role of a national association: A clear and distinct brand positioning, combined with the development and implementation of a strategic communications plan, results in creating widespread understanding about the role of national associations in developing, facilitating and growing football at all levels of the game.

Awareness of areas of national association responsibility: There is a high level of awareness of the full range of activities for which national associations are responsible.

Perception of national association success: Not only do the vast majority of people believe that national associations are successful organisations, but importantly the percentage of people that respond 'don't know', when asked about the role of a national association, has significantly reduced as a result of clear and strategic communications activity and more developed brand positioning.

Values associated with national association: National associations are perceived in a positive light and associated with those values that are determined by the associations themselves and are in line with their overall vision.

The role of communications: Strategic communication plans have been developed, enabling the national associations to adopt a more proactive approach to managing how they and football are perceived by key stakeholders.



IMAGE

Select the vision cluster which best defines how image will help the national association to achieve its strategic goals



ADVANCED

The national association is perceived, both nationally and internationally, as a leading sports governing body.

The management of its image or corporate reputation is the responsibility of a single individual (i.e. a chief reputation officer), who reports directly to the general secretary and works across the organisation to proactively look at ways in which the national association can enhance its image, while also looking to ensure the necessary processes are in place to manage any potential reputational risk.

The national association is proactively engaging with its stakeholders on a regular basis and is actively listening to their views and factoring them into its communications planning and activation.

This is achieved through quantitative and qualitative research, which is conducted regularly throughout the year or in relation to specific topics.

Crisis communications planning is regularly reviewed, rehearsed and updated, with the aid of external partners where necessary. The national association has identified potential crisis points, established a process to manage these and provided senior executives with media training.

All major social media channels are actively monitored so that the national association can not only map and track reputational risk, but also identify and capitalise on opportunities that will enhance its image.

The national association has established, and is actively using, a number of direct-to-consumer channels to communicate targeted messages to specific stakeholder groups. It works proactively with third parties, such as commercial and broadcast partners, to communicate key messages. It has developed relationships with key football media channels and publications and works with them on a formal and informal basis to communicate messages and influence opinion on key issues.



DEVELOPED

The national association is perceived as a leading sports governing body in its country.

The management of its image or corporate reputation is the responsibility of a group of people from the communications, brand and/or marketing teams. They work across the organisation to proactively look at ways in which the national association can enhance its image, while also looking to ensure the necessary processes are in place to manage any potential reputational risk.

The national association is proactively engaging with its stakeholders on a regular basis and is actively listening to their views in its communications planning and activation.

All major social media channels are actively monitored so that the national association can not only map and track reputational risk, but also identify and capitalise on opportunities that will enhance its image.

Crisis communications planning is regularly reviewed, rehearsed and updated, with the aid of external partners where necessary. The national association has identified potential crisis points, established a process to manage these and provided senior executives with the appropriate media training and support.

The national association has established, and is actively using, a number of direct-to-consumer channels to communicate targeted messages to specific stakeholder groups on an ongoing basis. It works proactively with third parties, such as commercial and broadcast partners, to communicate key messages. It has developed relationships with key football media channels and publications and works with them on a formal and informal basis to communicate messages and influence opinion on key issues.



DEVELOPING

The national association is perceived as one of the leading sports governing bodies in its country.

The management of its image or corporate reputation is the collective responsibility of the communications or marketing department. While some work is done to proactively look at ways in which the national association can enhance its image, the main focus is on ensuring the necessary processes are in place to manage any potential reputational risk to the organisation.

The national association engages with its stakeholders on a regular basis and factors their views into its communications planning and activation.

A crisis communications plan has been developed and approved by the senior executive

team. The national association has identified potential crisis points, established a process to manage these and provided senior executives with media training.

Social media channels are monitored to identify any potential reputational risks.

The national association has established, and is actively using, a number of direct-to-consumer channels to communicate targeted messages to specific stakeholder groups on an ongoing basis. It works proactively with third parties, such as commercial and broadcast partners, to communicate key messages. It has developed relationships with football media channels and publications and works with them on a formal and informal basis to communicate messages and influence opinion on key issues.

How a national association can achieve its vision

When looking to identify a process through which to enhance the image of the national association, please also consult the strategic communications and brand pillar plans. These contain additional relevant information that will assist in establishing a process to move from current to vision status.

- Establish a fundamental understanding across the national association that a positive image or reputation creates business value and is not something that just needs to be managed. It is a tool for achieving strategic objectives and should not be seen as a goal in itself.
- Ensure image and brand are board-level concerns and are managed together.
- While the senior executive team is ultimately responsible for the national association's reputation, appoint a dedicated team or person, with day-to-day responsibility for coordinating and overseeing reputation management.
- Invest time in creating a clear and inspiring vision, while developing a narrative that expresses the organisation's wider social purpose.
- Develop a clear and coherent brand architecture, which is communicated clearly and consistently to all stakeholders on an ongoing basis.
- Build a comprehensive 'picture' of each of the national association's key stakeholder groups in order to understand how best to engage with them, either directly through established communications channels or indirectly, via a network of influencers.
- Conduct or commission regular research to ascertain:
 - how stakeholders view the national association in comparison with similar organisations, based on a common set of attributes;
 - what factors stakeholders believe to be important in shaping their opinion of the national association and what their current perception is in relation to those factors.
- Build positive relationships and communicate regularly with the individuals or organisations that can influence the national association's key stakeholder groups.
- Put in place a process through which the national association is able to monitor social, digital and traditional media platforms and channels to identify any reputational risks or opportunities at an early stage and respond accordingly.
- Establish a clear understanding of the difference between an issue and a reputational crisis and put in place the necessary processes to deal with both.







PUBLIC AFFAIRS



Public affairs

Overview of the current status of public affairs for all national associations

There is a significant gap between stated intentions and actions. While some national associations see public affairs as being critical to business success and are therefore proactive, with a well-developed approach, others understand that this work is increasingly becoming a priority, but currently devote limited internal resources to this pillar, with most public affairs engagement being carried out by the president and/or general secretary.

Benefit of public affairs: National associations recognise the benefit of building and maintaining a relationship with decision-makers at national, regional and local government levels. Strategic stakeholder engagement within public affairs can raise the profile and reputation of the association, help to influence government policy and open the door to new opportunities, including increased funding. However, a key question is whether national associations are engaging with these decision-makers and other key actors as effectively as they could.

Public affairs in practice: Some national associations see public affairs as a clear priority and have already developed a holistic approach to public affairs and established a formal programme of engagement activities, which is aligned to their overall strategy. However, while most associations have some level of engagement with government officials, this is not always done in a coordinated and concerted way.

Getting organised internally: Some, but not all, national associations see public affairs as a core business function, understanding that it takes time to build relationships and trust with decision-makers. These associations are devoting internal resources to public affairs activity on a formal basis. Others tend to engage on a less formal basis, with individuals within the association developing relationships and holding meetings with government officials as and when required. There is often a lack of relationships at civil-servant level and a greater focus on engaging at a ministerial level.

Measuring success: It can be difficult to measure success. Most national associations with established public affairs plans tend to focus on inputs and not outputs. Success would need to be assessed with an eye to the tangible benefits this work can bring, such as an enhanced reputation and increased monetary value.



Select the cluster which best describes the current status of public affairs within the national association

A

ADVANCED

Public affairs plays an important role in the national association, ensuring a coordinated approach to its outward-facing activities and seeking to make a difference.

There is clear strategic direction from the leadership team. Public affairs is seen as an important activity for the business, demonstrated by how it supports this work with appropriate resources, and devotes time to engagement when required.

There is a public affairs strategy in place which is driven by a small team of experts, drawing on expertise from around the business and, in some cases, external political advisers.

The national association regularly reviews progress against clear output (KPIs) from its public affairs programme of activities. There is an established method of evaluating impact, which includes stakeholder sentiment, image research, winning on issues, coproduction on policy, and funding secured.

B

DEVELOPED

There is a formalised programme of public affairs activity, but the national association recognises that improvements can be made. The president and general secretary are fully involved in the engagement programme, meeting regularly with government ministers, but there is no public affairs plan across all levels of the organisation.

The national association has some understanding of public affairs, but wishes to develop its expertise in this area in order to have a more strategic relationship with government.

There is limited understanding of how the national association could position football better in order to secure additional funding from outside sport, e.g. from government or from the EU.

The national association has limited understanding of public affairs activity in the regions, how it impacts on regional members and what funding opportunities are being secured.

It has not secured significant regional funding for any of its national programmes.

There may be some monitoring of progress, but it is not as detailed or robust as it could be.

C

DEVELOPING

Public affairs does not feature as a major pillar within the national association. Consequently, the organisation has little engagement with government, other than that which is required for funding and regulatory matters.

The national association's strategic plan does not include any mention of public affairs; this results in a lack of consistency in stakeholder mapping and relationship building.

There does not appear to be any real opportunity to engage with government on any non-sport opportunities.

There is a lack of understanding of how football can attract funding from government and the EU, other than existing support for the elite programme.



Vision 2024

Overall public affairs vision for all national associations

Football federations of the future have positioned public affairs as a critical business function, thus enabling them to engage with decision-makers and key influencers across all aspects of government. In addition, they are now securing funding from a wide range of government departments at local and national level, and EU sources linked to aspects of their overall strategic plans.

Benefit of public affairs: National associations recognise the benefits of building and maintaining a relationship with decision-makers at national, regional and local government levels, as well as with other relevant public bodies.

Public affairs in practice: There is a defined ambition for public affairs and it is seen as a strategic priority for national associations. A plan and formal programme of engagement activities has been developed and is fully aligned to the overall strategic goals.

Getting organised internally: The available resources match the national associations' ambitions for public affairs work, employing individuals or teams of expert practitioners who coordinate activity across relevant internal departments to ensure a joined-up approach across the organisation.

Measuring success: Success is measured through outputs using both quantitative and qualitative metrics. The most important measures are probably the number of risks mitigated, opportunities realised, costs avoided or monetary value gained.

Select the vision cluster which best defines how public affairs will help the national association to achieve its strategic goals

A

ADVANCED

The national association is seen by government as a strategic partner and thought leader that delivers on preset KPIs, influences politicians and is active in key areas, e.g. think tanks.

It has a forward-looking, highly effective and proactive government engagement and lobbying strategy to influence and improve policy, increase funding and ensure positive reputational outcomes.

There is an understanding that everyone within the business has a role to play in developing relationships with decision-makers and key influencers, and networks that provide valuable intelligence and information.

As a result of its public affairs activity the national association is seen as a leading voice on key issues and its opinion is sought on major policy developments.

The national association ensures that its regional associations have a localised public affairs programme that flows from the national plan, but which is aimed at their local political stakeholders.

To support this work, it creates an annual calendar, which outlines all proactive engagement with government and key stakeholders across the business.

The national association has strong relationships with key representatives at all levels within its own government and parliament as well as at the EU.

Funding is secured, based on the association's strategic plan, from a wide range of government departments and other public sector sources, e.g. Department of Health, Department of Justice and the EU (direct programme funding and/or European Structural and Investment Funds).

An ethical policy has been developed and is communicated to all individuals interacting with decision-makers and key influencers.

B

DEVELOPED

The national association has a cohesive public affairs plan in place, with sufficient resources to help deliver the activities across the business.

It has well-established relationships with government officials at both national and local level.

Across the organisation there is an understanding of the role public affairs plays within the business

and the benefits that engaging in such work can bring about.

Additional national and local government funding has been secured as a result of positioning and promoting football as a social tool.

There is a well-developed approach to EU funding and other opportunities.

C

DEVELOPING

The national association has developed a stakeholder map and begun building and maintaining relationships with relevant government departments.

There is a public affairs plan in place, with clear roles and responsibilities assigned to relevant individuals from across the organisation.

New funding opportunities are identified and secured from national and regional government.



How a national association can achieve its vision

- Identify the need: recognise the motivation for building a strong public affairs practice and thus establishing relationships and positive interactions with national and local government and their officials.
- Audit: assess your current position by carrying out a baseline audit, which will then inform any future public affairs planning.
- Plan: build a public affairs plan, establishing a process that provides opportunities to influence public policy, communicate about regulatory issues, secure additional funding and have regular one-on-one conversations with government representatives.
- Resources: organise the necessary internal capacity within the business to deliver this public affairs work, including determining what resources, in terms of time, money and staff, are needed and how this work can be financed.
- Measurement: seek agreement from leadership regarding the end goal for this public affairs work, establishing how success will be measured and assigning KPIs to individual work plans.
- Culture: ensure that there is an organisational narrative for this public affairs work, so that the leadership team and other relevant internal stakeholders share knowledge around which they can have meaningful discussions with decision-makers and key influencers.
- Policy decision-making: create a protocol for briefing the leadership team and other internal stakeholders on progress and any developments on policy and regulatory issues.
- Internal communications: ensure there is sufficient internal communication so that all employees are aware of the public affairs plan and are clear on how they can be involved in this work via their day-to-day activities.



SINCLAIR

12







INSIGHTS

Insights

Overview of the current status of insights for all national associations

While there is general consensus that research, data and insights are extremely important and will be even more important moving forward, the vast majority of UEFA's 55 national associations are currently not insights- or data-driven organisations.

Culture: The lack of a data and research culture is a challenge faced by most national associations, irrespective of the size of the association or the region it is from.

Decision-making process: The majority of national associations do not inject analytic insights, data and/or research into strategic decision-making and resource planning; data and research is predominantly used ex post to justify decisions that were taken.

Resources: Varying budgets and resources lead to a different application of insights across the national associations; those that invest tend to either focus on consumer insights (anonymous data) or data analytics (known data) – only a limited number of national associations do both.



INSIGHTS

Select the cluster which best describes the current status of insights within the national association

A

ADVANCED

The national association has a dedicated team working across the organisation to manage all aspects of its research, data and insights programme.

The senior management team fully understands the value data, research and insights bring to the organisation and they are an integral part of the decision-making process at all levels of the organisation.

However, in reality there is still capacity for some departments and team members to adopt a more data and insights-driven approach within their work.

This is due to a skills and knowledge gap, which means some people are not able to understand and accurately interpret the information that has been provided by the data and analysis team. As a result, the impact of insight is yet to be truly realised across the national association.

To overcome this, the data and insights team is focusing on working with each relevant department to help them to not only understand and interpret the data, but to use this as the basis for creating a series of actionable recommendations.

B

DEVELOPED

The senior executive team understands the value of data, research and insights in helping the national association with its strategic planning and evaluation and is supportive of their use across the organisation.

However, typically, there is no single department or individual responsible for managing this across the organisation.

Instead, there is a decentralised approach, with each department collecting and analysing its own data and research and developing individualised insights.

Research and insights that potentially have useful applications in other departments or across the organisation have a tendency to get trapped in silos.

This sometimes create challenges in adopting findings across the organisation, and on occasion can result in inefficiencies as different departments seek to collect the same data.

As such, in most cases, there is no formal link to collective organisational decision-making.

C

DEVELOPING

The national association is not currently using data, research and insights on an organisational or departmental basis.

Any projects that are undertaken are done on an ad hoc basis and facilitated by UEFA or an external agency.

The findings are used to support specific tactical activity. They are generally not shared across the organisation or used to help inform the development of subsequent strategic planning.

The reasons for this are threefold. First, there is limited understanding of the value this can bring the national association at both a senior executive and departmental level. Second, there is limited budget available to fund these projects. Finally, staffing levels mean that people are often working across a number of areas, so there is no time available to undertake projects of this nature.



INSIGHTS

Vision 2024

Overall insights vision for all national associations

Football federations of the future are insights-driven and make decisions based on evidence.

Culture: National associations have embraced the concept of evidence-based decision-making and are perceived by their stakeholders as the unrivalled experts on football trends in their respective markets.

Decision-making process:

- The use of data, research, insights and foresight are at the very heart of national associations' strategic planning. SMART objectives are developed, at both organisational and departmental levels, which are continually measured, reviewed and refined against predefined KPIs. The results are then used to inform future planning.
- Insights are used not only to inform strategic thinking but also to enable national associations to make better, more informed and actionable tactical decisions on a day-to-day basis.

Resources: National associations have invested in creating a strong insights function at the heart of their organisations, with the necessary staffing and budgets to enable them to service the entire organisation and key external stakeholders, including regional associations, clubs, and municipalities.



INSIGHTS

Select the vision cluster which best defines how insights will help the national association to achieve its strategic goals

A

ADVANCED

The national association is using foresight to build reliable predictive models, which allow it to anticipate the future needs of the game and its key stakeholders.

Furthermore, in order to strengthen the use of insights and data in organisational decision-making, the national association has embedded insights into the budget approval process for strategic projects.

The research and insights department is not only responsible for managing all data and research-led projects, but also for actively working with each department on an ongoing basis to ensure all information is accurately and correctly translated into corresponding actions and implemented accordingly.

The team has also established a support or consultancy service for the national association's key external stakeholders, such as regional associations, government bodies, municipalities and commercial partners, to enable them to capitalise on the data and insights available across the game.

The national association has integrated its databases and data sources to create a centralised data warehouse that provides relevant departments with a single-customer view.

It is actively exploring the ways in which it can use performance-related data (e.g. on-pitch performance data, sports medicine research) to support business objectives.

B

DEVELOPED

Across the national association there is an understanding of the value of data, research and insights and their use has been adopted across the organisation to inform planning and create actionable recommendations.

There is a high level of buy-in from the senior executive team, which has resulted in the national association allocating dedicated resources for managing all data, research and insight-related projects, across the organisation.

The findings are used to support the national

association's strategic planning, on an organisational and departmental level, as well as enabling departments and individuals to make better, more informed, tactical decisions on a day-to-day basis.

Databases and data sources have started to be merged and integrated to create a single-customer view and although this process is still ongoing, it has already started to yield valuable data and insights, which are being used by departments across the national association.

C

DEVELOPING

The national association has moved from an ad hoc use of research and data to making this part of the day-to-day operations and of most strategic decision-making.

There is at least one person in the national association driving research, data and insights and this is part of their job description and objectives.

This person delivers insights to senior management to inform strategic decision-making.

Research and data is also provided to other colleagues in a comprehensible way, to allow for the research and data culture to change across the organisation.



INSIGHTS

How a national association can achieve its vision

- Further centralise and strengthen the insights function at a structural level. There needs to be a realisation that even if a national association accords high importance to data, research and insights, it will only improve in this area by devoting sufficient resources to it.
- Learn from other industries' best practice and allocate a dedicated budget that will enable the organisation to embrace the concept of 'test and learn'.
- Carefully evaluate the skillsets and departmental structure required to deliver on the organisation's insights strategy, i.e. do you need a data scientist, data analyst, etc.?
- Further centralise and/or integrate internal and external data sources to create a centralised data warehouse that meets the association's current and future requirements. Technological expertise and personnel (e.g. data scientists) are needed to facilitate this.
- Education is an extremely important area in order to address the research and data culture and the challenges that come along with it. Educate all staff with regard to why data and research are so important and assess which self-service tools are available to make staff more comfortable using data and research on a day-to-day basis. Train researchers in how to present their research in a comprehensible way for people who do not have a background in research or data analysis.
- Conduct more stakeholder-oriented research, i.e. go beyond the organisation's own needs and look at what information key stakeholders need.
- Shift from merely providing data to internal departments to providing internal and external stakeholder consulting services related to data, research and insights.
- Devise a change strategy to achieve this. Internal advocates, regular meetings, management 'buy-in' strategies, quick wins and focussed objectives should form a part of the process.
- Be fully aware of the outside resources available, from UEFA and other specialist research organisations, and leverage these to the organisation's advantage.



INSIGHTS





BRAND



Brand

A brand is more than just a logo. Brands are promises and ideas that live in a person's mind. Branding is the integrated strategic thinking that defines what a product or service stands for, such as why it exists and what it will do for its consumers.

A brand can radiate values that consumers want to be connected with and as such it can create and drive consumer preference.

For a national association, creating a powerful brand portfolio is therefore key. A strong brand can attract more sponsors, develop an emotional bond with fans and other stakeholders, and support the national association's strategic objectives.

Overview of the current status of brand for all national associations

Across the 55 national associations there is a wide disparity in terms of the overall understanding and role of the brand function, as well as the level of investment and resourcing in brand-related matters, on both a strategic and an operational level.

Understanding of brand: A common issue within many national associations is that the role of the brand function is not clear to the senior executive team and other staff, which leads to a lack of understanding as to its purpose and the wider value it brings to an organisation. Brand is often seen as a cost centre, rather than a value driver.

Resources: The vast majority of national associations are currently not brand-led organisations and there is therefore limited perceived value in creating or developing separate brands across the organisation.

Image: While the image of football is extremely strong across Europe, there is no love for the national associations.



BRAND

Select the cluster which best describes the current status of brand within the national association

A

ADVANCED

The national association has a highly developed understanding of the role and value of a strong brand across its organisation.

A brand strategy is in place, covering important elements such as brand positioning and brand architecture.

There is an acknowledgment within the organisation that the association brand should be a standalone entity and not the same as

that of the national team or any of the related teams, competitions or events.

However, there are still occasionally situations where the national association and the competitions or events it organises are used interchangeably. This can also mean that in some instances there is a loose understanding of the role of brand architecture, i.e. identifying the role of each brand and the interrelationship has been achieved, but often not in detail.

B

DEVELOPED

The national association has one of two approaches to its brand activity:

- The national association clarifies its brand architecture on paper, but this rarely leads to execution. In this case, the association believes it has a strategy in place, but as this is not adopted and followed across the organisation, it has little true impact.
- The national association uses many different logos, which are defined as brands, but in reality they are simply logo executions with little or no rationale or substance as to why they have been created. In this situation the issue is that more and more logos are created in a bid for the organisation to be perceived as delivering more brand activities.

C

DEVELOPING

Across the national association there is limited understanding of the value a strong brand can bring to the organisation and a clear brand strategy has not been developed. The primary focus is on executional (i.e. logo) consistency with a strong desire to focus on marketing activation around teams, competitions and events.

Due to a lack of available resources, there is no dedicated brand manager in the national association. Instead, brand management is included as part of a wider, more encompassing marketing role. This impacts on the time

available to create, develop and curate a portfolio of brands across the organisation.

As a result, the national association tends to favour a more general approach of 'one brand' across all its areas of activity, as this is more manageable and provides the greatest impact given the resources available.

The lack of a dedicated brand manager also means there is limited time to engage with other departments across the association and educate them as to the value of a brand and how to manage its activation and implementation across the organisation.



Vision 2024

Overall brand vision for all national associations

Football federations of the future use brands as strategic tools to create value for the organisation, football and wider society.

Understanding of brand: National associations understand that a brand is more than just a logo. Instead it is seen as the integrated strategic thinking that defines what a product or service stands for, such as why it exists and what it will do for its consumers.

Senior executives, directors and other staff understand that creating a powerful brand portfolio is key to the overall success of the organisation, as a strong brand can attract more sponsors, develop an emotional bond with fans and other stakeholders and support the national association's strategic objectives.

Resources: National associations invest in creating, developing and curating brands across their portfolio to achieve greater commercial, sporting and social value.

Image: National associations are perceived as trusted, well-respected and valued organisations.



BRAND

Select the vision cluster which best defines how brand will help the national association to achieve its strategic goals

A

ADVANCED

The national association is recognised as being a best-in-class branded organisation, with a brand management team that has full control over brand strategy.

It uses brand as a strategic tool to evaluate commercial decisions, guide marketing strategy and activity as well as engaging its stakeholders.

The national association has a clear brand architecture, with separate positioning and brands for the various teams (e.g. men's A team,

women's A team, youth, futsal) and has a clear understanding of how the association brand and grassroots activities are linked from a brand perspective.

There is a distinct national teams brand that captures the essence of the nation.

It has developed clear and distinct competition brands, each of which is linked to its own, unique DNA and these are used to enhance fan engagement and commercial opportunities.

B

DEVELOPED

The national association understands the value that a strong brand brings to the organisation, from both a reputational and commercial perspective.

As a result, it has become more brand conscious and the brand function is now an integral part of its wider strategic planning process.

There are multiple brand properties across the organisation and each has a distinct identity and positioning.

A clearly defined brand purpose has been identified and communicated to all stakeholders.

The identity and positioning of each brand is integrated across all the wider marketing and strategic communications planning and activation.

The organisational brand values are incorporated across all internal and external marketing and communications activity.

C

DEVELOPING

There is a clear understanding of the role of brand across the organisation and the senior management team, which has resulted in the national association mastering the shift in focus from logos to brands.

The national association has separated its corporate brand from the national team brand in order to create greater clarity and understanding.

The national association has a dedicated brand manager that works across the organisation to create, develop and curate all brands and ensure there is a clear and consistent use of brands across the association.

As a result of this work, the national association's brand portfolio contains some of the most recognisable and connected sporting brands in the country.



How a national association can achieve its vision

- Establish a strong brand management team that understands the fundamentals of branding and marketing to build long-term value across the organisation.
- Engage internally within the organisation so that everyone understands a brand is more than just a logo. A lack of internal understanding can mean that branding is misunderstood as either a logo or marketing exercise. Understanding the role of a clear brand strategy needs to increase. Staff also need to be aware of their role as brand ambassadors.
- Develop a clear brand architecture, where each and every competition, team or initiative has a distinct role. If a clear architecture is defined it can help leverage the commercial value of each brand.
- Conduct more regular evaluation, including of how the brands perform against benchmarks. Brands live in the minds of consumers, so it is important to understand what fans and other stakeholders think about the brands. Organisations from other industries invest in monthly and quarterly brand tracking studies and national associations would benefit from doing the same.



BRAND





COMMUNICATIONS



Communications

Overview of the current status of communications for all national associations

Across the network of national associations there is wide disparity in terms of the:

- overall role and remit of communications;
- levels of senior support, financial investment and human resources given to communications;
- time and focus teams are able to devote to proactive strategic communications versus managing the reactive day-to-day news agenda;
- skills, knowledge, experience and capability of individual communications teams;
- understanding of the positive impact communications can have on an organisation;
- willingness to meet reputational challenges head on versus adopting a wait-and-see approach;
- socio-economic and political environment in which they operate.

Image/perception: While the image of the game is strong, the perception of national associations is generally negative; with many facing similar challenges in building and maintaining a positive reputation.

Senior executive buy-in: Support for communications is focused around a desire to maintain good relationships with the media and not an understanding of the strategic value it brings to an organisation.

Strategic communications planning: Most national associations have some form of communications planning in place. However, the focus is on short-term tactical activity, rather than on long-term strategic communications planning.

Stakeholder management: Communications activity is generally centred on reactive media relations or the promotion of the national team across digital platforms. It does not focus on how best to communicate targeted messages to individual stakeholder groups, which support the business objectives.

Planning: The use of data and insights to aide the communications planning process is limited.

Measurement: There is little focus given to using data and analysis to set targets and measure outcomes against pre-determined KPIs.

Expertise: There is a skills and knowledge deficit, which is preventing communications teams from being able to fully integrate digital activity within communications planning and delivery.

Crisis communications: A knowledge, skills and culture gap is preventing many national associations from developing effective crisis communications plans.

Internal communications: National associations do not understand the potential of internal communications. As a result, there is no clear structure or strategy, with activity being ad hoc and tactical.

Select the cluster which best describes the current status of communications within the national association

A

ADVANCED

Professionals with specialist expertise staff the communications team.

A communications strategy has been developed, which supports the organisation's overall strategic priorities and incorporates fully scoped internal and crisis communications plans.

This is supported by a set activation budget, which enables the team to deliver proactive PR campaigns as well as managing reactive activity on an ongoing basis.

Market research, media monitoring and sentiment analysis measure the impact of key campaigns.

The national association has a highly developed presence across all leading digital platforms and uses its social channels to engage with key audiences, build communities, amplify messages via social influencers and gain an understanding of public opinion on key issues.

The national association has access to an in-house content production team.

B

DEVELOPED

Communications professionals staff the team, but they don't have expertise across specialist areas.

The organisation has a communications plan that is focused on tactical day-to-day activity.

There is limited budget available to support tactical activation around a few major initiatives, but the majority of activity, including internal and crisis communications, is reactive or ad hoc.

The national association is active across the main digital platforms, but its activity is tactical and does not support the wider strategic goals.

Content is produced in-house, but resources are limited. So, output is focused on the most visible areas, such as the men's national team, and does not support wider strategic goals.

C

DEVELOPING

The communications team has limited resources and is generally staffed by generalists who often have more than one role within the department.

There is no overall strategic plan in place across the organisation. As a result, a strategic communications plan has not been developed and activity is very tactical and reactive.

The budget is very tight, so there is no real campaign focus, with activities being based around reactive media relations, and matchday media operations.

There is no crisis communications plan in place and the senior management team dictates how the organisation responds to major incidents.

The national association makes no real distinction between an issue and a crisis. Therefore, there is no planning or proactive communications activity. Instead, the focus is on reacting to events as and when they might occur. This means the association is constantly 'fire fighting' in an attempt to combat negative opinion from key stakeholders.

The national association is active across the major digital platforms, but activity is tactical and generally focused around the promotion of the men's national team.

There are limited resources for in-house production and no budget to generate content externally.



Vision 2024

Overall communications vision for all national associations

Football federations of the future are perceived as trusted and progressive organisations that play a positive role in society.

Image/perception: National associations are perceived as successful organisations with positive brand values and a clearly defined social purpose. There is a clear understanding of the role they play in facilitating football and the way in which this enhances the lives of people in the country.

Senior executive buy-in: Communications sits at the very heart of national associations. The director of communications is present at all senior executive meetings, while the president and general secretary are actively engaged in strategic planning as well as issues and crisis management. Key business decisions are made after assessing and understanding the reputational impact they may have on the image of the organisation.

Strategic communications planning: National associations each have a strategic communications plan in place, which has been approved by the senior management team and receives an annual budget to cover the costs of key campaigns. Communications teams are structured around the delivery of the plan, in conjunction with managing the day-to-day demands of a busy press office.

Stakeholder management: Communications teams are channel- and platform-agnostic. The focus has moved away from pure media relations, to developing more integrated communications campaigns that utilise direct and indirect channels to communicate key messages to different stakeholders in the most effective, impactful and personalised way possible.

Planning and measurement: The use of data is at the very core of all strategic communications activity. Insight and audience analysis are an integral part of the planning process, enabling teams to make better, more informed decisions. Research and analytics are used to measure the effectiveness of all campaigns in delivering against predetermined KPIs.

Expertise: Communications teams are dynamic, and constantly evolving in structure, capability and expertise. They are aware of emerging and changing trends in communications in order to ensure they are engaging with key stakeholders in the most effective and impactful way possible.

Crisis communications: Crisis communications planning is regularly reviewed, rehearsed and updated with the involvement of external partners where necessary. National associations have identified potential crisis scenarios and established a process to manage these. Senior executives have been provided with the necessary media training.

Internal communications: Employees have a clear understanding of the national association's vision, values and strategic goals, which enables them to make more informed decisions. This has helped create a workforce that feels valued and has an emotional attachment to the organisation.

Select the vision cluster which best defines how communications will help the national association to achieve its strategic goals

A

ADVANCED

The communications team employs specialists that possess industry-leading expertise and knowledge across all key areas of communications. The team is structured so as to provide dedicated support to key functions across the organisation, as well as to manage the organisation's reputation on an ongoing basis.

There is an established communications advisory group, which includes senior communications professionals from key stakeholder groups and external consultants.

A comprehensive strategic communications plan is in place, with clearly defined SMART objectives and pre-determined KPIs. These support the delivery of all relevant organisational goals. Activity is measured and refined on an ongoing basis to ensure delivery of key goals.

Data, insights and analytics form an integral part of all aspects of communications operations – informing all future planning and enabling ongoing assessment of activity and overall measurement of success.

Campaigns are developed using paid, earned, shared and owned media channels.

The national association enjoys a positive, mutually beneficial relationship with its network of professional clubs.

The national association maintains relationships with a network of organisations, partners and influencers to provide third-party endorsement and amplify the reach of key messages.

The implementation of an engagement strategy leads to greater advocacy from fans for the national association, while the creation of focus groups and closed group research has helped better understand the opinion of fans on key issues relating to the game.

The national association has its own in-house production team, with content being produced to support the delivery of key campaigns across its digital channels and also via a network of influencers and informal third-party media partnerships.

Personal and professional development is actively encouraged, with each member of the team allocated a budget to use for training or to gain professional qualifications.

Within the team, senior and middle management allocate time to support other national associations that are considered to still be developing in this area, either through ongoing mentoring or through direct consultation on specific initiatives.

B

DEVELOPED

The communications team is staffed by professionals who use external agencies and consultants to provide specialist support as and when required.

The national association has a strategic communications plan, with clearly defined SMART objectives and pre-determined KPIs. Owing to limited human and financial resources, its implementation is staggered, with activity focused on campaigns that support the organisation's immediate priorities.

Data, insights and analytics, provided as part of the UEFA GROW programme, are used to help inform planning and enable the overall measurement of success.

Campaigns are developed using paid, earned, shared and owned media channels.

There is an established communications advisory group, which incorporates senior communications professionals from key stakeholder groups and external consultants.

The national association enjoys a positive, mutually beneficial relationship with its network of professional clubs. The national association

provides clubs with training and support to develop their strategic communications planning and capabilities.

The national association works with a small, targeted group of formal and informal partners and influencers to provide third-party endorsement and amplify the reach of its key messages.

A fan relation strategy has resulted in greater levels of understanding and support from fans for the national association. The national association has also established an annual fan survey to better understand the opinion of fans on key issues relating to the game.

The national association has its own in-house production team, with content being produced to support the delivery of key campaigns across its digital channels and also via a network of influencers and informal third-party media partnerships.

Personal and professional development opportunities are available and are supplemented with initiatives provided under the UEFA GROW programme.





DEVELOPING

Experienced professionals and talented executives staff the communications team.

A strategic communications plan is in place, with clearly defined SMART objectives and predetermined KPIs. The focus is on enhancing the corporate reputation of the organisation and supporting the delivery of one or two of the organisation's key strategic goals.

There is an established communications advisory group, which incorporates senior communications professionals from key stakeholder groups and external consultants.

The data, insights and analytics provided as part of the UEFA GROW programme are used to help guide the planning process and measure outcomes every two years.

Campaigns are developed using earned, shared and owned media channels.

The national association provides the clubs with bespoke training and support to develop their strategic communications planning and capabilities.

The national association has a strong digital capability across the most popular channels.

There are established relationships with a network of organisations, partners and influencers able to provide third-party endorsement and amplify the reach of key messages.

The national association engages with fans using fan relationship management (FRM) and its own social/digital channels.

It has an in-house production capability, with content being produced to drive greater engagement across the national association's digital channels and support the promotion of key campaigns.

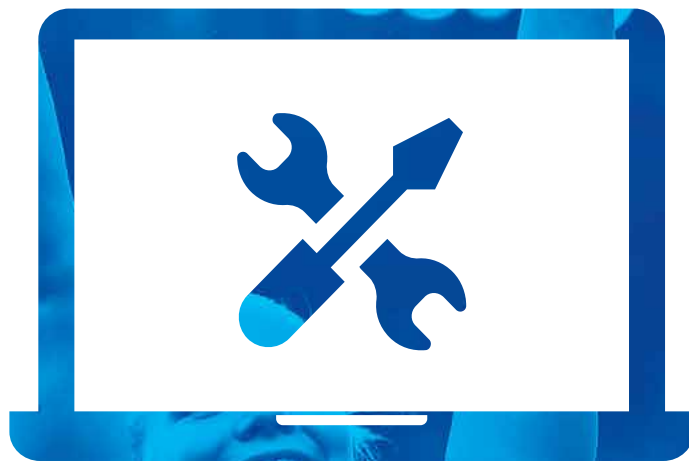
Personal and professional development opportunities are available as part of the UEFA GROW programme, which provides seminars, training and mentoring opportunities.

How a national association can achieve its vision

- Generate greater awareness and support within the national association for the business benefits that communications delivers to the organisation.
- Make communications teams data- and insights-driven. Supplement traditional media monitoring with greater use of audience research, focus groups, sentiment analysis, social listening and digital analytics to help inform the planning and measurement of all proactive and reactive activity.
- Develop a strategic communications capability, which:
 - supports the organisation in achieving its overall strategic objectives;
 - uses SMART objectives and clearly defined KPIs, which are signed off and have the backing of the senior executive team;
 - enhances the perception of the national association in the eyes of all key stakeholders; raises awareness, understanding and support for the work it does in developing football and promotes the positive impact this has on the wider society;
 - ensures the necessary plans and processes are in place to enable the national association to effectively manage the communications around any issues or crises;
 - integrates all digital activity within the wider communications strategy;
 - is focused on using new models of working, such as PESO (paid, earned, shared, owned), to reach and communicate with target audiences across multiple channels, in a consistent, engaging and impactful manner.
- Review the structure of the communications department at regular intervals to ensure it:
 - remains geared towards delivering the objectives as defined within the strategic communications plan, while at the same time being able to manage the day-to-day reactive requirements of a busy press office;
 - keeps abreast of the latest developments and evolving trends in communications.
- Ensure each member of the communications team has a detailed job description, with clearly defined objectives and goals, which are reviewed on an ongoing basis.
- To support this, develop a specific training and mentoring programme, which provides members of the communications team with an opportunity to gain the necessary skills, knowledge and expertise required to do their job effectively.







IT

IT

Overview of the current status of IT for all national associations

The vast majority of national associations do not have a specific IT strategy. Those that do tend not to align it to the association's overall strategic goals.

Senior executive buy-in: There is a lack of understanding and appreciation of the role IT can play, not only in streamlining and creating greater efficiencies within a national association's workflow, but also in how it can directly support the delivery of key strategic goals.

Understanding return on investment (ROI): IT expenditure is currently seen as an expense, rather than viewing the wider business benefits it can bring.

Strategic planning: At present, IT strategies are currently developed in isolation and not in synergy with wider organisational strategic planning processes.

Industry standards: To run a company in a sustainable way, the cross-industry standard for IT spending is a minimum of 3.5% of the total budget, and the cross-industry standard for full-time IT employees (FTEs) is 5% of the number of total FTEs (Gartner 2016). Currently, national associations' IT budgets and IT staff head counts are not aligned with these industry standards.

IT systems: A lack of long-term strategic planning means that national associations often have large, cumbersome IT systems in place, which do not have the flexibility or scalability to incorporate and develop in line with changing consumer demands, technological developments or organisational requirements.



Select the cluster which best describes the current status of IT within the national association

To provide national associations with a clearer, better defined assessment of their current IT status, the UEFA GROW team has developed an IT maturity matrix that scores associations across 60 KPIs in accordance with Maslow's hierarchy of needs. This interpretation of Maslow's hierarchy of needs will help associations select the cluster that most accurately defines their current status.

A

ADVANCED

An advanced national association is placed in the 'Grow' level within Maslow's hierarchy of needs, working to safeguard business development needs, such as digitalisation, data standardisation, and monetisation. Additional characteristics include:

- an IT-specific strategy, although this may not always be aligned to the organisation's overall strategy;
- a dedicated IT team with a budget that covers the day-to-day running of the department and enables some small-scale projects to be planned;
- some buy-in from senior management, with access to decision-makers;
- recognition of IT as an important business function, but not at the forefront of business development;
- beginning to innovate, yet still has issues securing the foundations;
- planned workflows, detailing and safeguarding the processes in place;
- a need for support to grow key business functions, i.e. tracking and understanding stakeholders (centralised data reporting), increasing registrations and monetising assets.

B

DEVELOPED

A developed national association is placed in the 'Secure' level within Maslow's hierarchy of needs, working to ensure business continuity aspects, such as investment, trained IT staff and IT processes. Additional characteristics include:

- an established IT plan; however, this is often not a long-term strategy and is not linked to the organisation's overall strategic goals;
- a small team of IT professionals that receive a dedicated budget that covers the day-to-day running of the department;
- limited buy-in from senior management, which means that IT is often not represented at a senior executive level within the organisation;
- recognition of IT as running 'business as usual' functions and ad hoc requests;
- an interest in developing high-end products/services, but often without a sound or secure IT foundation;
- some planned workflows, detailing and safeguarding the processes in place;
- a need for support to secure key business functions, i.e. dedicated IT budget and staff numbers aligned with industry standards, documented processes, data protection and security measures.

C

DEVELOPING

A developing national association is placed in the 'Survive' level of Maslow's hierarchy of needs, working to ensure core business functions such as the player registration system, connectivity and support. Additional characteristics include:

- an absence of an IT-specific strategy; instead the focus is solely on fire-fighting issues as and when they occur;
- a single person dedicated to IT with a very limited budget;
- no buy-in from senior management;
- perception of IT as office support and not crucial for business development;
- an interest in developing high-end products/services, but without a sound or secure IT foundation;
- no planned workflows, detailing and safeguarding the processes;
- a need for support to ensure key business functions survive, i.e. electronic stakeholder registration systems (players, coaches, referees), corporate office tools (email systems) and IT support.



Vision 2024

Overall IT vision for all national associations

Football federations of the future fully understand their IT capabilities and needs. They not only provide services, systems and people to function effectively in the current environment, but are also aware and flexible enough to adapt to future trends, products and software to stay ahead of the game.

Senior executive buy-in: Senior executive teams are aware of the benefits and opportunities that investment in IT brings to the wider organisation and a senior IT representative is involved in all high-level strategic decisions and provides IT-related support to other business functions.

Understanding return on investment (ROI):

- ROI is understood across national associations, not just in terms of a cash return, but as an important factor in relation to operational efficiency, image, asset monetisation, IT security, etc.
- As a result, the national associations are at the forefront of implementing creative and innovative solutions to improve bespoke services for stakeholders and staff, e.g. delivering rich content, amateur player analysis, e-sports, and blockchain-based solutions.
- Investments in IT support the national associations' overall strategic objectives.

Strategic planning:

- The importance of establishing an IT strategy is now fully understood as national associations focus on continued digital transformation in order to capitalise on emerging and evolving business development opportunities.
- Technology is perceived to be essential for creating new business models, products and services, enhancing customer service as well as customer experiences, increasing revenues, improving productivity and supporting interactions with stakeholders.

Industry standards:

- National associations meet Gartner (2016) industry standards for investment and staff.
- Minimum levels of security are reached to ensure business continuity.
- Safety is increased and operations rationalised.
- Products, services and methods are appropriate for their intended use, compatible and interoperable.

IT systems: National associations have a long-term strategy in place with the ability to adapt to trends, products and innovative software. This has the flexibility and scalability to incorporate or evolve in line with changing consumer demands, technological developments or organisational requirements.



Select the vision cluster which best defines how IT will help the national association to achieve its strategic goals

Given the rapid changes in the development and adoption of new and emerging technologies, it is impossible to provide a definitive assessment of where national associations should be, in terms of their IT maturity, in five years' time. Therefore, the UEFA GROW team will update its IT maturity matrix every 18 months, to ensure it continues to provide national associations with a relevant assessment of where, and how, they should develop in line with the latest consumer trends and technological innovations, within the wider IT market.

A ADVANCED

Categorised in the 'Innovate' level of Maslow's hierarchy of needs, the national association is at the forefront of the implementation of emerging technological trends, i.e. e-sports and blockchain. It is seen as a technology pioneer, not just within sport but also across the wider business world. Additional characteristics include:

- the positioning of IT and digital at the core of the association's strategy and the use of this perspective to constantly challenge and change traditional business models and processes;
- a dedicated IT team with a diverse range of competencies and dedicated budget, which enables it to deliver on its strategic objectives;
- buy-in from the senior executive team, which enables direct access to decision-makers;
- the recognition that IT is an important business function and that technology is an enabler of innovation, which can create greater business value;
- the use of IT to create direct business-to-consumer relationships with key stakeholders, which provide the optimal user experience;
- planned workflows, which detail and safeguard the existing processes that are in place;
- a realisation of new revenue streams, which leverage the national association's digital relationships and assets.

B DEVELOPED

Categorised in the 'Grow' level of Maslow's hierarchy of needs, the national association is working to safeguard business development needs. Characteristics of this include:

- an IT-specific strategy that is aligned to the national association's wider strategic goals;
- an established IT team with a dedicated budget, which enables it to deliver on its strategic objectives;
- buy-in from the senior executive team, which enables direct access to decision-makers;
- the recognition that IT is an important business function;
- standardisation of data and its collection across the organisation;
- optimisation and automation of processes using technology;
- utilisation of data for better decision-making at a senior level across the organisation;
- planned workflows, which detail and safeguard the existing processes that are in place;
- constant investment in people selection and training to systematically build and grow a team with a digital mindset across all departments.

C DEVELOPING

Categorised in the 'Secure' level of Maslow's hierarchy of needs, the national association is working to ensure business continuity. Characteristics of this include:

- the recognition that effective IT systems and processes are needed for cost-saving business functions;
- digital member and stakeholder databases, enabling effective multi-use of data across departments;
- utilisation of digital communication tools that offer bespoke messaging, e.g. social media and website engagement;
- digital support of core business processes to ensure workflows are faster, more efficient and cost-saving;
- some planned workflows, which detail and safeguard all existing processes.



How a national association can achieve its vision

- Review how results of the maturity matrix align with the overall national association strategy, and other business pillar strategies.
- Adjust strategies if necessary to future-proof, considering the appropriate lifespan.
- Create a specific IT strategy with appropriate resources, integrated across the business to support other pillars/business functions.
- Develop an open digital mindset among the national association's top management, removing traditional organisational/digital silos across departments.
- Continuously develop software, processes, systems and people to provide fit-for-purpose and innovative solutions.
- Where needed, request UEFA assistance in improving the IT maturity of the organisation.
- Attend UEFA workshops on IT innovation and knowledge sharing.
- Utilise UEFA's rationale on the importance of having an IT strategy.
- Review UEFA's 'IT as an Investment, Not a Cost' white paper.
- Review UEFA's 'Creative Player Registrations and Systems' guidance paper.



IT





EDUCATION

Education

Overview of the current status of education for all national associations

All the national associations we surveyed have established educational initiatives or are making use of the ones developed by UEFA. However, the level of development across all 55 UEFA member associations is very diverse and there is a disparity in how education is resourced and delivered, as well as in the inclusivity and accessibility to key programmes for all stakeholders from across the football community.

Resourcing: There is disparity in the level of both human and financial resources for education within national associations. While some have a clear budget and head count to support their learning initiatives, others act mostly on a case-by-case basis.

Senior buy-in: Although education has the direct backing of senior executives in some associations, it is often not seen as an essential business requirement for a national association and as such does not have senior-level support.

Alignment to strategy: Currently, education is most often developed in isolation and is not directly linked to the goal of providing staff and stakeholders with the necessary skills and knowledge to help deliver the organisation's overall strategic goals.

Scope of activity: The education initiatives currently in place are mainly focused on supporting staff needs within a national association. There is limited understanding of the way in which increasing skills, knowledge and expertise across the wider football community can help grow the game and support an association in delivering its strategic goals.

Partnerships: All national associations utilise the existing UEFA education initiatives (e.g. UEFA CFM, MESGO, UEFA PLAY, etc.), either as a main resource or in addition to other initiatives. Some associations also work with other third-parties, such as universities, to develop specific courses and deliver them at national level.

Delivery: There is currently very limited use of digital platforms and e-learning as part of the delivery of education programmes. Most of the learning initiatives implemented by national associations are delivered through face-to-face seminars or workshops.

Stakeholders: Although in some cases national stakeholders (such as clubs, leagues or regional associations) are invited to participate in education initiatives, it is not systematic. Therefore, with access to a more advanced and structured form of education, national associations' staff can develop at a faster rate than their stakeholders' staff, which increases the risk of a knowledge and skills 'gap' emerging.



EDUCATION

Select the cluster which best describes the current status of education within the national association

A

ADVANCED

There is a significant level of buy-in from the senior executive team, who are actively supporting the national association's education initiatives. As a result, there is a budget dedicated to human resources and education.

While there is a clear vision for education across the organisation, generally speaking there is no dedicated education strategy.

The education initiatives cover a wide range of topics. However, the skills and knowledge developed through these programmes are not

specifically aligned to match those required to deliver the organisation's overall strategic goals.

Education programmes are facilitated directly by the national association, in cooperation with external national partners or via UEFA.

The programmes themselves are predominantly delivered face-to-face. However, if not already implemented, the national association is in the process of creating an online platform to support its educational courses and knowledge-sharing initiatives.

B

DEVELOPED

There is support from the senior executive team, who are aware of the national association's education initiatives. However, it is not perceived to be of strategic importance to the organisation. As such, few resources are currently allocated to education initiatives.

At present, there is no clear vision for education across the national association and no specific strategy has been developed.

The education initiatives that are available are limited to specific topics and facilitated by external national partners or via UEFA.

Programmes are delivered face-to-face and there are currently no plans to create an online platform in the near future.

C

DEVELOPING

There is a level of awareness among the senior executive team of the value of education initiatives, but owing to pressure on resources it is not seen as a strategic priority for the organisation.

Owing to a lack of available resources there is no systematic approach to education initiatives and the development of employees.

The national association has no allocated budget for education and the decision to make funds available to support a specific initiative is dealt with on a case-by-case basis.

The education initiatives available are limited to those provided by external partners, such as UEFA.



Vision 2024

Overall education vision for all national associations

Football federations of the future understand the vital role education can play in enabling them to deliver their strategic goals and have developed a range of initiatives that are inclusive, tailored and representative of the needs of the wider stakeholder community, at all levels of the game.

Resourcing: Education has a proper budget based on the number of employees and has the human resources to support the creation and implementation of learning initiatives at a national level.

Senior buy-in: Senior executives understand the importance of education in developing the skills and knowledge of the employees, as well as the importance of engaging national association stakeholders in these learning initiatives and in helping deliver the organisation's overall strategic goals.

Alignment to strategy: Education initiatives are aligned to the national associations' strategy to make sure staff can develop the skills and knowledge necessary to deliver the organisation's overall strategic goals.

Scope of activity: To become more agile organisations, national associations empower their employees, giving them responsibility for their own personal development budget. This has created a more dynamic workforce able to react when they identify a gap in their knowledge or skillsets.

Partnerships: A greater number of education programmes are delivered in partnership with recognised universities. These partnerships reinforce the attractiveness and the value of the programmes and the certificates delivered. UEFA and the national associations work hand-in-hand to offer the best possible education for staff, either through pre-existing programmes or through tailor-made solutions.

Delivery: Digital platforms play a vital role in supporting the delivery of education programmes and knowledge-sharing initiatives across all national associations. These platforms increase the contact between national associations and stakeholders and facilitate greater sharing of information and best practices.

Stakeholders: Stakeholders (clubs, leagues, regional associations, players unions, etc.) are invited to take part in the learning initiatives put in place by national associations. Education programmes are also used as a platform to share and create contacts with stakeholders.



EDUCATION

Select the vision cluster which best defines how education will help the national association to achieve its strategic goals

A

ADVANCED

The senior executive team is fully aware of the national association's education initiatives and actively supports their alignment with the overall strategy.

As such, the education strategy ensures that all staff within the national association can acquire the knowledge and skills required to deliver the organisation's overall strategic objectives.

The national association has a clear long-term strategic plan and a robust implementation plan regarding education and has allocated the necessary budget and human resources to ensure its successful delivery.

All staff across the national association are aware of existing learning initiatives at national level as well as those run by UEFA, and are encouraged to take part in them.

Employees are given responsibility for their own personal development budget. As a result, they are able to proactively address any gaps in their knowledge or skillsets.

Partnerships have been established at national level with local universities and specialist external providers as well as at European level with UEFA. This enables the national association to offer its staff and stakeholders a mix of programmes best designed to suit their needs.

Programmes are delivered through a combination of e-learning and face-to-face activities. An online platform is used to share information and knowledge with national stakeholders as well as the wider European football community.

National stakeholders take part in the learning initiatives.

B

DEVELOPED

The senior executive team is aware of the education initiatives across the national association and supports their continued development.

The national association has a clear long-term strategic plan for education. Any new initiatives launched are done so with the organisation's overall strategic goals in mind.

The national association has a dedicated budget allocated to education and at least one person responsible for managing its delivery across the organisation.

There is a mix of programmes run at national level (developed by the national association for its staff and its stakeholders) and at European level (developed by UEFA, with representatives from other national associations).

All staff across the national association are aware of existing learning initiatives, both at the national level and those run by UEFA, and are encouraged to take part in them.

In partnership with UEFA, the national association has identified its learning needs and is developing new education initiatives. These are supplemented with additional programmes run in conjunction with local universities to enable the association to offer a wide variety of education opportunities to its staff.

The national association has developed an online platform to share information and knowledge with the wider European football community and its national stakeholders. Most programmes at national level are delivered face-to-face.

National stakeholders take part in the learning initiatives.

C

DEVELOPING

The senior executive team supports a systematic approach to education and understands the business value of aligning it to the national association's overall strategic goals.

There is a clear vision for education and the national association is working towards creating a formalised long-term strategy. In the meantime, any new initiatives launched are done so with the organisation's overall strategic goals in mind.

A dedicated budget has been allocated to education.

New educational initiatives are being developed by the national association, predominantly in partnership with either UEFA or local universities.

These are tailored to the needs of its staff and wider stakeholders.

All staff across the national association are aware of existing learning initiatives, both at national level and those run by UEFA, and are encouraged to take part in them.

An online platform is used to share information and knowledge with the European football community and its national stakeholders.

National stakeholders take part in the learning initiatives.

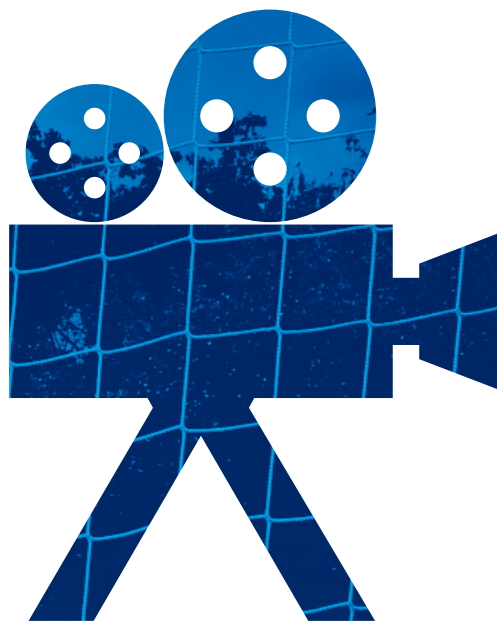


How a national association can achieve its vision

- Ensure that senior executives across the national association understand the importance of education as an essential business requirement and the need to align the learning initiatives with the organisation's overall strategic goals.
- Share best practices, both internal and external, with senior management, who should be invited to take an active role in education initiatives across the national association.
- With senior executive buy-in and the alignment of the education initiatives with the national association's overall strategy, ensure a dedicated budget is allocated to education.
- Appoint a dedicated person responsible for the organisation's education strategy and for overseeing the development of specific learning initiatives, which are tailored to the needs of the national association.
- Create and promote a knowledge-sharing culture within the national association and across its wider stakeholder community. This can be facilitated through the creation of an online platform, which enables knowledge acquired by staff to be shared internally and externally, as required.







MEDIA RIGHTS & CONTENT

Media rights and content

Context

Through this process we have identified a high level of complexity around media rights and content distribution across the national associations. In particular, the way in which rights management interacts with UEFA's team means that this document cannot be a stand-alone vision for media rights. Instead, we believe there is the need for a more comprehensive approach that is coordinated with the central UEFA media rights team. In general, national associations' media rights need to be seen as a whole, not broken into primary, secondary or tertiary rights, in particular because comparison across countries is extremely challenging. However, as the discussion so far has used these terms, we will continue to employ them in this document for ease of reference. This document reflects the responses received from national associations to the media rights questionnaire and workshop facilitated by UEFA. It should be seen as a starting point for a collaborative approach, which will audit the rights and what is done with them on a case-by-case basis. The outcome of this will reflect where there is already work being undertaken and where there is more that can be done.

Overview of the current status of media rights and content for all national associations

National associations believe that:

- the media rights and content distribution landscape is evolving rapidly and often too rapidly for them to devise, resource and deploy strategies to keep up and drive viewership, engagement and revenues;
- the secondary rights retained by national associations, post-centralisation, are difficult products to sell effectively without a fully rounded offering from a production, commercial, linear, digital and strategic perspective;
- a coordinated, resourced and fully supported strategy is required to enable the national associations to create demand, package/produce effectively and drive commercial value/return on investment (ROI) across the commercial programme;
- UEFA's centralisation programme has been a huge success and is greatly appreciated by national associations. However, the complexity of unpackaged, unproduced and unsold retained secondary rights is a challenge. As a result, more ongoing consideration and consultation is needed between associations and UEFA;

- they operate across a huge range of media markets, from developed to developing to non-existent. There is no one- size-fits-all approach that can be adopted.

Organisation/resources: The production, packaging and 'demand creation' for secondary rights is a complex process. A lack of perceived value and focus has served to undermine the efforts of some national associations, as the market environment does not support investment at this time. Return on investment (ROI) remains an issue. Other, more developed national associations focus on their high-value retained secondary rights and struggle to engage their clients with the smaller secondary elements. There remains a broad range across all national associations, from those with produced and unsold products to those without basic levels of production and packaging.

Audience demand: Many secondary products, particularly those that are unconnected to the men's domestic club game, struggle to find a place in the national sporting narrative, thereby reducing consumer demand and commercial interest. Establishing a narrative is a key, but an overwhelmingly underutilised element. Coordination with the fan engagement and overall national association communications programmes, with a particular focus on digital elements, is missing.

Commercial demand: The lack of sporting narrative, storytelling and packaging has led to minimal commercial interaction with broadcasters. The creation of new packaging and the engagement of digital distribution platforms are not as developed across all national associations as desired. Production volume and quality can also be improved across the board.

Metrics/data: Most national associations lack objective metrics against the deliverables and the associated data to both support ROI and drive the initial strategy. This is restricting success. The sharing of market intelligence between the macro markets (UEFA) and the micro markets (national associations) does not currently take place.

Select the cluster which best describes the current status of media rights and content within the national association

A

ADVANCED

All secondary rights are effectively produced, packaged and presented for distribution within the domestic and international market. However, there are still significant gaps in domestic and international markets when it comes to distribution.

There is an understanding within the national association that it needs to transform from being a rights seller to becoming a content provider and ultimately a media house.

The national association has dedicated expertise in each relevant area of its operations, from production and communications to engagement, digital development and sales. It also has effective market and consumer demand creation programmes in place.

The national association has multiple partners delivering opportunities for mass participation. Utilising the regional associations in this is common practice.

Social and digital media strategies are used to boost engagement and viewership of smaller products and ensure that all rights have a route

to market, either retailed or on a free-to-view basis via digital channels, which are either owned by the national association or delivered by a third-party platform provider.

The national association understands it must transition from being a business-to-business (B2B) to a business-to-consumer (B2C) organisation. This process is underway, but more is still to be done.

There is buy-in and support from the national association's senior executive team.

The national association has a high value in retained secondary rights (e.g. domestic club cup competitions, super cup) with which to leverage and build value in its smaller secondary rights.

The national association is under pressure from the domestic league and clubs to protect and develop value in the current product base.

The national association has a high level of micro-market intelligence and analysis. It is aware of developments in the macro market and the shift in consumer trends.

B

DEVELOPED

The national association has established value in part of its retained secondary rights and has developed production and distribution strategies that have driven revenues within the domestic market. International distribution is as yet untapped and many rights remain unexploited on a domestic basis.

There is an understanding of the importance of a connected and coherent strategy around media rights and distribution and the national association is in the process of developing a robust and far-reaching strategy across all of its output and content. However, at present it is focused primarily upon the elements with current value.

Within the national association there is limited expertise and staffing focused solely on media rights and content distribution. Those responsible are spread across a number of different departments.

As a result of the lack of a coordinated strategy, there is no focus or clear prioritisation in place.

The national association has well-established, long-term media partners who are often facing their own challenges as the media business models continue to evolve. Both parties realise that an effective strategy for transition to a new model is required for the future.

There is a partial integration of data, customer relationship management (CRM) and fan relationship management (FRM) into the sales process and related products, but there is an acceptance that more can be done, particularly in terms of macro-market trend analysis.

The national association has linked up its media rights and content distribution function with the other relevant departments, but coordination and senior executive buy-in could be improved.



DEVELOPING

The national association has limited value in its premium secondary retained rights and no established value in its remaining non-premium rights.

There is either an established and separate domestic club structure that limits the national association's ability to monetise and leverage rights or alternatively, it retains full control of every aspect of domestic and international football, with the exception of the men's national team, but has no established or competitive commercial landscape into which to place its rights.

There is no overall strategic plan across the organisation, which impacts on its ability to create a coherent and long-term media rights plan.

The national association has no real dedicated resources internally and currently does not employ any external media rights specialists to provide market data and understanding.

There is a lack of buy-in and understanding of media rights among the senior executive team.

Currently, there is no international media rights distribution and large gaps in both production and product distribution.

While the national association acknowledges the need for greater strategic direction, production values and coordination with the media rights market, it lacks the resources and bandwidth to firstly devise and then implement any potential strategy.

It also faces significant challenges driving competition in an uncompetitive and often non-existent market.

Vision 2024

Overall media rights and content vision for all national associations

Football federations of the future have an established broadcast presence and product mix that is broadly distributed across all relevant platforms. The overall commercial and sporting strategy is geared towards the development and growth of participation, viewership and value of centralised and non-centralised rights internationally and domestically.

Organisation/resources:

- A comprehensive strategic media rights plan has been developed and then subsequently approved by the senior executive team.
- The plan covers content creation, packaging, demand creation and sales resources. It utilises existing brand architecture to create a consistent positioning and tone of voice across each product sector.
- Partnership management is recognised as being crucial in enabling national associations to transition from silo-based operations.
- National associations capitalise on the organic social/digital ecosystem that surrounds them and are actively working with celebrities and influencers within their markets.
- They have overcome the challenges associated with illegal streaming and are protecting their revenue streams at source.
- There is a focused commercial strategy, which is centred on a fully scoped business strategy and has defined ROI benchmarks.
- Platform-specific content creation with a platform-neutral sales approach has been developed, which enables the market to buy what it wants.
- Content creation and packaging is focused around those products demanded by the market.
- Where competition is lacking, national associations are instrumental in creating market dynamics.

Audience/commercial demand:

- National associations understand the dynamics of their market.
- An enhanced production quality and output has built greater demand and enhanced perceived value, while user-generated content, influencer strategies and digital platforms have delivered greater levels of interest and demand among younger audiences.
- There is a coordinated licensing system in place, which helps facilitate domestic and international distribution.

Metrics/data:

- National associations have identified target demographics and hyper-targeted content creation to appeal to, and drive interest from, these target demographics based around the unsold and under-exploited secondary rights.
- They use tailored content and segmentation to place content at the point of consumption for the consumer.
- There is a comprehensive product mix across all platforms and potential channels.
- Key micro and macro-market intelligence is shared between national associations.



Select the vision cluster which best defines how media rights and content will help the national association to achieve its strategic goals

A

ADVANCED

The national association has a dedicated internal media rights team, which possesses specialised knowledge and expertise across content production, social/digital engagement, sales, account management and communications.

It has a fully developed and executable media rights and content distribution strategy, designed to build market and consumer demand, narrative (digitally and through public relations activity) and competitive commercial environments. This has been signed off by the senior executive team, who have allocated the necessary resources to enable its implementation.

The national association has become a media house, with in-house production, customer service, OTT and digital distribution capabilities

alongside traditional methods of content management.

The media rights team is in constant dialogue with industry specialists that are connected to the market makers in their respective markets and plugged into the wider sports rights industry on a global basis. Market intelligence is shared and the national association is a well-respected leader in the rights field domestically and internationally.

The national association understands market trends and maintains a flexible and agile approach to commercial media rights distribution.

It develops and maintains research and insights programmes that inform and shape its future commercial strategy and execution.

B

DEVELOPED

The national association has a core team of dedicated executives, tasked with maintaining close contact with the market and the relevant decision-makers within it. These executives have a specialism and in-depth knowledge of the global market trends with regard to media rights.

There is some internal production and content-creation capability creating targeted content that follows a coordinated narrative and strategic brand direction.

Content creation is delivered for multiple channels on multiple platforms, whether social media or OTT channels. It is fit-for-purpose and meets audience and technology expectations.

CRM/FRM management is deployed to inform business strategy and develop ROI. Regular benchmarking is conducted in conjunction with UEFA and partner agencies.

Executives are skilled in the creation of market competition and packaging.

C

DEVELOPING

The national association has some day-to-day contact with the main players in the market who lead pricing and influence deals as well as with decision-makers within the domestic and regional markets. This is supported by UEFA, and others, to ensure that a fully rounded view is formed.

It has good internal and informal connectivity and communication across disciplines. This ensures that its overall strategic objectives and

general operations do not run in opposition to the media rights and content distribution plan.

The national association uses external support to develop and deliver content and rights monetisation.

It understands the importance of production values and quality in terms of value generation and to prioritise the allocation of resources to the most viable products.



MEDIA RIGHTS & CONTENT

How a national association can achieve its vision

- Investigate the feasibility of developing your own direct-to-consumer platforms to ensure that all media rights have a route to market, either within the national association's own controlled platforms or via a third-party provider.
- Increase the narrative link between the high-value centralised rights and associated player/club/national team intellectual property rights and trademarks to increase consumer awareness and drive consumption/viewership.
- Investigate combining or bundling rights to secondary retained rights on a regional basis, to drive value.
- Develop internal and external expertise in digital platforms and market intelligence.
- Continue to share micro-insights with the central UEFA team and pool knowledge to build the macro environment for all national associations.
- Audit, locate and digitise the association's current archive footage and begin automatic archive digitisation immediately to build the archive function.
- Understand the importance of collecting accurate consumer data and insights, and use this to build a clearer picture of fan preferences.
- Allocate a percentage of centralised rights revenues to the development and marketing of the retained secondary rights, to ensure consistent budgetary support.







**FINANCIAL
SUSTAINABILITY**

Financial sustainability

Overview of the current status of financial sustainability for all national associations

Owing to the introduction of club licensing in 2004, today every national association implements the UEFA licensing system as part of the admission process for UEFA club competitions. This has inspired and encouraged the establishment of domestic licensing systems, which are now applied in the majority of UEFA member associations for their domestic competitions. This has established a formal structure and mechanism through which national associations can raise professionalism, improve governance and transparency, promote club development and ultimately create a sustainable and financially stable domestic football environment. Nonetheless, there is still a need to strengthen the regulatory framework, improve inconsistencies and raise standards for domestic competitions if national associations are to protect the long-term health and sustainability of domestic football for the benefit of future generations.

Organisation: Most national associations already have a dedicated and independent administration in place tasked with managing the club licensing system and ensuring that clubs fulfil the set criteria. This has also led to the development of a strong and recognised club-licensing network throughout Europe that has encouraged more collaboration and knowledge sharing between the 55 UEFA national associations. However, there are still a number of associations for which the implementation of club licensing is an additional responsibility on top of the regular duties and activities of the team. This prevents associations from realising the benefits of a licensing and monitoring system by diverting resources away from the necessary focus to administer and assess implementation. Support and cooperation from senior management is a crucial factor for installing essential administrative structures and expertise to assist and promote the further development of domestic football in the country.

Regulatory framework: Domestic club licensing allows for national associations to implement a system that is more in tune with national specificities and legislation, as well as to increase its scope by applying it to lower-division clubs. Today, almost all associations already operate some form of domestic club licensing, but there is a desire, if not a need, to work towards more harmonisation of the diverse systems, in addition to further developing the monitoring mechanisms necessary for improving the financial sustainability of domestic football. The lack of cohesion and regulatory guidance at national level means many clubs still take key financial decisions in isolation, based on short-term gain rather than long-term benefits. As a result, clubs sometimes maintain outstanding debts to creditors, overspend on wages relative to their revenues, neglect long-term investments in infrastructure and in some cases face the constant threat of falling into complete insolvency. Not only can this hinder the aim of achieving greater transparency and credibility in European football, but threatens to undermine the whole stability of domestic football generally.

Supporting resources: Other than financial support, national associations generally ensure that adequate structures are in place, as well as professionals that can provide domestic expertise in terms of assessing clubs' financial, legal, sporting, infrastructural and administrative considerations. Nonetheless, it is acknowledged that allocated budgets vary greatly depending on the national association's size and domestic economic environment, as well as market and political forces. This effectively means that some simply do not have the administration in place with the required expertise or that they cannot fully dedicate themselves to their specific area of work. This is exacerbated by a lack of appropriate IT infrastructure necessary to efficiently apply a club licensing and domestic monitoring programme and realise true long-term benefits for domestic football.

Stakeholder involvement: Strong collaboration between all relevant stakeholders is one of the main reasons why the club licensing system has been so successful. On the other hand, minimal or unsystematic collaboration between national associations and relevant stakeholders still occurs and often leads to inconsistencies, slower progress and a lack of understanding and trust between parties when trying to illustrate and implement measures meant to raise the long-term viability, professionalism and growth of domestic football. A complex array of commercial and sporting interests risks clouding the overarching objective of sustainable domestic football when the concerns of too few are taken into account. A constant and serious dialogue between all stakeholders is imperative for the long-term health of the game.

Youth development: Fundamental youth training, education and care is now recognised as a crucial factor for developing a sustainable club business model. This has been evident through recent trends in international football that have demonstrated the real benefits of effective youth development. However, not all national associations monitor and assess the implementation of youth development programmes or key measures introduced by their clubs that are meant to both protect the welfare and ensure the quality of education provided to youth players. A more systematic and consistent approach for establishing and evaluating youth development programmes would not only benefit domestic football growth specifically, but also football growth in Europe generally.

Infrastructure: Improving standards and quality of infrastructure is one of the fundamental objectives of the club licensing system. Moreover, the nature of financial fair play rules mean that club owners are incentivised to invest in stadiums and facilities, which in turn has had a profound impact in these areas. Nonetheless, though these last years have seen one of the largest rises in investments in football infrastructure, specifically with regard to stadiums, these investments are unbalanced and inconsistent across national associations. Indeed, in the last two years, clubs have seen the largest increase in fixed assets on record. Yet, there is still a lack of sufficient investment to improve the accessibility and availability required to provide suitable training and development facilities to maintain and support a healthy mix of player demographics. Further work and support is required to ensure that supporters and players are provided with suitable sporting infrastructure throughout Europe.

Integrity: Equally important for the sustainability and growth of domestic football is belief and trust in its institutions and competitions. The most direct dangers to integrity are match-fixing, corruption, doping and negative changes to club identity, but it is not only limited to those. A more insidious threat to integrity can manifest itself through multiple ownership of clubs as well as gross financial disparities resulting in extreme competitive imbalances. Likewise, promotion and relegation is a key principle that should be considered. Efforts and guidance need to ultimately be given through formal channels to preserve the competitive nature of domestic competitions.

Solidarity: Although clubs generate revenues through traditional market means, many if not the majority also receive and benefit from solidarity payments. Direction and leadership would be useful to assist national associations in optimising the distribution of solidarity payments and understanding how best to allocate the funds for the long-term support and sustainability of domestic football.

Community relationship: The social importance of clubs is such that they are not viewed as simple corporate entities, but rather as communal institutions that have a deep impact at local, national and in some cases international level too. The social roots and relationship between a club and its community is a fundamental driver of sustainability. Unwavering fan and community loyalty and support is the life force of domestic football and must be continually cherished and buttressed through measures that enrich the relationship (e.g. supporter liaison officers). A formal expression of this relationship between fans and the local clubs is a healthy way to maintain social bonds and ensure continued support within the local community. This can also be achieved through various football social responsibility programmes and initiatives that strengthen the relationship.



Select the cluster which best describes the current status of financial sustainability within the national association

A

ADVANCED

The national association is committed to ensuring that its clubs are well managed and follow a sustainable business model through a stringent regulatory framework for their domestic competitions that is adapted to their needs and goes beyond what is required by UEFA regulations. It has implemented an efficient club monitoring mechanism in order for clubs to be financially compliant and assessed on a regular basis. It also acts proactively and provides support when clubs are facing financial difficulties.

Senior management strongly supports and provides adequate resources in the implementation and maintenance of a club licensing system at domestic level, as well as ensuring the independence of decision-making bodies.

There is strong collaboration and regular contact between the national association and its stakeholders. This is achieved through dedicated workshops and meetings that help foster a healthy and productive working relationship between all parties.

Quality youth development is a priority and adequate resources are allocated to it. Qualified coaches train youth players and there are policies in place to ensure that they practice football in a safe environment. Their welfare is also prioritised through educational programmes and regular medical examinations. The national association monitors the quality and application of youth development programmes implemented by their clubs.

There are extensive requirements linked to stadium and training infrastructure, which are regularly assessed by expert staff from the national association to ensure they provide a suitable, safe and accessible sporting environment for both fans and players.

A robust legal framework and extensive due diligence processes are in place in order to ensure that a club's heritage and identity are not put at risk when it makes legal changes to its structure. Likewise, the integrity and smooth running of competitions are safeguarded through these policies.

B

DEVELOPED

The national association has strong regulations in place for domestic competitions and understands the value of implementing club monitoring consistent with the UEFA Club Licensing and Financial Fair Play Regulations.

Senior management is regularly in contact and provides enough resources to its club licensing administration for it to work efficiently and support clubs when necessary.

The national association and its stakeholders collaborate well on many matters and understand that they must work together in order to avoid potential issues.

A good youth development system is in place at both national and club level with youth players

being provided with extensive sporting and non-sporting educational programmes. Youth players have access to adequate facilities as well as medical and technical experts.

Stadium and training infrastructure are up to standard and are regularly assessed. The majority of clubs participating in UEFA club competitions are able to use their own stadium for their home matches.

Some form of regulation is implemented in order to ensure that a club is required to inform and provide relevant documentation to the national association if it plans to change its legal form or make changes within its overall legal group structure.

C

DEVELOPING

The national association has, or is planning to have, a domestic club licensing system for its club competitions.

Senior management supervises the work done by its club licensing administration team and meets with them at least once in a given season.

Clubs have a youth development system operating within their own regions, but there is no centralised system operated by the national association for the whole country.

The majority of the national association's clubs must play UEFA club competition matches in the national stadium, as their own are not always up to the required competition standards.

There are no domestic regulations in place other than those imposed by UEFA to ensure there are no drastic changes undertaken by a club that could negatively affect its identity or the integrity of a competition.



Vision 2024

Overall financial sustainability vision for all national associations

Football federations of the future have robust and comprehensive regulatory frameworks that ensure the stability, long-term financial viability and sporting health of their domestic competitions. Their clubs adhere to the principles of transparency and solidarity with clear long-term development strategies for the overall growth of the domestic game.

Organisation: National associations have an experienced and dedicated administration team solely tasked with the administration of the club licensing and club monitoring systems. Senior management provides the necessary guidance, support and resources for the effective implementation of these measures.

Regulatory framework: All 55 national associations have implemented and operate a club licensing and club monitoring system for domestic competitions. Under the guidance of the national association (and/or league), clubs take strategic decisions, which understand and take into account the long-term development and health of the domestic competitions and clubs overall and are not done in isolation. The regulations remain flexible enough in scope to anticipate future challenges, which may need more formal guidance.

Supporting resources: National associations provide all necessary financial, technical and administrative resources to ensure the appropriate club licensing and monitoring systems are implemented and enforced for the long-term viability and sustainability of the domestic game as well as improving international performances.

Stakeholder involvement: National associations regularly consult with key stakeholders (perhaps in more formalised relationships) in order to continually assess the financial and sporting health of domestic football as well as in making key strategic decisions, which may have an impact on its long-term development.

Youth development: Clubs' youth development programmes are systematically and regularly monitored and evaluated by the national association. Youth players are provided with a safe and supportive training and development environment that safeguards their overall welfare and ensures a proper sporting and non-sporting education.

Infrastructure: There are stadium and training facilities available that are safe, accessible and well equipped. These are regularly assessed to ensure that supporters and players participate in a secure, accommodating and satisfactory environment.

Integrity: Appropriate and effective education, prevention and detection programmes are instigated in relation to match-fixing and doping. Good corporate governance and transparent business practices are formally addressed to ensure fit and proper club ownership avoiding conflicts of interest, which may impact the integrity of competitions. An objective assessment and regular consultation is performed to ascertain the degree of financial disparity and its impact on the sporting balance of the domestic competitions.

Solidarity: Fair and supportive solidarity systems are in place for the benefit and sustainability of the entire domestic pyramid and do not contribute to further financial disparity. Clubs are committed to fair and appropriate distributions of solidarity payments to improve the cohesion and competitiveness of the domestic game.

Community relationship: Clubs maintain a strong local connection to their community by engaging the local community as a vital stakeholder. The national associations and clubs cultivate positive social returns and benefits for the locality through sport. Clubs encourage the local population to get involved in the club and strive for the club to become more involved in community engagement.

Proactivity: National associations look further than UEFA directives to anticipate future challenges to the sustainability of domestic football. This vision introduces areas that national associations should monitor and be aware of to ensure the holistic long-term sustainability of the domestic competition, but they should also be willing to be proactive and put forth further recommendations or proposals that could influence the strength of the domestic game. It is imperative that national associations work in conjunction with the relevant stakeholders, especially considering the role leagues can play in ensuring the health of domestic football at all levels and in all areas of the game (i.e. women's, grassroots, futsal, etc.).

Select the vision cluster which best defines how financial sustainability will help the national association to achieve its strategic goals

A

ADVANCED

Through the regulations and directives of the national association, clubs are well managed and operate under a credible business model. A recognised club monitoring mechanism is well established, with clubs being financially compliant. Support is regularly provided and the system works with the aid of an IT licensing and monitoring tool. This allows for the exchange of documents and information, constant monitoring, and follow-up.

Senior management is dedicated to the ongoing establishment of domestic club licensing and club monitoring systems, which is reflected in the budgetary allocations and adequate governance structures within the national association's administrative structure.

The national association proactively seeks and collaborates with its stakeholders in its key decision-making process.

Youth development is recognised as key to the sustainable growth of clubs and national team pathways. World-class technical coaching and adequately equipped facilities are in place (e.g. presence of defibrillators). Furthermore, youth player welfare is seen as crucial and adequate measures are applied and continuously assessed.

Event management is delivered to an international standard and is focused on optimising the matchday experience for supporters. As a result, it is widely perceived as a benchmark for other national associations.

B

DEVELOPED

Both domestic club licensing and club monitoring are well established and applied by the national association's clubs, ensuring the financial viability of the national association's domestic competitions and therefore its commercial draw.

There are dedicated resources provided to the national association's club licensing administration team, enabling it to provide expertise of the highest quality.

The national association and its stakeholders work together in order to continue improving the footballing structures in the country.

Youth development structures are of the highest standards and youth players are exposed to the very best sporting and non-sporting educational programmes.

Football stadiums and training facilities are among the best sporting infrastructure in the country and meet internationally recognised standards for accessibility.

Clubs abide by the legal framework the national association has implemented, and the national association proactively collaborates with them before any changes to their legal structures are undertaken in order to ensure compliance.

C

DEVELOPING

The national association has introduced a domestic club licensing system for its club competitions as well as some level of financial monitoring.

Adequate resources are provided to ensure the proper functioning of the domestic club licensing and club monitoring system.

The national association has implemented an elite youth development programme across all regions of the country.

Each club has proper training facilities in place for both its professional and youth players and the majority of teams participating in UEFA club competitions can do so in their own stadiums.

The national association has also introduced relevant legal criteria aimed at ensuring the integrity of its clubs and domestic competitions in accordance with national legislation and UEFA principles.

How a national association can achieve its vision

- Strengthen and improve domestic club licensing systems and establish a form of domestic financial club monitoring mechanism consistent with the UEFA Club Licensing and Financial Fair Play Regulations.
- Ensure clubs adhere to and harmonise their financial reporting methods with internationally recognised reporting and accounting standards, as well as recommended methodologies prescribed by UEFA.
- Establish a dedicated administration team that works on club licensing and club monitoring matters for both domestic and UEFA club competitions.
- Establish appropriate IT infrastructure to enable reporting and monitoring of financial information from clubs. The same should be done in view of assessing youth development programmes and their consistent application throughout a national association's territory.
- Provide regular training to club financial experts and establish key milestones in order to roll out a successful monitoring programme.
- Put specific measures in place to protect, safeguard and ensure the welfare of youth players.
- Focus attention on event management and the improvement of infrastructure.
- Establish a systematic or formalised stakeholder involvement and consultation process.
- Undertake regular health-checks or diagnostics to ascertain the competitiveness and financial solvency of domestic competitions.





GOVERNANCE

Governance

Overview of the current status of governance for all national associations

At governance level, UEFA member associations must comply with certain requirements laid down in UEFA circular letter No. 11 of 17 February 2009 and in Articles 7bis, 59 and 60 of the UEFA Statutes. Furthermore, Article 15 of the FIFA Statutes establishes mandatory principles of good governance with which member associations' statutes must comply. Following UEFA's governance reform process, as approved by the 41st Ordinary UEFA Congress in Helsinki, the trend for many national associations is to align their governance with that of UEFA, in particular insofar as terms of office and gender balance are concerned. While it is clear that some national associations have undergone a reform process, not all of them have high standards of good governance in place. For this reason, following the recommendation of the UEFA National Associations Committee to improve good governance within the UEFA member associations, a set of ten comprehensive and wide-ranging UEFA good governance principles, covering the broad spectrum of a football association's activities and operations, was approved by the UEFA Executive Committee at its meeting of 27 September 2018. The good governance principles are linked not only to statutory provisions but also to the strategy of each association. While the UEFA Executive Committee agreed that the fundamental organisational autonomy of the UEFA member associations must be preserved and respected, it strongly encourages them to apply all the principles.

Good Governance Principles for UEFA Member Associations

Clear strategy: It is a good governance principle that, nowadays, national associations should not only run day-to-day business but also have in place a clear business strategy. A published strategic plan should ideally be implemented for both the short and medium term, e.g. for one to five years, and should be the result of an inclusive internal and external process. It is recommended that the strategic objectives be evaluated on an annual basis, to ensure that the strategy corresponds to the national association's statutes and, for the sake of transparency, to publicly communicate it, ideally through the national association's website. Without a strategic plan with measurable objectives, the president and executive body/board cannot be properly held accountable by the members. The development of a clear strategy should also be seen as an opportunity for both elite and amateur players to consult and identify common goals.

Statutes: National associations are encouraged to revise and modernise their statutes. Desirable minimum requirements are outlined in UEFA Circular letter no. 11/2009 and certain mandatory provisions to be implemented at national level may be found in the relevant provisions of the FIFA and UEFA Statutes. It is recommended that fixed terms for both the president and board/executive committee members are established (e.g. term and/or age limits). In addition, a system of checks and balances should be in place to avoid excessive concentration of power in one person, while at the same time adequate arrangements



GOVERNANCE

should ensure continuity in the work of relevant bodies (for example, partial renewals to have at least one third of members in office at each renewal).

The executive committees/boards of the national associations should have balanced gender representation (diversity) and it is, therefore, recommended that there is a fair representation of women in these bodies and, ideally, in the corresponding bodies of leagues and clubs as well.

The statutes should provide for a clear separation of powers (e.g. legislative/executive, executive/administrative and independent judicial bodies), a definition of rights and obligations of the members, a clear indication of responsibilities and decision-making bodies, as well as minimum provisions related to ethics. The statutes should also guarantee a democratic process with free elections, stakeholder consultation, regular general assemblies and the definition of roles and powers of the president, board/executive committee and administrative body.

Finally, it is recommended that the revision process for statutes takes place in specific working groups (where necessary including FIFA and UEFA).

Stakeholder involvement: Stakeholders (i.e. clubs, leagues, players, coaches, referees, supporters) and other interest groups, such as political bodies, media and relevant NGOs, are important partners for the overall development of football at the national level. Therefore, it is recommended that national associations recognise and consult them on a regular basis. National associations are free to decide on the precise degree of stakeholder involvement, be it at board/executive committee, standing committee or working group level, and stakeholders are expected to work closely with the national associations in order to support mutually agreed objectives. In countries where professional football exists, social dialogue should be formalised and national associations are expected to ensure that the minimum requirements for standard player contracts are implemented at national level, as unanimously agreed by the 46th Ordinary UEFA Congress in Istanbul on 22 March 2012. It should also be determined, whether the relationship between professional and grassroots football can be based on a contractual agreement, providing a framework in which the reciprocal activities can be negotiated.

Promotion of ethical values, integrity and good governance: Ethical values and good governance should be incorporated as statutory objectives. There should be an overall strengthening of ethical principles, in particular, the principles of integrity, honesty, fiduciary responsibility, loyalty and sportsmanship. Rules should be put in place to avoid or mitigate (e.g. through disclosure), conflicts of interests and to tackle the threat of corruption, whether in the form of offering or accepting gifts and bribes, or through any other abuse of office. There should be robust internal control procedures to combat such incidents and, in particular, to ensure that bidding and voting is always transparent and compliant. These principles must apply to everybody members, stakeholders, staff and volunteers.

National associations are invited to specifically address ethics matters either in their disciplinary rules or via a specific code of ethics. Furthermore, the bodies applying such rules must be protected from any form of undue pressure or political interference, meaning that the independence of these bodies, as well as their secretariats, is completely guaranteed.

Finally, national associations are invited to invest in relevant communication, training and education programmes, e.g. compliance/ethics/integrity training or the women's leadership programme.

Professionalism of committee structures: The standing committees of national associations play an important role as they contribute to the development of the national game. Consequently, national associations should ensure that their statutes and regulations contain clear definitions regarding the work, responsibilities, and composition of the committees, including appointment rules and members' qualifications.

The number of committees and frequency of meetings should correspond to the real needs of each national association. In addition to the independent judicial bodies (which are mandatory), national associations are encouraged to have at least the following committees in place: competitions, women's football, grassroots and finance. Due consideration should be given to the reality of each country and the structure of each national association.

National associations are also encouraged to have a fair gender representation and balance of interests in their standing committees and to appoint external technical staff or experts, if needed.

Finally, it is of the utmost importance that a clear mechanism/procedure is in place so as to allow a proper flow of communication between the committees and the relevant board/executive committee.

Administration: The administration of each national association is the body that delivers the day-to-day business. To guarantee a high quality of work, it is recommended that the administration is protected from undue political influence on operational matters and daily decisions. Moreover, it is recommended to have an open, clear and transparent hiring process to ensure that the most competent candidates are recruited to work in the administration and, in so doing, to protect the overall interests of the national association.

As the image of the administration reflects the image of the national association, there should be clear guidelines/regulations in place for the use of social media, confidentiality matters, accepting/offering gifts, etc.



Accountability: To enhance accountability it is recommended that a clear process regarding signatory rights in national associations is established. In particular, for certain documents of major importance, it is recommended that a “double signature system” is implemented in order to ensure that important contracts cannot be signed off by a single person.

As national associations may be exposed to financial losses in view of the various commercial businesses they run, it is highly recommended that adequate insurance is taken out. This is in line with the general need for a proper risk management programme.

For sales or purchases above a certain limit, national associations should envisage having tender processes to provide greater accountability and to better protect their own financial interests. In defining the applicable thresholds, circumstances in of each country should be taken into account.

Finally, there should be a clear definition of internal budgets and responsibilities/competence for each division and unit.

Transparency in financial matters and corporate documents: Transparency is one of the most important principles of good governance, especially when it comes to financial matters. A national association which is transparent will have a better image and will protect itself more effectively from any accusation of mismanagement or undue influence. This is appealing, both to the general public and to business partners, such as sponsors, but also political bodies (both as potential funders and regulators). For this reason, it is strongly recommended that there are transparent structures and strict financial controls in place, both internally (i.e. the internal control system, including internal audit) and externally (i.e. independent companies).

In addition to the audited annual report and accounts, other relevant corporate documents should be made publicly available where possible, ideally on the national association's website, provided such documents do not conflict with the overarching interests of the national associations or data protection law. It is recommended that specific sections be created, where the following documents can be made available for download: statutes, regulations, strategy, background info on president/general secretary/board members, composition of committees, clear explanations of general assembly and other bodies' key decisions (and ideally also meeting agendas), media releases, circular letters, annual activity report and financial information (as provided to members), sustainability report, procedure and forms for registration of intermediaries.

Finally, the organisational structures and contact details of national associations' members (e.g. regional associations, clubs, etc.) should be available on the website and updated when necessary.

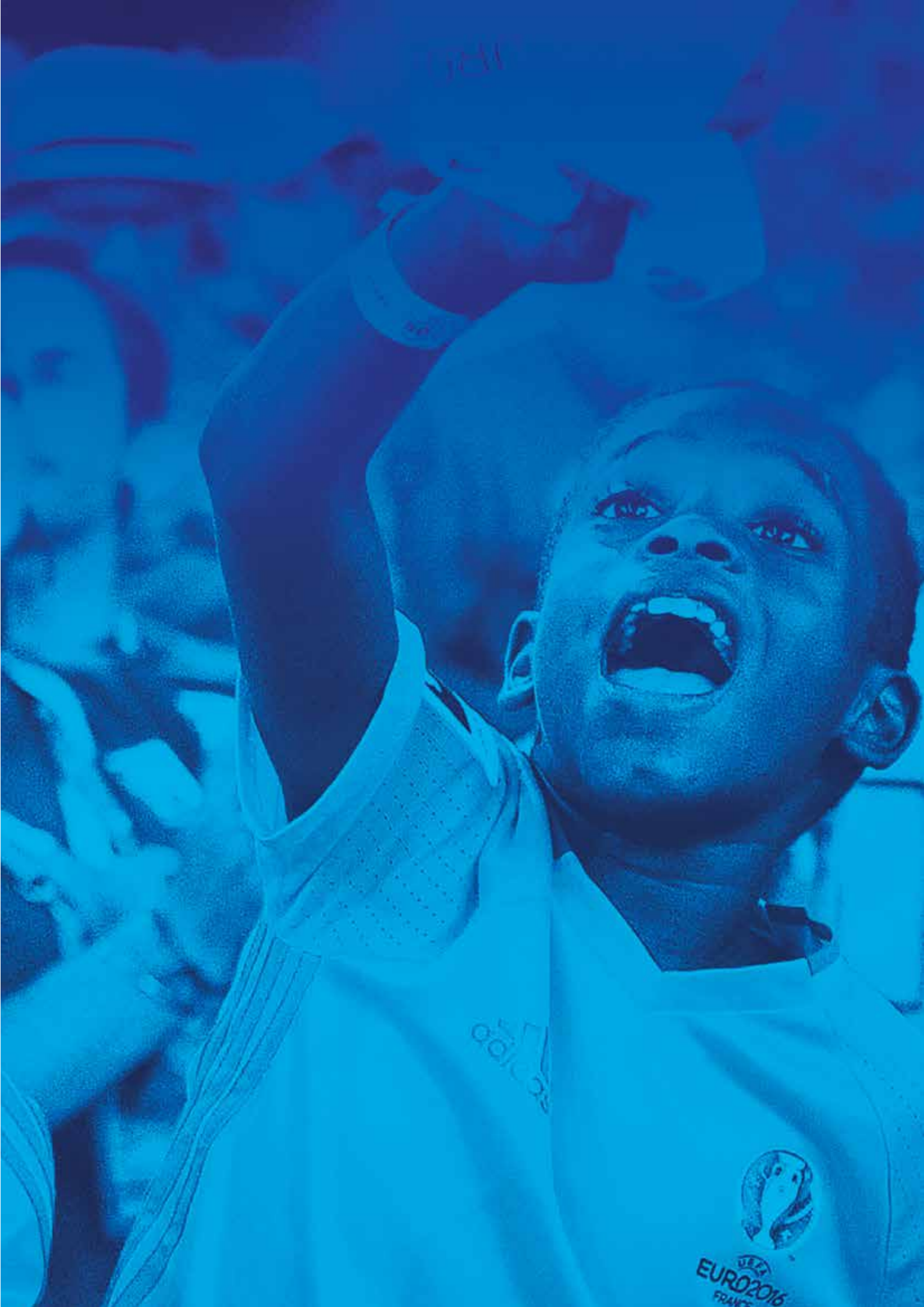
Compliance: National associations are always expected to have a system and resources to check that they comply with their own statutes and regulations, as well as all general civil and criminal laws to which they are subject.

All national associations should have a compliance policy and culture. Policies such as respect, transparency, health and safety, equality/diversity, protection of minors, match-fixing, doping, human rights, fair play and solidarity, the fight against racism and discrimination, and data protection are of major importance and should be reflected in the national association's strategy and operations. From time to time, UEFA invites its national associations to adopt certain campaigns or policies with specific resolutions approved by the UEFA Congress (e.g. the “European football united against racism” and “European football united for the integrity of the game” unanimously adopted respectively by the 37th Ordinary UEFA Congress on 24 May 2013 in London and the 38th Ordinary UEFA Congress held on 27 March 2014 in Astana).

Volunteer programmes: As the overall goal of all national associations should be to stimulate participation in football, it is recommended that volunteer programmes are run to increase the number of people active in all different aspects of the game, especially young people. Not only will this lead to a better image of national associations but it will also establish a stronger foundation for the future development of football. The significance of honorary engagements, in particular at the grassroots level of football, should be emphasised and acknowledged by the national associations.

How a national association can achieve its vision

- Analyse the association's current governance model in comparison with FIFA and UEFA standards.
- Benchmark that governance model against those of similar associations to get a clearer picture of where the association is situated.
- Recognise and believe in the need to increase good governance at national level as a tool to protect the association from external criticism.
- Cooperate with other national associations as a way to explore different models of governance that can be used.
- Engage in dialogue and be proactive with institutions at a national level on a wide variety of matters, in order to achieve the national association's overall objectives and promote good governance.
- Encourage dialogue with governments, local authorities and sponsors to protect the ethics of sport and, at the same time, to increase the chances of receiving additional funding for football-related projects.
- Start the reform process by establishing a clear business strategy for both the short and medium term, e.g. for one to five years.
- Ensure the reform process has the support of the executive committee and top management.
- Constantly evaluate the impact of new and existing stakeholders through a process of strategic analysis.
- Constantly monitor the environment and adjust the strategy to match rapidly changing situations, both internally and externally, as well as developing and adapting the governance model to meet those challenges.
- Have a dedicated person/people to help the leadership with the reform process, ideally, with a legal background; their position should enable them to influence, monitor and coordinate the process across the organisation.
- Have a clear understanding of the time needed for implementation and, where necessary, involve the relevant stakeholders (e.g. FIFA/UEFA) as early as possible in the process.
- Communicate to stakeholders why a reform process is needed and what it will bring to the association.
- Explain the process. Since the national association's statutes need to be approved by the general assembly/congress, normally, by a qualified majority, the members of these bodies need to feel comfortable with and convinced of the new model as this might bring about some important changes to their powers. Therefore, proper explanations need to be given.





UEFA GROW

LEADING AND SUPPORTING
THE GROWTH OF EUROPEAN FOOTBALL
