



# Ecosystem evolution series

## Place-centric ecosystems: the smart stadium

### Main message

5G is key to transforming the experience in stadiums, from venue operations, media production and real-time analytics to immersive and engaging content.

### Target audience

CSP ecosystem owners  
Enterprise digital transformation owners

## Talking points

### Characteristics of a place ecosystem

- Centered around a location with a clearly delimited area, for example a sports venue, airport, campus, shopping mall, university, factory or warehouse.
- The same go-to-market and deployment capabilities can be reused, allowing for growth in the same segment (or related segments).
- High customer-orientation with a focus on local adaptations.
- Two-phased journey to unlock the value. First identify a few strong use cases that build the business case for digital infrastructure. Second extend and build on top.

### Smart stadium context

- Stadiums compete with watch-from-home experiences of sophisticated TVs, second screens and access to social media from the couch.
- Existing connectivity at stadiums often not good enough to meet today's demand and certainly not to enable new immersive fan experiences.
- 5G mmWave and edge computing provide superior bandwidth, handle more devices in a dense area, and deliver content with lower latency.

### Four closely related ecosystems

- 4 ecosystems with close relationships anchored around the digitally-enhanced and connected stadium:
- Sports league ecosystem: includes the sports league, sports teams, technology and marketing partners, game attendees.
  - Stadium facility ecosystem: includes stadium owners (municipality or team), sports teams, title sponsor, connectivity providers, game attendees.
  - Live event ecosystem: includes event promoters, record labels, online concert streaming platforms, concert goers.
  - Sports broadcasting ecosystem: includes broadcasters or sports channels, cable TV and IPTV providers, connectivity providers, viewers.

### Relationships and dynamics in the smart stadium ecosystem

- Business model shift to OTT streaming.
- Automated wireless cameras enabling new media experiences.
- Digitally-enhanced stadiums to provide hassle-free fan experience, efficient and safe stadium operations.
- Match data and real-time analytics for coaches and fans.
- Concerts becoming more virtual and moving online.

### When and why focus on place ecosystems?

- A good fit for local players with close customer-orientation and strong local anchoring.
- Allows the leveraging of go-to-market and deployment capabilities from one deployment to another in the same segment, such as all stadiums in a country.
- Possible scaling to other places with similar digitalization needs, for example amusement parks, outdoor music festivals, shopping malls and tourist districts.