



International
Olympic
Committee

IOC FEASIBILITY ASSESSMENT - OLYMPIC WINTER GAMES

SWEDEN

NOVEMBER 2023



SUMMARY - SWEDEN

- The Swedish project's vision is to host the most sustainable Games ever, setting a new standard in terms of ecology, social aspects and economics
- The project benefits from good public confidence, with 59% support across Sweden
- The venue masterplan is based on using maximum existing world class venues and spreads the competition venues over 5 clusters in Stockholm, Falun, Åre, Östersund and Sigulda/Lativa (for sliding events)
- The Commission has received expressions of support. These expressions are however conditional, with the national government and the City of Stockholm only willing to support the Games if other stakeholders formalise their support. The guarantees would still need to be approved by the parliament. Therefore, the Commission expresses its concerns with regard to essential political support
- The Commission also expresses concerns with the proposed funding strategy. Private revenues appear to be on the high side, in particular when it comes to domestic sponsorship and ticketing (Ticket sales by Sweden projected at USD 432 m (2030 value). For reference, Milan Cortina 2026 current ticket sales target is at EUR 206 m (2026 value). This represents a risk that the domestic revenue projections between the IOC contribution of USD 722m and the total Olympic and Paralympic Games budget of USD 1.6bn (USD 2030) could not be fully reached
- The strategy to securing a Games Delivery Guarantee from a public authority was not sufficiently substantiated to provide comfort to the Commission that the guarantee would be provided in a Targeted Dialogue

→ The Commission believes that Sweden may need more time to overcome these concerns and encourages the Swedish NOC and other stakeholders to continue the dialogue with the IOC with regard to strengthening their project for a future Olympic Winter Games in Sweden

FEASIBILITY ASSESSMENT

Part 1: Strategic
Assessment

Part 2: Technical
Assessment





1. STRATEGIC ASSESSMENT

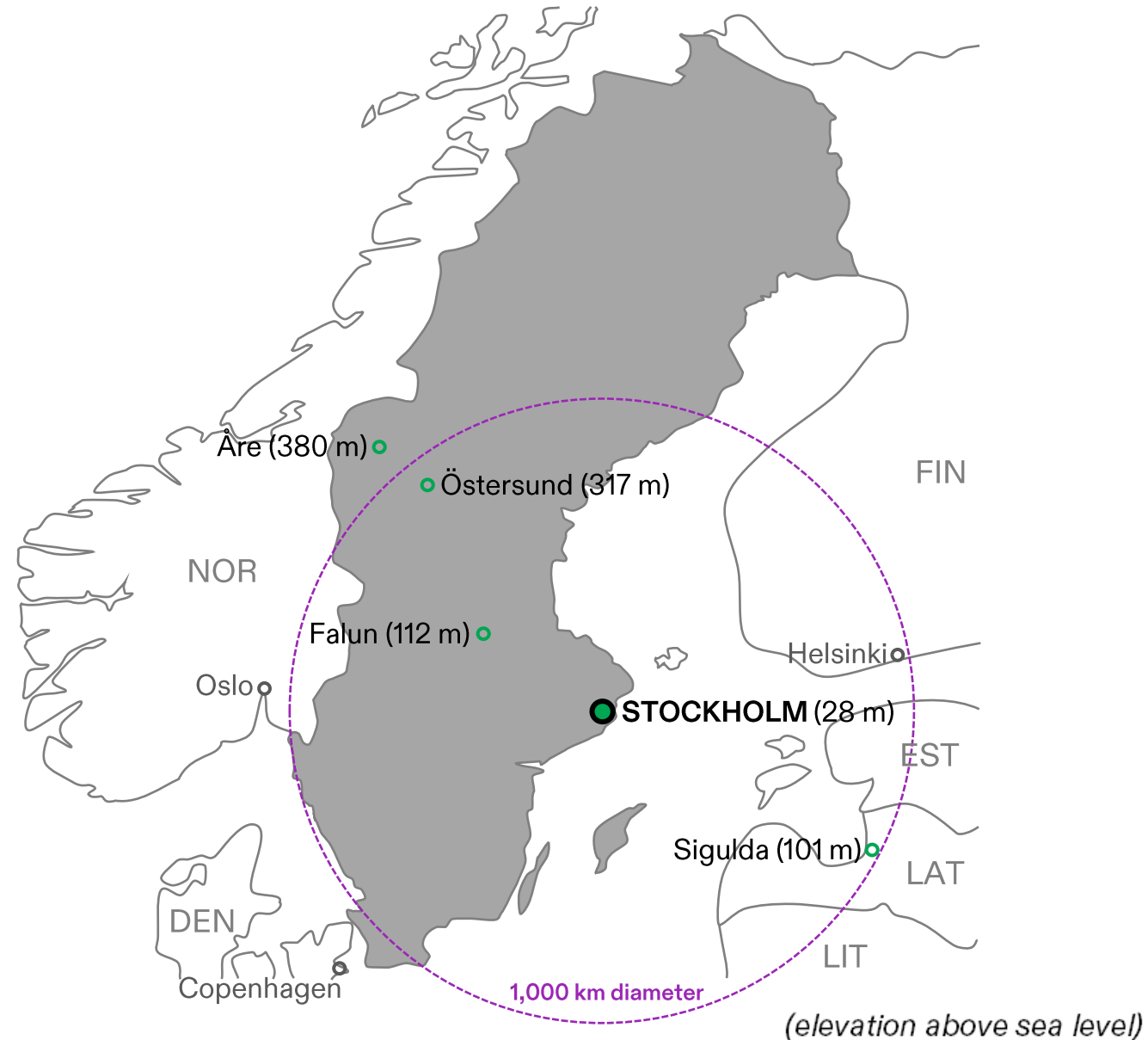
- Country Background
- Political Context
- Human Development Context
- Environmental Context
- Human Rights Context
- Economic Context

COUNTRY BACKGROUND

KEY DEMOGRAPHIC DATA

- Sweden population: 10.5 million
- Stockholm population: 1 million (2.3 million in the metropolitan area)
- ~23% of population < 20 years old
- ~20% of population > 65 years old
- Life expectancy at birth: 83

Source: [UNDP / UN Population](#)



POLITICAL CONTEXT

Minority government at national level

- Following very close elections in September 2022, Sweden's parliament narrowly approved centre-right Moderate Party leader Ulf Kristersson as Prime Minister. The Kristersson cabinet (formed by Moderates, the Liberals and the Christian Democrats) is a minority government, which has 103 out of 349 seats. The far-right anti-immigration Sweden Democrats (SD) party, with 73 seats, is not a formal member of the coalition, but is backing it in Parliament in exchange for some influence over government policy.
- The new government's coalition agreement includes proposals to cut taxes and cap welfare benefits but is also heavy on law and order.

Source: COFACE / Economist Intelligence Unit

Stockholm:

- City Council election took place in September 2022
- New Mayor elected: Karin Wanngard (Social Democrats) is leading a coalition with the Left Party and the Green Party



UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS (SDG) - PERFORMANCE

Source: [OECD](#)

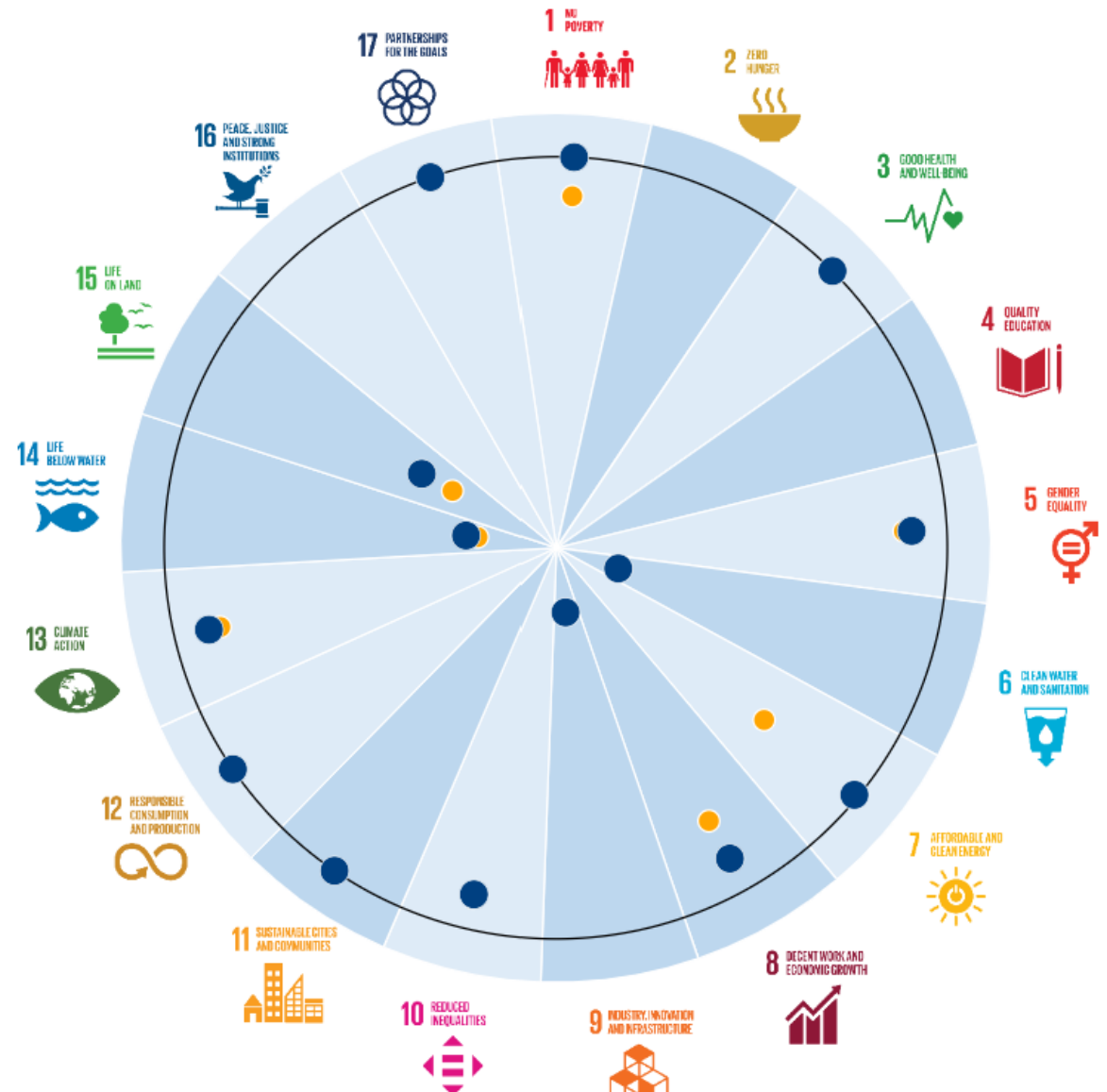
HOW TO READ THE CHARTS

- **Blue dots = Stockholm**
- **Orange dots = Sweden**
- The outer black circle = end value for 2030. The closer the dots are to the outer black circle, the closer the country/region/city is to reaching the intended outcomes for this goal

INTERPRETATION

Level of achievement varies across all 17 SDGs. Very strong performance in nine SDGs:

- 1: No poverty
- 3: Good Health and Well-being
- 5: Gender equality
- 7: Affordable and Clean Energy
- 10: Reduced inequalities
- 11: Sustainable Cities and Communities
- 12: Responsible consumption and production
- 13: Climate action
- 17: Partnerships for the goals



ENVIRONMENTAL CONTEXT / SWEDEN

Environmental Performance Index (EPI) Data	
Overall ranking (out of 180 countries)	5 th
Score (out of 100)	72.7
GHG emissions per capita	113 th
Biodiversity	59 th
Waste management	8 th
<p>EPI is a joint project of the Yale Center for Environmental Law & Policy and The Center for International Earth Science Information Network (CIESIN) at Columbia University's Earth Institute. It provides a data-driven summary of the state of sustainability around the world. Using 32 performance indicators across 11 issue categories, the EPI ranks 180 countries on environmental health and ecosystem vitality.</p>	
Energy Mix	
Renewable share of total energy consumption (including transport, heating, industry, ...) – SDG 7.2 (IEA)	58.4%
Share of renewables in electricity generation (IEA)	65%
Air Pollution Data	
Air Pollution Index 2022 (February monthly average): PM 2.5 www.iqair.com	Stockholm: 7.2 (slightly above WHO target 0-5)

HUMAN DEVELOPMENT AND HUMAN RIGHTS CONTEXT

Ratification of international standards	
Human Rights Treaties Ratification - OHCHR	Sweden has ratified 14 out of 18 human rights treaties
ILO Core Conventions Ratifications - ILO	Sweden has ratified 11 out of 11 ILO Core Conventions
United Nations Convention against Corruption	Sweden ratified the Convention in 2007 and has completed the first and the second cycles of implementation review
Governance and Institution	
Rule of Law Indicator – World Bank	94/100 – Rule of law is strong
Corruption Perception Index – Transparency International	83/100 – Risk of corruption is perceived to be low
Civil Society	
Freedom of Press- RSF Index	88.15 (ranked 3/180) - Good press freedom
Freedom of Expression - Article 19	93/100 – Open freedom of expression
Data Protection and Privacy - UNCTAD	Sweden has legislation in place to secure the protection of data and privacy
Freedom on the Net Score - Freedom House	While no score exists for Sweden for this index, given the high scores for the remainder of indicators and the political context, it is assumed that the risk of government restricting, censoring, or disrupting internet access is low
Labour and Human Rights	
Global Workers' Rights Index (International Trade Union Confederation, 2022)	1/5 – Low risk
Global Slavery Index (Walk Free, 2018)	Low risk
Global Gender Gap (World Economic Forum, 2022)	0.815/1 - Gender gap is low

HUMAN RIGHTS CONTEXT

In line with Olympic Agenda 2020+5, the IOC commissioned a third-party independent not-for-profit organisation, [Business for Social Responsibility \(BSR\)](#), to conduct a report on the human rights situation in Sweden and to identify Games legacy opportunities

Extracts of Country Report Summary

The overall risk level of Sweden is low

- High-level human rights indicators all position Sweden as one of the freest countries in the world, and Sweden's reputation of being a country with low corruption and with freedom in political rights and civil liberties is underpinned by a robust legislative landscape
- Sweden does not currently have mandatory human rights due diligence legislation applicable to businesses and their supply chains. However, the forthcoming EU CSDD Directive will set out the legislative requirement for companies to conduct human rights due diligence
- Despite the overall positive picture, there are still tensions in the social fabric and discrimination against minority groups, including ethnic and religious minorities. The growing division in Swedish society has also manifested in an increase in violent crime, attributable primarily to religiously-motivated hate crimes. In addition, the influx of migrants, refugees and asylum seekers has resulted in some cases of undocumented workers in Sweden's workforce.

OPPORTUNITIES TO ADVANCE HUMAN RIGHTS

- Demonstrate human rights due diligence in supply chains
- Strengthen inclusion and equality in sports
- Foster recognition of Sweden's cultural diversity

AREAS TO MONITOR

- Societal discrimination and violence against minority groups, including religious minorities
- Labour rights abuses of migrant workers in Sweden and of supply chain workers
- Lack of protection of the rights of Indigenous peoples

ECONOMIC CONTEXT

Rating Source: Moody's (October 2023)

Sweden

Aaa - minimal risk

Key Economic data - Sweden

GDP: USD 638 bn ([Coface](#))GDP per capita of USD 60,816 ([Coface](#))

GDP growth

- 5.9% ([OECD, 2021](#))
- 2.9% ([OECD, 2022](#))

Inflation:

- 8.4% ([OECD 2022](#))
- 7.9% ([OECD forecast 2023](#))

Public debt (% GDP): 53% ([OECD](#))

Unemployment rate:

- 7.5% ([OECD, 2022](#))
- 7.9% ([OECD forecast 2023](#))

Ranked 3rd in [Global Innovation Index of WIPO 2022](#)

- Very diversified economy, specialised in high-tech products (automotive, aviation, telecommunications)
- Small but well-developed commercial market

STRATEGIC OPPORTUNITIES AND CHALLENGES: SUMMARY

OPPORTUNITIES

- High levels of stability from a socio-economic perspective
- Country context provides excellent foundation to align the Games with Olympic Agenda 2020+5
 - Sweden ranks 5th out of 180 in Environmental Performance Index
 - High share of renewable energy in electricity generation in Sweden can support significant reduction in carbon emissions of the Games
 - Sweden provides strong respect for and protection of human rights and a Games could be an opportunity to foster inclusion

CHALLENGES

- Small (but well-developed) commercial market
- High inflation (7.9% in 2023)



2. TECHNICAL ASSESSMENT

Vision & Legacy, Alignment and Venue Masterplan

- Vision & Legacy
- Alignment with existing development plans
- Venue Masterplan

Support and Funding Strategy

- Political Support
- Private Sector and Civil Society Support
- Public Support
- Governance and Funding Strategy

Games Delivery

- Sports/Event Experience
- Meteorological Data
- Accommodation capacity
- Transport (incl. airport) infrastructure
- Energy & Telecom
- Safety and Security



FEASIBILITY ASSESSMENT SOURCES

- IOC background research supported by IOC Olympic Games advisors
- Independent third-party reports
- Information gathered throughout Continuous Dialogue in the form of workshops and meetings
- Sweden joined Continuous Dialogue in June 2023

VISION & LEGACY, ALIGNMENT AND VENUE MASTERPLAN



VISION & LEGACY

The vision presented by the Swedish project is to deliver the **most sustainable Olympic Winter Games in history**, setting new standards in terms of:

- **Environmental impact:** with 80% reduction in carbon emissions compared to the average of previous editions
- **Social aspects:** with a focus on gender equality, inclusion and accessibility
- **Economics:** pledging financially-responsible Games

Sweden aims to offer a modern, engaging journey and sports celebration that inspires dreams and pushes boundaries for both present and future generations.

The **legacy** objectives are:

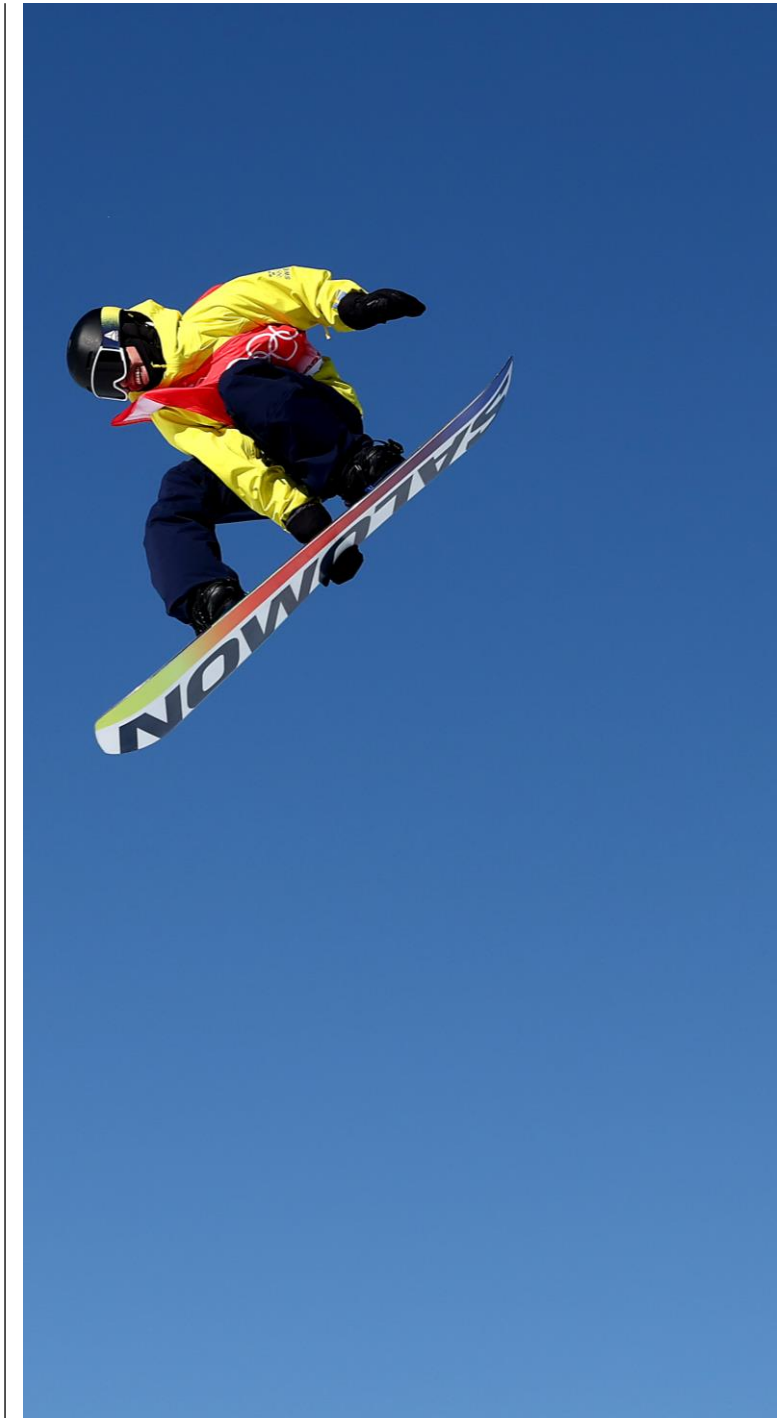
- To increase accessibility to sports and physical activity for children, youth, and adults, contribute to national health goals, and encourage more investment in elite sport
- To use the international stage to express values such as democracy and solidarity, while showcasing Swedish culture, nature, and innovation and promoting its attractiveness
- To use the Games as a driving force for sustainable development, inclusion, technological innovations and tourism



ALIGNMENT WITH EXISTING DEVELOPMENT PLANS

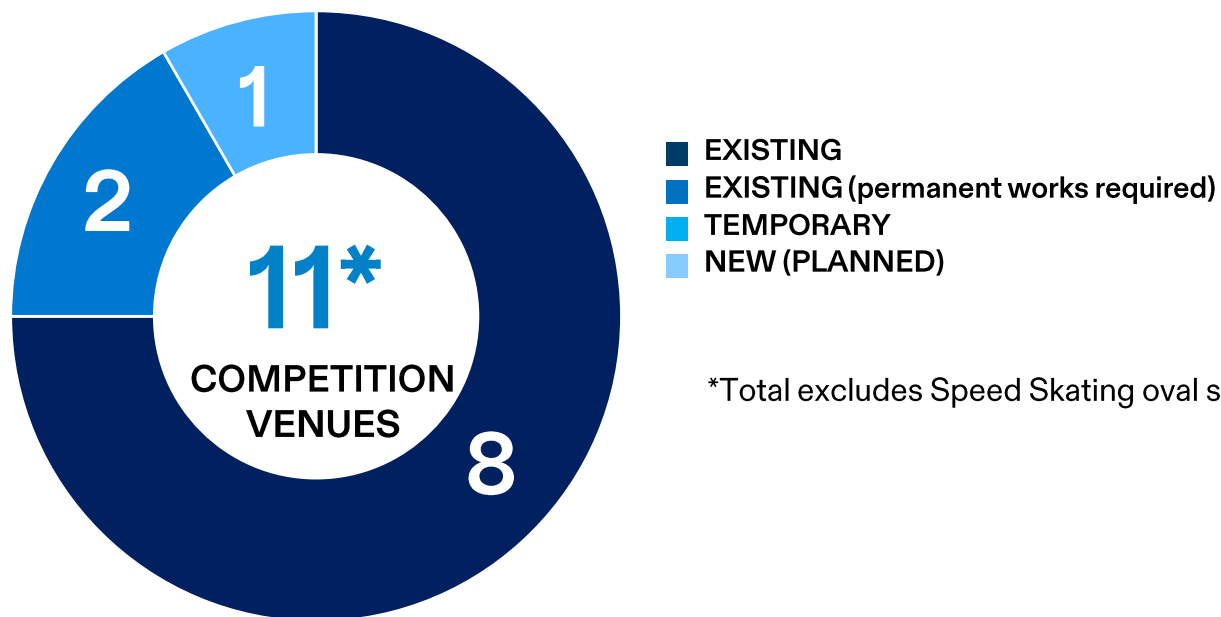
- The Olympic Games would align with the City of Stockholm’s commitment to implementing locally the United Nations’ 2030 Agenda for Sustainable Development
- The proposed Olympic Games concept would leverage the existing plans to build additional housing units, including social housing, to address the needs of a fast-growing population in the Stockholm area
- Hosting the Olympic Winter Games would align with the country’s positioning as a traditional host of international winter sports events

The Games project is broadly aligned with existing long-term development strategies



ALIGNMENT WITH OLYMPIC AGENDA 2020

100% of competition venues existing or temporary



*Total excludes Speed Skating oval still TBC

IBC/MPC



Existing exhibition centers in Stockholm (TBC):

- Stockholm Waterfront
- Kistamässan Convention Center

OPENING AND CLOSING



- Opening: Existing Olympic Stadium and Friends Arena in Stockholm with satellite celebrations in other clusters
- Closing: Concept and venue(s) to be confirmed

5 OLYMPIC VILLAGES



Olympic Villages:

5 Olympic Villages in the following clusters:

- Stockholm
- Åre
- Falun
- Östersund
- Sigulda (Latvia)

VENUE MASTERPLAN



TBC

OV

VENUE MASTERPLAN: PARALYMPIC WINTER GAMES



TBC
PV

VENUE MASTERPLAN

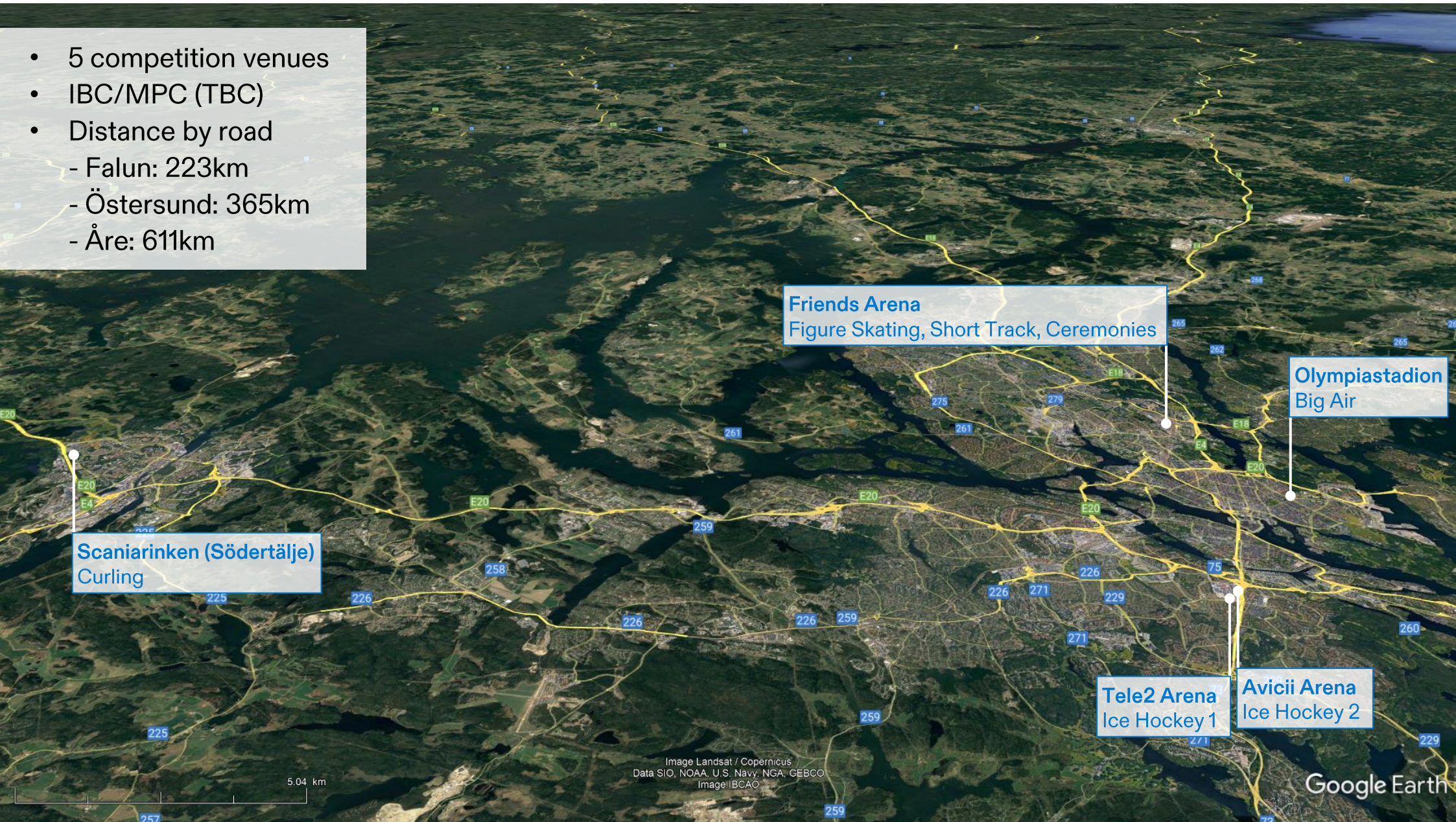
Sports / Disciplines / Events		Proposed Competition Venues	Status	Games Capacity	IOC comments
Alpine Skiing	Downhill	Åre	Existing	15,000	<ul style="list-style-type: none"> 2019 FIS Alpine World Championships venue
	Super G				
	Super Combined				
	Slalom				
	Giant Slalom				
	Super Combined				
Biathlon	Biathlon	Östersund Ski Stadium	Existing	20,000	<ul style="list-style-type: none"> 2019 IBU World Championships venue
Bobsleigh	Bobsleigh	Sigulda Sliding Track (Latvia)	Existing (permanent works)	5,500	<ul style="list-style-type: none"> World Cup venue
	Skeleton				
Luge	Luge				
Cross-Country / Nordic Combined	Cross-Country	Lugnet Sport Complex Falun	Existing	12,000 – 15,000	<ul style="list-style-type: none"> 2015 FIS Nordic World Championships venue
Curling	Curling	Scaniarinken, Stockholm (Södertälje)	Existing	5,500	<ul style="list-style-type: none"> Existing Ice Hockey venue
Ice Hockey	Ice Hockey 1	Tele 2 Arena (Stockholm)	Existing	18,000	<ul style="list-style-type: none"> Existing football arena with roof
	Ice Hockey 2	Avicii Arena (Globe) (Stockholm)	Existing	13,500	<ul style="list-style-type: none"> 2025 Ice Hockey World Championships venue

VENUE MASTERPLAN

Sports / Disciplines / Events		Proposed Competition Venues	Status	Games Capacity	IOC comments
Skating	Short Track	Friends Arena (Stockholm)	Existing	23,000	<ul style="list-style-type: none"> Existing football arena with roof
	Figure Skating				
	Speed Skating	New venue in Falun or existing venue abroad	TBC	TBC	
Ski Jumping / Nordic Combined	Ski Jumping NH/LH	Lugnet Sport Complex Falun	Existing	12,000 – 15,000	<ul style="list-style-type: none"> 2015 FIS Nordic World Championships venue
Snowboard / Freestyle Skiing	FS Aerials	Åre / Duved	Existing (permanent works)	5,000	
	FS Moguls				
	SB PGS				
	FS / SB Half-pipe				
	FS / SB Slopestyle				
	FS / SB Cross				
	FS / SB Big Air	Olympiastadion (Stockholm)	Temporary	14,000	

VENUE MASTERPLAN: STOCKHOLM CLUSTER

- 5 competition venues
- IBC/MPC (TBC)
- Distance by road
 - Falun: 223km
 - Östersund: 365km
 - Åre: 611km



VENUE MASTERPLAN: ICE HOCKEY I & II

TELE 2 ARENA



Ice Hockey I

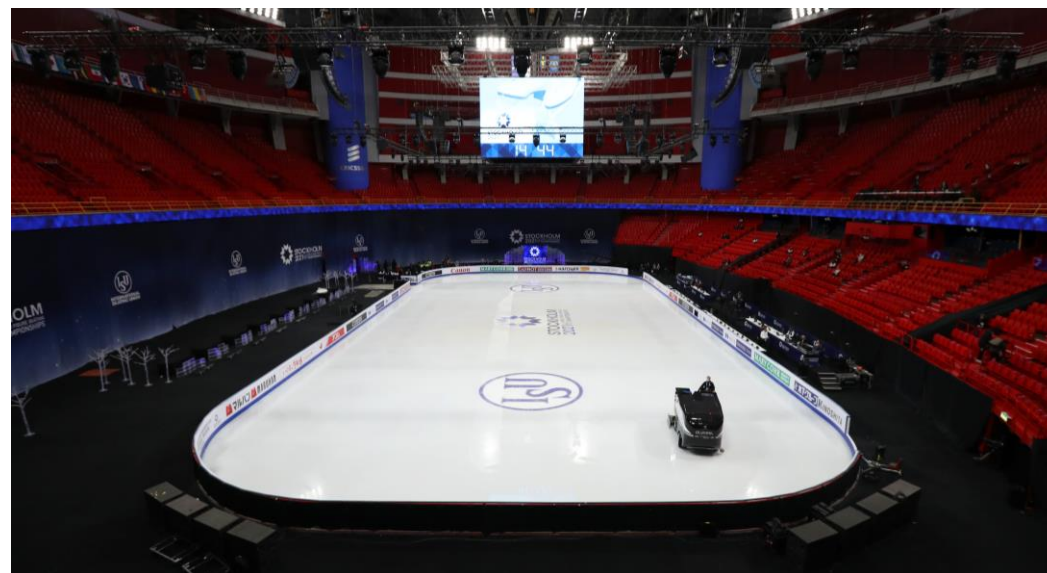


Status	Existing
Construction	2013
Future Works	Regular life cycle upgrades (Temporary reconfiguration from football arena to ice rink)
Capacity	18,000
Owner	Public
Operator	Private
Experience	<ul style="list-style-type: none"> Major sport experience including ice events No figure skating / short track experience

AVICII ARENA (GLOBE)



Ice Hockey II



Status	Existing
Construction	1989 (renovation 2021)
Future Works	tbc
Capacity	13,500
Owner	Public
Operator	Private
Experience	<ul style="list-style-type: none"> Host of multiple Ice Hockey World Championships Home of 2 professional ice hockey teams

VENUE MASTERPLAN: FIGURE SKATING / SHORT TRACK / CURLING

FRIENDS ARENA



Figure Skating / Short Track / Ceremonies



Status	Existing
Construction	2012
Future Works	No major works required
Capacity	23,000 (Games capacity)
Owner	Public/Private
Operator	Private
Experience	<ul style="list-style-type: none"> • Host of regular national and international sports events

SCANIARINKEN



Curling



Status	Existing
Construction	1970 (renovation 2005)
Future Works	Regular life cycle upgrades
Capacity	5,500
Owner	Public
Operator	Public
Experience	<ul style="list-style-type: none"> • No major international event experience

VENUE MASTERPLAN: BIG AIR

OLYMPIASTADIUM



Big Air Freestyle Skiing / Snowboard / Ceremonies



Status	Existing / Temporary
Construction	1912
Future Works	Temporary venue overlay
Capacity	14,000
Owner	Public
Operator	Public
Experience	<ul style="list-style-type: none"> • 1912 Olympic venue • Regular national and international events

VENUE MASTERPLAN: CEREMONIES / IBC / MPC

CEREMONIES

To be confirmed

- Initial concept for the Opening Ceremony would include one main ceremony at the Friends Arena and the Olympic Stadium in Stockholm (see venue description on previous slides) with satellite celebrations in the other clusters (Falun, Östersund, Åre and Sigulda) to ensure an Olympic experience for all athletes and residents. The concept would require further development
- The concept for the Closing Ceremony is still to be confirmed

IBC / MPC

To be confirmed

- Existing venues to be used for MPC/IBC in the Stockholm area. Options considered:
 - Stockholm Waterfront (14,000m²)
 - Kistamässan Convention Center (15,000m²)

VENUE MASTERPLAN: ÅRE / DUVED

- 2 competition venues
- Distance by road
 - Östersund: 98km
 - Falun: 428km
 - Stockholm: 611km

Åre
Alpine Skiing

Duved
Aerials, Moguls, Cross, Half-pipe, PGS, Slopestyle

1305 m

Image © 2023 Maxar Technologies
Image © 2023 CNES / Airbus
Image © 2023 Airbus
Image © 2023 Lantmäteriet/Metria

Google Earth

VENUE MASTERPLAN: ALPINE SKIING

ÅRE SKI RESORT



Alpine Skiing



Status	Existing
Future Works	Regular life cycle updates
Finish area(s)	1
Capacity	15,000
Owner	Private
Operator	Private
Experience	<ul style="list-style-type: none"> • Regular FIS World Cups • FIS Alpine World Championships 2019

ÅRE DUVED



Freestyle / Snowboard



Status	Existing (permanent works required)
Future Works	Reconfiguration of freestyle and snowboard courses
Finish area(s)	3
Capacity	5,000
Owner	Private
Operator	Private
Experience	<ul style="list-style-type: none"> • No specific freestyle or snowboard experience

VENUE MASTERPLAN: FALUN

- 2 competition venues
- Distance by road
 - Stockholm: 223km
 - Östersund: 365km
 - Åre: 428km



Lugnet Sport Complex Falun
Cross-Country, Nordic Combined

Lugnet Sport Complex Falun
Ski Jumping, Nordic Combined

VENUE MASTERPLAN: SKI JUMPING / NORDIC COMBINED / CROSS-COUNTRY

LUGNET SPORT COMPLEX - FALUN



Ski Jumping (NH/LH) / Nordic Combined



Status	Existing
Construction	1973 (upgraded in 2014)
Future Works	Regular lifecycle upgrades
Capacity	12,000 – 15,000
Owner	Public
Operator	Public
Experience	<ul style="list-style-type: none"> • 2015 FIS Nordic World Championships • Regular FIS World Cups

LUGNET SPORT COMPLEX - FALUN

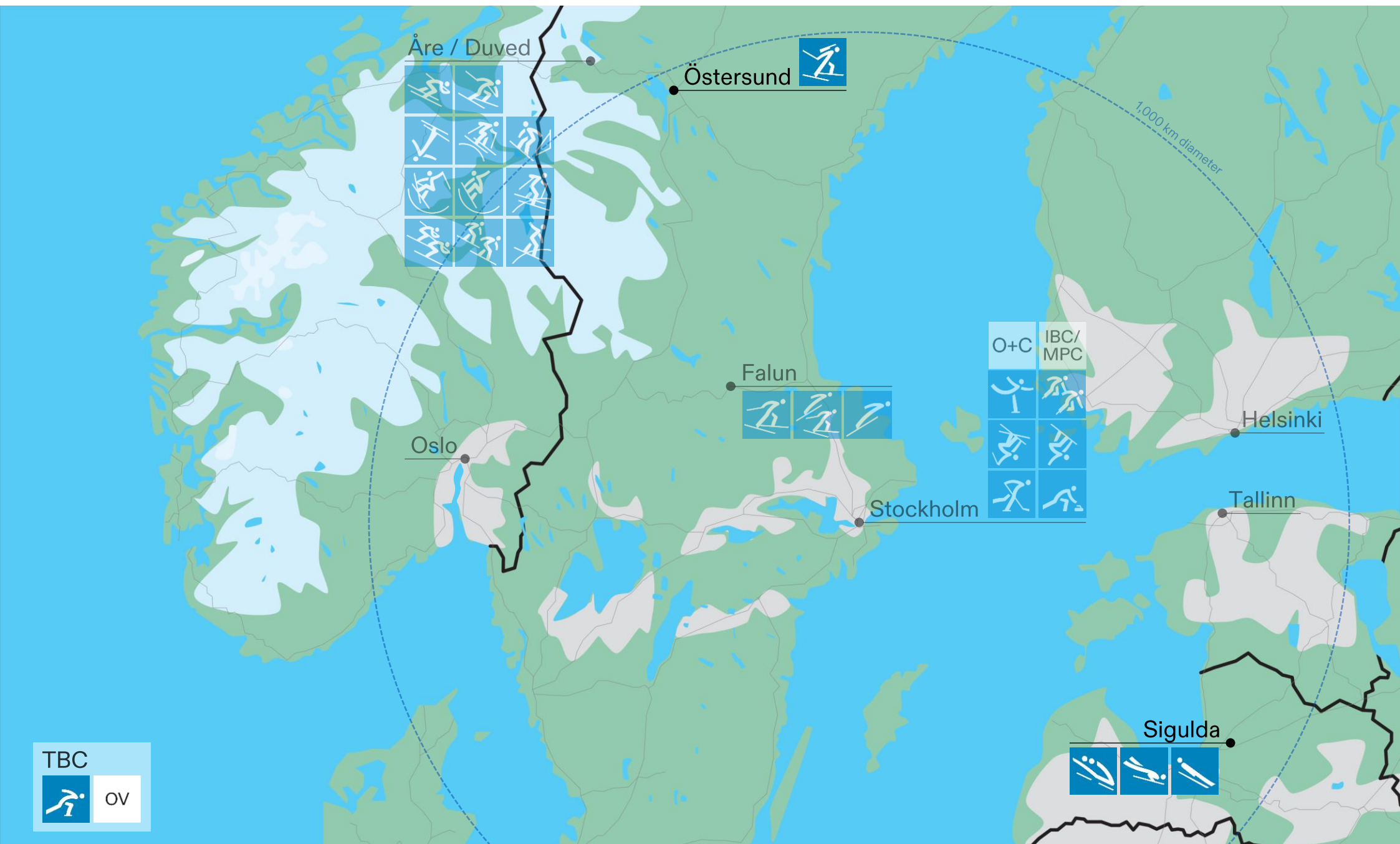


Cross-Country / Nordic Combined



Status	Existing
Future Works	n/a
Capacity	12,000 – 15,000
Owner	Public
Operator	Public
Experience	<ul style="list-style-type: none"> • 2015 FIS Nordic World Championships • Regular FIS World Cups

VENUE MASTERPLAN: STAND ALONE VENUES



VENUE MASTERPLAN: BIATHLON



ÖSTERSUND SKI STADIUM

Biathlon



Status	Existing
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Future Works	n/a
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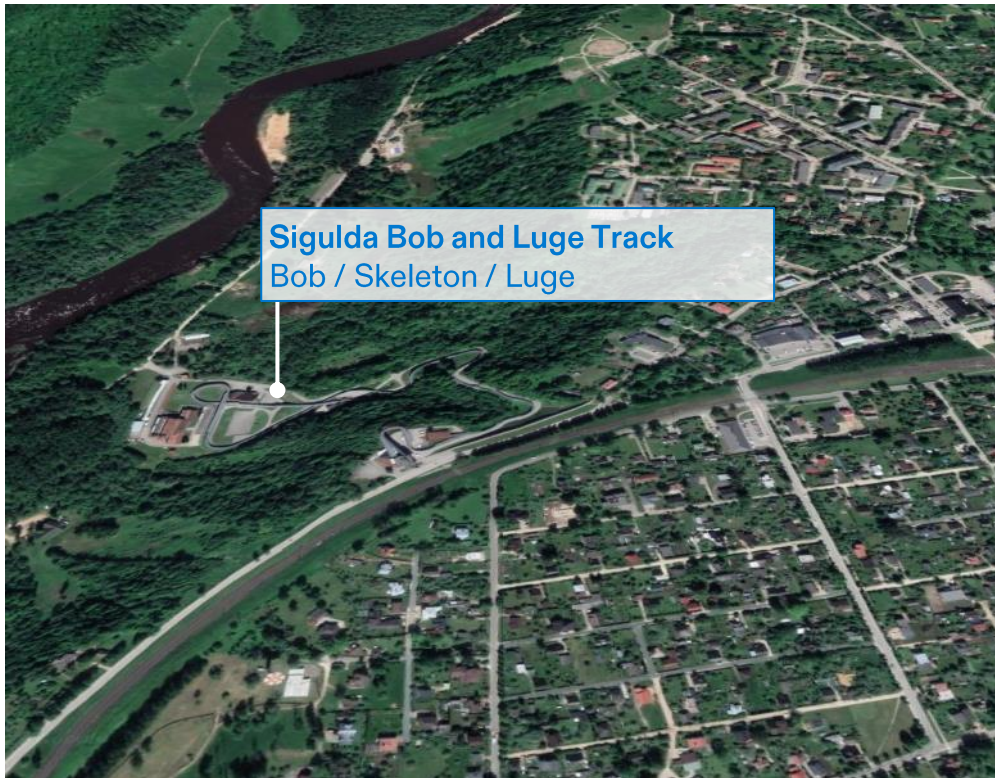
Capacity	20,000
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Owner	Public
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Operator	Public
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Experience	<ul style="list-style-type: none"> • 2019 IBU World Championships • Regular World Cups
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VENUE MASTERPLAN: BOB / SKELETON / LUGE



- 1 Olympic Village
- Distance Stockholm – Sigulda: 680km

SIGULDA BOB AND LUGE TRACK



Bob / Skeleton / Luge



Status	Existing (permanent works required)
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Construction	1986
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Future Works	TBC
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Capacity	5,500
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Owner	Public
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Operator	Public
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Experience	<ul style="list-style-type: none"> • Regular World Cups
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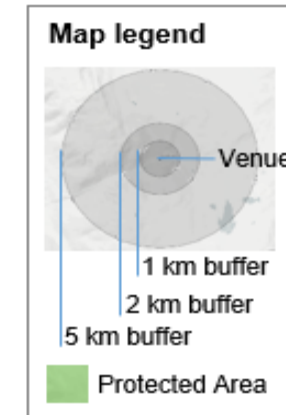
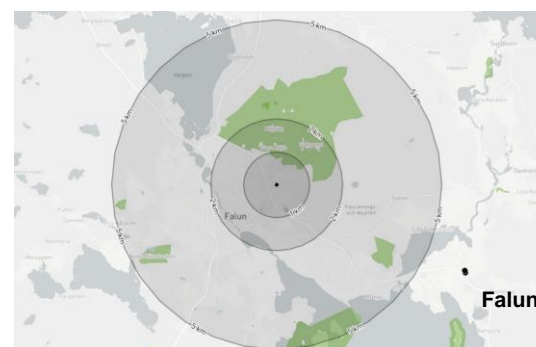
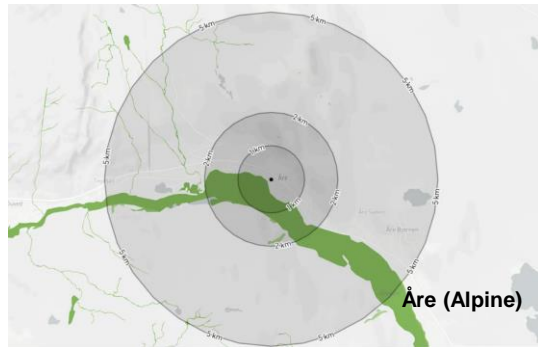
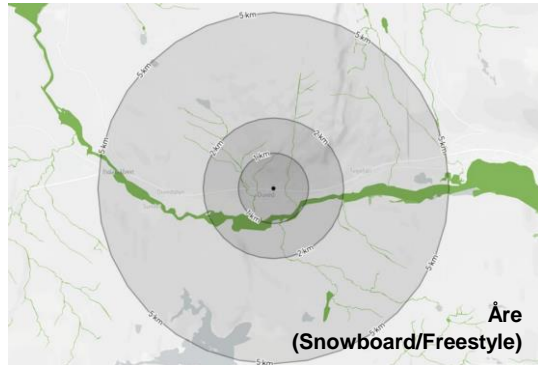
VENUE MASTERPLAN: OLYMPIC VILLAGES

While the Olympic Village concept will need to be further developed, the athletes and officials could potentially be grouped in 5 Villages:

Olympic Village	Sports/Disciplines	Comments
Village 1: Stockholm	Ice Hockey, Figure Skating, Short Track, Curling, Big Air	<ul style="list-style-type: none"> New development in line with long term development plans (TBC)
Village 2: Åre	Alpine Skiing, Freestyle and Snowboard	<ul style="list-style-type: none"> Existing hotels/apartments/future development projects in line with long term plans
Village 3: Östersund	Biathlon	<ul style="list-style-type: none"> Existing hotels/apartments/future development projects in line with long term plans
Village 4: Falun	Cross Country, Ski Jumping and Nordic Combined	<ul style="list-style-type: none"> Existing hotels/apartments/future development projects in line with long term plans
Village 5: Sigulda	Bobsleigh, Luge and Skeleton	<ul style="list-style-type: none"> Existing hotels/apartments/future development projects in line with long term plans

VENUE MASTERPLAN: PROTECTED AREAS

Mountain venues screened through buffer analysis*



→ No permanent construction would occur in statutory or cultural protected areas**

*Source: International Union for the Conservation of Nature (IUCN), Biodiversity proximity analysis: Olympic Winter Games - potential venue locations

**As required by the Olympic Host Contract

VISION & LEGACY, ALIGNMENT AND VENUE MASTERPLAN: SUMMARY

OPPORTUNITIES

- The Games' vision is to be the most sustainable Games in history, setting a new standard in terms of ecology, social aspects, and economics
- Venue masterplan fully aligned with Olympic Agenda 2020 in respect of the use of 100% existing / temporary competition. Venues overall are well maintained
- Many competition sites are established World Cup and World Championship venues
- Experienced venue operators and event delivery capacity (e.g. Falun FIS Nordic World Championships organisers)
- Inner City of Stockholm provides opportunity to create dynamic Games celebrations

AREAS FOR FURTHER DEVELOPMENT

- Venue for Speed Skating still to be confirmed
- Little information available on main Olympic Village in Stockholm, to be built. Further discussions required on general concept, funding model and timelines. Alternatively, existing hotels have been proposed
- Explore opportunities to create a unique atmosphere for athletes in Åre, Östersund, Falun and Sigulda and further develop the ceremonies, live site and medals plaza concepts to connect the Games

SUPPORT AND FUNDING STRATEGY



POLITICAL SUPPORT

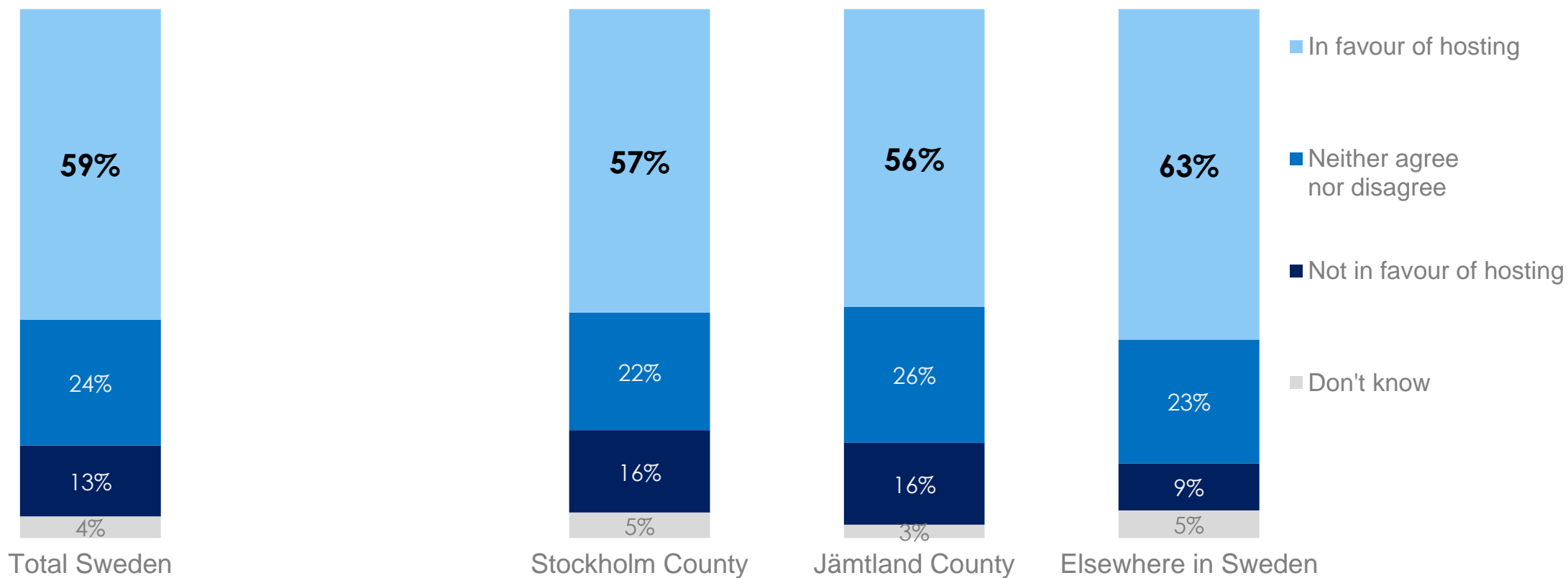
	Political Support	Referendum
City of Stockholm	<p>Conditional Support Statement of the Mayor of Stockholm: “The Municipal Executive Board is in favour of the initiative for a Swedish candidacy for the 2030 Olympic Games and Paralympics. The city will engage in dialogue with the Swedish Olympic Committee and other relevant parties and sign a municipal guarantee, called the ‘Municipality Guarantee’. The municipal guarantee <u>does not constitute any financial commitment, and the decision requires the Government to provide state guarantees.</u>”</p>	Not required / not planned
Åre / Östersund / Falun / Sigulda / Riga	<p>Support Support at municipal level from Åre, Östersund, Falun, Sigulda and Riga:</p> <ul style="list-style-type: none"> • Letters provided include guarantees to respect of Olympic Charter, etc. • Initial commitment to take appropriate measures to provide a Public Services Guarantee specifying if such services will be provided free of charge or at a charge to the OCOG • Östersund, Sigulda and Falun provided Venue Use Guarantees 	Not required / not planned
National Government	<p>Conditional Support Letter from Social Affairs Minister (13 November 2023): “The Government takes a positive view and is ready to move to the next phase: examining the specific prerequisites to provide the central government guarantees required to host the 2030 Winter Games in Sweden.” Letter contains some conditions:</p> <ul style="list-style-type: none"> - <u>In order for the Government to support Sweden’s bid, the business sector must provide the sponsor revenues included in the calculated budget for the Games.</u> (approx. USD 300m) - <u>Importance that an application for the Olympic Winter Games 2030 has broad support in the parliament</u> 	Not required / not planned

PRIVATE SECTOR AND CIVIL SOCIETY SUPPORT

	Support
Private Sector	Support letter received from Confederation of Swedish Enterprises stating: “After contacts with a large number of major companies, we can see a significant interest in the Olympic Winter Games in Sweden 2030. We want to declare that we strongly support the candidacy and welcome the world to Sweden 2030.”
Civil Society	Support received from: <ul style="list-style-type: none">• Olympic and Paralympic athletes• National sport federations

PUBLIC SUPPORT

IOC OPINION POLL (SEPTEMBER 2023)



Source: Publicis Sport & Entertainment Opinion Poll, September 2023

GOVERNANCE AND FUNDING STRATEGY

Governance and Funding Strategy

Games Operational Budget* and approach to Games Delivery Guarantee	<ul style="list-style-type: none"> – The Games Operational budget has been developed by an accounting firm together with experts with previous Games experience partly bottom-up and partly top-down and is foreseen to be fully privately funded without any government subsidy. – The budget is balanced and currently estimated at SEK 17bn (USD 1.6bn) (2030 values)** (including approx. USD 300m from domestic sponsorships) – Approach to Games Delivery Guarantee to be clarified
Government Support Services	<ul style="list-style-type: none"> – Discussion ongoing with regard to public support services (security, medical services, customs and immigration, etc.) – Working assumption that each government level would provide respective public support services as for any other event
Long-term Capital Investment	<ul style="list-style-type: none"> – Confirmation required as to who would fund capital investments for the Olympic Village in Stockholm and any upgrade works for venues

* In Continuous Dialogue, no Games Operational Budget is requested

**Source: Draft budget provided by SOK

Exchange rate SEK/USD = 10.57

GOVERNANCE AND FUNDING STRATEGY

Governance and Funding Strategy (continued)

Governance Structure	<ul style="list-style-type: none">– OCOG: Responsible for Games delivery– World Championship Organising Committees could provide expertise as Event Delivery Entities in numerous sports– Responsible body for development of Olympic Village to be confirmed
Intended signatories to the Host Contract	<ul style="list-style-type: none">– City of Stockholm– Swedish Olympic Committee

SUPPORT AND FUNDING STRATEGY: SUMMARY

OPPORTUNITIES

- Initial support from national government and City of Stockholm to move on to the next phase and examine the more detailed conditions for providing the relevant guarantees
- Support from local governments in Åre, Östersund, Falun, Sigulda and Riga
 - Östersund, Falun and Sigulda provided already venue use guarantees
- Good public support (59% support in Sweden)

AREAS FOR FURTHER DEVELOPMENT

- Expressions of support provided by national government and City of Stockholm are conditional:
 - City of Stockholm only willing to support the Games if national government formalises its support
 - In order for the national government to support Sweden's bid, the business sector must provide the sponsor revenues included in the calculated budget for the Games. (approx. USD 300m)
 - Guarantees would still need to be approved by the parliament
- Strategy to securing a Games Delivery Guarantee from a public authority was not sufficiently substantiated to provide comfort that the guarantee would be provided in a Targeted Dialogue
- National government of Latvia for sliding sports to be confirmed
- Proposed funding strategy: private revenues appear to be on the high side, in particular when it comes to domestic sponsorship and ticketing
- Funding responsibilities for capital investments to be clarified (Olympic Village and venue upgrade works)

GAMES DELIVERY



EVENT DELIVERY – SPORTS EXPERIENCE

INTERNATIONAL WINTER SPORTS EVENTS IN OLYMPIC SPORTS IN THE SEASONS
2013/14 - 2022/23:

9 World Championships **57** World Cups

- Sweden has hosted **65 World Championships or World Cups** in **9** out of **15** disciplines over the past 10 years.
- Sigulda, the proposed venue for Bobsleigh, Skeleton and Luge, has hosted 1 World Championship and 22 World Cups over the past ten years.
- In addition, Sweden will host a further 3 World Championships by 2030.
- 6 out of 12 of the proposed competition venues have hosted major winter sports events in the respective sports in the past 10 years or will host them by 2030.
- Ranked 5th in Beijing with 18 medals (delegation of 116 athletes in 11 sports disciplines).

→ Sweden has very good experience in organising and hosting major international winter sports events.

→ Sweden can benefit from an experienced venue workforce.



METEOROLOGY

STOCKHOLM	JANUARY	FEBRUARY	MARCH
Mean daily min. temperature (°C)	-4.0	-4.0	-2.0
Mean daily max. temperature (°C)	0.0	1.0	1.0
Mean total monthly precipitation (mm)	38.0	30.0	28.0
Mean number of precipitation days	12.2	11.5	10.9
ÅRE (Alpine Skiing and Freestyle / Snowboard)	JANUARY	FEBRUARY	MARCH
Mean daily min. temperature (°C)	-8.0	-8.0	-6.0
Mean daily max. temperature (°C)	-2.0	-2.0	0.0
Mean total monthly precipitation (mm)	60.0	44.0	46.0
Mean number of precipitation days	18.3	15.7	17.1
FALUN (Cross country skiing / Ski jumping)	JANUARY	FEBRUARY	MARCH
Mean daily min. temperature (°C)	-6.0	-7.0	-4.0
Mean daily max. temperature (°C)	-1.0	0.0	3.0
Mean total monthly precipitation (mm)	38.0	30.0	32.0
Mean number of precipitation days	12.4	10.7	10.9
ÖSTERSUND (Biathlon)	JANUARY	FEBRUARY	MARCH
Mean daily min. temperature (°C)	-10.0	-10.0	-7.0
Mean daily max. temperature (°C)	-3.0	-2.0	0.0
Mean total monthly precipitation (mm)	38.0	29.0	31.0
Mean number of precipitation days	12.8	10.2	11

Source: Meteoblue (30-year period)

GAMES DELIVERY: SUMMARY

OPPORTUNITIES



- Very good experience in hosting major international winter events in most Olympic sports
- Sweden can fully benefit from an experienced venue workforce
- Good amount of natural snow and sufficiently low average temperatures for artificial snowmaking

AREAS FOR FURTHER DEVELOPMENT

- Limited experience in hosting major international events in Speed Skating and Short Track in the last 10 years

ACCOMMODATION

GAMES NEEDS: 24,000 ROOMS FOR GAMES STAKEHOLDERS

EXISTING INVENTORY	HOTEL ROOMS	ALTERNATIVE ACCOMMODATION
Stockholm area (~50km radius)	~41,000 rooms	~9,000 listings
Åre (~10km radius)	~4,300 rooms	~900 listings
Falun (~10km radius)	~700 rooms	~100 listings
Östersund (~10km radius)	~900 rooms	~300 listings
Sigulda (~10km radius)	~300 rooms	~60 listings
TOTAL	~47,200 rooms	~10,400 listings



Source: The Swedish Agency for Economic and Regional Growth and Statistics Sweden / booking.com / AirDNA

TRANSPORT

Transport Concept	
Distances and Travel Times	<ul style="list-style-type: none"> - While the final concept for the Olympic Village in Stockholm is yet to be confirmed, all city venues are within 60 minutes from the proposed Olympic Village site. - In Åre, Östersund, Falun and Sigulda, all athletes will be accommodated in close proximity to their respective venues, ensuring minimum distances and travel times for them.
General Strategy	<ul style="list-style-type: none"> - The Games concept widely relies on existing transport infrastructure and allows for extensive use of mass transit/rail service. - All proposed Games venues are in operation today and the existing transport network serves these venues well for hosting events.
Infrastructure	<ul style="list-style-type: none"> - The Games project is fully aligned with existing long-term development plans, hence no major Games-related capital investments in the existing transport infrastructure would be required. - Stockholm has an extensive network of public transport infrastructure, consisting of 7 metro lines, spanning 106km; 4 tram lines, spanning 36km; and 11 suburban rail lines, spanning >84km. - Connections between Stockholm and the other Games clusters are multifold, with road + trains to Falun; road + trains + air travel to Åre and Östersund; and road/ferry + air travel to Sigulda.

TRANSPORT

Transport Concept

Airport and travel times to nearby venues

- **Stockholm:**
 - Arlanda airport is Sweden's largest airport and the international gateway and air hub to the remote venues in Åre and Sigulda.
 - In 2022, Arlanda handled more than **18 million PAX** and served 107 direct destinations (87 abroad, 20 domestic), operated by 55 airlines.
 - From Arlanda Airport, all competition venues in Stockholm can be reached between 45 minutes and 2 hours, using public transport.
- **Åre/Östersund:**
 - Åre Östersund Airport is located at Frösön, eleven kilometres west of Östersund and 94 kilometres east of Åre. It will be used mostly for domestic flights from/to Stockholm.
 - In 2019, prior to the pandemic, Åre/Östersund handled approx. **500,000 PAX** and served 11 direct destinations.
 - From Åre Östersund Airport, the competition venues in Åre, Duved and Östersund can be reached between 15 minutes and 1 hour 20 minutes, using shuttle buses.

TRANSPORT

Transport Concept

Airport and travel times to nearby venues

- **Riga:**
 - Riga International Airport is one of the largest airports in the Baltic states.
 - In 2022, Riga Airport handled **5.38 million PAX** and a total of 54,818 flights, and served more than 70 direct destinations, operated by 13 airlines.
 - From Riga International Airport, the competition venue in Sigulda can be reached within 1 hour, using shuttle buses.

GAMES DELIVERY: SUMMARY

OPPORTUNITIES



- Excellent existing transport infrastructure can adequately meet Games' needs
- Sufficient airport capacity to meet Games' needs
- Venues in Stockholm are well connected by public transport



- Room inventory in Stockholm would meet Games' stakeholder and spectator needs
- Room inventory in Sigulda limited but can be complemented by rooms in Riga

AREAS FOR FURTHER DEVELOPMENT

- Traffic management measures required for the inner City of Stockholm
- Venues in Åre, Östersund and Falun need to be served by longer distance transport solutions from Stockholm, requiring additional capacities (bus, train, plane)
- Accommodation is very limited in Åre, Östersund and Falun. A large portion of the hotel rooms would be used by stakeholders, leaving limited hotel capacity for spectators and workforce
- February is high season for the mountain resorts which may impact availability and prices

ENERGY & TELECOM

Energy

- Energy network in Sweden is well-developed to support Games demand
- Sweden holds a leading position in clean energy source exploitation, with hydropower, nuclear, wind, and solar comprising more than 90 percent of its energy mix
- Plans in place to increase transmission grid capacity
- Flexible grid tariffs and market regulation already in place
- Need for expansion of electricity generation
- Quality of service in rural areas moderate with decreasing trend in certain metrics

Telecom

- Sweden possesses the required telecommunications infrastructure to host the Olympic Winter Games
- Availability of advanced fixed and mobile services in all host areas in Sweden is expected to limit the need for Games-specific telecoms infrastructure investment
- Availability of diverse fiber routes to mountain venues for broadcast purposes should be confirmed
- Connectivity to potential venues outside of Sweden (e.g. sliding sports) has the potential to increase telecoms infrastructure costs significantly and should be further explored

GAMES SAFETY AND SECURITY

Security Forces	<ul style="list-style-type: none"> Sweden has a well-organised and capable Police force that plays a crucial role in maintaining law and order, ensuring public safety, and upholding the country's security
Geopolitical	<ul style="list-style-type: none"> Sweden actively engages in diplomacy and cooperation to address geopolitical risks, and it seeks to promote regional stability and international security. The country's foreign policy is characterized by its commitment to peace, neutrality, and international cooperation. Tensions and incidents in the Baltic Sea region can affect Sweden's security and posture. If Sweden's accession to NATO is approved, it may attract state sponsored cyber-attacks
Terrorism	<ul style="list-style-type: none"> There remains a persistent threat of terrorism from 'lone actors', 'single-issue' activists, 'extremists' (left-wing / right-wing), and from self-radicalised individuals. The threat of sophisticated 'mass-casualties' attacks by trans-national terrorists exists, although effective intelligence and security has substantially mitigated these threats.
Infrastructure - Water, Telecommunication, Technological and Cyber Risks	<ul style="list-style-type: none"> Sweden has reliable and effective infrastructure, including roads, airports, water, telecommunications, transportation, energy, and technology (including cyber-security). Sweden's topography and climate make it susceptible to risks associated with these challenges. However, the country has well-developed infrastructure and disaster management systems in place Sweden actively works to mitigate these risks through proactive maintenance, investment in infrastructure resilience, and disaster preparedness planning.
Natural Catastrophes	<ul style="list-style-type: none"> Sweden is susceptible to extreme weather conditions such as heavy snowfall, winter storms, and flooding. These events can damage transportation infrastructure, disrupt energy supply, and affect public services. However, Sweden is well-prepared to deal with natural catastrophes, and it has robust disaster management and early warning systems in place to minimise the prolonged impact of these events.

→ There is a credible prospect of a safe, secure and peaceful celebration of Games in Sweden

GAMES DELIVERY: SUMMARY

OPPORTUNITIES



- Sweden possesses the required telecommunications infrastructure to host the Games



- Availability of advanced fixed and mobile services in all host areas in Sweden is expected to limit the need for Games-specific telecoms infrastructure investment
- Energy network in Sweden well-developed to support Games demand



- There is a credible prospect of a safe, secure and peaceful celebration of the Games in Sweden
- Sweden has a well-organised and capable Police force that plays a crucial role in maintaining law and order, ensuring public safety, and upholding the country's security

AREAS FOR FURTHER DEVELOPMENT

- Availability of diverse fibre routes to mountain venues for broadcast purposes should be confirmed venue by venue to meet peak Games demands

- Sweden is susceptible to extreme weather conditions such as heavy snowfall, winter storms, and flooding. However, Sweden is well-prepared to deal with natural catastrophes, and it has robust disaster management and early warning systems in place

FEASIBILITY ASSESSMENT SOURCES

Documentation from Interested Party	<ul style="list-style-type: none"> • SOK Feasibility Study – Olympic Winter Games in Sweden 2030 (June 2023)
IOC advisors	<ul style="list-style-type: none"> • IOC Energy and Telecom Advisors • IOC Security Advisor • IOC Venue, Transports and Accommodation Advisor
Third-party independent expertise	<ul style="list-style-type: none"> • AirDNA • Article 19 • Booking.com • Business for Social Responsibility (BSR) • Coface • Economist Intelligence Unit • Environmental Performance Index (EPI) • Freedom House • International Energy Agency (IEA) • International Labor Organization (ILO) • International Trade Union Confederation (ITUC) • IQAir • Meteoblue • Moody's • Organisation for Economic Co-operation and Development (OECD) • Office of the United Nations High Commissioner for Human Rights (OHCHR) • Publicis Sport & Entertainment (PSE) • Reporters without Borders (RSF) • Transparency International • United Nations Development Programme (UNDP) • United Nations Office on Drugs and Crime (UNODC) • United Nations Conference on Trade and Development (UNCTAD) • University of Innsbruck / University of Waterloo (Climate Reliability Study) • Walk Free • World Economic Forum (WEF) • World Intellectual Property Organization (WIPO) • World Bank • Data from Swedavia & Riga Airports / The Swedish Agency for Economic and Regional Growth / Statistics Sweden

CREDITS

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