



## ***Qatar Sports Market Opportunities Seminar***

---

Jalal Dahham  
Senior Economic & Trade Policy Officer  
Netherlands Embassy in Qatar



# **Qatar is emerging as a Global Sports Hub**

---



## *Qatar is investing in world class sports assets in a variety of sports*



- ❖ 8 new stadiums are being developed for the 2022 FIFA World Cup TM
- ❖ 3 new arenas were built for the 2015 World Men's Handball Championship
- ❖ Aspire Zone Foundation manages five key physical assets
  - Aspire Dome
  - Khalifa International Stadium
  - Hamad Aquatic Centre
  - Ladies Sports Hall
  - Aspetar Orthopaedic and Sports Medicine Hospital
- ❖ There are also existing sporting facilities covering a variety of sports such as:
  - Tennis
  - Squash
  - Motorsports
  - Swimming
  - Athletics
  - Equestrian



## ***Qatar is emerging as a global sports hub with hosting many international competitions***

**2006 Asian Games**



**Asian Indoor Athletics Championships 2008**



**2010 World Indoor Athletics Championships**



**Arab Games 2011**



**2011 Asian Football Confederation Cup**



**2014 World Swimming Championships**



**2015 World Men's Handball Championship**



**IPC Athletics World Championships 2015**



**AIBA Boxing World Championship 2015**



**UCI Road Cycling World Championships 2016**





## *Looking ahead Qatar will host premier global sports events in the coming years*

### **2018 World Artistic Gymnastics Championships**



### **2019 World Championships in Athletics**



### **2022 FIFA World Cup**



### **2023 World Aquatics Championships**



*...In addition to more than 30 local, regional & international sporting events, hosted in Qatar each year.*



## *Qatar Sports Investments Abroad*



In 2011 Qatar Sports Investments (QSI) became the sole shareholder of Paris Saint-Germain Football Club.



In December 2010 QSI also reached a five-year, \$35.7 Million per season sponsorship and partnership agreement with FC Barcelona. The partnership included sponsorship of the club's shirt by the Qatar Foundation.



In 2013 Qatar Airways replaced the Qatar Foundation as the club's shirt sponsor in a four-seasons deal worth some \$113.8 Million.



# Sports Ecosystem Players

---





## ***Qatar Major Sports Players***



The Ministry of Culture and Sports (MCS), is responsible for developing a culture of athleticism, regularly encouraging activities in schools and regulating youth associations. MCS committee is responsible to review proposals for hosting regional and international tournaments, and providing feedback on the feasibility and economic benefits of accommodating such events.



The Qatar Olympic Committee (QOC) is the overall supervising body for the Olympic movement in Qatar. The QOC works closely with its 27 National Federations to provide support to athletes, coaches and officials at every level of the sporting pathway, as well as in the bidding for and organization of world-class sports events.



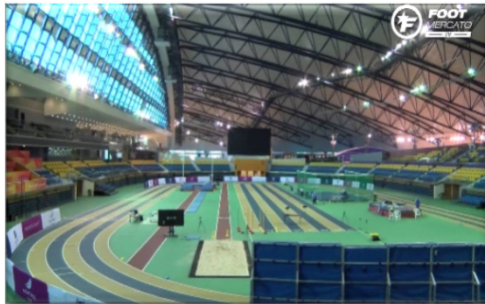
The Supreme Committee for Legacy and Delivery (SC) is responsible for overseeing and coordinating the delivery of the infrastructure required to host the 2022 FIFA World Cup.





## *Aspire Zone*

### **Aspire Academy**



Aspire Academy is mandated to provide sports training and education to students with sporting potential, in an exceptional learning and sporting environment. The overall purpose is to have Qatari athletes that are well prepared in their sport, and academically, to meet the needs of the Qatari society and realize its aspirations in international sports competitions.



Aspire Zone is a 2.5-sq-km, home to two important institutions:

### **Aspetar**



Aspetar is an internationally recognized entity for sports medicine. The hospital was accredited as a FIFA Medical Centre of Excellence and an International Olympic Committee Research Centre for Prevention of Injury and Protection of Athlete Health. Today the hospital's 790 employees deliver medicine, physiotherapy, orthopedic surgery and rehabilitation to both local and international clubs and federations.



# World Cup 2022 - Build up

---



## *Estimated total spending on the 2022 FIFA World Cup would reach USD 200 Billion*

### Mega National Projects set to tie in with 2022 tournament preparations

Hamad Int. Airport



Qatar Rail Network



New Doha Port



FIFA 2022



Lusail City



Musheireb Downtown



Doha Festival City



- ✓ **\$140bn** was earmarked for pre-existing plans set to tie in with tournament preparations
- ✓ **\$45bn** for expanding tourism infrastructure
- ✓ **\$2.3bn** is earmarked for World Cup facilities
- ✓ **\$6.9bn** for transport infrastructure and associated projects

Source: 2013 report by management consultancy Deloitte



## *Stadiums Projects*

---



**Khalifa International Stadium** completed in May 2017.

The renovations to Khalifa International Stadium have **doubled seating capacity from 20,000 to 40,000**, and installed a fitted overhead canopy and modern cooling technologies.



**Al Bayt Stadium**, 60,000- capacity seat located 50 km north-east of Doha in Al Khor Municipality, featured a giant tent structure will cover the whole stadium. FIFA reported in April 2017 that 40% of the venue's structural work and 25% of the work on the surrounding precincts had been completed. It is expected to be completed in September 2018.

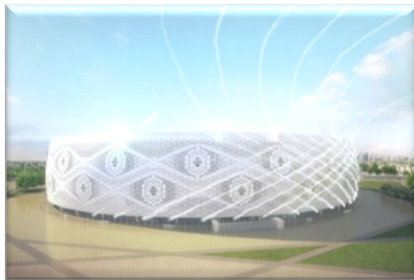


**Al Rayyan Stadium**, is known for its love of history and local culture, as well as its hugely popular football team – Al Rayyan Sports Club. The new arena will host up to 40,000 fans at 2022 FIFA World Cup™ matches through to the quarter-final stage.

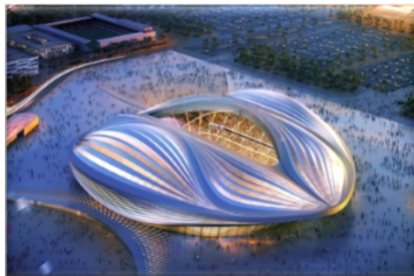


## *Stadiums Projects*

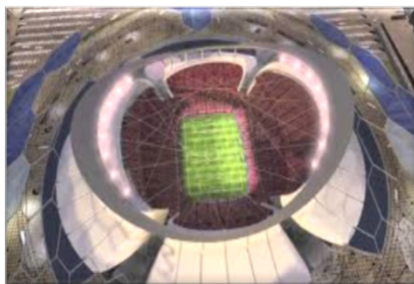
---



**Al Thumama Stadium**, design represents the gahfiya – a traditional woven cap worn by males across the Arab world and beyond. The 40,000-seat stadium will host 2022 FIFA World Cup Qatar™ matches through to the quarter-finals.



**Al Wakrah Stadium**, located 15 km south of Doha, will house 40,000 spectators and will be used for 16 matches during the World Cup. Al Wakrah has long been a seafaring trader, its people ploughing through the waves on the dhow boats whose sails inspired Al Wakrah Stadium.

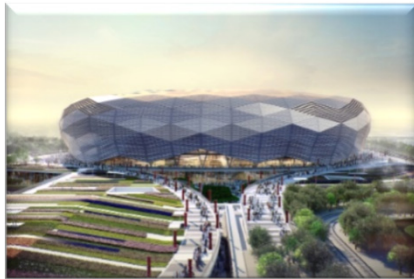


**Lusail Stadium**, is scheduled to host the opening and closing ceremonies, matches throughout the tournament and the main event itself, is also under way.



## *Stadiums Projects*

---



**Qatar Foundation Stadium**, located within the Education City, a vibrant center of knowledge and innovation, with 40,000-seat stadium at its heart.



**Ras Abu Aboud Stadium**, constructed using shipping containers, removable seats and other modular 'building blocks', not only will this innovative, 40,000-seat venue have a remarkable design, but it will be entirely dismantled and repurposed after the 2022 FIFA World Cup Qatar™.



# **Qatar Sports Market Outlook & Opportunities**

---





## *SC 2022 identified business opportunities related to 2022 FIFA World cup*

Technical Delivery Office	Tournament Operations	Administration	Marketing & Communications
<p>Subcontractors:</p> <ul style="list-style-type: none"><li>- Lighting Systems</li><li>- Doors / Windows</li><li>- Turf &amp; Landscaping</li><li>- Cooling Systems &amp; Equipment</li><li>- MEP</li><li>- Flooring</li><li>- Structure Solutions</li><li>- Security</li></ul> <p>Non Competition Venues</p> <ul style="list-style-type: none"><li>- Fan Villages</li><li>- Overlay for Major Sports Events</li><li>- Medical Services and Doping Control</li><li>- Media Requirements &amp; Facilities</li></ul>	<ul style="list-style-type: none"><li>- Government &amp; Host City Operations.</li><li>- Security Operations</li><li>- Transport Operations</li><li>- Stadium &amp; Training Site Operations</li><li>- Pitch Maintenance and Protection Systems.</li><li>- Precinct / Estate Operations</li><li>- Pre and Post Tournament Operators</li><li>- Logistics planning for big events</li><li>- Medical Services &amp; doping Control</li><li>- Temporary Infrastructure (Kitchens, Power, Lighting, Plumbing and drainage systems)</li></ul>	<p>Information Technology</p> <ul style="list-style-type: none"><li>- Consultancy &amp; Professional services</li><li>- Applications Development</li><li>- Infrastructure and End-user services</li></ul> <p>General Services</p> <ul style="list-style-type: none"><li>- Facilities Management</li><li>- Consultancy Design for Fit Outs</li><li>- Hospitality/Pantry Services</li><li>- Stationary</li><li>- Security/HSSE</li><li>- Support Staff</li></ul> <p>HR</p> <ul style="list-style-type: none"><li>- Training providers</li><li>- Recruitment support</li><li>- Medical and Travel Insurance</li><li>- Consultancy and Professional Services</li></ul> <p>Finance &amp; Procurement</p> <ul style="list-style-type: none"><li>- External Audit and Consultancy services</li></ul>	<p>Content Generation</p> <ul style="list-style-type: none"><li>- PR Agencies</li><li>- Sports Marketing Agencies (Digital Communications &amp; VIRO Videos Companies)</li><li>- Journalist Press Association</li><li>- Creative Agencies (Film &amp; Digital Production)</li><li>- VR/AR Content Creation</li><li>- Repurpose Content agencies</li></ul> <p>Publication</p> <ul style="list-style-type: none"><li>- Social Media Platforms</li><li>- IPTV</li><li>- Traditional Publication</li><li>- MICE Services for Publication</li><li>- News Wires</li></ul> <p>Engagement</p> <ul style="list-style-type: none"><li>- Consultancy</li><li>- Experiential Marketing Events</li><li>- Football Associations – CSR</li><li>- Sport Kit Manufacturing</li><li>- VR/AR Agencies</li><li>- Talent Management Agencies</li></ul> <p>Monitor / Review</p> <ul style="list-style-type: none"><li>- Project Management</li><li>- Communication Dashboard &amp; Analytics</li><li>- CSR Impact Assessment Companies</li><li>- Legacy Benefits Tracking Management</li></ul>

Source: Supreme Committee for Legacy and Delivery – Business Opportunities 2018



## *Business opportunities related to the 2022 FIFA World Cup*

### *Stadiums*

#### **Primary Material Opportunities**

- Structural Steel
- Concrete
- Asphalt
- Sand Cement Plaster

#### **Interior Opportunities:**

- Seating
- Doors
- Windows

#### **Mechanical, Electrical and Plumbing**

##### **Opportunities:**

- Stadium Cooling
- Systems and Equipment
- Elevators
- Firefighting Systems
- Plumbing Materials
- Generators
- Electric Distribution Boards
- Sanitary Appliances

#### **Green Space Opportunities:**

- Stadium and Training Site Pitches
- Landscaping

#### **Security Opportunities:**

- Cameras
- Networked Video Storage
- Security Fencing
- Hostile Vehicle Mitigation
- Security Doors
- Turnstiles

#### **ICT Opportunities:**

- Server Infrastructure
- Wi-Fi Solutions
- ICT Cabling
- Video Displays
- Broadcast Cabling
- SCADA Systems (11kV Networks)
- Building Management Systems (BMS)

#### **Lighting**

##### **Opportunities:**

- Stadium Floodlight Systems
- Other Exterior Lighting Systems
- Interior Lighting Systems

*Source: Supreme Committee for Legacy and Delivery – Business Opportunities for stadiums*



## *Sports Sector Market Size & Associated Business Opportunities*

**Market size of the sports sector** in the country is **expected to reach USD 19.77 billion by 2023**. The Ministry of Economy and Commerce in Qatar has identified **83 commercial and investment opportunities in sports for the private sector in Qatar**. The Ministry, in collaboration with the Ministry of Culture and Sports, the Supreme Committee for Delivery and Legacy, Qatar Olympic Committee and Aspire Zone Foundation has conducted an in-depth study on available investment opportunities in the sports sector. These developments include plans **to host various international sporting events over the next seven years**, including the 2018 Gymnastics World Championships, the 2019 World Championships in Athletics and the 2022 FIFA World Cup, in addition to more than 30 local, regional and international sporting events, hosted in Qatar each year.





## The Ministry of Economy and Commerce has prepared action plans for 30 investment opportunities

The Ministry of Economy and Commerce (MEC) has also prepared action plans for **30 investment opportunities**, with a market requirement worth **22 to 30 Billion Qatari Riyal (6.02 - 8.21 USD Million)**. The investment opportunities, that will go directly from the government to the private sector, have been classified into seven sectors: Management and promotion of sporting events; sport development; establishment and construction of sports facilities; merchandise and sports equipment; sports marketing; sport tourism; and operation and maintenance of sports facilities.

Value chain	Number of opportunities	Opportunity Size	Shortlisted opportunities	Value range
Event management & promotion	26	QAR 14 Bn	15	~QAR 8 – 13 billion
Sports development	7	QAR 3 Bn	3	~QAR 470 – 615 million
Venue construction	31	QAR 9 Bn	7	~QAR 5 – 6.4 billion
Venue operation & maintenance	9	QAR 5 Bn	1	~QAR 4.1 – 5.3 billion
Sports goods & equipment	2	QAR 14 Bn	1	~QAR 3 billion
Sport commercialisation	4	QAR 0.4 Bn	1	~QAR 100 – 200 million
Sports tourism	4	QAR 2 Bn	2	~QAR 1.5 – 2.4 billion
<b>Total</b>	<b>83</b>	<b>QAR 47 Bn</b>	<b>30</b>	<b>~QAR 22– 30 billion</b>
		<b>12.87 USD Billion</b>	<b>6.02 - 8.21 USD Billion</b>	

*Opportunities for the period of 2016 - 2023*

*Shortlisted opportunities span*

*Expenditure localisation & optimisation*

*Revenue maximisation*



## *Opportunities Market Size in USD Million, CY2016-CY2023*

**Sound and Stage Production**  
**246 - 301**



**Crew-wear and uniforms**  
**178 - 205**



**Corporate hospitality**  
**178 - 205**



**Ticketing**  
**178 - 205**



**Temporary grandstands & platforms**  
**178 - 205**



**Temporary staffing & training**  
**123 - 150**







## *Opportunities Market Size in USD Million, CY2016-CY2023*

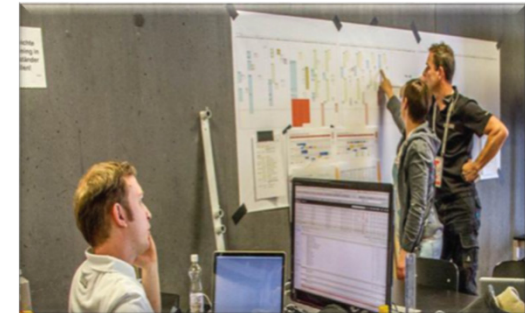
**Signage, external screens  
and way finding  
150 - 178**



**Sports television production  
33 - 45**



**Event organization, planning  
& marketing  
2191 - 2904**



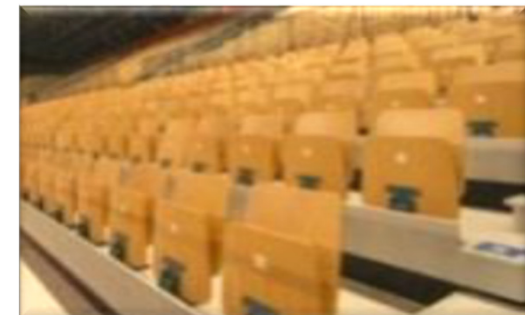
**Sports management, timing  
& scoring  
84 - 112**



**Temporary toilets  
136 -164**



**Seating  
246 - 301**





## *Opportunities Market Size in USD Million, CY2016-CY2023*

**Special lighting**  
**191 - 246**



**Communications, security  
and control systems**  
**547 -1041**



**Mechanical, Electrical,  
Plumbing**  
**2191 - 3095**



**Video boards**  
**41 - 68.4**



**Mobile fences, barriers  
and turnstiles**  
**95 - 150**



**Field maintenance  
equipment**  
**82 - 109**





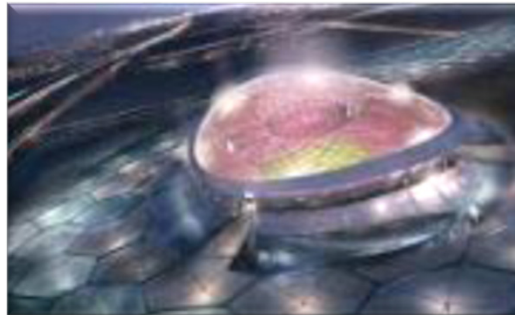


## *Opportunities Market Size in USD Million, CY2016-CY2023*

**Landscape & turf  
1917 - 2356**



**Facilities management  
1534 - 2082**



**Digitalize the stadium  
experience  
2.7 - 8.2**



**Commercialize existing  
venues  
54.7 - 82.1**



**Venue operations &  
maintenance  
986.3 -1260.2**



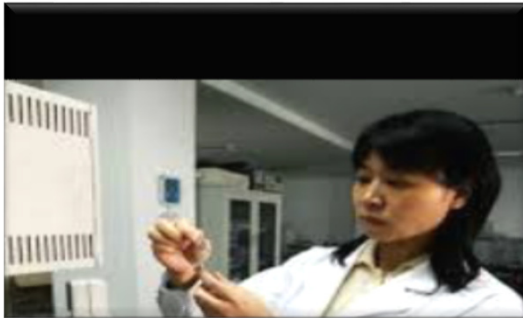
**Sports education  
43.8 - 54.7**





## *Opportunities Market Size in USD Million, CY2016-CY2023*

**Sports medicine  
and anti-doping  
76.7 – 101.3**



**Sports data & analytics  
8.2 – 12.3**



**Sport Tourism  
82.1 – 150.6**



**Wearables  
Global 822**



**Merchandising  
54.7 – 82.1**





# Doing Business in Qatar

---







## *Doing Business in Qatar*

**Local Distributor**



**Qatari partner with 51% Ownership of the enterprise**



**FI owns up to 100%**



**Qatar Science & Technology Park**



**Qatar Financial Center**



**Manateq**



100% foreign ownership



## Dutch Embassy in Qatar Mandate to boost Qatari and Dutch Collaboration

---





## *The Embassy serves as the main gateway and key accelerator for vibrant relations between Qatar and the Kingdom of the Netherlands*

**Sports Mission to Qatar**  
**May 2016**



**ASPIRE4SPORT**  
**Amsterdam 2016**



**Wesley Sneijder joined**  
**Al-Gharafa football club**







## *The Embassy serves as the main gateway and key accelerator for vibrant relations between Qatar and the Kingdom of the Netherlands*

### **Qatari Football clubs- Summer Training Camps in the Netherlands**



### **KNVB, Worldcoaches program with Qatar Women Sports Committee**



### **Dutch Embassy Team Sports events**







Thank You  
For Your Attention



*Roeland Kollen*

*Deputy Head of Mission and Economic Counselor*

*Email: [roeland.kollen@minbuza.nl](mailto:roeland.kollen@minbuza.nl)*

*Jalal Dahham*

*Senior Economic & Trade Policy Officer*

*Email: [jalal.dahham@minbuza.nl](mailto:jalal.dahham@minbuza.nl)*