Qatar Sports Market Opportunities Seminar

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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 Championships2016

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

2022 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 Zone

Aspire Academy

Aspetar

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

Mushereb 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

The Road to Qatar 2022

https://youtu.be/BpSXmDuhbSc

Qatar Sports Market Outlook & Opportunities

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

SC 2022 identified business opportunities related to 2022 FIFA World cup

Technical Delivery Office
- Subcontractors:
  - Lighting Systems
  - Cooling Windows
  - Turf & Landscaping
  - Cooling Systems & Equipment
  - MEP
  - Flooring
  - Security Solutions
  - Security
- Non-Competition Venues
  - Fan Villages
  - Overlay For Major Sports Events
  - Medical Services and Doping Control
  - Media Requirements & Facilities

Tournament Operations
- Government & Host City Operations.
- Security Operations
- Venue Management
- Stadium & Training Site Operations
- Pitch Maintenance and Protection Experts
- Fan Zone Venue Operations
- Pre and Post Tournament Operators
- Logistics planning for big events
- Medical Services & doping control
- Temporary Infrastructure (Kitchens, Power, Lighting, Plumbing and drainage systems)

Administration
- Information Technology
  - Consultancy & Professional services
  - Applications Development
  - Infrastructure and End-user services
- General Services
  - Facility Management
  - Consultancy Design for FIs Club.
  - Hospitality/Ticking Services Stadiums
  - Security/PDSC
  - Support Staff
- HR
  - Training providers
  - Recruitment support
  - Medical and Travel Insurance
  - Consultancy and Professional Services
- Finance & Procurement
  - External Audit and Consultancy Services

Marketing & Communications
- Content Generation
  - Media Agencies
  - Sports Marketing Agencies (Digital Communications & VMU Videos Companies)
  - Photographers Association
  - Creative Agencies (Film & Digital Production)
  - VR/AR Content Creation
  - Response Content agencies
- Publication
  - Social Media Platforms
  - IPTV
  - Traditional Publication
  - MICE Service for Publication
  - News Wires
- Engagement
  - Experiential
  - Experiential Marketing Events
  - Football Associations – CSR
  - Fan Engagement Marketing
  - VR/AR Agencies
  - Talent Management Agencies
- Monitor / Review
  - Project Management
  - Communication Dashboard & Reporting
  - CSR Impact Assessment Companies
  - Legacy Benefits Tracking Management

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

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,** and 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).**

Value chain	Number of opportunities	Opportunity Size (Opportunities for the period of 2016-2023)	Short/Mid term Opportunities (Opportunities within 2 years)	Value range
Event management & promotion	20	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	1	~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 commercialization	4	QAR 0.4 Bn	1	~QAR 100 – 200 million
Sports tourism	4	QAR 2 Bn	2	~QAR 1.5 – 2.4 billion
Total	83	QAR 47 Bn	30	~QAR 22–30 billion
	5.87 USD Billion		3.75 USD Billion	6.02 - 8.21 USD Billion

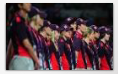
Direct Investment & Activities

Venue Investment

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

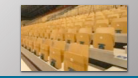
Sports television production
33 - 45

Event organization, planning & marketing
2191 - 2904

Sports management, timing & scoring
84 - 112

Temporary toilets
136 -164

Seating
246 - 301

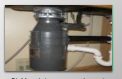


Opportunities Market Size in USD Million, CY2016-CY2023

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 $32

Merchandising
54.7 - 82.1

Doing Business in Qatar

Doing Business in Qatar

100% foreign ownership

Local Distributor

Qatari partner with 51% Ownership of the enterprise

Freeze up to 100%

Qatar Science & Technology Park

Qatar Financial Center

Manateq

Dutch Success story in Qatar Sports Sector

Khalifa Stadium, 1st World Cup Stadium equipped with Philips LED lighting

8 out of 8 world cup stadiums will be equipped with Philips Lighting State of the art technologies for the field of play

Dutch Embassy in Qatar Mandate to boost Qatari and Dutch Collaboration

Sports Mission to Qatar-May 2016

ASPIRE4SPORT Amsterdam-October 2016

Wesley Sneijder & Nigel de Jong play as midfielders for Qatar Stars League clubs

KNVB, Worldcoaches program
with Qatar Women Sports Committee - May 2017

Qatari Football clubs-Summer
Training Camps in The Netherlands

Dutch Embassy Team during
Sports Day

Thank You

For Your Attention

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