

YouGov[®]Sport

United Arab Emirates

Sustainability in the sports, events and tourism industries in the UAE



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Key Areas of Exploration

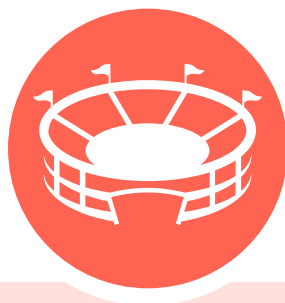


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in the United Arab Emirates (UAE).

This report will focus on these 3 key areas of exploration.



Sustainability and its position
in the UAE



Sports, events & tourism
in the UAE



Sustainability within sports,
events & tourism

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Methodology

Research for this project was conducted in 2020 and in 2 phases:

IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews sports and events industry executives
- > Interview length 15 minutes
- > 10 Industry professionals interviewed in the UAE

DESK RESEARCH

- > Supporting data for the report will be provided by desk research
- > All sources for the desk research will be credible and verifiable

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UAE Country Overview

1

United Arab Emirates

Located at the North Eastern point of the Persian Peninsula, the UAE is strategically placed as a trading hub. The UAE is a federation of seven emirates – Abu Dhabi, Dubai, Sharjah, Ajman, Um Al-Quwain, Ras Al-Khaimah and Fujairah – that united in 1971.

COUNTRY INFORMATION

Size	0.83m sq. km
Population	10.0 million
Capital	Abu Dhabi
Other major cities	Dubai
Languages	Arabic, English
Currency	UAE Dirham (pegged to US \$, currently \$0.27)
Borders	The Kingdom of Saudi Arabia & Oman

Source: Desk Research

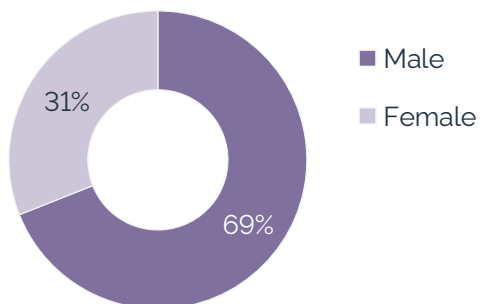


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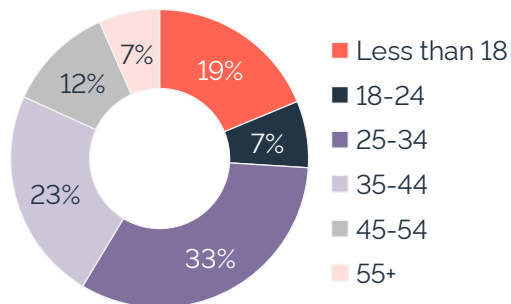
Its people

Young, expat and male are dominant characteristics of the UAE population. They also constitute the majority of the workforce at 92%.

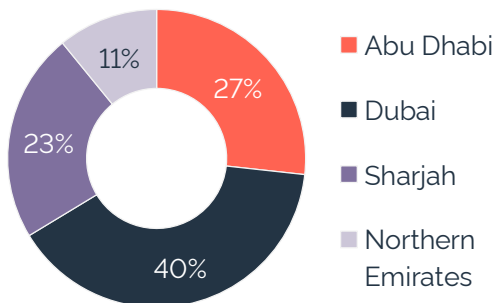
GENDER



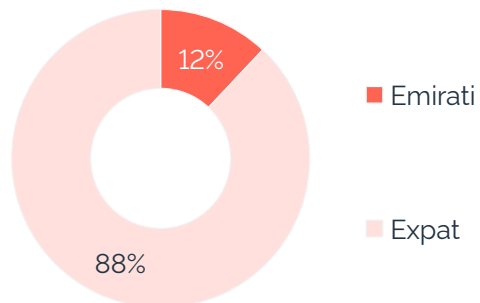
AGE



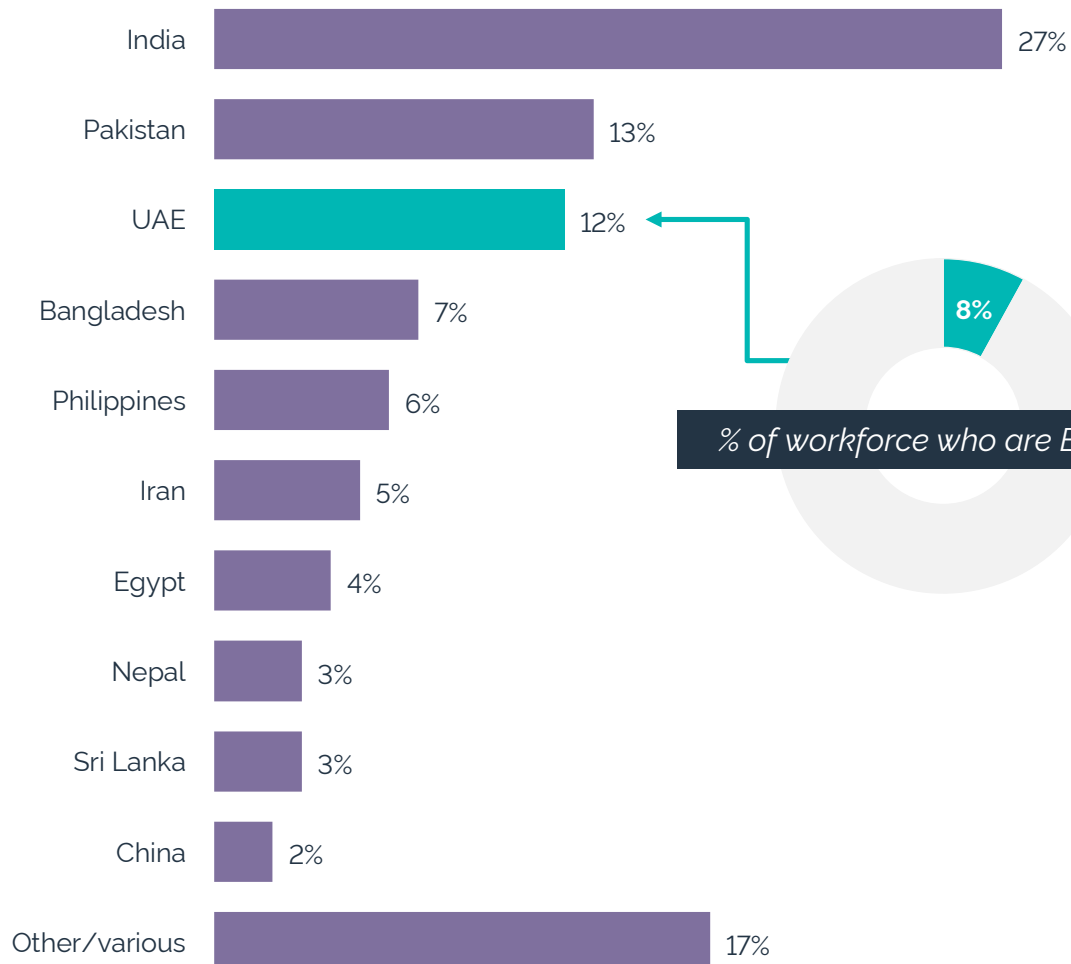
LOCATION



NATIONALITY



POPULATION BY NATIONALITY



% of workforce who are Emirati

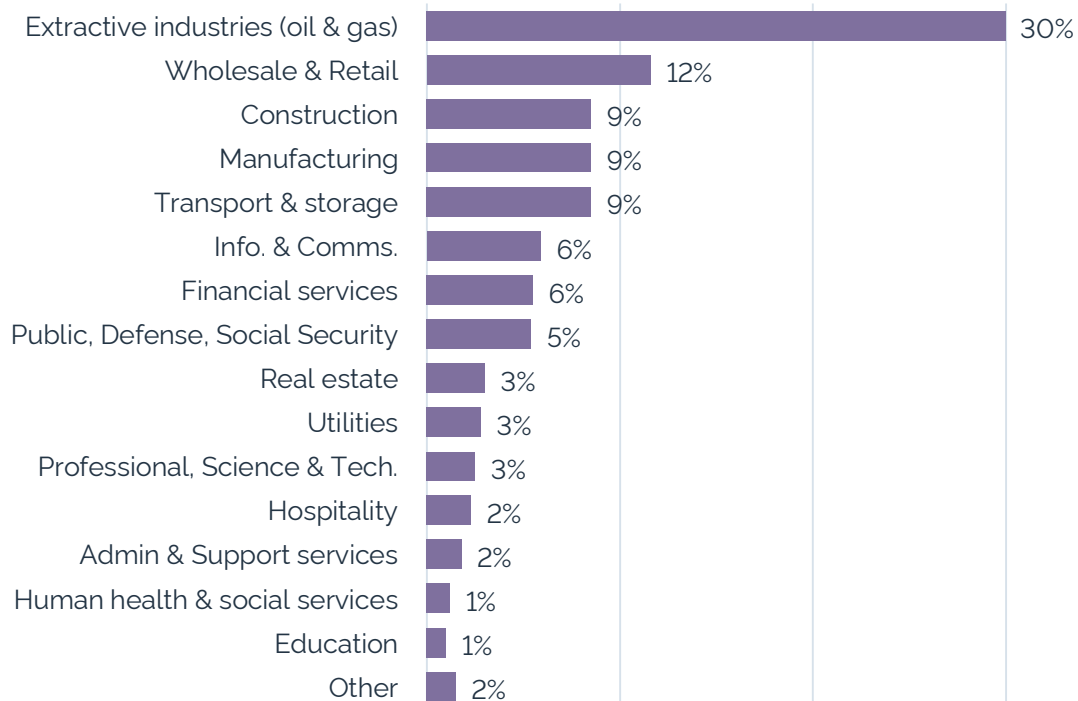
Source: Desk Research, YouGov Panel

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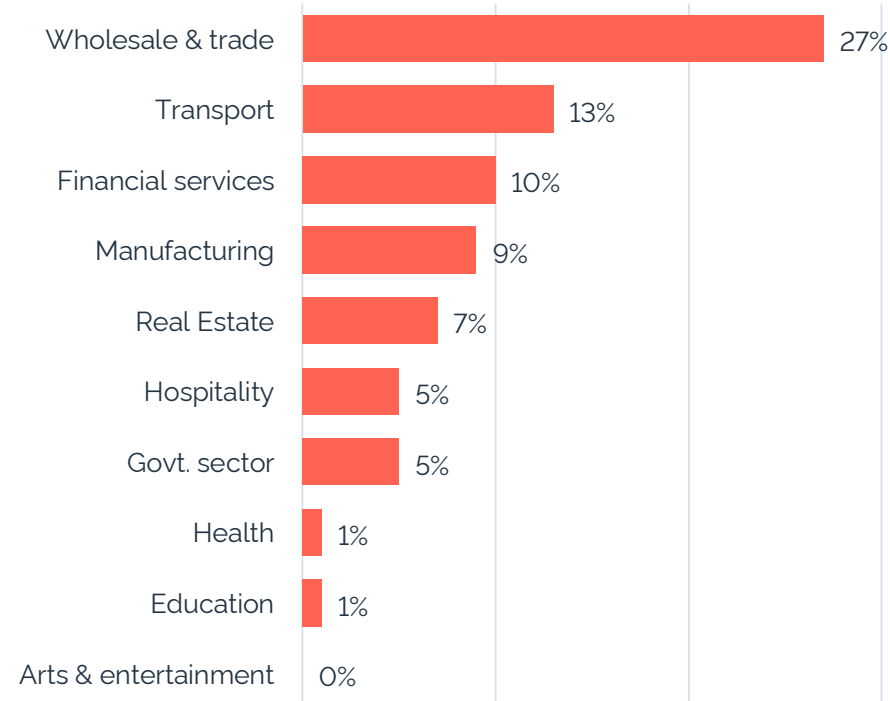
Economy

The largest contributor to the UAE economy is oil. However, with a lack of these natural resources, Dubai has diversified to a greater extent than other Emirates; largely via trade and services which include sport events, tourism and event hosting.

UAE INDUSTRIES



DUBAI INDUSTRIES

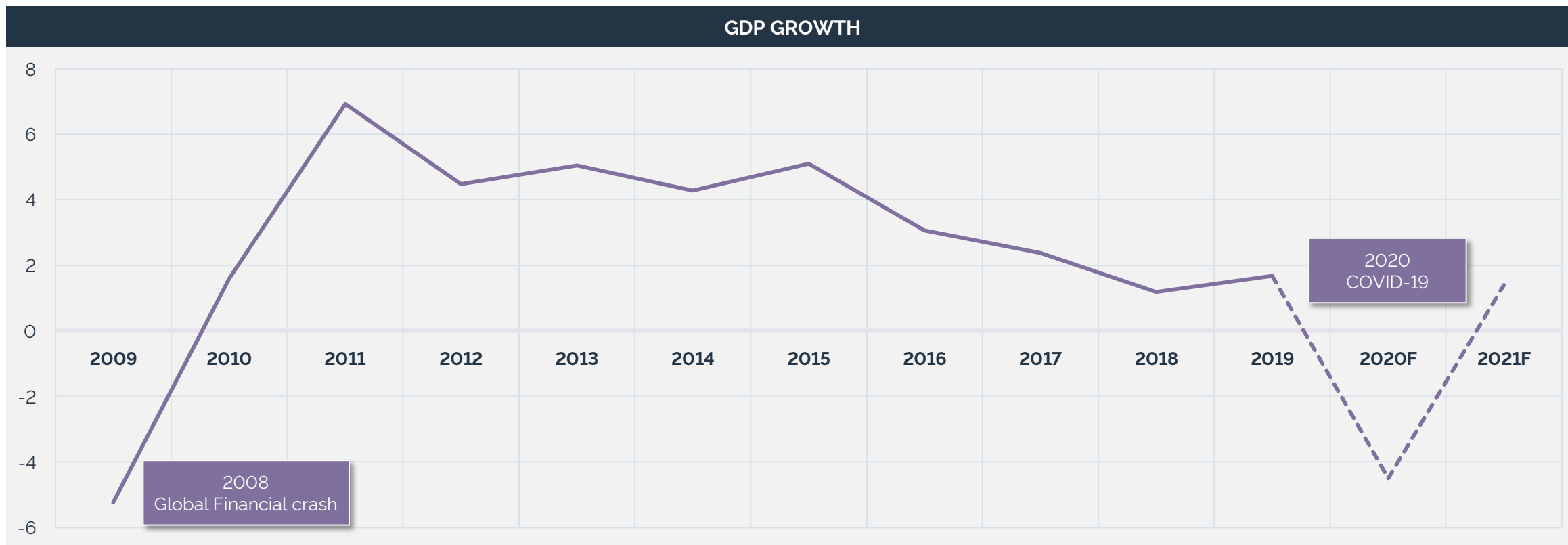


Source: YouGov Sport, Desk research, Statista

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Outlook

Since recovery after the 2008 Financial Crash, the UAE enjoyed a healthy average 3% growth up to 2018. With the onset of COVID-19 worldwide, short-term prospects are challenging.



Source: YouGov Sport, World Bank

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Sustainability in the UAE

2

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Launched in 2010, **Vision 2021** is the UAE's national development plan, based on 4 pillars aimed at building and empowering the local population.

UAES VISION PILLARS



UNITED IN RESPONSIBILITY

An ambitious and confident nation ground in its heritage

UNITED IN KNOWLEDGE

A competitive economy driven by knowledge and innovation

UNITED IN PROSPERITY

A nurturing and sustainable environment for quality living

UNITED IN DESTINY

A strong union bonded by common destiny

- > Sustainability is a core theme
- > While the Federal government authorities handle core policy and service delivery; including foreign relations, defence, education, health and environmental policy, each Emirate, has considerable autonomy to shape their own variation of Vision 2021
- > The aim is to '*position the UAE among the best countries in the world*' by the Golden Jubilee of the Union in 2021

Source: Desk Research, Vision2021.ae

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In general, sustainability (or elements thereof) is understood amongst sport, tourism and event industry professionals.

> The most commonly acknowledged areas are environmental

'It is about elimination poverty, reducing the use of plastic, ending starvation ... providing equal healthcare to all countries in the world, achieve equality among all members of society, reducing energy consumption and drainage of natural resources and rely on solar energy, wind and water energy to produce electricity'

Large Events Organiser

'Sustainability is a global orientation to achieve an environmental, climate and biological equilibrium that fulfils the needs to the individual and the country ...

Decreasing the carbon emissions, achieving equality between all categories of the society, improving the sewage system, development in economic resource, encouraging investment, coping with climate change challenges and conserving natural reserves, seas and oceans'

Tourism Governing Body

'People everywhere are reducing the use of resources that are about to end such as petrol and are searching for alternatives such as the wind. Everywhere in the Emirates and in schools they are placing sorting containers for recycling'

Major Tourist Attraction

'Sustainability is about caring for the environment and using recyclable material ... Recycling, environmental friendly material and reusable things like plastic or wood'

Event Organiser

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6 national priorities have been identified as drivers of Vision 2021.



- > As sustainable growth is core to the nation's future
- > Overlaps with the UN Sustainable Development Goals (SDGs) have been identified



UN SUSTAINABLE DEVELOPMENT GOALS – ‘SDGs’

1 NO POVERTY 	2 ZERO HUNGER 	3 GOOD HEALTH AND WELL BEING 	4 QUALITY EDUCATION 	5 GENDER EQUALITY 	6 CLEAN WATER AND SANITATION
7 AFFORDABLE AND CLEAN ENERGY 	8 DECENT WORK AND ECONOMIC GROWTH 	9 INDUSTRY, INNOVATION AND INFRASTRUCTURE 	10 REDUCED INEQUALITIES 	11 SUSTAINABLE CITIES AND COMMUNITIES 	12 RESPONSIBLE CONSUMPTION AND PRODUCTION
13 CLIMATE ACTION 	14 LIFE BELOW WATER 	15 LIFE ON LAND 	16 PEACE, JUSTICE AND STRONG INSTITUTIONS 	17 PARTNERSHIPS FOR THE GOALS 	SUSTAINABLE DEVELOPMENT GOALS

Source: Desk Research, vision 2021.ae

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The UAE national priorities have been mapped against the United Nations SDGs and each Emirate has their own plan.



World-class Healthcare

SDG #	Goal
2	Zero Hunger
3	Good Health & Well-being
6	Clean Water and Sanitation
11	Sustainable Cities & Communities
13	Climate Action
16	Peace, Justice & Strong Institutions

Sustainable Environment & Infrastructure

SDG #	Goal
1	No Poverty
5	Gender Equality
6	Clean Water and Sanitation
7	Affordable & Clean Energy
9	Industry, Innovation & Infrastructure
11	Sustainable Cities & Communities
12	Responsible Consumption & Production
13	Climate Action
15	Life on Land
17	Partnerships for the Goals

Cohesive Society & Preserved Identity

SDG #	Goal
3	Good Health & Well-being
5	Gender Equality

Safe Public & Fair Judiciary

SDG #	Goal
3	Good Health & Well-being
16	Peace, Justice & Strong Institutions

First-rate Education System

SDG #	Goal
1	No Poverty
4	Quality Education

Competitive Knowledge Economy

SDG #	Goal
1-17	All 17 SDGs

Source: Desk Research, vision 2021.ae

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With their individual autonomy, each Emirate has its own development plans; these too have been mapped against the SDGs that are relevant to their growth.

Abu Dhabi Plan 2030	SDG #		
Social Development	3	4	11
Security, Justice and Safety	2	16	
Economic Development	8	17	
Vital Sectors Contributing to Economic Diversity	11	12	17

Pillars of Dubai Plan 2021	SDG #			
The Preferred Place to Live, Work and Visit	3	4	11	
A Pivotal Hub in the Global Economy	2	8		
A Pioneering and Excellent Government	16	17		
City of Happy, Creative and Empowered People	4			
A Smart and Sustainable City	9	11	12	14

Pillars of RAK Strategic Framework 2015-2017	SDG #			
Creative Talents	4	8		
Competitive Economy	2	4	8	9
Quality of Life	3	11	18	
A Leading Government	8			
Integrated Environmental and Health System	6	12	14	15

Pillars of Fujairah 2040 Plan	SDG #		
Preserve Natural Resources and Celebrate Culture and Heritage	15		
Building a Sustainable Environment	9	11	
Prosperous Economy	8		
Build a Community of Skilled and Active Citizens	4		

Pillars of Ajman Plan 2021	SDG #			
A Distinguished Government	8	9	17	
A Green Economy	8	9	11	
A Vibrant Community	3	4		
Best Place to Live	6	7	11	16



Source: Desk Research, vision 2021.ae

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As a nation, **‘Nurturing a sustainable environment for quality living’** is a very high profile objective.



UAE – By 2050



40%

Increase consumption efficiency of individuals and corporates



50%

Clean Energy



70%

Reduction in carbon footprint

Source: Desk Research, vision 2021.ae

ABU DHABI – By 2030



15%
Waste Diversion



22%
Power Savings



32%
Water Savings



50%
Renewable and Clean Energy

DUBAI – By 2030



25%
Renewable Energy



30%
Energy Savings



30%
Water Savings



75%
Clean Energy

RAS AL-KHAMAH – By 2040



20%
Water Savings



30%
Renewable Energy



30%
Energy Savings



30%
Water Savings



30%
Power Savings

SHARJAH – By 2040

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(1) **'Nurturing a sustainable environment for quality living'**: together with the UN SDGs, the numerous national strategies for a green economy are recognised amongst industry professionals to varying degrees of awareness.

Green Economy for Sustainable Development

- > The strategy aims to position the UAE as a world leader and a center for export and re-export of products and green technologies as well as maintaining a sustainable environment which supports economic growth

UAE Energy Strategy 2050 (2015)

- > The strategy aims to increase the contribution of clean energy in the total energy mix to 50%, balance the supply and demand, and ensure a conducive economic environment for growth across sectors

Abu Dhabi Vision 2030

- > Guides the development of Abu Dhabi Urban Planning Council's plans, policies, standards and guidelines. The vision is based on four pillars of sustainability: environmental, economic, social and cultural.

Environment Vision 2030

- > Developed by Environment Agency – Abu Dhabi (EAD) with priority areas:
 - Climate Change, Clean Air and Noise Pollution, Water Resources, Biodiversity, Habitats and Cultural Heritage & Waste Management

Estidama Pearl Rating System (2010)

- > Addresses the four pillars of sustainability: environmental, economic, social and cultural. The PRS is mandatory for all new buildings in the Abu Dhabi Emirate. It is also the first mandated sustainability rating system in the Arab region.

Ras Al Khaimah Energy Efficiency and Renewable Energy Strategy 2040 (2018)

- > Targets 30% energy savings, 20% water savings and 20% generation from renewable energy sources by 2040.

Barjeel – Ras Al Khaimah Green Building Regulations (2019)

- > The regulations target five main components: energy efficiency, water efficiency, renewable energy, material & resources, and comfort & well-being and are split into Fundamental Green Building Regulations and Comprehensive Green Building Regulations.

'... the Emirates have been implementing sustainability for a long time ... [they] directly implement any idea that shows up. The reason of their success is their management and their understanding'

Major Tourist Attraction

'The UAE plan, prepared by the President of the State will be completed by 2050. We will reach 70% of clean energy consumption'

Major Events

'The United Nations set a plan for 2030 for countries to participate in sustainability'

Large Events Organiser

Source: Desk Research, vision 2021.ae

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(2) 'Nurturing a sustainable environment for quality living': national strategies for a green economy.

Dubai Plan 2021 (2014)

- > With a special focus on people and society, the plan addresses six focus themes, each highlighting a group of strategic developmental aims for Dubai.
 - *The People: "City of Happy, Creative & Empowered People", The Society: "An Inclusive & Cohesive Society", The Experience: "The Preferred Place to Live, Work & Visit", The Place: "A Smart & Sustainable City", The Economy: "A Pivotal Hub in the Global Economy", The Government: "A Pioneering and Excellent Government"*

Dubai Integrated Energy Strategy 2030 (2011)

- > Has as its purpose to diversify sources of energy and increase the clean energy share. Dubai aims to increase the share of clean energy to 29% and the Emirate's energy demand by 30% by 2030.

Dubai Clean Energy Strategy 2050 (2015)

- > Aims to make Dubai a global centre of clean energy and green economy. It aims to provide 75 % of the Emirate's energy through clean energy sources by 2050.

Dubai Green Building Regulations and Specifications and Al Sa'fat Rating System (2011)

- > These regulations have been mandated on government owned buildings since 2011 and on all new buildings in Dubai starting 2014. Based on the GBR&S, Dubai Municipality introduced Al Sa'fat rating system in 2016 to strengthen the sustainable built environment in the city and support the goal of Dubai's Plan 2021 to create a smart and sustainable city.

Trakhees EHS Regulations and Standards

- > Trakhees serves as a regulatory arm for the issuance of building permits, commercial licensing, and for the supervision of engineering and all health, environmental and safety related matters within the Free Zone.

'Of course sustainability is a topic that occupies public opinion at the present time, and a large sector of the state here'

Major Events

'There is the industry of sustainable architecture. They are heading towards having entire residential cities that implement sustainability in order to preserve natural resources for the longest time possible. They also implement the responsible use of natural resources.

Regarding public transport, it reduces the carbon emissions so they are directing towards using public transport. As a result, we will be supporting the idea of sustainability more'

Sport Ministry

Source: Desk Research, vision 2021.ae

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Growth plans are supported by many government backed sustainable initiatives.

GOVERNMENT BACKED INITIATIVES



Dubai Cares



UAE Food Bank
Zero Hunger



International
Humanitarian City



Masdar City Green
Initiatives, Sustainable
cities and communities



Mohammed Bin Rashid Al
Maktoum Global Initiatives
No poverty



Noor Dubai Foundation
Good health and well-being



Sustainable Schools
Quality education



UAE Water Aid Initiative
Clean water and sanitation

> Initiatives that have higher awareness appear to be those that are the most visible

'Masdar City is a good example of applying sustainability, ... It's a city completely depending on sustainability'

Large Events Venue

'If there is anything about sustainability, then it is found in Masdar'

Event Organiser

'..in the United Arab Emirates, I notice that the taxi run on electricity. There is also the electric metro for transportation'

Large Events Organiser

'In the law, any new city that is being built has to use most of it in solar energy and green rooves. Renovation for and building will have to follow the same rule. There is also the metro of Dubai that works on solar energy'

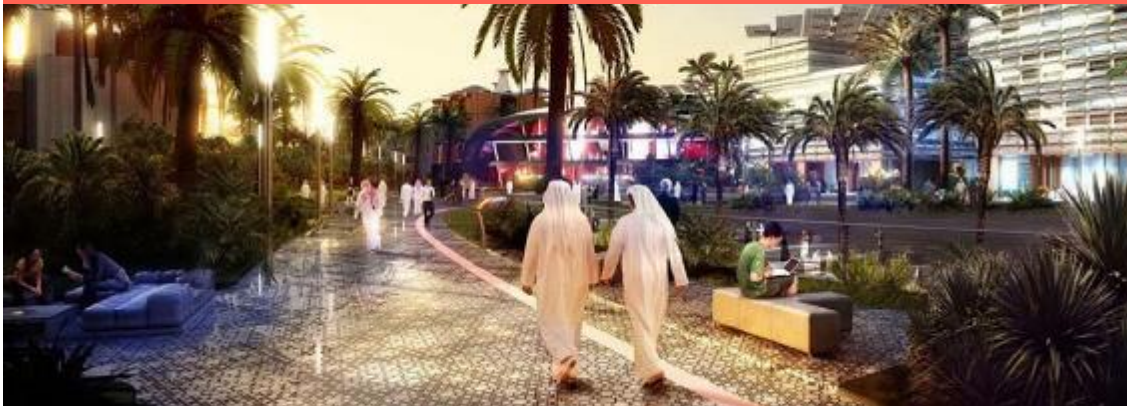
Major Tourist Attraction

Source: Desk Research, vision 2021.ae

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Selected projects:

The UAE is active in implementing sustainable showcase solutions for future growth.

Masdar City in Abu Dhabi

- > Masdar City is a development reliant on solar energy and other renewable energy sources and is the headquarters of the International Renewable Energy Agency (IRENA).
- > The City is designed to be a hub for clean-tech companies. Masdar uses clean energy generated on site from rooftop solar technology and one of the largest photovoltaic installations in the Middle East; powered by a 22-hectare (54-acre) field of 87,777 solar panels with additional panels on roofs. There are no light switches or water taps in the city. Movement sensors control lighting and water to cut electricity and water consumption by 51% and 55% respectively.

Source: Desk Research, Trade Sites

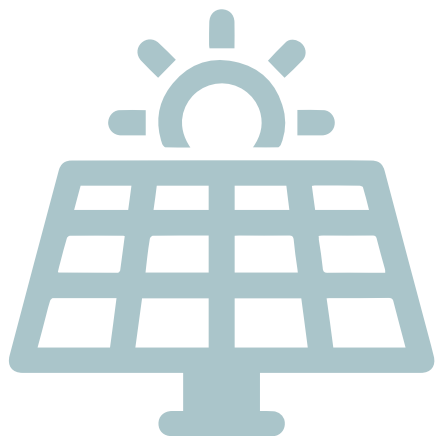
Dubai Sustainable City

- > Dubai Sustainable City is the first operational net zero energy city in Dubai, modelled to become a showcase for sustainable living, work, education and recreation.
- > The Sustainable City provides shaded car parks throughout covered with solar panels. These panels supply the electricity needed to power street lighting, electric vehicle charging stations, and the urban farm, helping the City achieve net zero service charge.
- > Apart from periphery roads and car parking areas, the development is designed as a car-free site. Transportation system within the City is operated through communal electric buggies.

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Selected projects:

The UAE is active in implementing sustainable solutions for future growth.



Expansion of Solar Power

While being a major oil producing country, the UAE has taken steps to introduce solar power on a large scale.

Although solar power still accounts for a small portion of energy production, the country is planning to generate the vast majority of its electrical energy from solar and nuclear sources.

Source: Desk Research, Trade Sites

Sweihan Solar Power Project – Abu Dhabi

Abu Dhabi opened the Sweihan Solar Power Project in 2019, aimed at helping to preserve the Emirate's natural gas resources.

- > The project aims to reduce Abu Dhabi's CO2 emissions by 1 million metric tons; the equivalent of removing 200,000 cars off the roads.
- > The plant's capacity enough to cover the demand of 90,000 people.



Dubai Solar Park



School Roof – Dubai



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A recently launched initiative is Abu Dhabi's 'Single use plastic policy'.

The policy has 4 main objectives:

- 1) Reducing the use of single-use plastic (and non-plastic) materials and declaring the Emirate of Abu Dhabi free of single-use plastic bags in 2021.
- 2) Reducing the amount of plastic material that enters the environment.
- 3) Declaring Abu Dhabi Government free of single-use plastics by the end of 2021.
- 4) Changing public behaviour towards more sustainable practices.

"... there are (also) initiatives...such as the Abu Dhabi initiative, with their groceries more than a year working on them (on) the basis that from the year 2020 there will be no use of plastic."

Major Events

"I heard that Abu Dhabi took the decision to limit the consumption of plastic bags."

Large Events Organiser

Source: Desk Research, ead.gov.ae



- > With a strict timeline for the policy of just two years; 2020 to 2022, this appears to be one of the first initiatives that is 100% population facing, engaging and imposed
- > Some industry professionals have registered this

The policy will focus on the 16 items that constitute up to 70% of marine litter (according to international studies):

1	Plastic bags	9	Cotton buds
2	Cups and lids	10	Crisp packets
3	Cutlery	11	Sweet wrappers
4	Plates	12	Cigarette butts
5	Straws	13	Wet wipes and sanitary items
6	Stirrers	14	Sticks for balloons
7	Food containers	15	Balloons
8	Plastic bottles	16	Microbeads

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The state is very determined the *'single use plastics'* initiative is measured and actively drives the existing waste policy target; 75% municipal solid waste diverted from landfill by 2021.

The short-term focus is on eight priority single use plastic items with clear behavioural or sustainable alternatives:



Bags

From incentives to fees to full ban - Specifications for multiple use bags, the possibility of providing a bag-for-life.

The Emirate of Abu Dhabi will be also declared free of single-use plastic bags by 2021.



Other single use plastic items

Including cups and lids, cutlery, plates, straws, and food containers.

A fee will be introduced to motivate consumers to change behaviour and use reusable alternatives instead.

They will be provided only if requested and will not be distributed free of charge to consumers.



Single-use plastic bottles

A bottle return scheme will be introduced in retail outlets based on the principles of Extended Producer Responsibility, thereby establishing a closed loop system for plastic bottles by 2021.

Indicators and Targets

% of single-use Plastic Bags

The percentage of reduction in the single-use of plastic bags for each customer, consumed in the Emirate of Abu Dhabi

Target: 100% reduction of these bags from the baseline of 2019.

Rationale: This indicator is a proxy indicator for other types of target material in this policy, calculated through data collected from major retail outlets providing data on bag types consumed - In cooperation with the Department of Economic Development.

% of Plastic Waste collected

The percentage of the amount of plastic waste collected through a plastic bottle return scheme to total consumption

Target: A 50% collection of this material in 2021 from 2019 baseline.

Rationale: Measures the amount of plastic waste collected through the return scheme.

There is no baseline for this indicator yet.

% of Government Entities

The percentage of government entities that ban single-use plastics in their operations in the Emirate of Abu Dhabi

Target: 100% of government entities in the Emirate of Abu Dhabi.



Source: Desk Research, ead.gov.ae

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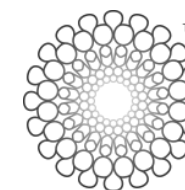
Sport and events in the UAE

3

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The UAE is a destination hotspot for tourism in the Middle East; hosting a growing number of global and international as well as local sport and cultural events. 2020's planned crown jewel being World Expo Dubai 2020.

World Expo Dubai



إكسبو 2020
دبي، الإمارات العربية المتحدة
DUBAI, UNITED ARAB EMIRATES

Dubai World Cup



F1 Abu Dhabi Grand Prix



Dubai Duty Free Tennis Championships



Special Olympics



Race to Dubai



Red Bull Air Race



AFC Asian Cup



Emirates Airline Rugby Sevens

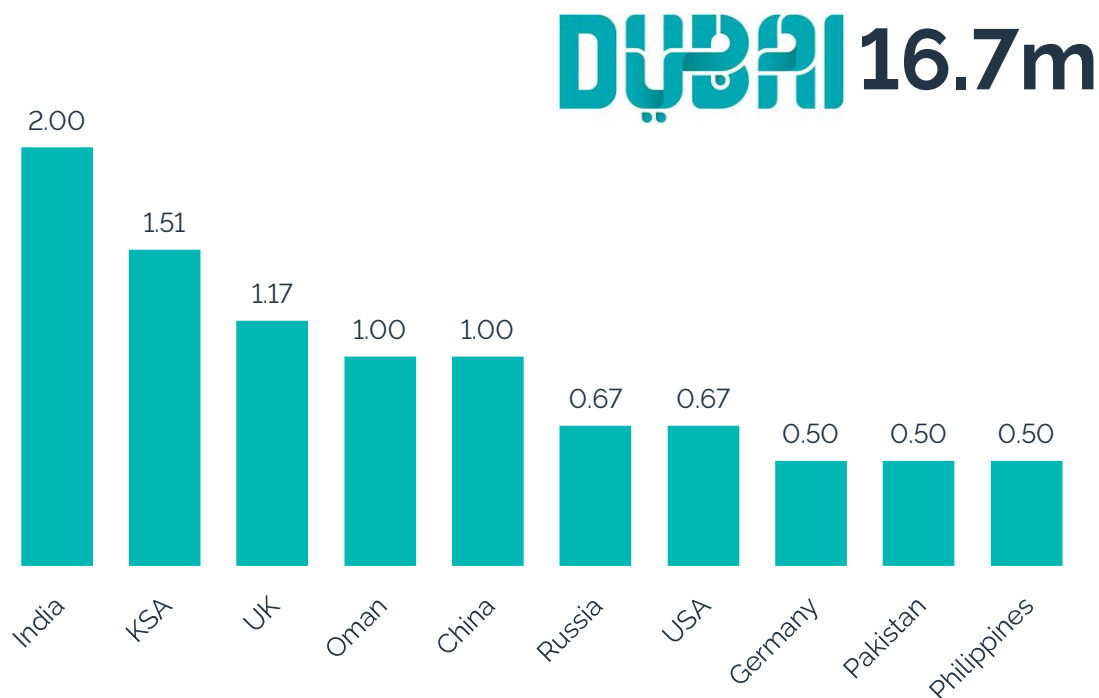


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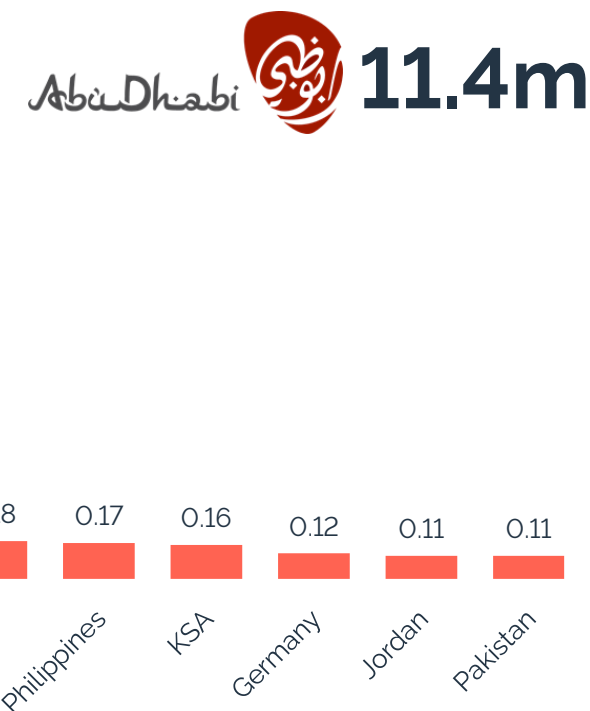
The UAE and Dubai, in particular, has established itself as a leading tourism destination – encompassing sun, culture, sport, retail and entertainment.

- > India is the key source market for visitors in the largest Emirates of Abu Dhabi and Dubai

Number of Visitors 2019, Dubai (Visitors. millions)



Abu Dhabi (Hotel Guests, millions)



Source: * Airtrax – World Airline Awards

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2019 was a bumper year for the UAE and sporting events; hosting both the Special Olympics and the AFC Asian World Cup and subsequently driving spectator numbers to new highs.

	Event	Sport	Emirate	Local / International / Global	Attendee Numbers
1	AFC Asian Cup	Football	Abu Dhabi	International	702,351
2	Special Olympics	Multiple	Abu Dhabi	Global	500,000
3	FIFA Club World Cup	Football	Abu Dhabi	Global	121,419
4	Dubai Rugby 7s	Rugby	Dubai	Global	100,000
5	F1 Etihad Airways Abu Dhabi Grand Prix	Motor racing	Abu Dhabi	Global	90,000
6	Abu Dhabi HSBC Championship presented by EGA	Golf	Abu Dhabi	Global	76,915
7	Dubai World Cup	Horse racing	Dubai	Global	72,000
8	Omega Dubai Desert Classic	Golf	Dubai	Global	62,700
9	DP World Tour Championship	Golf	Dubai	Global	60,000
10	Dubai Duty Free Tennis Championships	Tennis	Dubai	Global	54,000
11	Red Bull Air Race Abu Dhabi	Air racing	Abu Dhabi	Global	50,000
12	Egyptian Super Cup	Football	Abu Dhabi	International	25,000

Source: ADSC, YouGov Sport, Desk Research, Event Sites

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A series of annual events and destinations draw large numbers both locally and from around the world.

	Event	Emirate	Local / International / Global	Attendee Numbers
1	Dubai Shopping Festival	Dubai	International	10,000,000
2	Global Village	Dubai	International	7,000,000
3	Dubai Summer Surprises	Dubai	International	6,000,000
4	New Year's celebrations around UAE	Dubai	Local	2,000,000
5	UAE National Day celebrations	Dubai	Local	500,000
6	Dubai Food Festival	Dubai	Local	500,000
7	La Perle by Dragone	Dubai	Local	150,000
8	GITEX Shopper & Technology Week	Dubai	Local	100,000
9	Middle East Film and Comic Con	Dubai	International	45,000
10	Emirates Airline Festival of Literature	Dubai	Local	44,000
11	Dubai Jazz Festival	Dubai	Local	35,000

Source: YouGov Sport, Desk Research, Event Sites

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(1) All of which are hosted in stadia, arenas and centres that range in capacity, age and sustainable features.

	Venue	Emirate	Capacity	Built in	Main event	Sustainability features
1	Expo 2020 Site	Dubai	300,000	2020	Expo 2020	Clean renewable energy, smart water monitoring, convert air moisture into water, 75% shade through canopies, public transport to venue, sustainable building materials, reduce waste, recycle, sustainability awareness programmes
2	Meydan Race Course	Dubai	60,000	2010	Horse Racing	
3	Dubai Autodrome	Dubai	55,000	2004	Formula 4	Solar power
4	Yas Marina Circuit	Abu Dhabi	50,000	2009	Formula 1	Silt curtain to curb water pollution, mangrove forest around the venue, Solar panels, water retaining soil used to save water
5	The Sevens Rugby Stadium	Dubai	50,000	2008	7s Rugby	Water saving taps, recycling bins
6	Zayed Sports City Stadium	Abu Dhabi	43,206	1979	Cricket	Intelligent lighting to reduce electricity consumption, efficient AC units
7	Al Jazira stadium	Abu Dhabi	42,056	2009	Football - UAE Pro League	
8	Sharjah Cricket stadium	Sharjah	27,000	1982	Cricket	
9	Du Arena	Abu Dhabi	25,000	2009	Music Concerts	
10	Hazza Bin Zayed Stadium	Al Ain	22,717	2014	Football - UAE Pro League	Sustainable materials used for stadium construction, waster recycling, palm bowl façade acts as a shading device to reflect solar radiation to reduce heat
11	Dubai Cricket Stadium	Dubai	21,000	2009	Cricket	Solar power
12	World Trade Centre	Dubai	20,000	1979	Exhibitions	3,000 photovoltaic solar panels on the roof, LED lights, Hybrid cars charging stations, water saving taps,
13	Sheikh Zayed Cricket stadium	Abu Dhabi	20,000	2004	Cricket	
14	Sharjah stadium	Sharjah	18,000	1982	Football - UAE Pro League	

Source: YouGov Sport, Desk Research, Event Sites

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⁽²⁾All of which are hosted in stadia, arenas and centres that range in capacity, age and sustainable features.

	Venue	Location	Capacity	Built in	Main event held	Sustainability features
15	Etihad Arena	Abu Dhabi	18,000	2020 (Opening delayed due to COVID)	Music Concerts	
16	Coca-Cola Arena	Dubai	17,000	2019	Music Concerts	Humidity capture A/C units, Light and water sensors, LED lights, organic composter
17	Sheikh Khalifa International Stadium	Al Ain	16,000	1996	Football - UAE Pro League	
18	Al Maktoum Stadium	Dubai	15,058	1980	Football - UAE Pro League	
19	Dubai Media City Amphitheatre	Dubai	15,000	2001	Music Concerts	
20	Hamdan Sports Complex	Dubai	15,000	2010	Swimming	Solar energy for pool and shower heating, solar lights in parking area, motion sensor lighting system, pool and AC water reused for irrigation of surrounding area, recycling waste and LED light used across the complex
21	Tahnoon B.M. Stadium	Al Ain	15,000	1987	Football	
22	Al Nahyan Stadium	Abu Dhabi	11,456	1995	Football - UAE Pro League	
23	Fujairah Stadium	Fujairah	10,645	1968	Football - UAE Pro League	
24	Khalid bin Event Organiser Stadium	Sharjah	10,000	1977	Football - UAE Pro League	
25	Baniyas Stadium	Abu Dhabi	10,000	1982	Football - UAE Pro League	
26	Dibba Sport Stadium	Fujairah	9,000	Under construction	Football	
27	Abu Dhabi National Exhibition Centre	Abu Dhabi	6,000	2007	Exhibitions	Waste recycling, waste reduction, solar panels
28	Dubai Tennis Stadium	Dubai	5,000	1991	Dubai Tennis Championship	

Source: YouGov Sport, Desk Research, Event Sites

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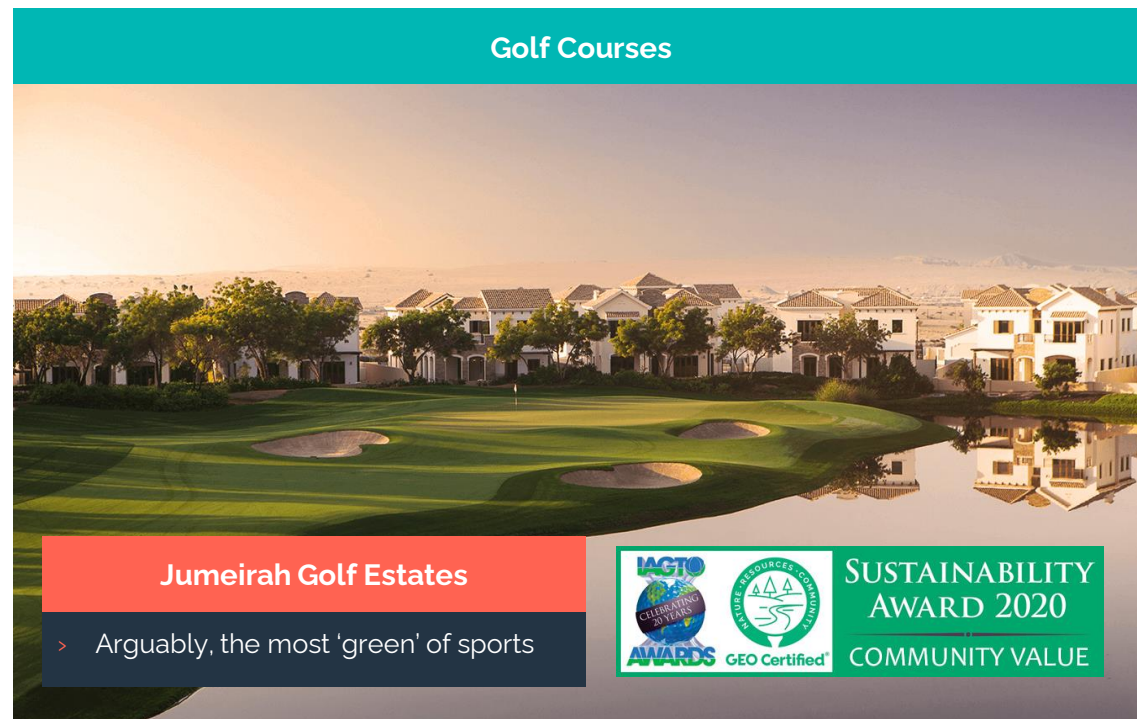
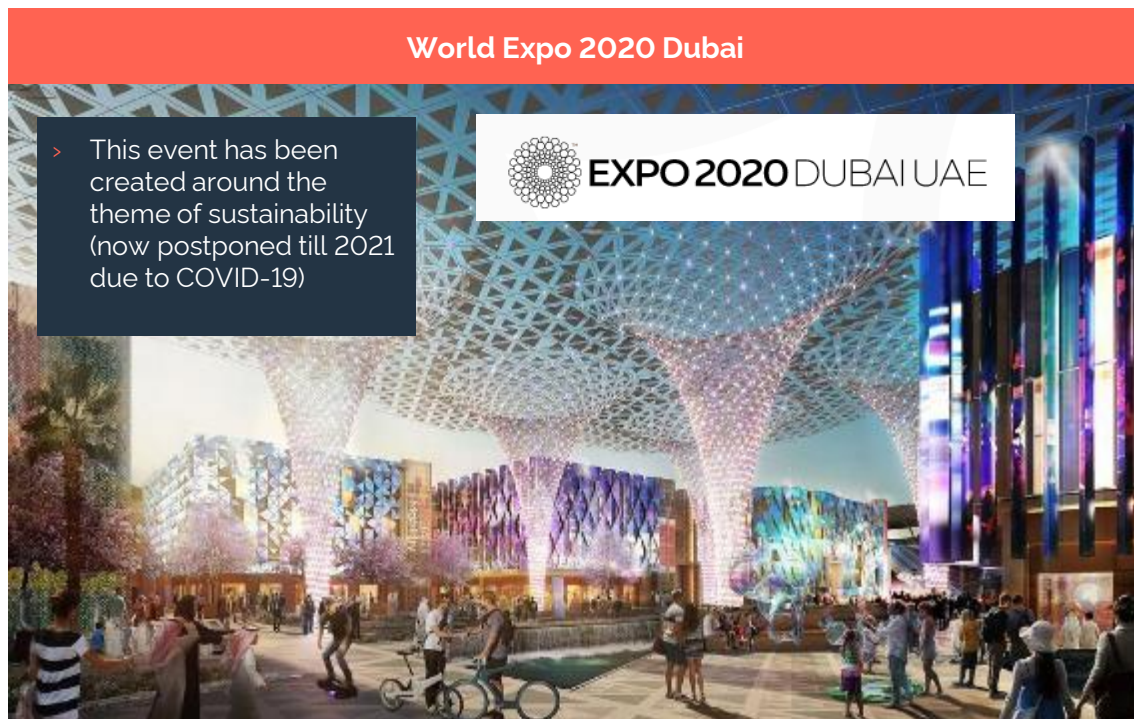
Sustainability in sport and events in the UAE

4

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Goals for sustainable development are defined at a national level in the UAE; with some high profile initiatives as showcases. As a global destination for sport and events, we looked to understand the how this has filtered down.

- > What becomes apparent is that there appears to be little by way of publicised information across the majority of events or venues, even Rights Holders.
- > However, two initiatives stand out: World Expo 2020 and Golf Courses



At an industry level, there is high awareness and pride in the UAE's positioning as a leader in sustainability. Translation in to commercial environment is a more of a challenge to apply.

Source: Desk Research, Event Sites

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Expo 2020 Dubai is a first for the Arab region and in keeping with national and international drivers, sustainability is a focus.



Expo 2020 Dubai's four key sustainability objectives include:

- | | |
|---|---|
| 1 | Leaving a legacy of sustainable infrastructure and future oriented sustainable practices |
| 2 | Catalysing sustainability efforts in Dubai and the UAE |
| 3 | Increasing public awareness by engaging society on sustainability principles and sustainable living |
| 4 | Developing sustainability solutions that are scalable extending their benefits to the wider economy |

OPPORTUNITY



MOBILITY



SUSTAINABILITY



Source: Desk Research, Expo2020Dubai.com

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Amongst the harder, ecological objectives of Expo 2020 is event certification recognition.



إكسبو 2020
دبي، الإمارات العربية المتحدة
DUBAI, UNITED ARAB EMIRATES

SUSTAINABLE OPERATIONS AND REPORTING

OBJECTIVE: Communicate sustainability progress and achievements in a transparent and stakeholder-responsive way

KPIs

Achieve ISO 20121 Sustainable Event Management Certification

2019 PERFORMANCE
On track for event time



Publish sustainability reports based on internationally recognised guidelines

2019 PERFORMANCE
Publication of the 2018 Expo 2020 GRI Sustainability Report



SUSTAINABLE CERTIFICATION

OBJECTIVE: Demonstrate added value through sustainability certification of both horizontal and vertical infrastructure

KPIs

Achieve LEED Gold for Expo building projects

2019 PERFORMANCE
On track for all Expo permanent buildings



Achieve CEEQUAL Excellent Certification for Expo infrastructure projects

2019 PERFORMANCE
On track for Expo permanent infrastructure



Source: Desk Research, Expo2020Dubai.com

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The GEO Foundation is the international not-for-profit organisation dedicated to helping golf deliver and be recognised for a positive impact for people and nature.

Programmes connect the efforts and knowledge of the global golf community and recognize those who are a part of the sport's sustainability movement:

OnCourse programme
OnCourse Facilities Online programme to help clubs get more from sustainability
OnCourse Tournaments guidance, mentoring and communications for golf tournaments
OnCourse Developments Guidance and mentoring with credible assurance for golf developments

> Currently, 9 golf courses across the UAE are engaged with the programme



Source: Desk Research, Sustainable.golf

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Three UAE (Dubai) golf courses have gained GEO accreditation, reflecting the combined and connected efforts of both the sport and the Emirate.



Emirates Golf Club



Dubai Creek Golf & Yacht Club



Jumeirah Golf Estates



GEO Certified® is **golf's** internationally **accredited** ecolabel which is awarded based on the **club** demonstrating a commitment to continual improvement in six main areas of sustainability; water, nature, energy, supply chain, pollution control and community.

Source: Desk Research, Sustainable.golf

Selected highlights of Jumeirah Golf Estates GEO accreditation

20% reduction in irrigation consumption over the past 3 years through auditing and best practices.



Recycled water used for cleaning of workshop facilities and golf course maintenance equipment.



Commitment to environmental sustainability by enhancing the conservation and protection of desert habitats, with their wildlife and vegetation.



Creation of habitats for migratory and native bird species who seek food, shelter and sanctuary.



Community engagement programmes through various sporting initiatives; mass participation walks, yoga, sports days, cycling races.



Use of locally sourced materials from native sand used in bunkers and locally recycled plastic used for the production of water towers.



Commitment to protecting native species through the use of native grass in unmaintained rough areas the planting of the native Ghaf Tree (the national tree of the UAE).



Dubai Golf encourages colleague development through our 'Service Culture' education and training programme.



Electric car charging points provided at Emirates Golf Club, Dubai Creek Golf & Yacht Club and Jumeirah Golf Estates.



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Leading by sustainable example in sport & events:

In line with our findings, initiatives within the industry do not appear to be high profile.

NATIONAL INITIATIVES

'There are (also) initiatives ... such as the Abu Dhabi initiative, with their groceries more than a year working on them (on) the basis that from the year 2020 there will be no use of plastic... The Dubai Sustainability Initiative, The UAE plan, prepared by the President of the State'

Major Events

ON THE AGENDA

'There is Abu Dhabi Initiative. At the beginning of 2021, they will announce that Abu Dhabi is single use plastic free.... There is also an initiative in Dubai airport to increase recycling and eliminate single use material' *Sport Ministry*

SUSTAINABLE CITY

'The Emirates directly implement any idea that shows up. The reason of their success is their management and their understanding. For example, Masdar, that is saving a lot of money for the government' *Major Tourist Attraction*

ENVIRONMENTAL MANAGEMENT COMPANY

'There's Bee'ah company that implements sustainability here. Their success goes back to their attention and dedication in it. They work in recycling, cleaning the beaches of garbage. They are focused on garbage right now'

Tourism Government

'I think Dubai Sports Authority. They organised an event a few years ago, and it was sustainability approved'

Large Events Organiser

SPORT EXAMPLE

'There are some companies but I do not remember names. I see on billboards ads that companies use sustainable energy... and e-ticket. However, I do not remember any companies that focus or completely highlight the fact that they implement sustainability in everything' *Event Organiser*

'Like tennis championships, horse riding championships, also one of the biggest known events, "The expo", We see it in solar waves used in lighting the place, in containers that keep food and drink, instead of using plastic we can use paper. We can see it in transportation techniques for players or people or tourists, buses and cars are from Tesla '

Tourism



- > The UAE is known to be an icon for sustainability, yet there appears little cohesive knowledge within industry
- > Masdar City was the most cited example of success

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Leading by sustainable - examples from across the UAE:

The state, tourism and hospitality industries in the UAE are visible implementers of sustainable measures.

'On a large scale in tourism there are activities... cars that are electric, and in airports they use them instead of exhaust and carbon... and plastic in restaurants, they replace it with healthy things, using natural materials. Also, the state encourages public transportation'

Major Events

'Electric cars, or green cars that don't work on petrol and don't pollute. When tourists see that they will feel like the government is taking care of them. The same goes for water filters. Also... in restaurants and they tell you they use glass bottles instead of plastic. In some beaches there are solar panel to charge your phones and Wi-Fi... They put up a sign that says this is clean energy'

Major Tourist Attraction

'The car making industry... they are trying to reduce the emission of CO2 the best way possible, and they have standards and regulations on a global scale and it should be the same for events and sports, there should be laws for them to implement sustainability'

Tourism Government

'It is used in streets. In lighting, waste containers that we can see in all public streets.'

Tourism



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Sustainable initiatives in practice:

Active sustainability remits and practices are largely in their infancy within the industry; most interviewees had none.

"We only reduce the use of paper and replace it with electronic messages and emails to preserve the environment and save money."

Major Tourist Attraction

"Reducing or limiting printing and books. During the past year and these events, we stopped the topic of books and were satisfied with the presence of electronic text messages that reach the goal."

Major Events

"We have some sustainability remits. Recently, there has been more awareness regarding energy, anything that we can use alternative energy for, we use it."

We have to improve a lot in other areas like disposables for serving food, the furniture uses for our guests, for us and for our meeting."

Event Organiser

'Recycling, reducing the use of paper and plastic'

Tourism Government

"We have the containers that separate the garbage: containers for paper waste, for plastic waste and for metal waste. We are trying our best that the company decreases the use of single-use plastic.. We are trying also as much as we can to use technology, anything that is via the internet, instead of using printed papers."

Tourism

> Is the private sector under supported?

Positioned as the first ever 100% environmentally sustainable rock concert with a net zero carbon footprint

'In 2019, we hosted a music concert, this included zero carbon emissions and all the electricity and sound system and all the concert was made with natural energy sources.



It is part of our CSR, and especially during this period you feel like climate change is something noticeable.

After some concerts or sports events, we have waste sorting... it's not the best, but it's the minimum we can do'

Large Events Venue

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Importance of sustainability:

However, as a concept, sustainability is considered to be of high importance amongst sport and event professionals.

- > Most of those interviewed had views on how and where it should be applied
- > Single use plastic was the most oft quoted challenge to be addressed

"All areas are important, using eco-friendly transportation, recycling, avoiding the use of plastic and reducing the use of paper, using solar energy.... It's all the same, lighting in stadiums could be powered by solar energy, restaurants can stop using plastics and paper and use recyclable material instead."

Tourism Government

"When it comes to sports, you need a big amount of water for pools and filters, they search for the most eco-friendly material and use it. There is also afforestation all around the stadium, using solar or wind energy for lighting, reuse water, reuse furniture, eco-friendly advertising and restaurants should reduce using one-use plastics."

Major Tourist Attraction

"... in sports, in events ... competitions and matches there are numbers of terrible people, waste consumption is very much. We have thought ..how we may be sustainable in the stadium, in swimming pools, if we replace all this as solar power."

Major Events

"We have to focus on public transport, the use of solar panels, the infrastructure having features the construction of the stadium, waste control and disposal, food and beverage and the workforce."

Tourism Governing Body

"Sustainability is important in all fields, because, especially in tourism and sports, we are dealing with big organizations and events, like that. So, we can spread awareness in a bigger way. Every time a person is aware, the more we were able to spread awareness to a big amount of people, and this subject helps us in society."

Tourism

"In events, you are forced to deal with the world in small details.... Think that in a soccer game, that 10 or 11,000 people are watching, minimum you can use ... sustainable energy sources or natural energy sources, or recyclable materials."

Large Events Venue

"... we are talking about things like food and beverage, waste management, the workforce, the construction of the stadium."

Sport Ministry

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Relevance of event size:

Sustainability is considered important no matter the size of event. What is apparent is the recognition of the need to spread awareness.



"For me, it is important regardless ... I am talking about the concerts or sports events, imagine the number of (re)sources you can keep (rather than dispose of)."

Large Events Venue

"... sustainability measures is regardless of the event size. Having more than one small event is similar to having a big one. If there were important people, athletes and actors and it was highlighted that they used alternative energy ... for impact on awareness ... Then yes of course the size of the event makes a difference."

Event Organiser

"... the most important thing is for the message to reach people and for the environment to become clean to ensure a future. But the size of the event doesn't matter..."

Tourism Government

"No, the size of the event is not important. It does not matter if the event was small or big."

Large Events Organiser

".. the important thing is to spread awareness."

Tourism Government

"Sustainability could be applied in both small and big events. As I told you before, awareness is very important. The more we have awareness, the more we can spread the good ideas across generations, and the more we are able to expand the idea. But, of course, the more the event was big, the more number of people receive my voice, and I can train them, the better it is."

Tourism



"People will take a role model of the football player or the athletes, so anything that is highlighted under something else, people will do it'."

Event Organiser



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Accreditation and measurement:

Where recognised, there is some potential confusion of ISO standards. However, when explained, the general consensus is positive, as is the openness towards measurement.

ISO 20121

"The Dubai police received this certificate last year for implementing sustainability. There was an event for disabled people." **Sport Ministry**

"Yes, I know that Dubai Sports Council, Dubai Police Force, Dubai Cultural Council and Dubai Union of Transportation received ISO certification." **Tourism Governing Body**

"I think Germany got ISO in 2016. It was in tourism. I have no idea regarding the field of sports, but I know the Dubai Tourism Police obtained the ISO. And in the field of health as well, in 2016." **Major Events**

"We have Expo, tennis championship; we have horse riding championship, used in speedboats championships etc...." **Tourism**

"I heard about ISO. ISO is available for everything in the world. But this one, no, I did not hear about it."

Tourism Government

"I think Dubai Sports Authority. They organised an even a few years ago, and it was sustainability approved."

Large Events Organiser

MEASUREMENT

"There has to be measurement for it in all areas. It could be measured by doing an evaluation of the level of success of each organisation in achieving sustainability.

I think benchmarks should differ according to the problem found in the country." **Tourism Governing Body**

"There could be an award. There is already an award, 'The Emirate Award for Urban Sustainability, for the best sustainable building or facility.

The benchmarks are supposed to be constant without being different from a country to another." **Sport Ministry**

"There are a lot of measures that can be used, like economic measurements. As far as I know, the most widely used is called green management. They use it in many countries, not only in Emirates. Its name is Green Economy Index." **Tourism**

"I believe that it is difficult ... Are there going to be standards that they will impose on me that I must follow at my events? It is difficult. I am thinking business wise. Today I want to live, and I have employees, so I want to make more profit. Honestly, I cannot implement sustainability well in my business and I am ashamed about."

Event Organiser



- > No overall agreement on benchmark alignment or measurement framework, which is vague
- > One dissenter outlines the pressures of the commercial reality

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Challenges:

Agreement across most industry professionals is that there is an overarching lack of awareness about sustainability amongst the population. Whilst companies still need to run commercial operations.

AWARENESS

"Yes of course, because the awareness about sustainability is still not found in the majority of people and they do not know its importance."

Sport Ministry

"Honestly, in our Arab world, when you converse with someone, you realise that he are not well knowledgeable."

Large Events Organiser

"From my point of view, the first thing, the basic one, is the awareness about this subject...it means that people have personal initiative, in their house they should do it, the case turns in to human behaviour."

Large Events Venue

COMMERCIAL

"I cannot say which is easy and which is tough. Today, if I want to speak logistically, sustainability must be available in the products that I deal with. But, I will not do this because it is very expensive."

Large Events Venue

"Today, if I want to speak logistically, sustainability must be available in the products that I deal with. But, I will not do this because it is very expensive ..."

Honestly, in our work, it is not a priority, even though I personally believe that it should be."

Event Organiser

"Economically this issue could be a bit difficult, its costs is a little bit difficult, but when this turns in to human behaviour, and after that you can talk about economic factors."

Large Events Venue

"The catering companies are not very sustainable and I think it is because of profit. For example, the plastic plate might cost 1 Dirham, while a wooden plate might cost 5 Dirhams."

Event Organiser

"The tough ones are using solar energy because it's expensive and produces less power that the traditional source of electricity. Also, eco-friendly transport because it depends on the event's budget."

Tourism Government

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Conclusions





.. I start to benefit, (when) the company that I buy products from starts to implement sustainability in its products and then I will use them."

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Conclusions

A sustainable future is a high profile and priority strategy within the UAE:

- > High levels of awareness of sustainability in industry
 - *Evident pride in the UAE leading the way in terms of development in the Middle East*
- > However, outside the government supported events, sustainable initiatives appear more tactical and small scale
 - *Little evidence of publicised strategies or achievements*
- > Single-use plastic is high priority
 - *State level – Abu Dhabi initiative*
 - *Industry acknowledgment*
- > A lack of public awareness and commercial viability are the main challenges faced
 - *A highly diversified population creates harder to reach audiences*
 - *The over-riding aim of any event is profitability, currently, implementing sustainable initiatives is cost prohibitive to some*

Recommendations

As the showcase country within the Middle East for sustainability comes great responsibility.

- > Tackle what you can control - Industry should play to it's strengths; engaged audiences, when faced with commercial restrictions.
 - > *Awareness (and knowledge) can be developed more effectively via communications and messaging around process, education and behaviour at any event*
 - > *Digital marketing and ticketing, encouraging public transport, waste management*
- > Replacing Single-use plastic will become easier as the Abu-Dhabi initiative rolls out – this is likely to cross over to Dubai at least
 - > *A situation that will encourage (push) more commercially attractive replacements which all should be encouraged to employ*

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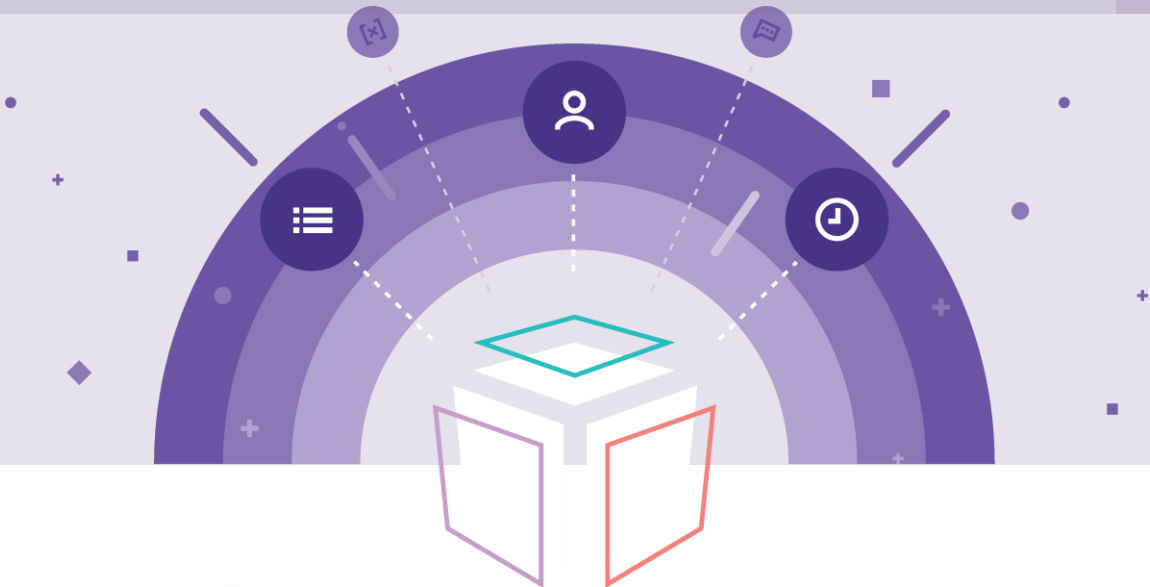
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