

YouGov® Sport

MENA

Sustainability in Sports, Events & Tourism in MENA



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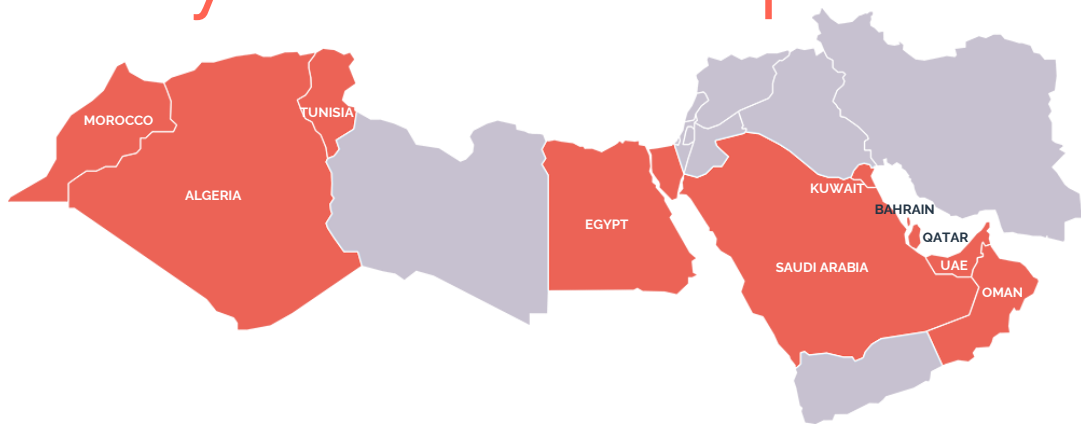
Background & research methodology



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MENA

Key Areas of Exploration

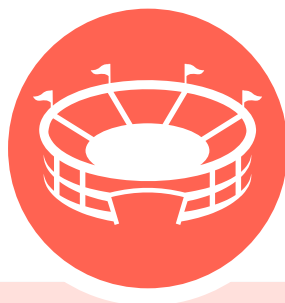


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in the Middle East and North Africa.

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



Sustainability and what it means across the region



Sports, events & tourism across the region



Sustainability within sports, events & tourism

MENA

Methodology

Research for this project was conducted in 2 phases:

IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews sports and events industry executives
- > Interview length 15 minutes
- > 70 Industry professionals interviewed across the 10 MENA countries reviewed

DESK RESEARCH

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

MENA

MENA Country Overviews

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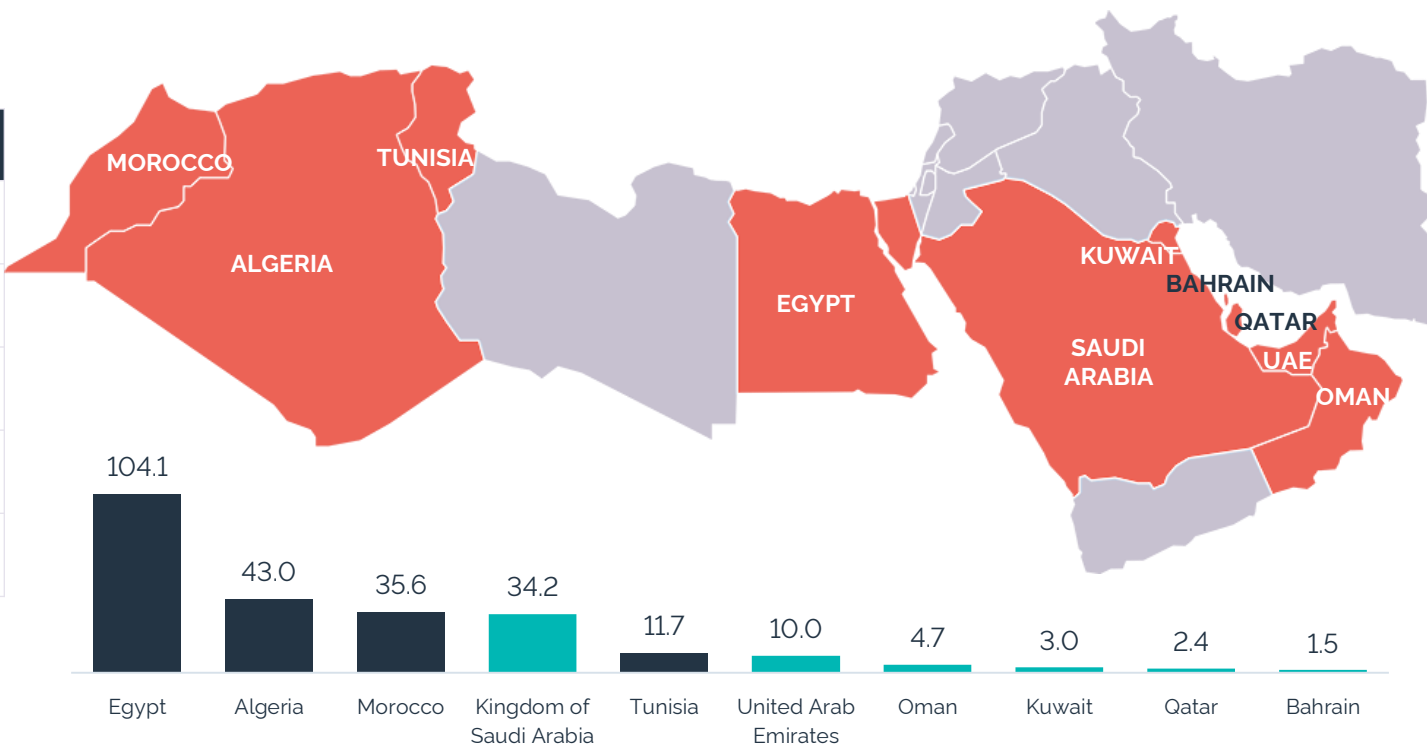
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Middle East & North Africa (MENA)

10 Countries covered

A vast area spanning three continents, the MENA region comprises countries that hold many resource and cultural similarities. Of the countries covered within this report, the point of greatest note is the comparatively larger populations in the North African area vs those in the Middle East.

North Africa	
Country	Population in millions
Egypt	104.1
Algeria	43.0
Morocco	35.6
Tunisia	11.7



Gulf Cooperation Council (GCC)	
Country	Population in millions
Kingdom of Saudi Arabia	34.2
United Arab Emirates	10.0
Oman	4.7
Kuwait	3.0
Qatar	2.4
Bahrain	1.5

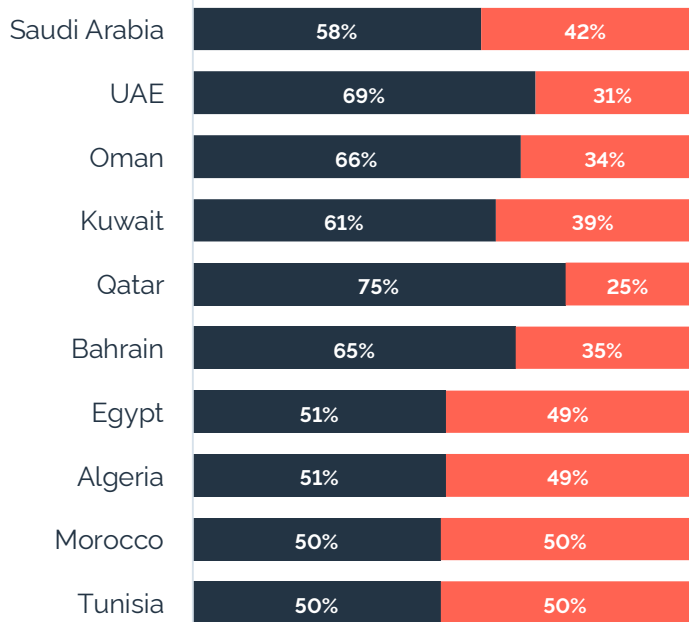
Source: Desk Research

MENA

Its people

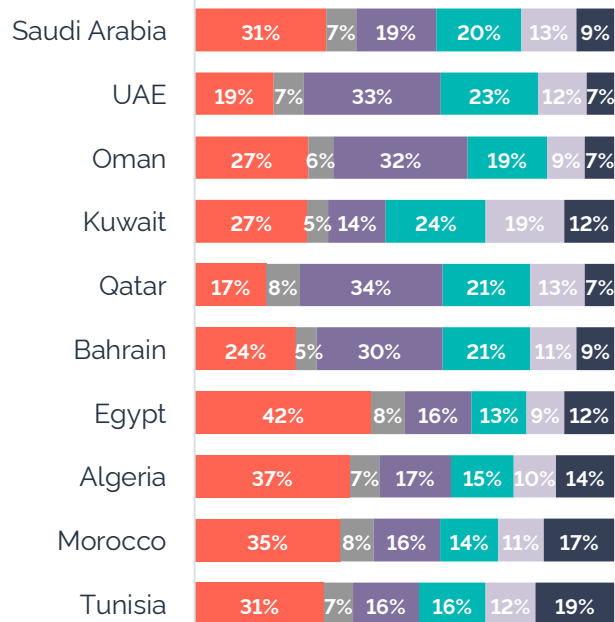
Young, expat and male are characteristics of GCC countries, the exceptions being Saudi Arabia and Oman where locals are in the majority. With still very young populations, North African countries are essentially local and this is therefore reflected in a more even gender balance.

GENDER



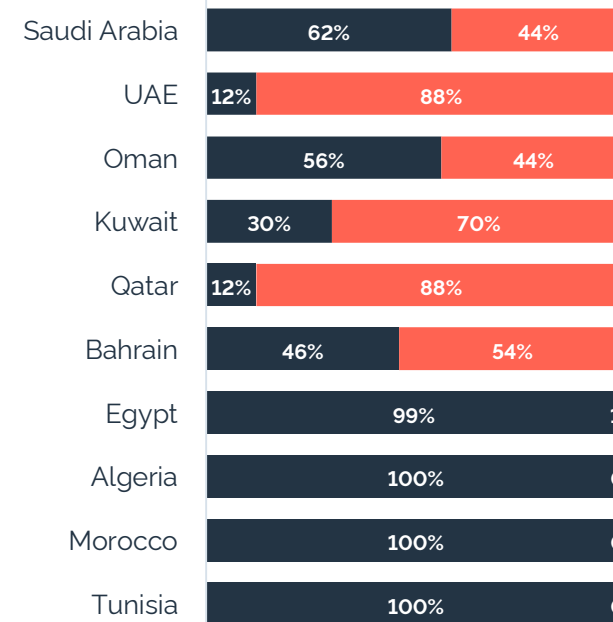
■ Male ■ Female

AGE



■ Less than 18 ■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

LOCAL VS EXPAT POPULATION



■ Local ■ Expat

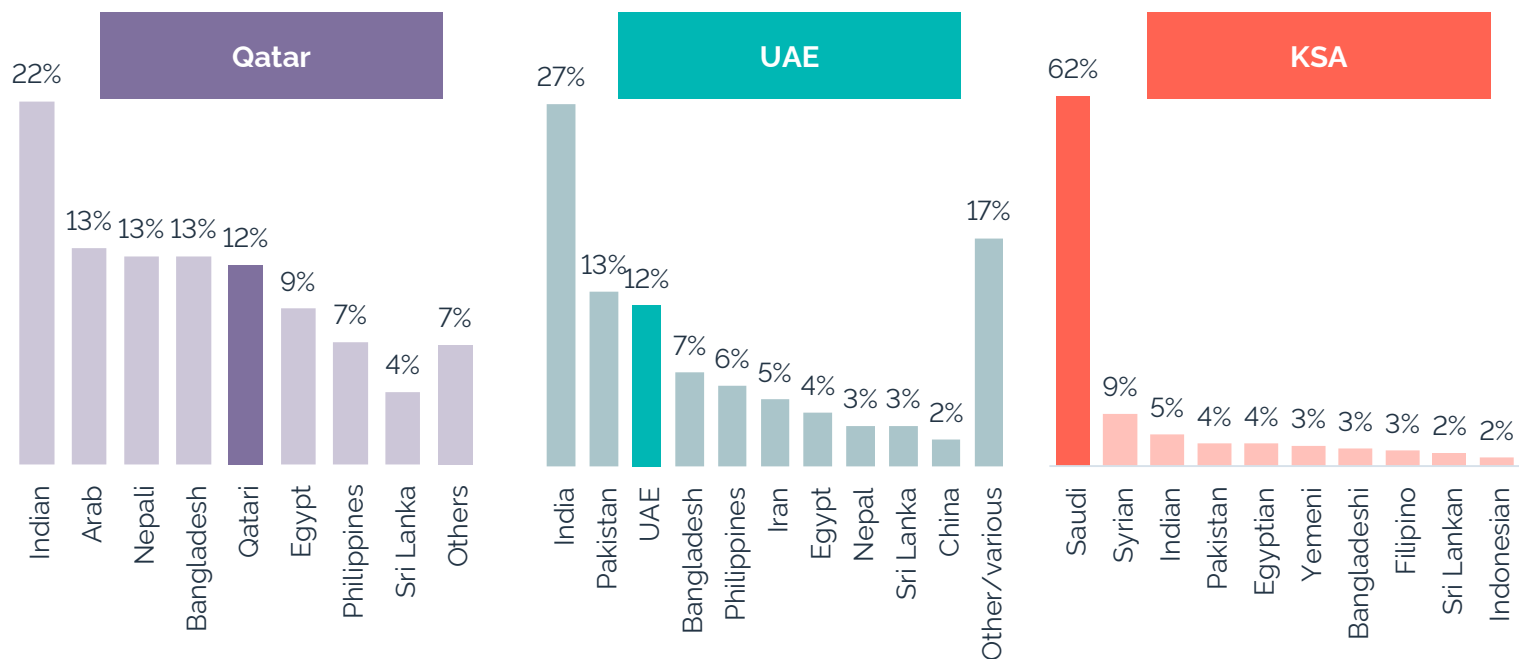
Source: Desk Research, YouGov Panel

MENA

Its people

GCC countries tend to be large workforce importers, many of which are male and therefore account for the apparent gender imbalances. The polar opposite situation is the case in North Africa where employment is a challenge, particularly so for women and the increasing young population entering workforce age.

POPULATION BY NATIONALITY (SELECTED COUNTRIES)

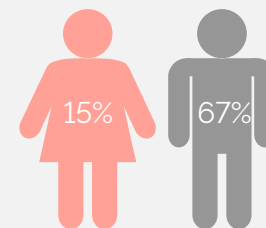


Source: Desk Research, YouGov Panel

EMPLOYMENT (SELECTED COUNTRIES)

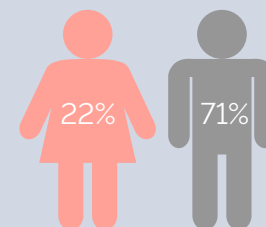
ALGERIA

EMPLOYED
41%
(2019)



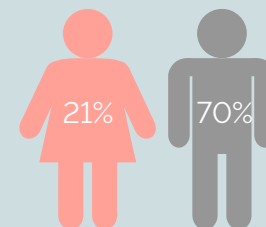
EGYPT

EMPLOYED
46%
(2019)



MOROCCO

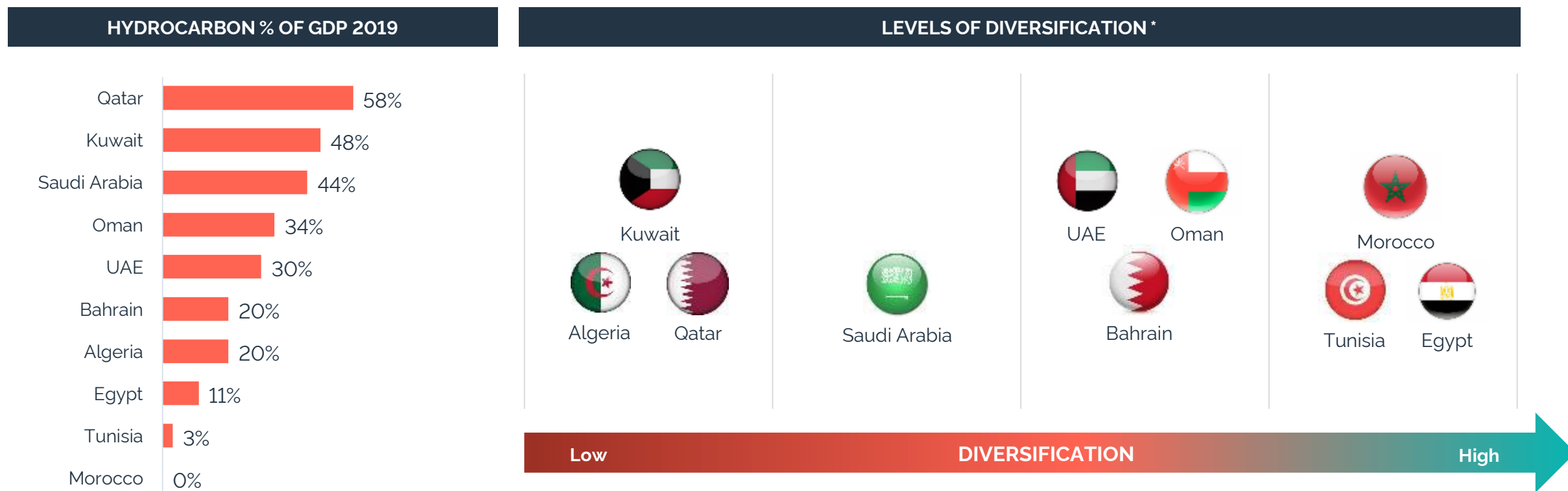
EMPLOYED
45%
(2020e)



MENA

Economies

Hydrocarbons are major contributors to GDP across MENA, the Middle East especially. For many, a more diversified economy is the future route to growth and some countries are further along this path than others. With the exception of Algeria, the North African countries within this report have been highly diversified for some time largely as there are less (known) oil reserves.



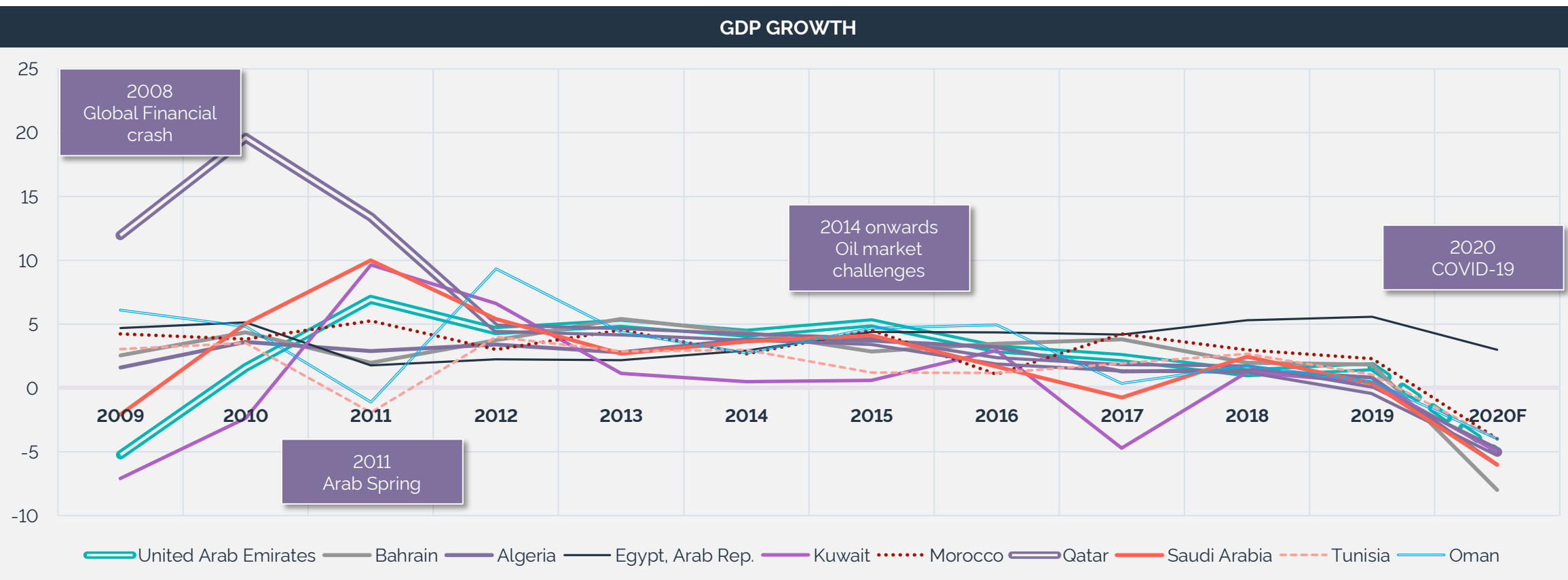
* Based on YouGov Sport analysis only

Source: YouGov Sport, Desk research, Statista, World Bank

MENA

Outlook

A varied economic decade experienced across countries; not all have been affected by the same market challenges, with the exception of the current global COVID-19 situation. Only Egypt is forecast to remain in positive growth in 2020.



Source: YouGov Sport, World Bank

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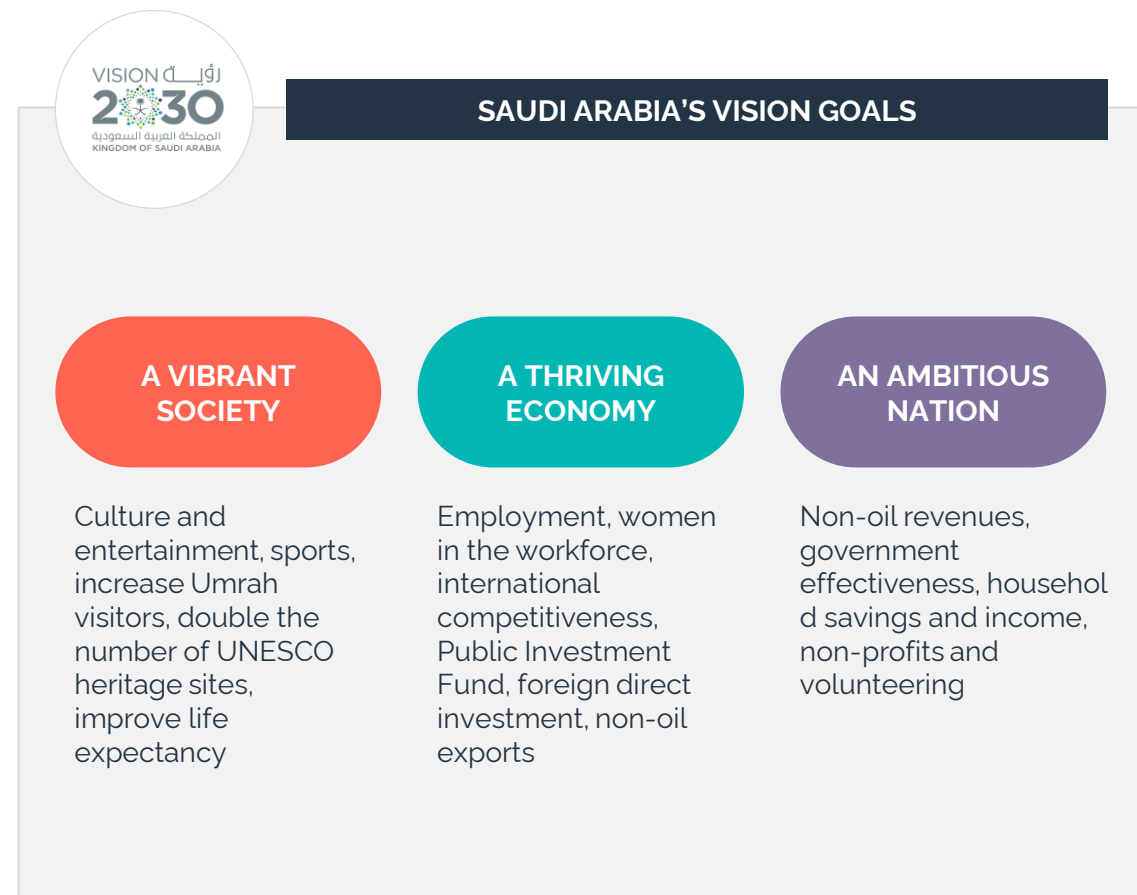
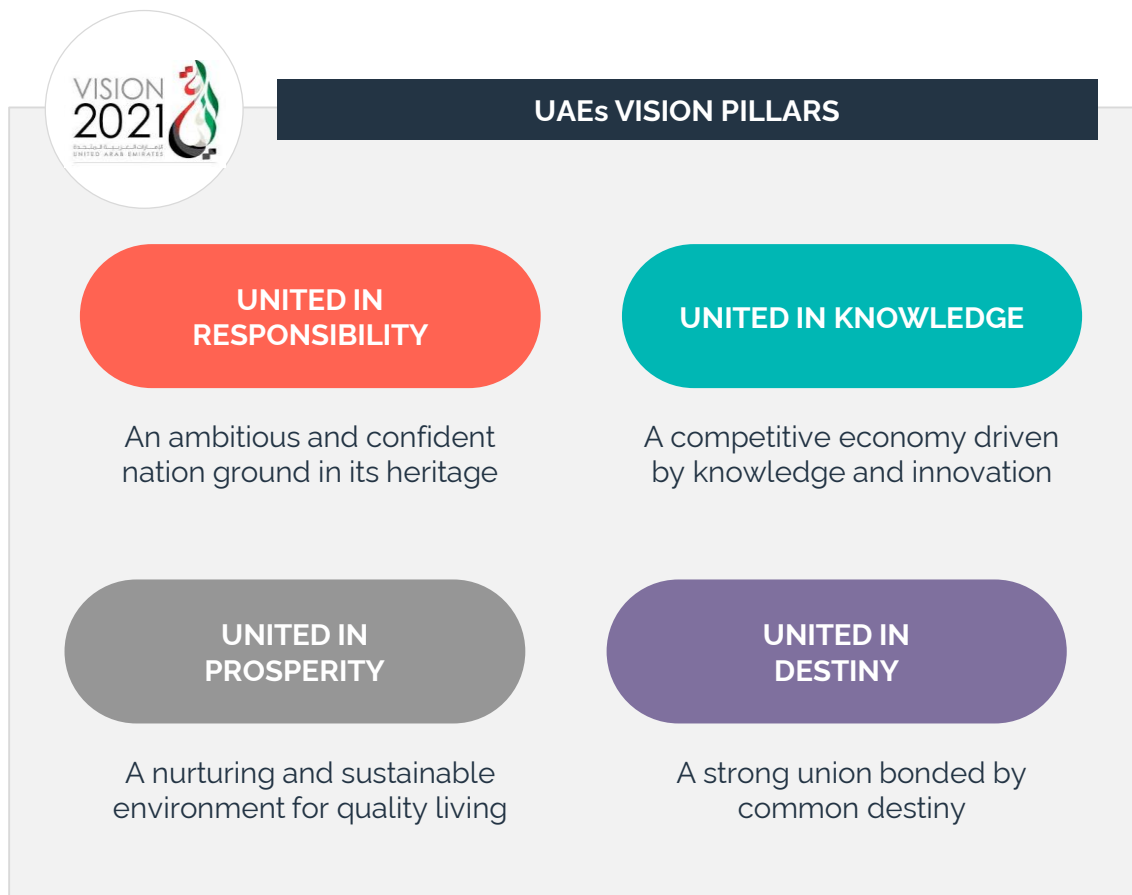
Sustainability in sports, events and tourism

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Due to a known precarious over-reliance on hydrocarbons (both supply and price), many countries have launched diversification **'Visions'** for future survival and growth.

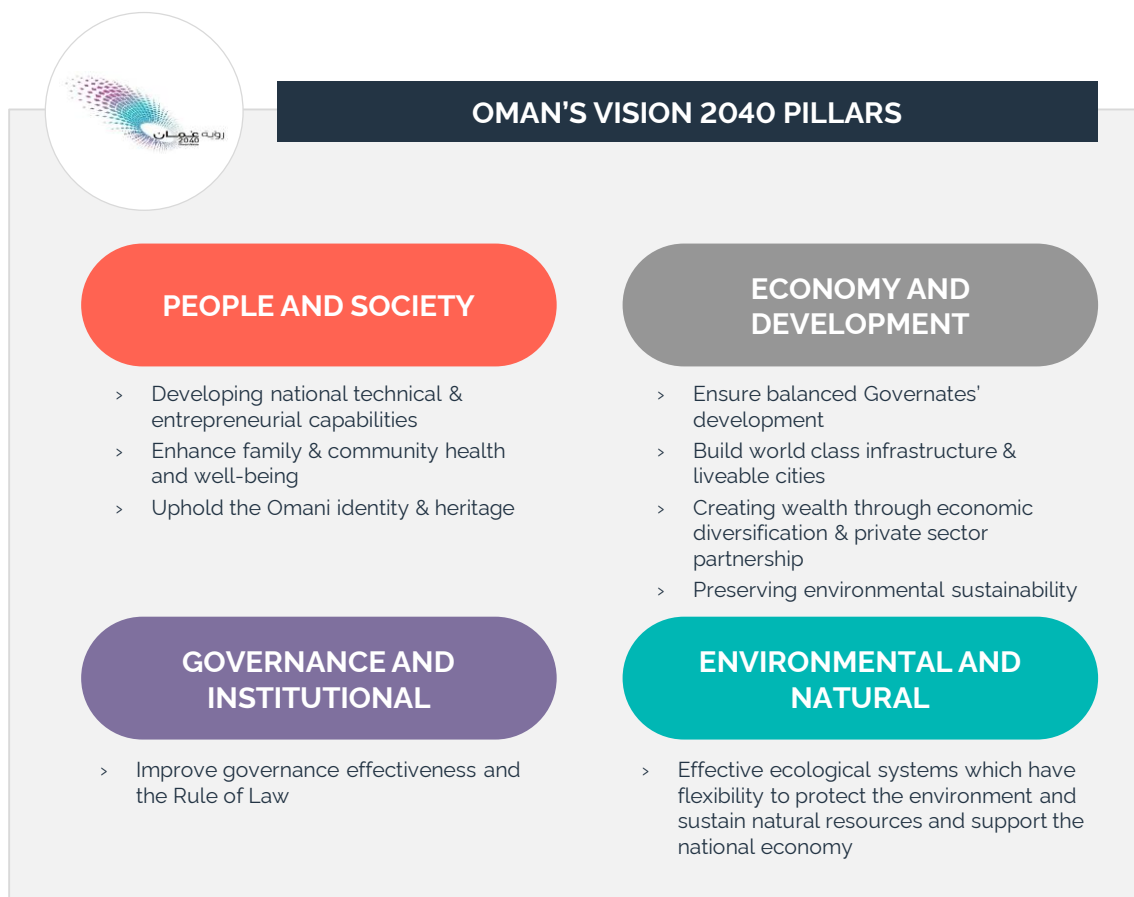
In a counter balance to what has gone before, 'clean' energy and sustainability are core themes for many.



Source: Desk Research, Vision 2021.ae, Vision 2030 National Transformation Plan

MENA

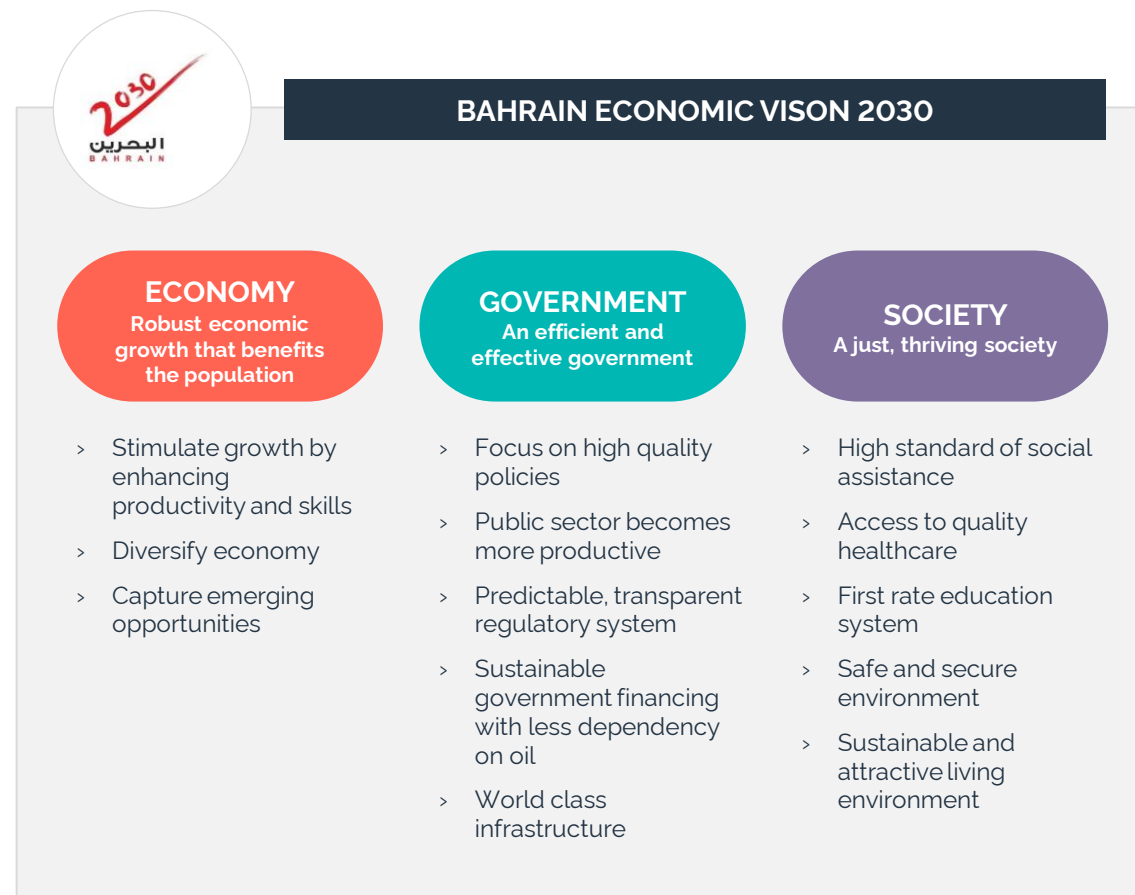
Apart from 'sustainability', other common themes are 'national identity', 'governance', 'people development – health & education'.



Source: Desk Research, First Voluntary Review of the Sultanate of Oman, Kuwait National Development Plan Development

MENA

Apart from 'sustainability', other common themes are 'national identity', 'governance', 'people development – health & education'.



Source: Desk Research, PSA.gov.qa

MENA

For the more diversified economies of North Africa, emphasis is on the private sector to help drive growth; with acknowledged need for foreign investment, competition and creating opportunities for all society.



EGYPT'S VISION 2030 PILLARS

"By 2030, the new Egypt will achieve a competitive, balanced, diversified and knowledge based economy, characterised by justice, social integration and participation, with a balanced and diversified ecosystem, benefiting from its strategic location and human capital to achieve sustainable development for a better life to all Egyptians."

THE ECONOMIC DIMENSION

- > Economic development
- > Energy
- > Knowledge, Innovation and Scientific research
- > Transparency and efficiency of governmental institutions

THE SOCIAL DIMENSION

- > Social justice
- > Health
- > Education and training
- > Culture

THE ENVIRONMENTAL DIMENSION

- > Environment
- > Urban development

TUNISIA'S 5 YEAR PLAN (2016-2020) PILLARS

"Bringing economy, finances and the assets of the "New Tunisia" to the forefront in order to restore sustainable growth and attract "not donations but concrete investments."

REFORMS AND GOVERNANCE

ECONOMIC HUB

HUMAN DEVELOPMENT

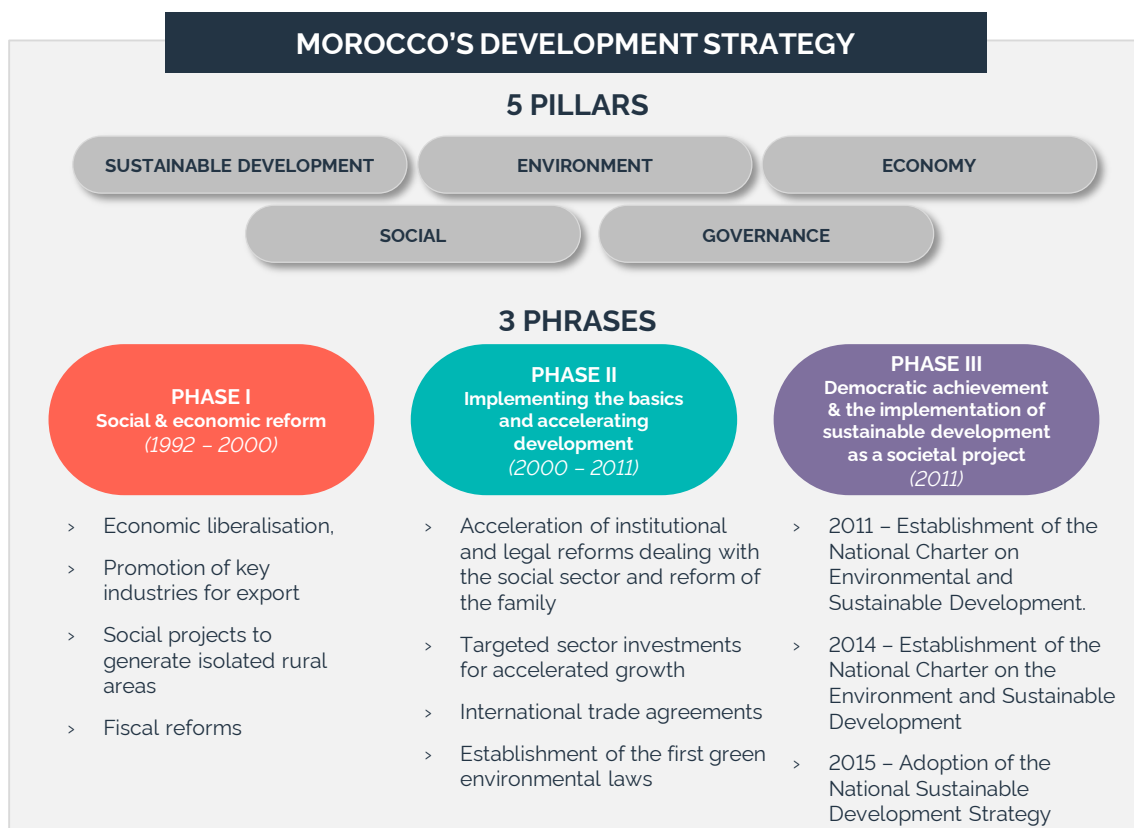
REGIONAL AMBITIONS

GREEN ECONOMY

Source: Desk Research, Egypt Vision 2030, , lammena.com, UN.org

MENA

Whilst Morocco has long been diversified, Algeria is still heavily reliant on hydrocarbons and largely under State control. In seat since early 2020, President Tebboune has announced plans for reform.



Source: Desk Research, , National Sustainable Development Strategy (NSDS), Morocco, World Bank, Reuters, Ake International, Energy World

MENA

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

"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."

UAE – Large Events Organiser

"Here in Saudi Arabia we have 2020 and 2030 Visions. We have cities that are built in a way to be sustainable and depend on alternative energy and clean energy, not using plastic. They established standards for gas emissions."

*Saudi Arabia
– Tourism Governing Body*

"Everyone knows about sustainability, it is an important matter especially nowadays, we reached a point where the planet is very damaged and we're damaging it unknowingly because of the factories and the excessive amount of cars which is really damaging the planet. ... Sustainability is a very important matter and we should really focus on it so that we ensure a future for our children and grand-children and for the planet to survive."

Oman – Tourism

"It works in events and activities, and its aim is to improve businesses and activities, decrease the negative effects on the environment and raise awareness about environment and preserving resources and recycling them."

Kuwait – Major Events

"It is about the sustainability of life, the environment we live in, the natural resources. Humans have a direct or an indirect impact on preserving the environment and affect it in a positive or negative way."

Bahrain – Major Events

"For me, sustainability is finding a way for the world to keep on going for a longer time, preserving the environment and the continuation of the bio-system, reducing the pollution in the world and in society."

Qatar – Sports Governing Body

"Sustainable development affects several areas such as the economic field: the preservation and protection of the country's assets and wealth and of human and social resources."

Algeria – Sport Governing Body

"People are supposed to be aware about sustainability. It does not concern one person only; it concerns the society. For example, if we preserve the Nile River that we have, not only you will use it, but also the future generations. You do not only care for your life but also for the future generation."

Egypt – Sport Ministry

"To me, on the subject of sustainability in Morocco, it is to meet the needs without compromising the capabilities of the future generation, and it is also a responsible business management approach. And there must be a positive impact for the company because it has a great role to influence the society and the surrounding environment."

Morocco – Sport Club

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As recognised by the countries reviewed, sustainable development is an all encompassing requirement; economic, social and environmental. Each country has signed up to partner the UN Agenda 2030 Sustainable Development Goals (SDGs) and where possible, alignment to country priorities have been made.

Implementation and success relies on each country's own sustainable development policies, plans and programmes and is led by each country.

UN SUSTAINABLE DEVELOPMENT GOALS – 'SDGs'



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

UAE – Large Events Organiser

Source: Desk Research, sustainabledevelopmentun.org

MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.



UAE – By 2050



40%

Increase consumption efficiency of individuals and corporates



50%

Clean Energy



70%

Reduction in carbon footprint

UAE – CLEAN ENERGY

A clear focus, the UAE has some overarching ambitious 'green' environmental targets.

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

SHARJAH – By 2040



30%
Water Savings



30%
Power Savings

Source: Desk Research, vision 2021.ae

MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.

CLEAN ENERGY

Drawing on other vast natural resources, many countries are establishing alternative solutions for energy generation.

Kuwait · Shagaya Park – Solar & Wind Power



Kuwait has set itself a target of achieving 15% of it's energy using renewable sources and the **Shagaya Renewables Complex** is the first step in achieving this target

Morocco · Noor Ouarzazate Solar Complex



With a view of achieving 42% of it's energy targets through renewables by 2020, Morocco has constructed several solar energy parks. The largest is **Noor Ouarzazate Solar Complex**, which until 2020 was disputably the world's largest

Oman · Ibri Solar & Dhofar Wind Farm



Keen to achieve a minimum of 10% contribution to the country's energy requirements from renewable energy resources by 2025, several initiatives are in motion

Source: Desk Research, trade sites

MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.

UAE · 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; 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

SUSTAINABLE CITIES

Sustainable cities are being developed as beacons for future living.

SAUDI ARABIA · NEOM



- > A centre piece of the Vision 2030 plan, NEOM has as its aim to be a new model for sustainable living and working; focused on new standards for community health, environmental protection and effective and productive use of technology.

MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.

Qatar · Msheireb Downtown Doha**Transforming Doha ...**

- > Buildings are grouped in such a way that shade is created, cool breezes are captured and cooling requirements reduced
- > The Doha Metro an integral part of the city
- > Systems have been designed to recover rainwater and condensation from air-conditioning into basement tanks for recycling in irrigation and toilets
- > Efficient Irrigation systems have been installed and planted with native species of plants able to survive the hot and arid conditions
- > Solar energy via photovoltaic solar panels, as well as solar hot water panels on the rooves generates electricity and hot water

URBAN REGENERATION

To deliver an overall goal of 32% energy reduction, Msheireb Downtown Doha has sustainability as central to this regeneration project; via functional design and the conservation of natural resources.

Downtown Doha

Source: Desk Research, trade sites

MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.



Source: Desk Research, trade sites

TOURISM

Tourism is a key growth sector for many of the reviewed countries, some have focused programmes to support sustainable growth



MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.

SINGLE-USE PLASTIC

To varying degrees of recognition and action, the elimination or alternative solutions to single-use plastic is being tackled.

Tunisia	Egypt	Kuwait
<p>After many years of industry resistance, Tunisia has implemented a ban on single use plastics bags from February 2020.</p> <p>Ban on Plastic Bags</p> <ul style="list-style-type: none"> > The program aims to reduce the 126,000 tons of single use plastic bags used by Tunisia annually. This equates to 4.3 billion single use plastic bags > 100,000 marine animals can be saved through this program > Will help reduce losses to Tunisia's economy to the tune of \$20M annually due to plastic pollution, as it affects the tourism, shipping and fishing economies 	<p>Beginning in 2020, a private–public project between Henkel and Plastic Bank will work to combat plastic pollution over the next 5 years.</p> <p>Henkel and Plastic Bank</p> <ul style="list-style-type: none"> > Incentives such as exchanging plastic waste at collection points for money, goods or digital services > The aim is to collect, sort and process at least 5,000 tons of plastic waste per year. This translates to 1 billion plastic bottles in 5 years > Processed plastic becomes 'social plastic' which acquires higher value than the recycling market. Henkel will also use the plastic to create packaging of its products > From the government side, the new system will also eliminate several landfills across the country, with plans to build incinerators that will generate electricity by disposing of the waste. 	<p>The National Bank of Kuwait (NBK) partnered with a local environment organisation, Omnia in 2019 to tackle the rising plastic pollution problem in Kuwait.</p> <p>NBK + Omnia Plastic Recycling Project</p> <ul style="list-style-type: none"> > The initiative started with collecting plastic bottles and cardboard waste from Iftar tents during Ramadan > Close to 18,000 plastic bottles and boxes were collected through dedicated recycling boxes and were sent for recycling > This collaboration aims to reduce waste in line with NBK's sustainable development strategy, which is also aligned with the UN Sustainable Development Goals and New Kuwait Vision 2035 > As well as with being an annual event Ramadan initiative, the aim is to extend all year round

Source: Desk Research, trade sites

MENA

Selected projects:

Each country has its own strategy for growth, amongst which are targets and initiatives which support sustainability in all its forms.

Oman · SustainableOman



WHAT WE DO

We are powered by a community of sustainability practitioners and advocates



PLATFORM

For every citizen and resident of Oman to show their commitment to achieve the SDGs.



KNOWLEDGE BANK

We provide actionable knowledge and other resources.



NETWORK

We encourage connections and collaborations. We can have more impact, if we work together.



FORUM

Engage in a conversation to share knowledge, experience and expertise.



SIMPLIFIERS

Sustainability is a big word, we strive to make it easily understood.



OMANISATION

Actions are customised to Omani environmental, social and cultural settings.

Actions include ...

- > Instructive articles
- > Resources
- > Webinars
- > Competitions
- > And more ...

17 SDGs 169 Targets 11 Communities 61 Wikis 2.73 Mn Citizens 1.77 Mn Engagements

COMMUNITY

Oman has recognised the importance of educating the wider population.

Oman · Environment Day

An annual countrywide event that then continues throughout January to raise awareness of the importance of protecting the environment and preserving the natural resources of the country.

Beach cleaning – Al Seeb Beach



Initiatives engage the entire nation: public and private companies and the community.

Tree Planting



- > Members of the Omani Woman Association, together with school students planting around 431 trees in Duqm Public Park. Aimed to promote awareness among students on the importance of preserving the environment.

Source: Desk Research

MENA

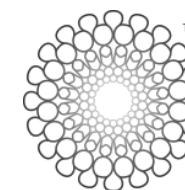
Sport and events in MENA

4

MENA

The UAE is the region's destination hotspot for tourism and sporting events 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

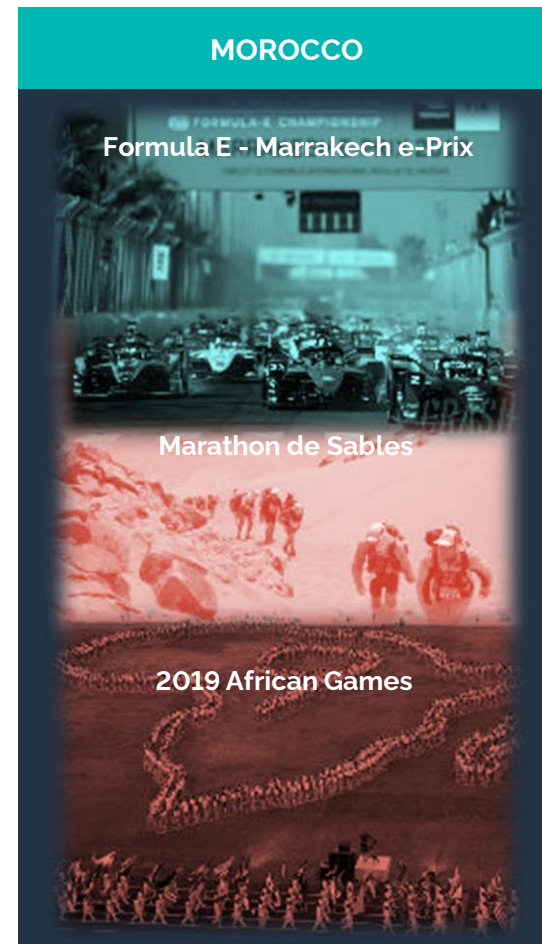
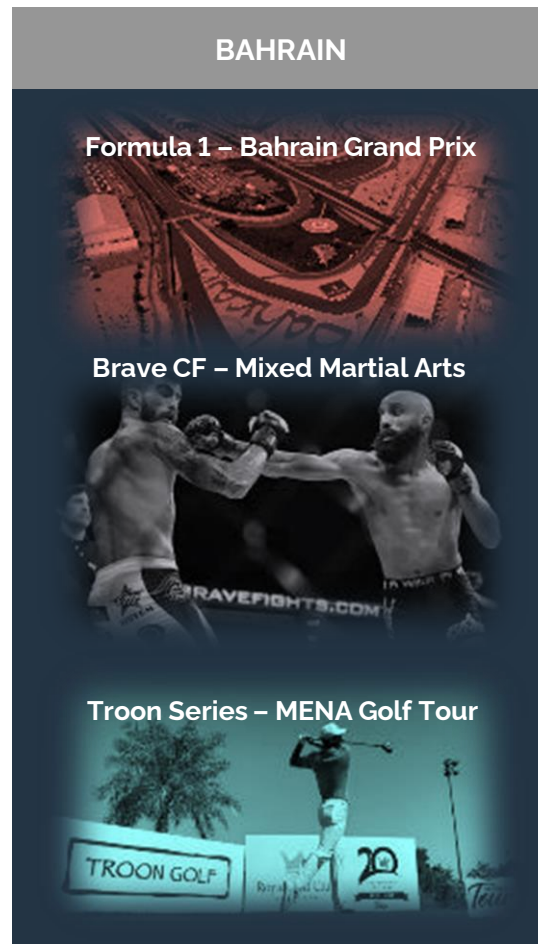
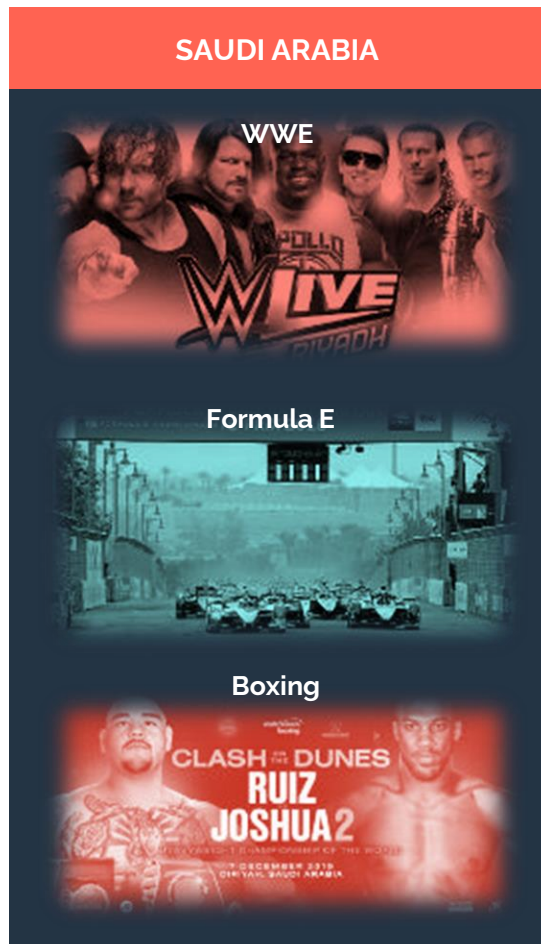


Emirates Airline Rugby Sevens



MENA

While other countries have held high profile global events for some time, most are in the nascent stages of growing their appeal internationally. The largest and most prestigious to be held in the near future is undoubtedly the FIFA World Cup 2022 in Qatar. Selected countries and events:



MENA

Stadia, arenas and centres

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

Selected Venues: Qatar – Key Stadia

FIFA World Cup 2022 stadiums in Qatar are leading the way in terms of sustainability efforts; several are already certified or planning to acquire the Global Sustainability Assessment System (GSAS) certification.

Venue	City	Capacity	Built in	Main event	Sustainability features
Lusail National Stadium	Lusail	80,000	2021 (expected)	FIFA World Cup 2022	Eticketing, Public transport, Sustainable materials used for construction, recycled water, water saving bathroom fittings, LED lighting, plans for Global Sustainability Assessment System (GSAS) certification.
Al Bayt Stadium	Al Khor	60,000	2021 (expected)	FIFA World Cup 2022	Eticketing, Public transport, Sustainable materials used for construction, LED Lights,
Khalifa International Stadium	Doha	48,000	1975	Football – Qatar Stars League, FIFA World Cup 2022	Eticketing, Public transport, energy-saving lighting, water saving bathroom fittings, LED lighting, Global Sustainability Assessment System (GSAS) certification.
Education City Stadium	Al Rayyan	45,350	2020	Football – Qatar Stars League, FIFA World Cup 2022	Eticketing, Public transport, integrated water and energy control and monitoring system, 55% Sustainable materials used for construction, 75% native plants for landscaping, LED lighting, Global Sustainability Assessment System (GSAS) certification.
Al Rayyan Stadium	Al Rayyan	44,740	2021 (expected)	FIFA World Cup 2022	Eticketing, Public transport, 80% recycled materials used for construction, water and energy control and monitoring system, LED lighting
Al-Janoub Stadium	Al Wakrah	40,000	2019	Football – Qatar Stars League, FIFA World Cup 2022	Eticketing, Public transport, Roof designed to as a temperature control method, 800 trees and lost water consumption plants around the complex, Global Sustainability Assessment System (GSAS) certification.
Al Thumama Stadium	Al Thumama	40,000	2021 (expected)	FIFA World Cup 2022	Eticketing, Public transport, recycled water used on plants, 84% native vegetation in the complex, Plans for a Global Sustainability Assessment System (GSAS) certification.

Source: YouGov Sport, Desk Research, Trade & Event Sites

MENA

Stadia, arenas and centres

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

Selected Venues: UAE

With a diverse and growing range of events held across the country, the UAE has a growing number of new sites, or ones which have been updated with sustainability features.

Venue	Emirate	Capacity	Built in	Main event	Sustainability features
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
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
The Sevens Rugby Stadium	Dubai	50,000	2008	7s Rugby	Water saving taps, recycling bins
Zayed Sports City Stadium	Abu Dhabi	43,206	1979	Cricket	Intelligent lighting to reduce electricity consumption, efficient AC units
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
Dubai Cricket Stadium	Dubai	21,000	2009	Cricket	Solar power
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,
Coca-Cola Arena	Dubai	17,000	2019	Music Concerts	Humidity capture A/C units, Light and water sensors, LED lights, organic composter
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

Source: YouGov Sport, Desk Research, Trade & Event Sites

MENA

Stadia, arenas and centres

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

Selected Venues: Oman and Saudi Arabia

Of the remaining countries, those with published evidence of sustainability features were limited to Oman and Saudi Arabia.

OMAN

Venue	City	Capacity	Built in	Main event	Sustainability features
Oman Convention & Exhibition Centre	Muscat	4,000	2016	Trade exhibitions	LEED Gold certification from the United States Green Building Council (USGBC)
Royal Opera House	Muscat	1,100	2011	Opera, Music concerts	Sustainability Initiative of the Year (2012 award from Omani construction industry)
Musannah Sports City	Muscat		2010	Beach games, Sailing	Local employment during construction

SAUDI ARABIA

Venue	City	Capacity	Built in	Main event	Sustainability features
Riyadh Street Circuit	Riyadh	100,00	2018	Formula E	ISO 20121 certified event
King Fahd International Stadium	Riyadh	68,752	1987 (Under upgrade)	Football – Saudi Professional League	E-ticketing, LED Lighting, Disabled friendly
Kind Abdullah Sports City	Jeddah	62,345	2014	Football – Saudi Professional League	E-ticketing, LED Lighting, Disabled friendly

Source: YouGov Sport, Desk Research, Trade & Event Sites

MENA

Sustainability in sport and events in MENA

5


MENA

Goals for sustainable development are defined at national levels; with some high profile initiatives as showcases. We looked to understand the how this has filtered down to industry level throughout the region.

What becomes apparent is that across the region, publicised information across the majority of sport events or venues, even Rights Holders is limited.

Two events stand out ...

UAE · World Expo 2020 Dubai



EXPO 2020 DUBAI UAE

> This event has been created around the theme of sustainability (now postponed till 2021 due to COVID-19)

QATAR · FIFA World Cup 2022

SOCIAL	HUMAN	GOVERNANCE	ECONOMIC	ENVIRONMENTAL
Provide an inclusive tournament experience	Develop human capital and safeguard workers' rights	Set an example of good governance and ethical business practices	Catalyse economic development	Deliver innovative environmental solutions



FIFA WORLD CUP
Qat_ar2022

At an industry level, there is generally good awareness of the events that are high profile communicators of their sustainable credentials and achievements. Translation in to commercial environment is a more of a challenge to apply.

Source: YouGov Sport, Desk Research, Trade & Event Sites

MENA

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, trade sites, Qatar22, FIFA

MENA

FIFA World Cup 2022 is the world's largest sporting competition and for the first time it will be held in the Middle East – the event is also a driving force behind sustainable development in Qatar.

A total of 22 detailed objectives with more than 70 concrete initiatives and programmes have been designed to deliver against the five key sustainability commitments for the FIFA World Cup 2022:



The biggest sporting event to ever be held in the Middle East, the FIFA World Cup is planned to kick off in November 2022.

- > With 8 venues spread across 5 cities, the distance between venues will be the least of any World Cup
- > With reduced distances and venues connected by Metro, fans can realistically attend multiple matches in a single day
- > There are fan parks planned across the country that will allow everyone enjoy games in a relaxed outdoor atmosphere
- > Along with new physical hotels, Qatar is planning to build several 'Floating Hotels' each with more than 100 rooms to accommodate the thousands of visiting fans



Source: Desk Research, trade sites, Qatar22, FIFA

MENA

Other examples: International community for sustainability in sport

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, **25 golf courses** across the MENA countries reviewed are engaged with the programme



Fostering Nature



Supporting Communities



Conserving Resources

Supporting Partners



Source: Desk Research, Trade & Event Sites, SustainableGolf

MENA

Other examples: Leisure destination

Qiddiya in Saudi Arabia will be a vast complex, with the aim of being the country's 'Capital of Entertainment, Sports and the Arts'. Planned opening is 2023.

- > In addition to the overarching sustainable goals: to deliver against Vision 2030, Qiddiya aims to promote:

Qiddiya will be a vast complex, with the aim of being Saudi Arabia's 'Capital of Entertainment, Sports and the Arts'. Planned opening is 2023.

- > Located 45 km from Riyadh, the 334 square kilometre site, of which the complex will cover 30% of the land. The rest will be dedicated for natural conservation.
- > Some of the entertainment facilities at Qiddiya will include training academies, desert and asphalt tracks for motorsports enthusiasts, water and snow activities, outdoor adventures and safaris.
- > This will include a Formula One motor racing track, 20,000-seat stadium and Six Flags theme park.
- > The complex will include a range of retail, residential, community services and commercial support facilities.

Source: YouGov Sport, Qiddiya website



BIODIVERSITY



**MICROCLIMATE
CREATION**



**WASTE
MANAGEMENT**

MENA

Leading by sustainable example:

Knowledge of where and how sustainability initiatives are applied varies across the region, with some surprises.

		Aware		
		International sport/tourism	Local sport/tourism	Country/other industries
	Algeria	Events		
	Bahrain	Events		National initiatives
	Egypt		Tourism/infrastructure	
	Kuwait			Oil & Finance
	Morocco	Events	Events	
	Oman	Events		
	Qatar		FIFA WC infrastructure	
	Saudi Arabia	Events	Event infrastructure	
	Tunisia			
	UAE		Tourism/events	National initiatives

* Based on YouGov Sport analysis only

What is clear is that active communication and promotion of sustainability credentials has room for improvement within industry

Locally, knowledge tends to be highest around infrastructure (builds) or 'National' initiatives

Highlights

- > Whilst the UAE leads the region in terms of high profile events, knowledge of local industry application is limited
- > Professionals in Saudi Arabia, Oman and Morocco appear to actively follow global developments within industry
- > The FIFA World Cup is the driver for awareness and knowledge in Qatar



MENA

Leading by sustainable example:

Whilst events in the UAE are actively applying sustainability throughout, recognition is limited. This is in contrast to Oman who are actively following their neighbour's activity

OMAN

Large Events Venue – Observation of the consumer journey at the Dubai World Cup

"When they wanted to take the audience and admit them into the field, it was through metro Dubai ... that runs on solar energy, and car companies that transport people also use cars that run on solar energy and chargeable cars ..."

"There was no papers at all, there was nothing printed ... There was waste sorting ... When I entered the event, I did not enter using a paper ticket ... Even the ads that were present there were all on screens and were digital."

"Everything that was supposed to be served in plastic was served in paper. All food and beverage was served in paper, there was not anything plastic. They said that they are trying to reduce the use of plastic because it is toxic..; it harms the environment and is not biodegradable in nature ..."

"The stands were empty from plastic ... Everything was made of cement. The infrastructure that the stand was made from were all related to sustainability and recyclable ... The lightings in the field and the stands run on solar energy.."

UAE

SUSTAINABLE CITY – local initiative

"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

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

Large Events Organiser

QATAR

LOCAL EXAMPLE

"One of the things that the government of Qatar did is that it linked the metro stations to the stadiums. This is a good thing because it decreased the quantity of cars that will arrive to the stadium."

When the quantity of arrived cars is decreased, then the use of cars has decreased for this duration, let us say it is 2 hours for example, and also the space that would have been used as a parking, it can now be used to grow plants in it."

Sport Governing Body



The UAE has some high profile national goals, however, at an industry level there appears to be some disconnect

In Qatar, all focus is on how the FIFA World Cup is a focal point for change

MENA

Sustainability initiatives in practice:

Sustainability remits and practices tend to reflect where active following is pursued within industry (Saudi Arabia, Oman and Morocco) and where country strategies focus and enable (Kuwait in particular).

For the majority of professionals interviewed, sustainability remits and practices are in their infancy within industry

Whilst country level strategies are clear, there is a question around whether industry and/or the private sector is sufficiently supported?

		Sustainability remits						
		Recycling	Waste management	Reduce / alternatives to single-use plastic	Reduce paper	Training / Comms / Awareness	Infrastructure	Event
								Mostly none
	Algeria							
	Bahrain							
	Egypt							
	Kuwait							
	Morocco							
	Oman							
	Qatar							
	Saudi Arabia							
	Tunisia							
	UAE							

* Based on YouGov Sport analysis only

MENA

Sustainability initiatives in practice:

Where established and working well, it is clear that those interviewed are highly engaged.

MOROCCO

"Cars used by the masses to travel between the corners of the large space in the ring are cars that run on electric energy. As well as with regard to waste, we deal with it in a special way, as there is a partnership agreement with a private institution for recycling waste and reusing it in other industries, as well as using waste water or airport water that we use to irrigate green spaces as well as accessories in our arena. We use solar energy to supply the field installations, and provide Electrical power teams. We do special sessions directed at different age groups, especially in the category of children, as well as awareness-raising courses about the importance of sustainability for future generations."

Major Events

SAUDI ARABIA

"We are currently seeking to apply sustainability measures. We have established a specialised department with competent employees to attain sustainability. We also organise training courses. I should note that we have almost banned, for the past years, plastics and all harmful materials."

Large Events Venues

UAE

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

OMAN

"I am a part of a sustainability team ...We are holding awareness campaigns about the elimination of plastic usage and replacing it with either paper or glass material. ... in our offices, we are not using paper nor plastic at all.

We are trying to replace them with glass because it is better than both paper and plastic. We are trying to place sorting waste bins, categorized as plastic, paper and other. We are trying to do all the transactions online. All the files are stored on the computer.

We do not have paper nor paper documents...We are trying to make all the tickets that we give our clients to be digital. No paper material as we are trying to limit it as much as possible. We are trying to do these things. We are starting with small steps and trying to go bigger."

Large Events Venue

MENA

Importance of sustainability:

As a concept, sustainability is generally considered to be of high importance amongst most industry professionals.

"It is a form of education for future generations. If we succeed in training the current generations and raising their awareness, we will have a well-educated population at the latest.

..... But first you need to raise awareness; you have to communicate with people who are aware of the importance of sustainability."

Algeria – Sport Club

"The practice of sustainability shows the advancement of the country and the awareness of the citizens so this. The best way to show sustainability in the country is through sports and tourism."

Egypt – Major Events / Large Events

"It is important and necessary because first we are raising awareness for the audience and participants. And there are trainings for the parties that are participating directly or indirectly in executing these projects or activities.

This leads to people becoming eager to be eco- friendly and preserve resources and avoid negative impact on the environment, as well as reducing costs and such things. We can say that it regulates the work."

Kuwait – Major Events

"In these industries, there are crowds of people so we can spread more awareness among them and present ideas. In addition, in these crowds, there is high consumption of materials that are harmful to the environment."

Oman – Tourism

'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."

UAE – Tourism

"Sustainable practices are important, especially for the future generations. Now sustainability has become an essential part of life and a lifestyle.... This requires a permanent solution from us, especially during the fast pace of construction in the tourism and events industry."

Saudi Arabia – Major Events

Many of those interviewed had views on how and where it should be applied

Where there is scepticism, it is largely linked to country economic development and priorities

"Yes of course. The UN works on implementing sustainability in sports for a healthy and safe lifestyle on the long run."

Bahrain – Sport Club

"No. Because the involvement of sustainability practices in events forces the costs to rise. Given the nature of our work, we are in a price war which does not give us the opportunity to increase the costs linked to the organization of events.

On the other hand, if the application of sustainable practices were generalized, from where everyone would be obliged to practice sustainability measures, therefore, it would be interesting to think of sustainability in the event industry in Tunisia."

Tunisia – Event Organiser

MENA

Relevance of event size:

There is no overall consensus on event size for sustainability initiatives. What is considered important no matter, is a recognition of the need to spread awareness.

'... 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'

UAE – Event Organiser

"Each event has things we need to take into consideration when it comes to preserving the environment. Whether it was a small event or a big one it is an important matter and we should take it into consideration."

Qatar – Sport Governing Body

"On the environmental side, it has no effect. On the social side, the bigger the event and more frequent, the more awareness is raised among people, who would like to know more about the sustainability, its practices, and its methods."

Egypt – Large Events Venue

"... It is important in order to get the wanted results. No matter the size of the event, the objectives are the same."

Saudi Arabia – Large Events Venue



"Yes, the importance of big events differ from the one of small events because it implements sustainability on a bigger scale and globally and it is able to make progress in this matter through training and education."

Bahrain – Sport Club

No country themes on size emerge – sustainability practices are important for spreading awareness within the wider population

- Essential at large events due to wider footprint
- Large events can reach wider audiences
- Little and often can also reach far and wide

"I do not think that the size of the event is important because it is local, regional or international. This local event may be a platform for communication with the masses and we will communicate the idea of the importance of sustainability in our daily lives. I suspect that the size of the event is not a factor in adopting sustainability measures because it should be applied in all circumstances."

Morocco – Major Events

MENA

Accreditation:

ISO 20121 accreditation has a generally high level of awareness amongst professionals in the Middle East and Morocco.

"ISO certification is highly relevant in the Middle East. It represents a green card for the good work. ISO is an entity empowered to evaluate the company's work and to guide it towards the right path in implementing the sustainability according to the globally approved standards. ... King Abdullah Economic City (is certified)."

Saudi Arabia – Large Events Venue

"Of course, as for our demonstration, it is true, and it is the main condition for organizing our events. It is considered an international standard for sustainable development, and it helps institutions implement the sustainability standards and provide their conditions."

Morocco – Major Events

"The ISO yes I know it talks about quality ... Yes, like the Olympics that happened."

In Qatar they had the ISO certificate and rating from IAAF which organize Olympics around the world.

So they had this certificate and the ISO because of the good work they did in developing the stadiums and the equipment that were developed."

Qatar – Sport Club

"All the events I already mentioned are ISO certified. And it is important to have it because it's proof that you did well in implementing sustainability. For example, there's also the World Horse Race in Dubai, Dubai Desert Tournament, the Speedboat Championship, cricket and rugby championships."

Oman – Major Tourist Attraction

"... It is an update to better usage of sustainability for each company and our company have it. (Also)...The Olympics and this is found on their advertisements."

Kuwait – Large Events Venue

'Yes, I know that Dubai Sports Council, Dubai Police Force, Dubai Cultural Council and Dubai Union of Transportation received ISO certification.'

UAE – Tourism Governing Body

There is some confusion or misattribution of specific ISOs

Varying degrees of agreement as to its relevancy in MENA – largely country priority dependent and in countries where its awareness is lower

"We must have political decisions before talking about the relevance of qualifications."

Algeria – Sport Club

"Before thinking about the usefulness and the services provided by this certification, we must first think about the situation of Tunisia and all the regions of North Africa."

We are too far from the application of sustainable development practices, although we must focus on protecting the environment, how preserving current resources is harming the capacity of future generations.

We are too far away because there is a lack of awareness, the concept of sustainable development is not well understood by everyone."

Tunisia – Event Organiser

M E N A

Measurement:

General agreement on the importance of measuring sustainability initiatives, with no clear view on how. Some debate on whether benchmarks should be fixed (a framework within which country economic development has weighting).



- > Active implementation verification could be a start
- > ISO 20121 is a considered tool for measurement

"It should be measured on an environmental scale, The measurement should be based on the annual performance index and the growth sustainability scales. ... The benchmarks should work on doing comparisons between e usages of petroleum products and their chemical, petrochemical effects. We should reinforce the work on achieving sustainability through certifications, like ISO... "

Saudi Arabia – Large Events Venue

"There is not a typical standard, but you can't control people's actions, but you do what you should do, and aware them. You have to tell them the damages this thing and that's it. After that they will act.

Benchmarks ... sure they are different because the cultures differ. Our culture for example, us the Arab, differs from the culture of Europe or foreign countries."

Qatar – Major Tourist Attraction

"There must be a difference in standards from one country to another because there is a difference from one region to another, as well as the way of life, traditions, economic level, as well as the human factor."

Morocco – Major Events

"We can measure it, by sending people specialized in sustainability and send with the economic schedule to check where the money is going.

They should check if sustainability is actually being implemented or not, and if it abides by the international standards or not ... I believe that the benchmarks should be the same so that everyone implements them and abide by them. It should not be different from a country to another."

Oman – Tourism

"We only can measure it if the person or team who is applying sustainability is knowledgeable and trained. Yes, it should be measured in my opinion, but first we should do trainings and raise awareness, and set frames and guidelines...."

Benchmarks ... The global headlines can be the same, but practices and details should differ and as I have mentioned this previously, we should take the awareness level into consideration, as well as the economic and social level of the target environment."

Kuwait – Major Events

"I think benchmarks should differ according to the problem found in the country"

UAE –Tourism Governing Body

"Benchmarks should be the same and constant, while taking into consideration certain countries lacking certain natural resources and wealth. These countries need support and solutions, paving the way for them to follow the same benchmarks."

Saudi Arabia – Large Events Venue

MENA

Challenges:

Agreement across many industry professionals is that there is a lack of awareness around sustainability in the region and this must be tackled first.

- > The commercial reality is that many initiatives are expensive and this poses a barrier to profitability
- > The high cost of infrastructural components is clear

AWARENESS

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

UAE
– Large Events Organiser

"The most important thing is to raise awareness among people about the benefits of sustainability, and that these areas would not harm the ecology."

Egypt – Sport League

"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."

UAE – Large Events Venue

"All stakeholders in Algeria, local authorities, different organizations must think about the protection and preservation of the environment, the nature of the country and the health of citizens through sustainable policies such as minimizing use of plastic, the use of solar energy....We must therefore work on raising awareness."

Algeria
– Sport Governing Body

COMMERCIAL

"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."

UAE
– Event Organiser

"The provision of water bottles is the most, and the plastic bags that people throw along, if there is an alternative material for it like leather or cloth, it will be better. But this should be available in the whole country it is hard to use because it will cost a lot of money. The plastic is used because it's cheaper."

Qatar
– Major Tourist Attraction

INFRASTRUCTURE

"I think it is the infrastructure and the construction of the stadium using recyclable material. If we want to install a huge solar to transform solar energy into power instead of electricity and petroleum. I think that it is costly; it will take time and effort."

Oman – Large Events Venue

"Infrastructure is the toughest because implementing it and changing it is going to need time and it will cost a lot."

Saudi Arabia
– Large Events Venue

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

UAE – Tourism Government

"The things that require infrastructure or technology, sometimes you are dealing with a group that has no accessibility to the online information. Some other times, we don't have infrastructures for sewage or electricity."

Kuwait – Major Events

"Do we have an infrastructure that allows us to talk about sustainability, degradable products, and environmental protection? The infrastructure does not allow us to practice this sustainability initiative well

Besides the infrastructure, the climate represents a major handicap so 'it is aggressive'."

Tunisia
– Sport Governing Body

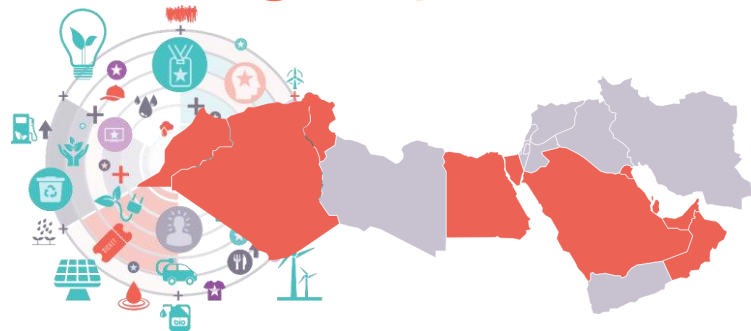
MENA

Conclusions



MENA

Nudge, push or pull?



AWARENESS



EDUCATION



BEHAVIOUR CHANGE



COMMERCIALLY VIABLE OFFER



INVESTMENT



INCENTIVE



"It might be found here but it is not implemented. Here, in the Arab countries, we have a problem, we have rules but three quarters of them are not implemented. There has to be reinforcement on the rules that the government imposes."

*Bahrain
– Major Tourist Attraction*

"We have other priorities, sustainability practices are not a priority, and there is no regulation which obliges us to do that, we manage with the minimum that we have."

Algeria – Sport Governing Body

"When the country implement sustainability practices, the rest will follow. It is important, like in Egypt, a country within good resources, to use them in applying renewable energy sources. The sustainability would be saving the country a lot of energy, resources, and money."

Egypt – Sport League

"It must focus on the economic factor and how to finance these activities well and provide the regulatory bodies with the means of work that respect the environment."

Likewise, we must focus on the human factor as it is the engine and the basis in every change and in every success and carry out continuous activities and continuous training in order to sense the importance of preserving the environment and how to use it well."

Morocco – Sport Governing Body

"They should incorporate new materials that are environmentally friendly, They should also train the workforce on how to use these new materials, in addition to recycling the materials currently being used. This process takes time depending on the research of the workforce.... This process needs a budget that includes the sustainability practices, training the workforce and raising awareness among the audience."

Saudi Arabia – Major Events

"I believe that we need cooperation to implement sustainability ... by the companies that organize these events and by the people who are responsible for sustainability and are trying to implement it ..."

There should be plans to be executed ... economic schedules to see how costly the things are, and for the companies to know if they can pay and if the companies responsible for sustainability can help in this thing."

Oman – Large Events Venue

Conclusions

Sustainability is a relatively high profile 'pillar' for future growth across the MENA region reviewed; many countries have environmental targets set and all are partnered with the UN on working towards Agenda 2030.

- > Little evidence of publicised strategies or achievements around events
 - *This is however, stronger within Tourism*
- > There are high levels of awareness of sustainability in the industry, with varying levels of working remits
 - *As a concept and on a country 'Vision' level this is strongest*
 - *Some countries stand out as both knowledgeable as well as actively implementing initiatives within industry – Saudi Arabian, Omani and Moroccan professional in particular appear to actively follow global developments/initiatives*
 - *There is some disconnect between understanding country 'visions' and how sustainability can be integrated within industry (in some countries it appears more of a 'concept')*
- > Some recognition that sports plays a central role in creating awareness for sustainability
 - *Sustainability is on the country agendas and raising awareness via high profile events is viewed as positive (planet, country & business)*
- > Alternative solutions to or reducing the use of single-use plastic is increasingly being tackled
 - *State level – Tunisia, Egypt & Kuwait (plus others)*
 - *Industry acknowledgment*
- > A lack of public awareness and commercial viability are perceived to be the main challenges faced
 - *The over-riding aim of any event is profitability. Currently, implementing sustainable initiatives is cost prohibitive to some*
 - *There is some feeling that until the State imposes laws and actively regulates, the implementation of sustainability measures or initiatives may not be attractive to companies trying to make profit*

Recommendations

Whilst high profile at a country level, sustainability needs to be made more relevant to industry.

- > A connection between country visions/strategies and industry needs to be made more evident:
 - *Requires framework and guidance*
 - *Financial support will be crucial*
- > State and/or foreign investment and guidance is a pre-requisite to make this commercially attractive and viable
 - *This includes job creation and support particularly for North African countries*
- > Many facilities and venues will likely need to be updated (or sustainable features promoted)
- > 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*
 - *Promote sustainability features, initiatives and achievements*

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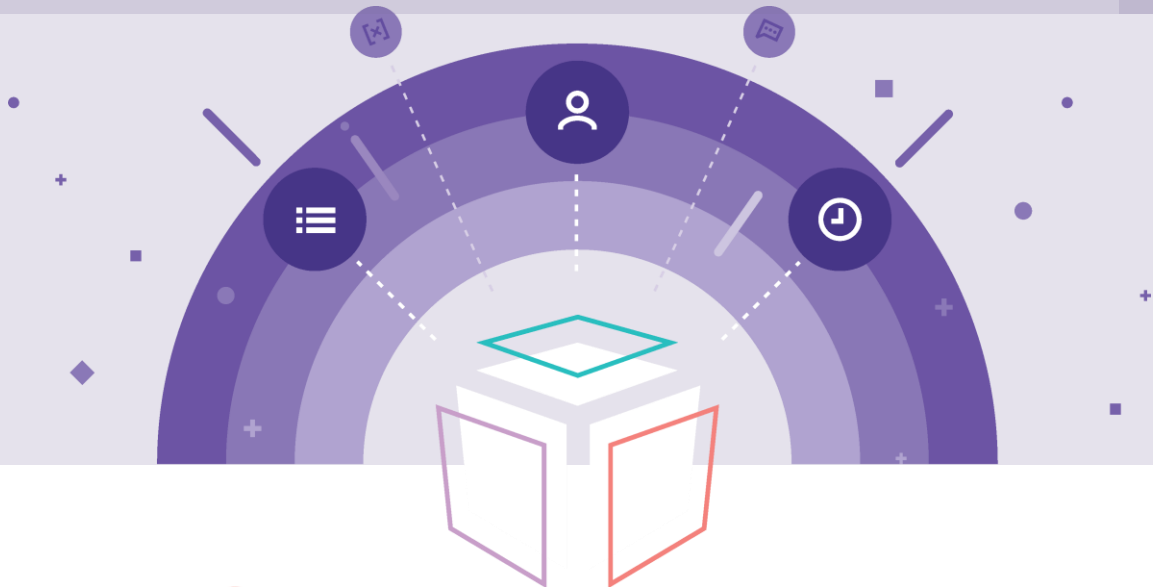
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