



The sports ecosystem in Africa : a potential development lever

2021

mazars





Contents

Foreword

Methodology

Executive summary

09 Evolution in turbulent waters: a critical lack of data

- 10 Lack of information on the African sports ecosystem
- 12 Lack of understanding of the crucial value of data
- 13 Promotion of African models
- 14 Case study: Decathlon in Ghana, the data marathon

16 Investing in human capital, the key to success

- 17 Expert opinion with Didier Drogba, football Legend
- 18 Improvement in the perception of sports-related jobs
- 20 Initial training of athletes and future sports managers
- 21 Continuous training on sports business and IT

23 The need for strong leadership: public authorities, institutions and governance bodies

- 24 Expert opinion with Valens Munyabagisha, President of the Rwandan National Olympic and Sports Committee
- 26 Executives' lack of awareness of the challenges in the sports industry
- 27 Good governance and individual ethics
- 28 Promotion of Pan-African collaboration
- 29 Expert opinion with Beatrice Ayikoru, Vice President of the Uganda National Olympic Committee

31 Creation of a business-friendly environment

- 32 Expert opinion with Pierre Laporte, Director Ghana Liberia Sierra Leone at World Bank
- 33 Sports, an area of development
- 34 Mobilisation of financial resources
- 34 Acceleration of infrastructural development through PPP
- 36 Legal, regulatory and fiscal framework
- 36 Promotion of entrepreneurship amongst young people
- 38 Expert opinion with Faycal Laraichi, President of SNRT, SOREAD 2M, FRMT & CNOM

39 Limited capacity: commercialisation and tapping into revenue sources

- 40 Expert opinion with Joseph Hundah, Former CEO of Econet Media, Founder & CEO of Banaya Group
- 41 Considering sports as a commercial product
- 42 The fan at the heart of the ecosystem
- 42 Presenting a distinctive value-adding offer
- 44 Case study: The opportunity offered by digitisation with Digital Sports Africa
- 46 Expert opinion with Will Mbiakop, Senior Director – NBA Africa

47 A new era

- 48 Expert opinion with Mlonzi Mashinini, Managing Partner, Rumble Ventures & FanBase Analytics
- 49 Evolution of sports
- 50 Digitisation of consumption
- 50 The advent of local content
- 51 Emergence of new economic models
- 52 Case study: Eyes firmly on the BAL, Africa's NBA

53 16 recommendations for transforming the sports industry into a development lever for Africa

Conclusion

Bibliography

Preface

Sports: a pathway for growth and development in Africa



Vera SONGWE

United Nations Under-Secretary-General
and Executive Secretary of the UN Economic
Commission for Africa

Sports the world over has evolved into a 1.5 billion euro a year industry. No longer are our young people only angling to play for major teams. They are also seeking employment off the field in the vast global sports industry. As Africa looks for growth paths out of the COVID-19 pandemic the sports industry is clearly an important sector to focus on.

Africa's contribution to the world of sports globally is unquestionable but so is the acknowledgement that overall the industry is performing below capacity and expectation. Africa has a lot to do to catch-up to Europe and North America in tapping into this global industry, which spans from apparel to health care to medical technology. There is much more that can be done, however, to ensure that Africa benefits from this global industry, which is equivalent to half of the continent's GDP.

The launch of the African Continental Free Trade Area should provide the scale needed for African businesses to compete in the sports related manufacturing sector building off of the already vibrant textile and clothing sector Africa has. There is a large and growing sports apparel market estimated at \$188.2 billion in 2020 which African businesses can take advantage of.). On the services front, over half of Africa's GDP today is derived from the service sector. From design to communication to promotional activities or events management. These are sectors that are particularly suited for youth employment with the appropriate infrastructure and legal framework and access.

To exploit the benefits of the sector for employment and prosperity an important policy lever will be improving the overall governance of the sector. Robust governance and management processes are needed to develop a supply chain that can deliver effectively for economies. The governance of the sector should be run largely by the youth who have the largest stake in the sector and can contribute enormously to the development of the sector.

In Africa as in the rest of world, sports is an important medium for building national cohesion. As Africa works to silence the guns on the continent and reduce conflicts, most of which are national, sports could also be used as a platform for dialogue to build the Africa we want as stated in the African Union agenda 2063.

Foreword

The impact of the sports industry on growth in Africa

By contrast, if we zoom in on Africa specifically, the statistics that we have access to - albeit sparse - indicate that its sports industry only accounts for 0.5% of its GDP. Yet if we look at the high growth rates across the continent over the last ten years, its young population (the median age being 19) and its phenomenal athletic talent, demonstrated by some of the world's greatest champions demonstrate that Africa undeniably has a wealth of assets it could be taking advantage of.

How can we transform this potential into an economic reality?

What is preventing the sports industry from developing in Africa?

What levers can we pull to turn it into a real economic powerhouse?

In order to answer these questions, the African Sports and Creative Institute (ASCI) and international audit, tax and advisory firm Mazars have put together this unprecedented study on the sports industry in Africa. For the first time in history, this survey provides a specific analysis of the sports economy in Africa, directly seeking the opinions of the professionals on the ground on the industry and its future through a discussion of the current state of play, the challenges the continent faces and the growth opportunities it has access to. The study concludes with 16 concrete recommendations for a structural and sustainable transformation.

The ASCI-Mazars study collected feedback from a total of 47 countries (out of the 54 that make up the continent), all showing incredible diversity in terms of culture, economic systems and resources. Six major topics emerged as being most relevant for an analysis of the continent's sports ecosystem:

- Data and information on the market, the various ecosystem stakeholders and their performance;
- Training of students and professionals on the challenges in the sports industry;
- Leadership of public authorities and institutions;
- Business environment;
- Perception of sports as a commercial product designed to satisfy fans;
- Innovation in order to adapt to this new era

The study's analysis therefore focused on these six key areas, leading to 16 concrete recommendations on how to successfully transform Africa's huge potential into a sports industry that can actively boost its development as a whole.

The enthusiasm with which the survey participants responded to our questions and the creativity of their ideas serve as clear evidence of how the various stakeholders in the African sports industry are indeed conscious of the continent's unused potential and at the same time are ready, willing and able to create a new development model unique to Africa.

“Africans can no longer afford to simply copy and paste Western formats. We need to create and test out new models. ”



Robins TCHALE
WATCHOU - Cameroon
CEO of Vivendi Sports

Methodology

Mazars and the ASCI structured their study around two approaches - qualitative and quantitative - in order to evaluate the state of the sports ecosystem in Africa and highlight the huge growth opportunities.

This unique strategy which, thanks to its diversity, gave stakeholders representing the entire value chain across the whole continent the chance to have their voice heard.

The qualitative part of the study was conducted with 30 individuals from the African sports ecosystem. These included athletes, equipment manufacturers, and managers of federations, leagues, financial institutions, research institutions, public institutions, etc.

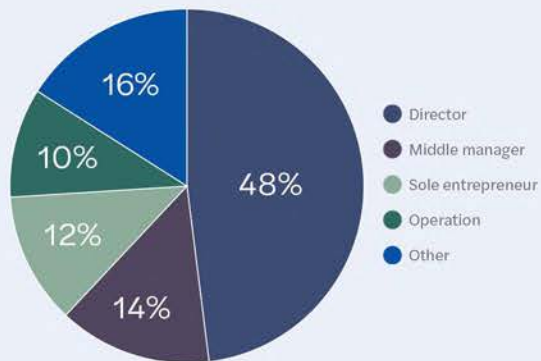
The quantitative part of the study was based on a representative sample of stakeholders in the African sports industry. 2,000 individuals were questioned (500 people responded) in line with a set of criteria relating to profession, experience (at least five years in the African sports sector), seniority (50% managers and 50% middle managers, employees and individual entrepreneurs) and nationality (representative of all sub-regions).

The survey included both open and closed questions with the aim of:

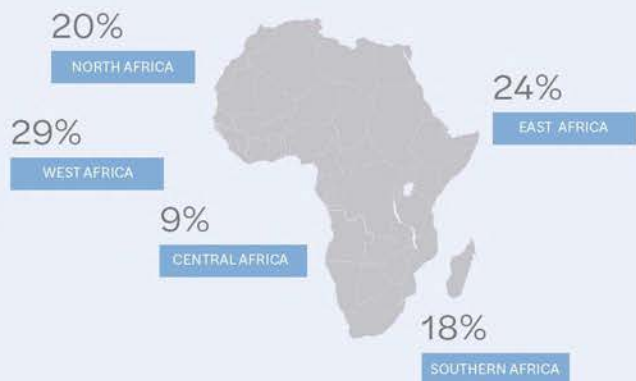
- Evaluating the sports ecosystem in Africa through an analysis of the health of its stakeholders, the level of collaboration, the value of the ecosystem and finally the impact of Covid-19
- Identifying the challenges to overcome
- Highlighting the opportunities to take advantage of



Function



Region



Organisation type



Executive summary

The sports industry is valued at around 2% of global GDP (1,500 billion euros) but only 0.5% of African GDP. Although the continent has seen strong growth over the last twenty years and has a young population with a median age of 19 and huge athletic talent, these advantages have still not been enough to make sports a major economic sector like it is across the rest of the globe. How can we structure and strengthen these new activities? And how can we transform the sports industry into a development lever for Africa?

With this goal in mind, the ASCI and Mazars conducted a qualitative and quantitative survey involving 500 professionals representative of Africa's entire sports value chain, in order to establish a clear picture of the current state of play and identify the major challenges and opportunities within this sector. These unique discussions have succeeded in laying the foundations for a rich dialogue that could lead to value-creating solutions in the long term.

Factoring in Africa's cultural, political and economic diversity, six clear common areas for discussion emerged:

- **Information** : creating visibility by investing in the collection and analysis of data on consumers, participants and fans, as well as the organisations serving them
- **Education** : creating, streamlining and regulating a sports management training programme for students and professionals
- **Governance** : reforming the governing bodies of public authorities and sports institutions so that they are more transparent, representative and participative
- **Business environment** : creating a business-friendly legal, fiscal and economic framework
- **Consumer value** : placing both participants and fans at the heart of the strategy for public authorities and companies
- **Innovation** : responding to new forms of practice and consumption through an innovative offer that draws on technology and African heritage



The ASCI and Mazars examined these six areas in detail and propose to put them into practice through sixteen concrete recommendations intended for governing bodies and all stakeholders in the African sports industry, with the aim of building a robust and attractive ecosystem :

Train and inform in the interest of human capital	Professionalise and monetise: view sports as a commercial product	Reinvent governance structures and create innovative economic models
Produce information and regular, reliable analyses, and create the African Observatory for Sport (AOS)	Make mass sports the engine behind the sports industry, notably with school, university and amateur sports as the basis for growth (rather than major events)	Reform sports governance structures, notably by creating a Pan-African sports governance body, the African Sports Steering Committee; separating executive power from administrative power
Invest in economic and social research to look to the future and anticipate trends	Create a legal, fiscal and economic environment that encourages investment in sports by proposing incentives, notably tax-related, and protecting intellectual property and investors through a regional harmonised legal framework	Focus on regional collaboration, notably by streamlining sub-regional legal, fiscal and economic environments, coordinating sub-regional public strategies, optimising the use of existing sports infrastructures and investing in new infrastructures by sharing capacities between neighbouring regions
Create, harmonise and regulate sports management training	Place fans at the centre of the sports ecosystem: the customer comes first! Understand the fans in order to better respond to their needs and offer them a high-quality product	Promote public-private partnerships, in order to ensure the provision of technical and financial support for more inclusive development
Improve the working ethics of sports professionals through the establishment of a code of ethics, including a reward and penalty system and a training policy for industry players	Be commercially innovative: engaging marketing campaigns, CSR, hospitality, and actions focused on enhancing the fans' experience, with a view to satisfying the fans and supporting the partner's/sponsor's commercial approach	Use sport as an answer to Sustainable Development Goals (SDG), notably in terms of health, well-being, gender equality and the fight against climate change
Invest in mass and amateur sports so that they can be used as development levers for elite sports	Accelerate digitisation: effectively manage the digital transformation of the sports industry to create platforms that are capable of generating significant revenue	Highlight Africa's cultural, intangible and natural heritage within the promotion of sports, for example
	Instill a sense of entrepreneurship in young people as a priority	

01

Navigating turbulent waters: a critical lack of data



Navigating turbulent waters: a critical lack of data

The digital revolution has made data the gold of the 21st Century, leading to the massification of data worldwide. Data on the African sports ecosystem is undoubtedly lacking. This sometimes forces operators to simply make it up as they go along. The respondents to our survey also confirmed this observation, pointing the finger both to the lack of credible data and to sports executives failing to understand the importance of such data. What's more, the survey revealed a preference for data from Western models, rather than African models.

“ The biggest obstacle standing in the way of growth in the sports industry is the lack of high-quality data and analysis. „



Kelvin WATT
South Africa
President of Nielsen
South Africa

Lack of information on the African sports ecosystem

The informal sector, which represents an average of 40% of African GDP* is a phenomenon that makes collecting data difficult. The majority of our survey respondents said they did not in fact have any credible sources of information on which to base their decisions. How can we draw up suitable growth strategies when we do not have adequate information on the stakeholders and the opportunities presented to them?

This lack of information forces decision makers to carry out their own research in order to “define and structure their own market”, as indicated by the director of a sports equipment distribution chain.

“ Our economies are informal. Our challenge is to create the visibility required to plan an ambitious strategy. „



Kwasi Tabury
Ghana
CEO of Decathlon Ghana

This lack of data can be explained by four phenomena.

Firstly, there is no way of evaluating the market (size and value) or its stakeholders (number and quality).

Secondly, sports industry stakeholders have a poor understanding of consumer and fan trends, which makes it difficult to create products that respond to their needs.

Thirdly, the absence of data on the performance of companies within the industry restricts collaborations with new partners and suppliers, and also hinders recruitment. As an example, a manager of a sports consultancy firm who was interviewed as part of the survey explained how she is not able to bid for projects that would allow her to target credible partners.

And finally, the lack of data can dissuade new stakeholders, such as donors, investors or sponsors, from investing, therefore depriving the market of their contributions. 41% of our respondents said that they feel that the main financial barrier to growth within the sector is the lack of attractiveness for these stakeholders.

This problem, which has significant economic consequences, could be significantly reduced through the creation of the African Observatory for Sports led by member organisations representing the diversity of the African sports ecosystem.

Its main aims would be to:

1. Draw up a map of the ecosystem: fans, sports institutions, equipment manufacturers, etc.
2. Define and adopt statistical methods for collecting and analysing data
3. Create indicators against which to evaluate the health of the ecosystem and its components: individual and community practices, infrastructures, etc.
4. Conduct general interest studies that shed light on public policies and analyse the economic and social impact of the initiatives
5. Draw up a plan for the future
6. Promote good practices

“ We would like to collaborate with neighbouring countries, but where do we start? The information unfortunately just isn't there for us to find! ,,



Suely NEVES
Cape verde
Secretary-General of the Cape Verdean Basketball Federation

Main financial hurdles

1	Challenges in identifying and convincing private investors
2	A lack of public subsidies
3	Economic downturn



Lack of understanding of the crucial value of data

Data is the first resource any company looks towards when seeking to create value.

By regularly collecting accurate data, organisations can equip themselves with the resources they need to map out their environment and therefore detect risks and opportunities. Managers who neglect the value of data are therefore doing little more than simply “winging it”, and risk putting all their activities in danger.

30% of our respondents highlighted the lack of understanding that African leagues and clubs have of their respective environments. The lack of quantitative and qualitative data regarding their competitors, consumers (fans) and even their own performance is not yet perceived as a major risk by their executives.

This oversight of the importance of data directly impacts leagues’ and clubs’ ability to attract new sponsors. In fact, new sponsors are primarily interested in being exposed to new consumers, whilst reinforcing their relationship with existing consumers. They expect the rights holders to qualitatively and quantitatively define the profile of their fan base, as well as the best levers to influence their behaviour and therefore hopefully convert them into customers.

Without reliable statistical data, sports industry stakeholders are depriving themselves of potential funding, which would significantly accelerate their growth.

In order to fix this issue, it is vital that institutional players invest in tools that enable them to collect, structure and capitalise on relevant industry data. International institutions could also play a key role in this sense.

Collaborations between major institutions, such as the World Bank or the African Development Bank and data experts would encourage other types of stakeholders to get involved.

This sense of competition would ultimately lead to an improvement in the quantity and quality of the data. Decision makers would also benefit hugely from quantitative and qualitative analyses conducted by university researchers and research institutes.

“ The lack of professionalisation within the industry can be seen through sports executives’ inability to understand the value of data and technology in establishing a relationship with fans. „



Kelvin WATT
South Africa

President of Nielsen
South Africa

Research institutes, considered by 80% of our respondents to be amongst the three least established stakeholders in the African sports ecosystem have a key role to play:

- Collecting and analysing data available in the market
- Drawing up case studies on existing innovations and good practices within the industry so that they can be duplicated
- Informing African stakeholders of the good practices observed elsewhere in the world
- Providing inspiration for public strategies, which was highlighted as a priority area for improvement by 59% of our respondents
- Measuring the impact of public and private initiatives

36%

of respondents believe that the **digitisation of sport consumption** is the second largest trend that will redefine the challenges related to the practice and consumption of sports.

Promotion of African models

“ I closely follow the actions of major African clubs like Al Ahly, Kaiser Chiefs, Raja, Wydad and Zamalek. It’s a lot easier to copy their practices, rather than those adopted by championships as sophisticated as the English Premiere League! „



Emeka ENYADIKE
Nigeria
Director of Digital Sports Africa

The participants in our survey believe that paradoxically, both African sports fans and executives are better informed on European and American sports news than that in their own continent. “Brought up to consume foreign content,” they have a poor understanding of regional success, notably regarding management and marketing.

This phenomenon was underlined by 34% of respondents, who consider the lack of local sports news coverage by African media as the main barrier to marketing and tapping into revenue generated by sport.

The consequences of the prevalence of foreign content are trifold :

Firstly, it is difficult to encourage new operators to invest in the industry or even to recruit qualified candidates when the data is not available.

Secondly, the lack of local and regional information hinders collaboration between different African stakeholders, as indicated by 31% of respondents.

And finally, imitating foreign models, designed for environments that are completely different to those in Africa, is rarely successful.

Based on the information collected during this study, we can conclude that data is a key element in the development of the African sports industry. Local, regional and continental sports news needs more coverage from different media channels, in order to promote the sports industry and highlight its success stories. We also believe that collaborations between public and private African organisations must be strengthened (a matter that will be covered in the next chapter).

Barriers related to commercialisation and revenue generation

1	Lack of coverage by African media
2	Lack of understanding of sponsorship
3	Lack of professionalisation of rights holders (leagues & federations)

“ We must promote local media, which not only inform but also educate and connect sports stakeholders „



Leslie KOROMA
Sierra Leone
Founder of Africa Sports Ventures Group

Case study: Decathlon in Ghana, the data marathon

1. A blank map

« Our economies are informal, and so our challenge is to create the visibility required to plan an ambitious strategy »

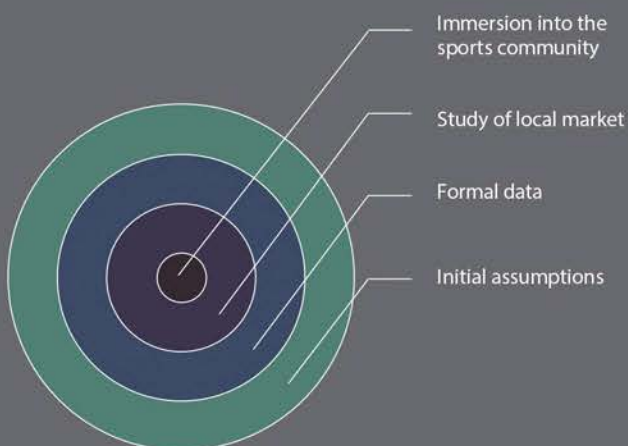
Decathlon, the French sporting goods production and distribution giant, has begun its expansion into West Africa, starting with Ghana. Supported by a turnover of 12 billion euros and 1,700 stores, including around twenty across Africa, the group was ideally positioned to replicate its winning model.

The manager in charge of this feat, Kwasi Tabury from Ghana, is nevertheless faced with a challenge not uncommon in the business world in Africa: how can he seize this opportunity in a market with so little reliable and up-to-date data?

2. The direct responsibility of the manager

« Despite the size of the Decathlon Group, I have to manage the brand like a start-up. To succeed in Ghana, we need constant innovation and collaboration. »

In order to collect the information on the Ghana sports market that he needed to put together a winning strategy, CEO Kwasi Tabury followed a structured plan:



Collection of “formal” data :

The data was initially drawn from macroeconomic reports conducted by organisations promoting Ghana as an investment destination: the National Chamber of Commerce & Industry and the Ghana Investment Promotion Centre, as well as the embassies in Accra.

Collection of “informal” data :

Kwasi Tabury then approached local players who also needed an accurate map of sports participation trends and consumption patterns in relation to sports products in Ghana. Decathlon then established partnerships with Ghanaian universities, marketing agencies and finally local traders in order to conduct market research together.

As a former semi-professional football player, Kwasi Tabury has experience in the amateur sports world, notably playing with district leagues in Accra. His discussions with sports players, organisers and fans helped him to understand consumers’ needs and preferences in terms of products, as well as the factors that would influence their decision to purchase an item. The last stage involved having the products tested and collecting specific feedback from the end users.

Finally, all the data collected on the ground was compared with the data from the market research.

3. Goal achieved

At the end of this incredible marathon, Kwasi Tabury, whose ambition is to become the largest distributor of sports equipment in Ghana, was able to evaluate the size of the Ghanaian market, which in turn enabled him to put together the most appropriate business strategy.

Several years later, Kwasi Tabury looks back at his journey and shares the key lessons he took from it:

- Make data collection and analysis the responsibility of the manager, as it is vital to the success of any business project
- Collaborate with stakeholders representing each stage of the value chain
- Agility and local reality: make observations on the ground, make hypotheses, test them and adapt if necessary
- The customer comes first: make customer satisfaction the driver behind all actions, by innovating if necessary

4. Onto the next race

In line with the Decathlon Group’s vision, the store launched the “Sport4all” programme, with the aim of providing access to sport to all Ghana citizens, notably through outdoor fitness classes. The ambition is to help combat society’s ills:

- Obesity (43% of the population) and non-communicable diseases (23% of the population)
- Pollution of the beaches (32% of plastic consumed is dumped as litter)

In collaboration with the network built during the data collection process (sports coaches, business providers, etc.), Decathlon is working to promote the economic development and structuring of its business sector.



02

INVESTING IN HUMAN CAPITAL, THE KEY TO SUCCESS



Expert opinion



Didier DROGBA

Football legend and candidate for the Presidency of the Ivorian Football Federation

Why are you a candidate for the presidency of the Ivorian Football Federation?

My sporting background is quite atypical in the world of professional football. I was born in Côte-d'Ivoire, then migrated to France with my family at the age of 6. I discovered football there, but while players of my generation like Thierry Henry and Nicolas Anelka competed in the World Cup, I was still playing at an amateur level.

This late breakthrough allowed me to experience the family atmosphere and the modest means of the amateur world before experiencing the extravagance and the pressure of the professional level. This knowledge of the two sides of our sport today motivates my candidacy for the presidency of the Ivorian Football Federation.

Two priorities guide my new career: the promotion of grassroots sport and good governance. Indeed, I am convinced that the practice of sport by the greatest number will not only have a positive impact on the physical and mental health of the population, but also on social cohesion and job creation.

In order for sports organizations to support this increased practice, they must adopt standards of good governance.

Is emigration the only way for African athletes to build a career?

Migrating is often a way to accelerate a person's development, whether they aspire to be a professional athlete or not.

My experience in France and then in England were extremely enriching, to the point of motivating me to return to share this knowledge with my people. Moreover, I remain convinced that young people trained and employed in Africa can lead great careers here. As a player, I had the opportunity to face the excellent Egyptian football team, 6 times African champions.

This great nation of African football has built this record on the quality of its training. Their best players rarely go abroad, because the league is competitive and the clubs pay their stars very well. In Ivory Coast, ASEC also produced quality players like Kolo and Yaya Toure, although they were unable to hold on to them long enough. It seems to me that the Federation's mission is to create a robust ecosystem, allowing local players to thrive and prosper in their home country.



Investing in human capital, the key to success

“ We must professionalise all stages of the value chain so that young people and their parents take careers in sports seriously ,,



Beatrice AYIKORU
Uganda

Vice-President of the Uganda
National Olympic Committee

Despite progress made over recent decades, Africa is still lagging behind in terms of education and development of skills, both on a quantitative level (average length of schooling) and a qualitative level (test results and growing gap between private and public institutions).

According to the African Development Bank's (AfDB) 2020 African Economic Outlook, the impact of education on boosting productivity at work is limited in Africa, notably due to the poor quality of education. Furthermore, the skills and training presented by Africa's workforces do not correspond to the needs of the African labour market.

Almost half of employed young people feel that their skills are below what is required for their job.

Whilst teaching basic skills is an important stage (expression, writing and citizenship), a focus on the skills relevant to the working world, notably relating to information technology and innovation, would lead to faster and more inclusive growth.

The answers from the African sports professionals who took part in our study are coherent with these observations: according to them, the problem surrounding the development of sports-related jobs in Africa can be traced back to society's perception of them.

Improving the perception of sports-related jobs

This statement from Evelyn Watta illustrates the somewhat narrow perception that many Africans have of sports. Sports is often perceived as just a leisure activity - nothing serious and something that young people with no future do. Plus, the lack of data and media coverage, as outlined in the previous chapter, does little to highlight the sector's economic potential.

In Africa, sports is primarily practised at school or on empty land in poor areas. Students who demonstrate a talent for sports or who express a desire to pursue a career in sports management are often discouraged by their parents and teachers in favour of more highly regarded industries, such as medicine or engineering. The participants in our survey observed this phenomenon all the way up to the highest sports bodies, where it is difficult to attract high achievers to sports jobs.

In order to reverse the trend and change this perception, we recommend a number of actions :

1. Promoting mass sports across the whole population, focusing particularly on girls, people with reduced mobility and older people, so that the benefits of sport are accessible to everyone. In Mali, for example, the Hamchatou Maiga Ba Foundation set up by the eponymous international basketball player offers inclusive sport and education programmes to children and mobility-impaired people.

2. Taking advantage of school enrolment campaigns to promote school and university sport (the second priority in strengthening the ecosystem according to our respondents), above all amongst the disadvantaged. Amateur and professional clubs could even get involved and therefore take advantage of these campaigns to identify potential talent.

3. Promoting the professional sports industry and the different jobs available, highlighting those that cross over with other disciplines, such as sports law or sports marketing.

There is also another phenomenon that has damaged the reputation of the sports sector: the continuous scandals that occur within its management bodies (FIFA, CAF, CIO, IAAF). This aspect will be examined in detail in chapter 4.

“ When I told my father I wanted to be a sports journalist, he replied: wouldn't you rather cover a serious subject ? „

“ In Africa, sport is mainly practised in schools. There is therefore a huge opportunity to develop university sport „



Evelyn WATTA
Kenya

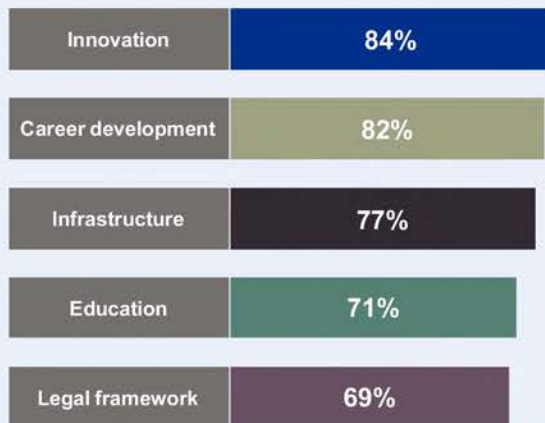
Vice-President of the International Sports Press Association and Olympic Channel Producer



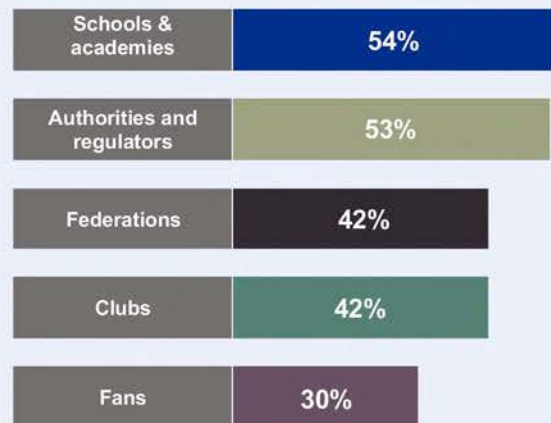
Leslie KOROMA
Sierra Leone

Founder of Africa Sports Ventures Group

Main weaknesses of the sport ecosystem in Africa
(in percentage of respondents)



Areas in which development efforts should be focused
(in percentage of respondents)



Training of students, athletes and future sports managers

A third of the sports professionals who took part in our survey believe that the gaps in sports management training are the main barrier to growth in the industry. Due to little promotion of the economic potential of the sector, there are still very few sports management training programmes. Those that do exist are primarily theory-based and are poorly adapted to the needs of the market, failing to teach students the soft skills that are vital in today's world, such as problem solving, communication and working as part of a team. An education specialist also highlighted the difficulties faced in recruiting teachers with practical experience, and the lack of qualitative and quantitative content available to teachers on the African market. Teachers are therefore limited to their own personal experience and to data from foreign markets.

What's more, the lack of streamlining across courses and the absence of certifications for training bodies makes comparing different programmes difficult and leaves the door open to poor institutions.

The second observation regarding student training is the absence of any bridges between training for athletes or sports managers and other higher education disciplines, which would allow students to reorientate during or after their studies.

“ If I want to achieve my full potential, I would need to leave Africa after I finish school. My dream is to study in the US ,,



Malak ABDELSHAFI
Egypt

Swimmer qualified for the 2020 Tokyo Paralympic Games

The lack of appropriate sports management training has several consequences. Firstly, it affects young graduates who lack the interpersonal and organisational skills needed to respond to the demands of the working world. Secondly, the lack of streamlining across courses prevents recruiters from identifying the best profiles. And finally, it makes it problematic for athletes wishing to reconvert at the end of their sports career. Some often find themselves unemployed.

In order to remedy these situations, which constitute genuine obstacles in the way of professionalising the sports industry in Africa, we have identified various ways we can improve :

- **Promote the creation of training courses that combine theory with practice, moulding students into young managers capable of setting up and directing businesses in any sector**
- **Work in partnership with the various ecosystem stakeholders to select the best formats (e.g. sandwich courses) and content, in order to prepare graduates to be able to respond to the needs of the market**
- **Streamline all courses, content and exams across the whole of Africa in order to make qualifications consistent with one another and therefore facilitate the work of recruiters**
- **Accredit the educational institutions delivering the qualifications to give them credibility, ensure their competitiveness on the international market, and protect the rights of students**
- **Regarding athletes more specifically, combine sports training with a professional education for reconversion purposes**
- **Finally, create a training programme that provides sports executives with a qualification, like the programmes provided for trainers.**

Regarding athlete training, the Mohammed VI Football Academy offers an interesting model. Financed by major national companies, this establishment offers the first sports-studies curriculum in Morocco: a bilingual training and academic programme co-created and led by Moroccan and foreign experts.

“ No one ever told me about professional reconversion until I met two young trainers from France. There was suddenly a whole new pathway open to me ! ,,



Aminata NAH FOFANA
Ivory Coast

Secretary-General of the National Olympic Committee

“ I invest a lot into providing young athletes with a financial education. If they want to be financially secure, they have to be able to make quick strategic decisions. „



Koye SOWEMIMO
Nigeria

Sponsorship and marketing
Consultant

Main barriers related to human capital

1	Lack of understanding of sports business
2	Gaps in education
3	Identify and recruit qualified staff

Continuous training on sports management and technology

In addition to young graduates' lack of appropriate skills, the respondents underlined industry stakeholders' (notably rights holders) poor understanding of the financial challenges within the sports industry.

Furthermore, professionals who want to continue to develop their skills throughout their career are presented with a limited range of continuous training options, forcing them to learn online or enrol with European institutions at an extortionate cost. Finally, numerous respondents noted a poor understanding of IT, despite the fact that the digitisation of consumption and supply are considered the second and third largest trends for the future of African sports.

The problems surrounding training means that it is not easy for people to understand the challenges of the sports industry, which is then clearly reflected by the continent's lack of ability to generate commercial revenue. Rights holders' lack of professionalisation and understanding of their sponsors' needs are listed as the second (30%) and third (10%) highest barriers to commercialisation and generation of revenue by our respondents.

Respondents also highlighted the lack of innovation within the range of commercial products and services offered. Sales teams are not equipped to offer differentiated solutions tailored to their sponsors' needs or to adapt to the continuous developments within the market.

Offering a range of continuous training that combines the best educational tools with content tailored to the needs of the market requires a public-private partnership between the government, training bodies and companies. This type of collaboration has proven its worth notably in Morocco in the provision of training in the aeronautical and automotive sectors.

“ To transform sports into a lever for development in Africa, training is essential. We need to professionalise sports jobs by providing young people with the relevant skills in all aspects of the sports sector (marketing, law, digital, finance, etc.) „



Kamil SENHAJI
Morocco

President of ISM and Vice President
for Emerging Countries at Galileo
Global Education

The advantages for the sports industry would be visible on three levels:

- **Content that is co-created to respond to the needs of market stakeholders and then rolled out by company managers to facilitate networking**
- **A hybrid format combining in-person and remote teaching made possible thanks to the superior technological expertise of the companies**
- **Financing: the stability of the government is reassuring and can therefore be used to attract investors and donors**

This type of alliance would considerably elevate the quality of the programmes, which would not only encourage companies to invest in training, but private individuals too.

Finally, it is worth mentioning “non-formalised” training. By collaborating with African companies, foreign multinational companies can help to enhance the skills of professionals in Africa. The transfer of technical, technological and team management skills would happen naturally during everyday interaction. African governments would therefore gain a huge amount by encouraging this type of collaboration, and indeed formalising them through genuine training programmes.

“ Specialised professional training in the sports industry is almost non-existent in Africa. I had to invest a significant amount to be able to study in London. If there had been an interesting programme available in Africa, I would have enrolled and I could have developed my network here a lot better. My everyday professional contacts are primarily African ,,



Mirado
RAKOTOHARIMALALA
Madagascar
Secretary-General of the
Orange League

“ If they want to respond to the problems faced by African consumers, major foreign groups must collaborate with local suppliers, even if that means taking steps to improve their skills ,,



Robins TCHALE WATCHOU
Cameroon
CEO of Vivendi Sports



03

STRONG LEADERSHIP: GOVERNANCE OF PUBLIC AND PRIVATE ORGANISATIONS



Expert opinion



Valens MUNYABAGISHA

President of the Rwandan National Olympic and Sports Committee

1. Respondents observe gaps in the governance of African sports, particularly in terms of training and ethics. How do we bridge those gaps ?

Governance is defined as the set of measures and rules aimed at efficiency within an organization. It is based, among other things, on independence, accountability, transparency and participation. In African sports, governance faces two barriers: ethics and professionalization.

In Africa, access to positions of responsibility sometimes requires support or a recommendation from someone else without necessarily taking into account the skills needed for the position. Governments, international and continental federations and even sometimes high-ranking individuals interfere in the choice of personnel for sports institutions.

Whoever is placed in these conditions, whether competent or qualified, automatically loses his independence and transparency in management, because he/she feels obliged to protect the interests of the person who supported him. In addition, we see a lack of enthusiasm in the implementation of management tools that guarantee good governance in our African sports.

Few institutions have a code of ethics. When there is no control or audit in an institution that manages public funds, the risk of lacking professional ethics becomes high. To remedy these shortcomings, it is imperative to put in place legal provisions as well as management tools to control, assess and possibly sanction those who are guilty of mismanagement. Of course, each of our 54 countries has specific features requiring specific solutions.

2. What governance reforms have you launched at the Rwandan NOC?

Since 2017, the National Olympic and Sports Committee of Rwanda (CNOSR) has undertaken a series of reforms promoting good governance in Rwandan sport, including :

- the four-year **strategic plan** is evaluated and then presented each year to the General Assembly for review and adoption.
- **management tools** including the administrative and financial procedures manual as well as recruitment and procurement policies
- each year, three audits are carried out internally, by an independent company and by Olympic Solidarity.
- A report is presented to the General Assembly.

Finally, the CNOSR has improved its communication with national federations. In addition to its Facebook, Twitter and Instagram accounts, it publishes a quarterly newsletter presenting its activities and an administrative and financial report. This report is also sent to the Ministry of Sports and to the Rwanda Governance Board, responsible for overseeing good governance.

Expert opinion

3. What governance model should be developed at the national, regional and continental level to structure the sports ecosystem in Africa?

It is not easy to design a governance model unique to all African countries. However, there are models that we can draw inspiration from to structure the ecosystem of sport in Africa.

The International Olympic Committee (IOC), the International Football Federation (FIFA), the International Association of Athletics Federations (IAAF) are examples of institutions with a strong governance system.

If each International Federation could develop strong organs and sports management tools for African confederations, if the latter in turn put in place organs and tools for national federations and so on, this would allow good coordination and evaluation. African sport institutions should also become less dependent on governments and work more closely with the private sector and civil society.

4. How do you feel about professionalizing the governance functions and separating the administration from the executive?

Amateurism in governance is a great handicap for the development of sports. The responsibilities of managers and technicians should be distinct and their respective performance should be assessed separately.

Sport leaders should strive to understand the real issues in the sport ecosystem and come up with policies that meet the development needs of sports, of course after consulting with technicians. Yet very often politicians and officials of National Olympic Committees or National Federations make technical decisions without consulting experts. Technicians should be allowed to manage the sport and suggest measures aimed at its performance.

Unfortunately, we see an increasing number of sports technicians becoming sports leaders, confusing sport performance with sport development.



Strong leadership: governance of public and private organisations

Sports professionals are calling for strong, ethical leadership, in order to prevent a repeat of the numerous scandals that have tarnished the sector, from the CAF's sophisticated corruption story to the travesty of Spanish basketball players faking a mental disability to be able to take part in the Sydney Paralympic Games. In this sector, much more so than others, misconduct seems to be perceived as a real betrayal by consumers and fans, who are intimately linked to their discipline, their athletes and those who manage them.

After lack of data and training, sports governance was highlighted by the 500 individuals taking part in our survey as a priority in the quest to boost performance, attract new resources and make Africa a global industry leader.

“ It didn't take much to create a national buzz around football. The government seized the opportunity created by the success of the national team at the 2019 Africa Cup of Nations and launched a plan for the construction of several local stadiums with a capacity of 2,000 to 5,000 spectators. „



Mirado
RAKOTOHARIMALALA
Madagascar
Secretary-General of the
Football Orange League

Managers have little knowledge of the challenges in the sports industry.

Traditionally, senior technical staff and managers of African sports institutions are recruited by former athletes. Although they have acquired a wealth of knowledge in the physical and mental preparation, and management of sportsmen and sportswomen, their understanding of the economic and financial challenges in the sports industry is limited. There are still not enough sports management training options available and investment from sports institutions into the continuous training of their executives remains very rare.

According to the respondents, executives of ministries, federations, leagues and clubs have large gaps in their knowledge of the needs and aims of investors, sponsors, technical partners and even fans. Furthermore, their lack of command of technological and business tools makes it impossible for them to propose innovative and value-generating economic models.

As well as investments into sports management training and information technology, we feel that it is necessary to rethink the selection process for senior executives of sports ministries and institutions, in order to make best use of available skills:

- **Experience** : sports industry stakeholders are collaborating more and more with organisations from other sectors. It would therefore be beneficial to recruit executives who have experience in a wider range of areas, such as IT, finance, law, marketing and psychology
- **Gender diversity** : although Africa has a higher proportion of women who have either set up or are managing a business than any other continent, African sports bodies are still a long way from achieving gender parity
- **Youth** : young people are the leading consumers of sports and the most familiar with the latest technologies
- **Civil society** : fans, former amateur club players, associations, health professionals and retired athletes all bring a different perspective
- **Diaspora** : as well as constituting a bridge between Africa and the rest of the world, the African diaspora brings good practises from more advanced countries, as well as a network of potential partners and investors

“ Sports will only develop at the same rate as other sectors when federation staff and ministers receive specific training on the challenges of this sector ”



Valens MUNYABAGISHA
Rwanda

President of the Rwandan National Olympic Committee and the Rayon Sport professional football club

Good governance and individual ethics

Sports institutions claim to contribute to education, citizenship and social integration. They must therefore ensure that their values and practices align, in order to avoid creating a lawless area. The respondents to our survey shed light on the major shortcomings in institutions’ governance systems. Each of the steps below must be completed in order to ensure that the institutions fulfil the mission assigned to them:

- Transparency regarding the election of executives
- Clarification over the roles and responsibilities assigned to executives
- Clarification of the decision-making process
- Establishment of counterpowers and clarification of responsibilities
- Financial transparency
- Regular evaluation of the performance of the system and its stakeholders
- Creation of independent bodies to apply punishments for misconduct
- Integration of all stakeholders, including industry representatives, young people and women

The establishment of a Pan-African sports governance body, which could potentially be called the African Sports Steering Committee (ASSC), would offer African sports institutions a framework for discussing and coordinating actions. The sporting world’s disorderly response to the Covid-19 crisis could have benefited from such a platform. The ASSC would unite all African sports executives around 3 common missions:

- Monitoring and coordination
- Promotion and influence
- Exchanging of good practices and submission of proposals to African institutions (AU, ECOWAS, etc.) regarding trade and public policies

Furthermore, individual interviews conducted within the framework of our study almost unanimously revealed ethical breaches along the entire chain of industry stakeholders. Given the breadth of the matter and notably its political, economical and legal ramifications, we need a holistic strategy to truly resolve this problem. But from our point of view, actions should start from the bottom up, i.e. training. We therefore suggest the following actions:

- Creating a code of ethics for sports professionals
- Introducing an obligatory training module on this code for new recruits, followed by an exam and a certification
- Imposing penalties for infringements
- Strengthening sports governance and the legislative framework to deter illegal practices, including corruption

“ Two years of sports management studies in China opened my eyes to the work ethic required if, like China, Africa wants to catch up ”



Aminata NAH FOFANA
Ivory Coast

Secretary-General of the National Olympic Committee

Promoting Pan-African collaboration

The integration of African economies has been a political priority for more than 40 years. This desire gave rise to 8 Regional Economic Communities under the aegis of the African Union, then the African Economic Community, and from 2021, the African Continental Free Trade Area (AfCFTA). Commercial integration and regional infrastructure are two key elements that could significantly impact the sports economy, in which three quarters of respondents felt that the level of intra- and extra-regional collaboration was weak.

All African industries share several challenges and opportunities: successful integration would allow them to combine skills, optimise resources, and attract investors seeking to create a large-scale impact.

In this sense, the Génération Foot football academy in Senegal serves as an interesting example. Génération Foot is a profitable training programme that has produced more than 30 professionals, including the famous Sadio Mane. It has forged international partnerships with top-level clubs such as FC Metz in France.

In light of this, we would like to suggest several initiatives:

- Commercial integration :
 - o Develop commercial partnerships between industry players, notably regarding responding to calls for tender and launching common sales proposals for the creation of a regional school sports event, for example
 - o Pool supplier efforts to respond to regional needs on a large scale
 - o Share commercial information and good practices: players, upcoming events, management, etc.
 - o Streamline legal and fiscal frameworks
- Infrastructure management:
 - o Coordinate public authorities' and regulators' strategies at the level of sub-regions or RECs, as called for by 70% of respondents
 - o Optimise the use and maintenance of existing sports infrastructure
 - o Pool investments into new infrastructure, sharing skills between neighbouring countries, for example into the organisation of the Africa Cup of Nations by several countries

“ I was inspired by the resilience and collaborative spirit between neighbouring countries, notably Senegal, Mali and Guinea, who worked together to prepare for the AfroBasket ,,



Fatoumata CAMARA
Guinea

Professional basketball
player in Spain



Expert opinion : Professionalisation of leadership and reinforcement of governance in Africa

With Beatrice Ayikoru - Uganda



Secretary-General of the Uganda Athletics Federation, Vice President of the Uganda Olympics Committee and one of the 3 African members of the World Athletics Council

How is sport perceived in Uganda?

In Uganda, it seems that sports are primarily perceived as a leisure activity and a game for young people. It is therefore mainly encouraged in schools. An understanding of its economic dimension is unfortunately often limited to elite sports. Ugandans who are passionate about football, basketball and athletics are influenced by the high salaries flaunted by the professionals competing in major world championships.

What is your opinion on the state of sports governance in Africa?

African governance is still marked by amateurism; however institutions have acknowledged the fact that the industry is in urgent need of professionalisation. Traditionally, sport is perceived as a “non-serious” activity that therefore does not require professional organisation or skills. Amateur associations have therefore not recognised the need to develop an economic model that can generate revenue. A gradual change in mentalities and an understanding of the impact of sport on the country’s development is now prompting our industry leaders to seek the intellectual and financial resources required to modernise our industry.

What are the conditions for professionalising our sports governance structure?

I believe that there are three changes that must be made if we are to professionalise our sports governance structure.

Firstly, governments must consider sports as an economic sector in its own right that can positively impact gross domestic product. They must then propose a clear policy aligned with the country’s other priorities, such as education, health and infrastructure. Secondly, they need to view sports as a lever for social development and integration for young people. And finally, they need to see sports as an industry capable of generating income and creating jobs.

How do you feel that diversity in sports has evolved?

We are working a lot on gender diversity and equal treatment between women and men. In Uganda, real progress has been made in this area: an amendment to the Constitution has been signed that affirms equal treatment. However, female athletes are still paid less than their male counterparts, due to the fact that they attract fewer spectators. We hope to be able to close this gap, notably by encouraging sports amongst girls and heightening their visibility.

What is the typical profile of a sports executive in Africa?

We do not have any exact data, but our executives are often former athletes or trainers. Having an understanding of practical sport, even at the highest level, is not enough to grasp the challenges of the industry and then provide a vision and an effective strategy. It is therefore crucial that we offer our top-level athletes a combined sports and academic training programme that prepares them for a career transition.

Ideally, three criteria should be met before assuming a position of responsibility in the sports industry: higher academic training, an understanding of the current challenges faced within the sports industry, and finally, an ability to work within an international context.

Have you got training programmes in place within your organisations?

Training our teams is a crucial responsibility for our managers. The International Olympic Committee provides members of all national committees (NOCs) with technical and managerial training. The Uganda NOC has established prerequisites at recruitment level, making a university qualification, for example, essential for anyone applying for the position of president.

“

Although we aren't there yet, we hope that our future generation of leaders will be properly educated. >>

What lessons did you take from your experience in governance ?

I took three lessons from my experience.

Firstly, it is essential that we have a deep understanding of the mechanisms of our own sport if we are to manage the constraints and identify the opportunities presented to us.

Secondly, I believe that interpersonal and managerial skills are more important than technical expertise. We all end up working with people from all sorts of backgrounds, all of whom expect us to understand their needs and communicate clearly.

Finally, it is vital to broaden your knowledge beyond sport. Working with the government and companies requires you to be constantly up to date on political, social and economic issues so that you can propose initiatives that generate value for all parties.

What major challenges and opportunities does the African sports industry face?

I would say there are three major challenges :

- 1. The narrow and often negative perception of sports in terms of its capacity to generate a financial and social impact**
- 2. Gaps in training for sports professionals**
- 3. Difficulties in convincing private and public investors**

There are also three opportunities :

- 1. Increased awareness amongst governments of the potential of the sports economy, which could lead to policies becoming more coherent**
- 2. The diversification of sports-related products and services, notably from private companies**
- 3. The youth and athletic talent of the African population**



04

CREATING A BUSINESS-FRIENDLY ENVIRONMENT



Expert opinion



Pierre LAPORTE

Director Ghana Liberia Sierra Leone at World Bank

The respondents describe a number of institutional, financial, and structural hurdles to the growth of the sports ecosystem. How can those be alleviated ?

One important factor that makes it difficult to get through these barriers is that beyond the sports actors, others who really matter like politicians and other key decision makers have not fully appreciated to what extent sports matters for development. You talk about the economy of sports, but other dimensions of sports like the social and educational dimensions are as critical. I consider sports as a contributor in enhancing human capital.

So to start with we should find ways of getting decision makers to internalize these positive aspects of sports. It is encouraging to see that institutions like the World Bank as well as some governments like France through the Agence Francaise de Developpement at the forefront of promoting the concept of sports and development.

On infrastructure, to be fair I feel that on the one hand African governments have tried their best to invest in sports infrastructure though of course more can always be done but, but on the other hand we have to be realistic about the gap between available resources and broader development needs of Africa and hence the challenges in funding sports infrastructure.

I agree with you that what is needed at the core is a Strategy for sports and development in Africa by Africans and driven by African institutions. I feel that today while it is gratifying to see African sportsmen and women giving so much back to the continent, and other institutions and governments from outside Africa supporting sports in Africa, there is a genuine lack of leadership at institutional level to really put sports in its rightful place in development of Africa.

How can public and private sectors best collaborate ? Which PPP models do you favour for the launch of sports related projects ?

Public resources are never enough for development, let alone in sports and thus it makes perfect sense to develop sports infrastructure through PPPs as this means plugging government budgetary shortfalls, better value for money for both governments and private investors, transfer of best managerial and technological practices, etc. However, as with standard PPPs in adopting a PPP approach to building sports infrastructure can come with significant risks, including fiscal risks, political interferences, technical complexities etc..

As such whilst the use of PPPs in sports infrastructure has huge potential benefits, the risks should not be underestimated, and the best model would be one based on international best practice and that avoid these risks.

Respondents list youth entrepreneurship as the second highest priority for our sector. How could we make it a lever for growth in Africa ?

I totally agree that sports provide huge entrepreneurial opportunities for African youths. From Management to coaching to sports medicine these are all streams that our youth can develop into professionals and make genuine careers out of. But again we need a proper framework or strategy in order to promote this vision. Maybe some sort of African Academy that could provide training programs for these various streams could be something to consider.

Creating a business-friendly environment

“ Our mantra is ‘sport for development and the creation of opportunities’ „



Teta NDEJURU
Rwanda
Tourism Development Manager
on the Rwanda Development
Board

African governments face several challenges, including the deterioration of sanitary conditions, unemployment amongst young people, brain drain, and the need to diversify national economies that are often dependent on raw materials.

According to the United Nations Conference on Trade and Development (UNCTAD), farming, mining and energy resources account for more than 60% of exports across Africa as a whole, with the exception of five countries: South Africa, Eswatini, Lesotho, Morocco and Tunisia.

Sport is a sector that can contribute to economic development. In order to accelerate this diversification, African governments must create a business-friendly environment by establishing a strategy with a common focus on 6 priorities:

- Making sports an area of national development
- Mobilising financial resources
- Accelerating infrastructural development through PPPs
- Reforming the legal, regulatory and fiscal framework
- Promoting the employment of young people, particularly in entrepreneurial roles
- Encouraging regional integration

Making sports an area of national development

Rwanda is one of Africa’s greatest pioneers in this sense. Over the last few years, sports has become a major focus for economic growth there, notably thanks to the promotion of mass sports, a unique sports tourism proposal, and the organisation of major events at international standards.

Unfortunately, not all African countries share the same vision. Our respondents indicated that the lack of any coherent national strategy in the sports sector constitutes the main barrier to its development. According to them, African sports industry executives primarily focus on entertaining and mobilising the masses for political purposes, for example through the organisation of major events with national football teams. They therefore overlook the huge revenues generated in Europe and in the US, where the sector represents up to 2% of GDP.

“ The sports industry in Morocco has huge potential. According to recent estimates, the Moroccan sports economy represents 1.1% of GDP. It could reach between 2 and 3% if we mobilise investments, notably in the private sector. Consolidating a sports ecosystem, notably at a local level and particularly in terms of training, could become a powerful lever in highlighting the attractiveness of the Moroccan sports industry. „



Mihoub MEZOUAGHI
Algeria
CEO of the French Development
Agency in Morocco

Attracting investment and mobilising financial resources



Hamchetou MAIGA-BA
Mali

Former international basketball player and Founder of the Hamchetou Maiga-Ba Foundation

“African countries should develop programmes to encourage the diaspora to come back to the continent to share their experiences and networks, and to invest.”

One of the major obstacles to the creation of value highlighted by this study were barriers to investment. Whilst the business environment in Africa has improved over the last 20 years, the 2020 Doing Business report released by the World Bank indicates that only 5 African states - Mauritius, Rwanda, Morocco, Kenya and Tunisia - are included in the 80 top-ranking countries. The good news is that Togo and Nigeria are amongst the 10 countries to have made the most progress over the last 12 months.

Governments should reflect on how they can increase the attractiveness of the sports sector through proactive marketing, a dedicated investment agency or through providing support to investors:

- **Protecting investors (insurance, risk management, court of arbitration): top financial barrier according to 41% of respondents**
- **Offering tax waivers that reward investment, as well as recruitment (notably young people) and local sub-contractors**
- **Making administrative procedures easier, for example by digitising them**
- **Promoting sport to attract foreign direct investment such as the Rwanda Development Board**

As well as targeting major investors, governments would also benefit from involving the African diaspora, notably athletes and students from abroad.

According to a note from the World Bank, funds sent by the African diaspora to the continent reached a record total of \$85 billion* in 2019, representing a significant proportion of GDP in certain countries, totalling 30% in Liberia. Although just over half of this amount is allocated to satisfying basic needs, considerable sums could be invested into value-creating projects, for example into an investment fund specially dedicated to sports projects.

Accelerating infrastructure development through PPPs

Poor infrastructure (access to electricity, internet, transport, etc.) is one of the main obstacles to setting up and investing in businesses in Africa. Although the continent's infrastructure expenses have doubled in nominal terms, going from an average of 36 billion dollars in 2001-2006 to 80 billion dollars in 2015, the proportion of GDP accounted for by infrastructure investments still stands at around 3.5%.

Public private partnership (PPP) models are interesting avenues to explore in terms of mobilising means of financing, optimising and reinforcing the management of sports teams, whilst contributing to the development of effective public sports services. Aside from the various criticism that they have been subject to, public private partnerships have shown numerous advantages in the fields of infrastructure, telecommunications and energy.

When properly set up, this partnership model indeed facilitates the provision of high-quality economic and social services and infrastructure at an optimal cost. Furthermore, PPPs reinforce the principles of equality between users and continuity of services, and enable the sharing of risks between governments and private operators. Another advantage is that PPPs can enable the development of managerial methods within the public sector, making them more results-focused and ensuring they take advantage of the latest innovations.

There are several PPP models available, which should be selected in line with the specific project and intrinsic characteristics of each country. The models put in place (delegated management, concession, etc.) provide a means for agreeing on the roles of each party, notably in terms of property, construction, restoration, planning, development, operation, etc. and define the conditions and modalities for remunerating the services provided by the private partner.

For example, in Morocco for the planning and development of sports infrastructure, the Minister of Youth and Sport has sought the assistance of SONARGES, which ensures the proper management of all infrastructure projects placed under its authority through controls, audits and rendering of accounts. It also manages all advertising spaces in the sports installations placed under its authority (swimming pools, multi-purpose sports halls, major stadiums - either existing ones or those undergoing construction).

The partnership between South African QA Venue and RDB (Rwanda development board), an extension of the Rwandan government, for the development and operation of the Kigali Arena (10,000 seats) also serves as an interesting example.

For local sports infrastructure, public private partnerships can also be built between regional authorities and private operators or civil society organisations. In this context, the regional authority may provide a furnished space and assign the operation and management to qualified public service organisations. If properly constructed and managed with appropriate governance, this model could enable the authority to reduce the running costs related to management of the service. Furthermore, there could also be remuneration opportunities for the private operator, notably through the development of related services (periodic rental of spaces, organisation of local sports events, sale of sport-related products and services, amateur sports training programmes, subscriptions and memberships to these activities, etc.).

As such, the African sports sector, traditionally driven and financed by public authorities, would benefit from exploiting these types of partnerships if the appropriate framework is put into place and notably through:

- **The development of incentivising regulatory frameworks proposing partnership models suited to local projects and contexts**
- **The creation of a project portfolio within the sports sector for potential investors**
- **The promotion of investment opportunities within the industry**
- **Assistance from local stakeholders in setting up local sports projects**



Legal and fiscal framework

41% of respondents identify the weak legal, regulatory and fiscal frameworks as the primary obstacle to the development of the ecosystem. Yet professionalising the sports economy and making it profitable requires the creation of a safe, stimulating business framework for potential new entrants such as service providers, sponsors and investors.

African states could:

- **Create different types of legal status specific to stakeholders in sport, such as the Société Anonyme à Objet Sportif for sports companies, which entitles Moroccan clubs to pay tax at a reduced rate of 17.5%.**
- **Protect rights holders' intellectual property**
- **Introduce tax exemptions that reward local investment and hiring of local employees and contractors**
- **Harmonise the legal, fiscal and economic environment of the sub-region**

Promoting entrepreneurship among young people

Demographic projections by the AFD predict that half of Africa's population (2.4 billion Africans) will be under 25 by 2050. This has prompted the African Union to encourage its member states to "take full advantage of this demographic dividend" (AU Roadmap 2017).

Promoting entrepreneurship among young people thus represents an opportunity for Africa to capitalise on its major asset. By equipping this growing section of the population with tools, and providing it with methods of business creation, the continent will position itself as one of the economic drivers of the future.

This view is shared by 30% of our respondents, who identify entrepreneurship among young people as the second highest priority for strengthening the sports ecosystem.

“ 58% of Rwanda’s population is under 25. We therefore see sports as a vehicle for the employability of young people, and for retaining talents on the continent ,”



Teta NDEJURU
Rwanda

Tourism Development Manager
on the Rwanda Development
Board

- o **Establish legal, fiscal and economic frameworks that encourage business creation**
- o **Offer training in sports management that develops entrepreneurial skills**
- o **Set up support programmes for the first few years of activity, including technical and financial assistance**
- o **Urge donors to simplify access to funding for young companies**
- o **Encourage corporate social responsibility by persuading companies to create partnerships with young entrepreneurs**
- o **Facilitate access to public contracts for young entrepreneurs**
- o **Invite the diaspora to return to the continent, or at least to invest**

Priorities to strengthen the sports ecosystem in Africa

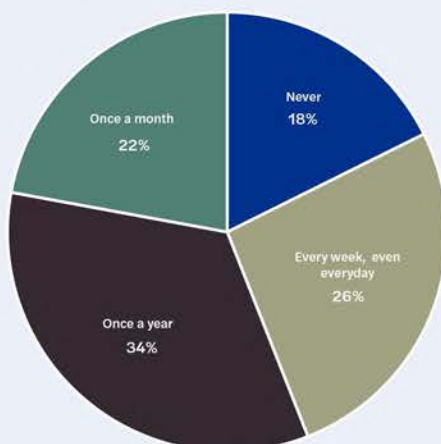
1	Better education and easier recruitment
2	Promote grassroots sports
3	Foster youth entrepreneurship

Encouraging regional integration

Le dernier axe prioritaire proposé aux gouvernements est l'accélération de l'intégration régionale. Contrairement aux grands marchés tels que les BRIC, l'Afrique est un patchwork de 54 économies avec un degré limité d'intégration économique et de collaboration politique, malgré l'existence de Communautés Economiques Régionales, ce qui est confirmé par 67% des participants à notre enquête. La fragmentation économique de l'Afrique a des effets importants sur la capacité des entreprises à s'approvisionner ainsi qu'à recruter. Les investisseurs et sponsors étant attirés par les économies d'échelle offertes par les grands marchés, la levée de barrières politiques, juridiques et fiscales stimulerait les flux d'investissement et de compétences. Les gouvernements africains peuvent agir sur cinq axes pour renforcer l'intégration régionale :

- **Implement effective regional integration, and in particular agreements linking members of Africa's Regional Economic Communities**
- **Accelerate the process of implementing the African Continental Free Trade Area (AfCFTA), and in particular take action on the free circulation of people and capital, and to finalise texts on intellectual property**
- **Help African companies grow by reducing time scales for the transport of goods, continuing to reduce customs tariffs between countries, and putting tax-exemption agreements in place**
- **Promote a sports-specific regional policy to attract Foreign Direct Investment**
- **Take action on continental preference in order to favour African companies in calls for tenders, as the African Federation for Construction Contractors Associations (AFCCA) does within the construction industry**

Frequency of collaboration between professionals



Expert opinion



Faycal LARAICHI

President of SNRT, SOREAD 2M, the Moroccan Tennis Federation and the Moroccan Olympic National Committee

What can the public sector do to support the growth of the sports ecosystem ?

The public sector already does a lot to support the practice and the promotion of sports. Its main role is to foster collaboration between stakeholders and provide them with long-term support, whether through financing, knowledge or regulation. To illustrate the latter, I can point to the Moroccan state which issued a number of forward-thinking laws to help professionalise the sector. Tax exemptions previously only available to athletes, have been extended this year to all employees of sports clubs. Such initiatives help sports organisations increase their investment in innovation, operational excellence, and most importantly education & training.

No matter how good our laws are, the sector cannot grow without employees trained well enough to benefit from them on the ground. So the first challenge is that a large share of people involved in sports on the continent are volunteers. Though those practitioners, trainers, and parents are driven by passion, they aren't equipped with the knowledge and processes necessary to run efficient organisations.

The second challenge is the perception that sports can only be a hobby...and never a profession, which is absolutely false! We need to promote the variety of great career opportunities available to students. Sports must be seen as a viable career path for young people to approach it with a professional mindset. If I look to the future, I see two clear priorities for a positive contribution of sports to the development of Africa: obviously education and training, then data. Sports professionals must leverage the power of data and the web in order to scale up and add value. The State but also Olympic Committees can provide support by upgrading or at least facilitating access to technological infrastructure.

My final thought on the question of the public sector relates to the importance of promoting the local in a global world. Each African country needs to focus on grassroots sports to make the practice of sports part of its fabric. Promoting sports in schools and universities, to both boys and girls, will increase the chance to create elite athletes. Thanks to my experience founding and leading the first TV channel dedicated to sports in Morocco, I realise that fans are starving for local heroes. They want to connect with athletes with whom they share a heritage.

Consequently, promoting local sports media outlets will go a long way in strengthening this vital connection between fans and athletes. After all, sport is about belonging to a community and sharing emotions!

What should be the priority in relation to sports infrastructure?

Unlike many people who complain about the lack of infrastructure, I believe the priority lies in optimising the existing facilities before building in new ones. The little data we are able to access points to the surprising fact that many facilities are today underexploited in Africa. Some of the reasons are very basic: practitioners are often unaware of the facilities in their surroundings because of a lack of visibility, particularly online.

A first step could consist in mapping out the existing infrastructure and optimising its use. Only then can we come up with innovative solutions like opening to the public school facilities after hours or even private infrastructure.

05

**LIMITED CAPACITY
TO GENERATE
BUSINESS REVENUE**



Expert opinion



Joseph HUNDAH

Former CEO Econet Media,
Founder & CEO of Banaya Group

How much is the sports media market in Africa worth?

In all honesty, there is no clear answer to this question. Based on my limited knowledge I would say that the biggest sport is soccer so a lot of the value would be driven by soccer. South Africa has the most lucrative soccer market and my guess would be that at least 50% of the value sits « in the size of sports » ecosystem in South Africa. In any case how would we value audiences, spectators, rights fees or sponsorships? Hard to tell.

What are the major challenges in the African sports media content market ?

Accessibility !!! Most local teams are neither featured on television nor on Free to Air platforms and Pay TV due to the prohibitive cost of acquiring the rights, producing, and transmitting the games. As a result, few fans are encouraged to watch, which obviously drives away potential sponsors. Traditional sports face an even bigger challenge since they first need to promote the discipline, for example through large scale events.

What are the opportunities for the future?

Based on the previous question there is clearly an opportunity in promoting local sports. Although most broadcasters believe that only football attracts audiences, I see an increased demand for local sports and heroes. Media play a key role here in putting the spotlight on those events but also on educating the public. The second opportunity resides in delivering sport content online, as data costs decrease and the consumption of videos explodes.

How does digital impact the supply of sports media content?

By 2030, I foresee all major leagues such as the Premier League and Champions League only distributing their games directly to fans via online platforms, thereby cutting out Pay TV broadcasters. Only less followed sports disciplines will want to be visible on Free to Air, in order to support their growth.

How can sport players structure their content offering and its distribution to make it a real source of income?

Today, Federations retain too much control to allow athletes such freedom. Athletes are best served by showcasing their life away from the sport to generate revenue. Ronaldo for example has grown from a football player to an influencer and celebrity. My advice is: be good at your sport, create your brand and promote it through creative means.

How can rights holders promote their content to traditional broadcasters and OTT platforms?

Right holders tend not to do much in market promotion because it's too costly to have any impact in any one market. The games speak for themselves. My guess is that one of the reasons why the Premier League is as big as it is in Africa is due to African players playing in it. I don't think they have done that much marketing on the continent. The broadcasters market their sports, grow audiences and then get penalised for growing the sports via higher rights fees.

Limited capacity to generate business revenue

“ The creation of the Basketball Africa League by the NBA and the FIBA in 2020 proves that sport has the potential to generate huge revenues in Africa ,,



Emeka ENYADIKE
Nigeria
Founder of Digital Sports Africa

The National Football League (NFL) illustrates sport’s extraordinary ability to generate revenue. In 2019, the NFL in the US generated turnover of \$15 billion by focusing on three main pillars: media rights, marketing rights and licenses, thus helping each of its 32 teams to achieve an average value of \$3 billion.

In comparison, data on the commercial performance of stakeholders in African sport are scarce, with the exception of the market valuation of large clubs such as Al Ahly, estimated at €23 million.

In this regard, respondents in our survey agree that both the commercial offer and innovation are weak, which has a negative impact on the African ecosystem’s ability to generate revenue.

By studying profitable models such as the NFL (National Football League) and the English Premiership, we can suggest three main areas of focus to bridge these gaps:

- **View sports as a commercial product**
- **Place the fans at the heart of the ecosystem**
- **Propose a commercial offer with added value**

Emphasising sport’s commercial dimension

The connection between the world of sports and its fans is unique. Participating in and consuming sports satisfy essential needs such as improving physical and mental health, sharing special moments with loved ones, and boosting self-esteem. The value of these services is so high that fans are willing to invest considerable sums for a quality service. However, according to respondents in our survey, this simple finding breaks with a strong belief held by many leaders in African sport: that sport is not a commercial product.

Nevertheless, these leaders need to combine their public utility mission with a commercial dimension which would finally enable them to escape dependence on public subsidies. If they do not grasp this opportunity, other sectors will do so.

Once this business dimension has been incorporated, it is essential that these organisations make value creation their primary objective. However, 30% of respondents describe stakeholders in the ecosystem as having a poor understanding of the sports business: in other words, as incapable of mapping their environment or understanding the goals and constraints of others involved in the ecosystem. How can they provide value without a sound understanding of the needs and expectations of stakeholders in the ecosystem?

To respond to this challenge, public and private stakeholders in the ecosystem should put themselves in the position of entrepreneurs and equip themselves with the means to achieve their ambitions.

The example of Tanzanian football club Simba SC illustrates this transformation very well. To support its continent-wide ambitions, the club changed its status from a sports association to a company, opening up 49% of its capital to businessman Mohammed Dewji and then appointing Barbara Gonzalez, an advisor to the new shareholder, as chair of the club. She is East Africa’s first woman in such a role.



Koye SOWEMIMO
Nigeria

Sponsorship and Marketing
Consultant

“African athletes are starting to understand that they are genuine brands ,”

Placing fans at the heart of the ecosystem

Any sports organisation wishing to maximise the revenue generated by its product must put the fans' satisfaction at the heart of their thinking and their actions.

On a strategic level, this means making the needs of the fans, rather than the leader's ideas, the starting point for every initiative, and then evaluating every initiative according to the satisfaction generated among fans.

On a more operational level, fans must be observed and interviewed in order to find out more about their participation in sports and their consumption habits. The sponsors interviewed in our survey highlight the primacy given to clubs and leagues that are able to provide them with comprehensive information on the various profiles of fans.

Furthermore, understanding of the fans needs to be extended beyond the sphere of sport. Fans are affected by major societal, economic and health phenomena, which influence their well-being and decisions. Organisations that are able to align their actions with the fans' priorities have a unique opportunity to consolidate their place in people's hearts.



Leslie KOROMA
Sierra Leone

CEO of Africa Sports Ventures
Group

“African fans have not consumed any local content. They therefore naturally turn to the foreign offer ,”

Presenting a distinctive value-adding offer

Once they have put the fans at the centre of their strategies, the final area of focus for development for stakeholders in sport is to create and then sell distinctive, high-added-value products.

A quarter of respondents indicates that the lack of innovation in the sports industry's commercial offer limits the ability to generate revenue in Africa. Indeed, the services offered by rights holders are still very simple, mainly focusing on traditional (above the line) marketing such as advertising hoardings. In terms of the fans' experience, one female respondent, a marketing expert, highlights the lack of differentiation between the clubs in her country, which only interact with fans for the duration of the match. Yet observation of the world's most profitable clubs proves that interaction with fans before and after the match greatly increases the revenue generated.

And, in Africa, the big clubs that interact with their fans on a regular basis are those that generate the most revenue. This emerges very clearly from an analysis of these African clubs' pages on the seven major social networks: Al Ahly, Cairo (27.4 million fans), Zamalek, Cairo (12.4 million), Raja, Casablanca (6.1 million), Kaiser Chiefs (5.5 million), Orlando Pirates (4 million), Wydad, Casablanca (2.3 million) and Club Africain, Tunis (1.9 million).



Besides the lack of innovation, sponsors highlight the difficulties sports organisations encounter in marketing their product, either directly, or indirectly through partners. Some professionals in sport suffer from a lack of interpersonal and business skills that limits their ability to convince new customers. Added to this, a form of inferiority complex drives operators on the continent to prioritise foreign providers at the expense of equally skilled local operators.

The final element in terms of creating and selling added-value products is the transformation brought about by digital tools. Respondents view these as the second biggest trend redefining the challenges of the sector.

In this respect, three aspects are of particular interest. First, digital technology as a tool for communicating with fans. The participants in our survey call for specific content to be produced by African athletes and rights holders, and wider coverage of African sports news by local media. They see this as an effective way of educating and mobilising fans.

Some have already taken the plunge. In addition to the Facebook pages mentioned above, on Thursday 3 December 2020 Raja in Casablanca launched its first mobile app, Raja Connect, which was downloaded 35,000 times in less than 24 hours. Digital technology also leads to increased revenue by enabling services to be offered to greater numbers of customers, for example using the functionality of mobile payment.

Finally, digital technology as an internal management tool for sports organisations. The internet is full of platforms that facilitate many processes at lower cost (project management, accounting, etc.). Very small businesses, which are central to the African economy, would be the first to benefit from this opportunity.



Case study: Digital Sports Africa

Capturing and commercialising revenue through digital transformation



Emeka ENYADIKE

Director of Digital Sports Africa

1. An opportunity within reach

The annual ranking of the top 50 football brands, published by consultants Brand Finance, demonstrates the astronomical value a sports club can achieve. At the top of the list, in 2020, Real Madrid's market value stood at €1.4 billion. Al Ahly, Africa's biggest football club, is worth an estimated €23* million euros, 50 times less than the Spanish champions.

In a context of heightened competition, how can African leagues and clubs become global players and thus capitalise on this economic opportunity? Emeka Enyadike, Nigerian Director of South African company Digital Sports Africa, suggests that this challenge is met by leveraging the digitisation of sports consumption, which the respondents in our survey describe as the foremost trend redefining consumption of sports in Africa.

“ The youth of the African population and their strong interest in mobile technology represent the greatest assets for the continent’s successful digital transformation ,”*

2. Placing fans at the heart of the organisation’s strategy: the example of DSA

DSA devised its strategy around one main observation: African sports organisations know too little about their customers, the fans and the sponsors, to attract large investments. DSA proposed to remedy this anomaly by putting data and digital technology at the heart of the leagues’ and clubs’ actions, thus helping them to answer the following questions:

- **How does digital technology change my fans’ consumption patterns?**
- **How can I use digital channels such as social media to reach my fans and thus monetise this special relationship?**
- **How can I leverage my brand to attract the greatest number of sponsors and investors?**

Emeka Enyadike also believes that business leaders in African sports need to keep themselves actively informed about the latest practices of their American, Asian and European counterparts. To this end, DSA launched the West Africa Sports Summit event in 2018, to facilitate contact and sharing of experience between sports leaders all over the world on the use of digital technology in sport.

“ European clubs discover players based not only on their talent, but also on the number of followers they have on social media. Online popularity therefore becomes a valuable resource for our clubs and players ,”*

3. Next step

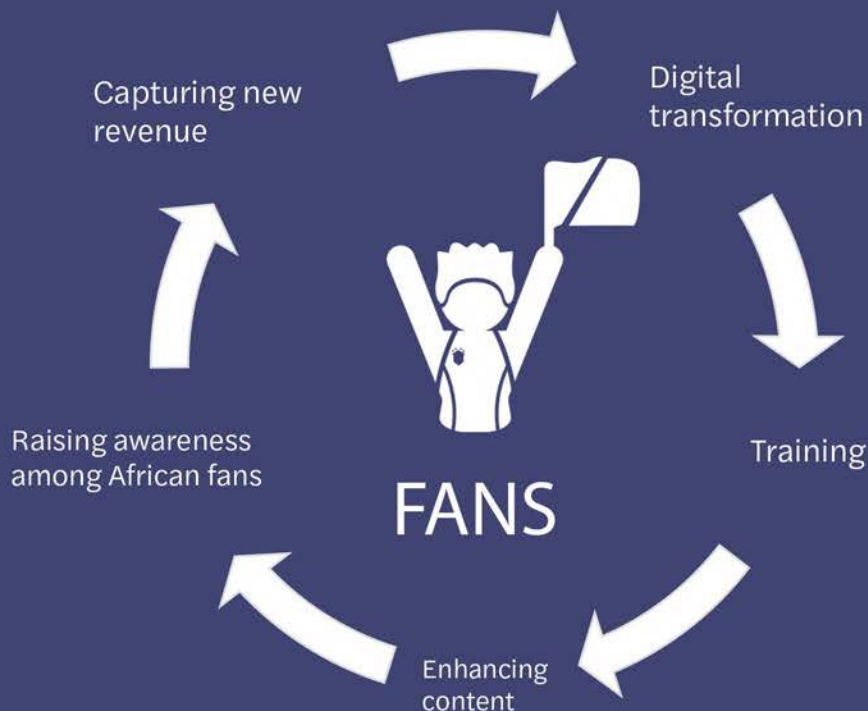
“Africa is not uniform: we need to create country-specific content, especially in local languages such as Pidgin in Nigeria „*

Digital Sports Africa’s success highlights the importance of training sports professionals, not only on the business aspects of sport (marketing, sales, finance, etc.) but on technology issues too. However, this is not the only training required to harness the opportunity offered by digitisation. It is also essential to create, structure and harmonise training for African students, so that the youngest arrive on the labour market ready to create businesses.

To this end, governments and training bodies could work with private-sector experts to co-construct programmes that are tailored to the needs of the market, and aligned with global best practices. Emeka Enyadike also perceives a strong need among African fans for local content that reflects their environment, language and culture. The creation of digital platforms providing varied, engaging content therefore represents a great opportunity for the continent’s media.

“While the Covid-19 pandemic will dramatically change the way we consume and learn about sport, it will also play a major role in the continent’s digital development. The youth of Africa’s population and their strong interest in mobile technology are the greatest assets for the continent’s successful digital transformation „*

** Emeka Enyadike*



Expert Opinion



Will MBIAKOP

Senior Director – NBA Africa

How can organisations in the African sports sector generate more income ?

One first needs to bear in mind the following 3 business fundamentals:

- o Listen to and understand the objectives of sponsors and TV broadcasters in order to meet their needs and help them amplify their commercial and marketing impact
- o Place the fan at the heart of the commercial strategy to grow and retain "his community"
- o Constantly create and deliver a quality product

I would then insist on creativity and innovation in the commercial approach (for example targeting new categories) in the consumer offer and the practice of sports. Beyond the ATL marketing action (above the line, such as advertising panels or exposure of the logo), it is key to focus on authentic, impactful activations promoting the unique experience that we are offering to sponsors, their clients / partners and fans. It is often said that a person can forget a name or a place but will never forget how she felt at a specific moment.

In addition, sports is an excellent vehicle for promoting Corporate Social Responsibility (CSR) and thus helping to improve our societies. Stakeholders can join forces with sponsors to raise awareness on specific social or environmental issues. Finally, Africans have a unique cultural heritage, which could be promoted in order to generate income. An African continental wrestling league would thus be an extraordinary means of popularizing this discipline, which is widely practiced in West Africa.

Should grassroots sport be the backbone of a thriving sports economy ?

Absolutely! It seems essential to demystify the idea that the economy of sports is limited to professional sports, GESI, and "sportainment". Although it constitutes an important and visible part of the sector, it actually represents only a small part of it.

Take the example of a country such as France where the sports economy weighs around 38 billion euros for a population of 68 million people: the majority of this sum is generated by household consumption and public subsidies to support amateur sports organizations. Imagine the potential of countries such as Nigeria (200M inhabitants), DR Congo (88M inhabitants) or even the African continent as a whole which represents a fantastic market of 1.4 billion people with an average age of 19 years old. So yes, the GESI are periodic (CAN takes place every 2 years) and necessary to make us dream and to attract new fans but the base of the economy of sports in Africa must be mass sports, whether organised (school and club) or not (free practice): it is household consumption that feeds a sustainable sports economy.

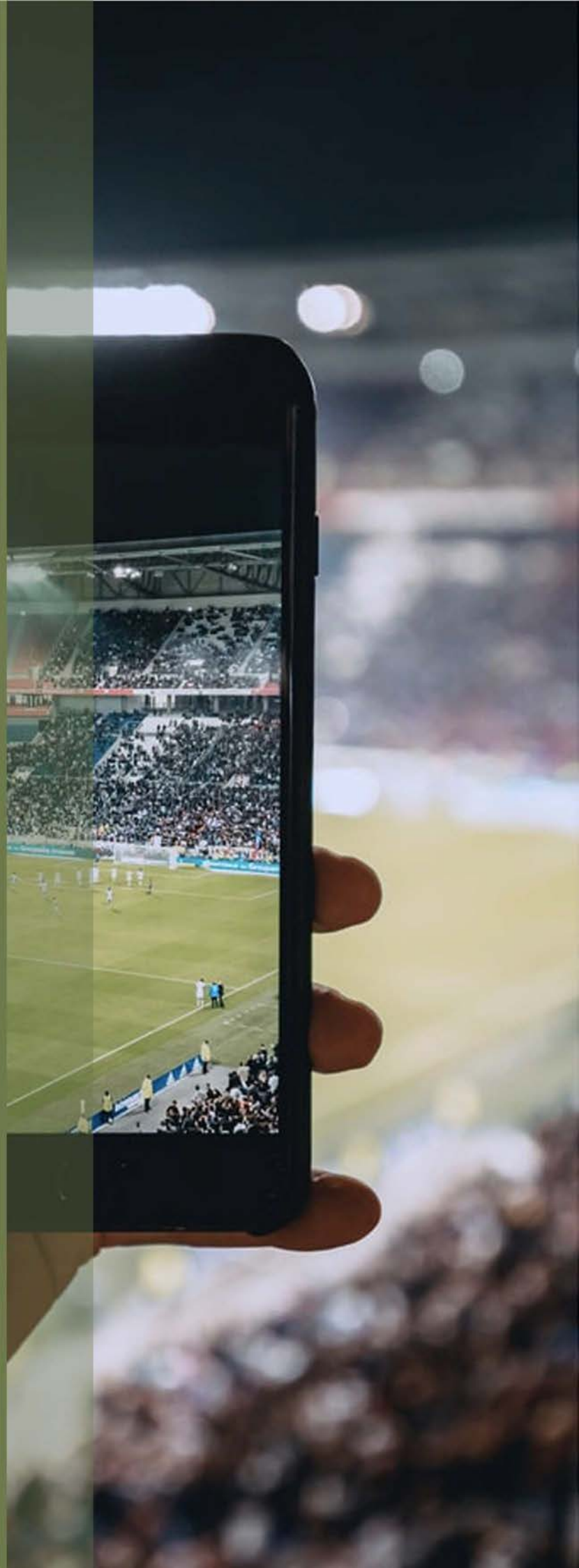
The health crisis favors the consumption of digital content. How should sports organisations understand this trend?

Covid19 only amplified an already existing trend. It is stronger in the West because the markets are more mature and have solid infrastructure. African sports organisations must absolutely accept this fundamental change and create business opportunities using a variety of platforms. I advocate a long-term and co-investment approach with these platforms. The priority is media distribution more than immediate income: content must be made available for consumption everywhere and to everyone: Youtube, IG and OTTs, in cities as well as in the countryside.

Aware of the high value of data in Africa, it is important to adapt the format of the content, for example by favoring short formats. The mobile phone plays a central role in the lives of Africans, I would encourage developing partnerships with MNOs and other phone manufacturers. For the most advanced sports organizations, there is value in launching their own OTT platform and thus respond to a growing demand for local sport programs in the local language.

06

A NEW ERA



Expert opinion

Digital innovation in African sports



Mlondi MASHININI

Managing Partner at Rumble Ventures et FanBase Analytics

Between 2014 and 2019, Africa received less than 1% of the sports technology venture capital investments, even though almost 17% of the global population lives on the continent. In contrast, North America captured 65% of those investments with only 5% of the globe's population. For Africa to bridge the gap, more young people will have to be equipped with skills in technology. They should then have an easier access to funding in order to scale up their organisations and transform the sports industry. In this regard, Rumble Ventures launched a Sports Innovation Fund, to direct global funds into the African SportsTech segment.

Digitalisation is transforming the global sports industry, allowing it to reach new audiences thanks to a combination of content, commerce and distribution. In Africa however, sporting organisations are still reliant on in-stadium experience and physical transactions. COVID-19 and the cancellation of sporting events has highlighted this problem and demonstrated that digital transformation is a business imperative. Digital transformation will not only enable African sporting organisation to create sustainable businesses but it will also lead to the development of business insights to grow the industry.

Initial steps the sports ecosystem can take in implementing digital transformation are :

- o **Customer data management and the gathering of fan insights to understand customers' preferences and purchase patterns.**
- o **Building and deploying digital assets, which enable teams and leagues to distribute content to fans and engage with them directly. These assets also serve as touch points for data collection.**

o Use of digital platforms and fan insights to commercialise by linking sponsors and business partners to fans. Additionally, sporting organisations can use digital platforms to expand their revenue channels by selling tickets, merchandise and introducing subscription-based services, to earn revenue beyond the game day / stadium experience. Digital platforms enable sporting organisations to reach fans who might never attend games in person.

I see a major opportunity in enhancing data management and analytics. The global sports analytics market is expected to reach \$4.6 billion by 2025, growing at a compound annual growth rate of 31.2%, according to Grand View research. At FanBase Analytics, we see a growing demand from Southern African clubs and league offices for fan data consolidation, customer relationship management platform deployment and fan insights acquisition.

COVID-19 has accelerated the rise of the digital economy in Africa. In a world where most interactions have become virtual, operating digitally is vital. Sports leaders therefore need to reassess their clients' needs and adapt the way they will deliver

A new era

“ Covid-19 has had a serious impact on our clubs. Most of them rely on just one major sponsor. If this sponsor withdraws, the whole organisation is put at risk ,,



**Mirado
RAKOTOHARIMALALA**
Madagascar

Secretary-General of the
Football Orange League

The sports sector, just like the global economy, has been hit hard by Covid-19. With major events cancelled, and gyms and stadiums closed, 60% of participants in our survey have suffered significant losses. 20% of them have had to suspend their activity, or even terminate it permanently.

Nevertheless, individual conversations indicate that this crisis is also seen as the accelerator for a transformation that was already under way. In order to understand this fundamental shift in the sports economy, we must look at four major trends: changes in sports practices, new patterns of sport consumption, the advent of local content, and finally the emergence of new economic models.

Changes in sports practices

The first major trend influencing sports issues in Africa is the changing nature of participation in sports. Awareness campaigns over the past 20 years have resulted in the growth and feminisation of participation in sport around the world. Despite the lack of accurate data for the African continent, respondents note three phenomena on the ground.

First, the growth in individual sports, independent of sports clubs and associations. With the basics of sports training learnt in schools, and access to online tutorials (such as pre-recorded videos on YouTube), participation in sport can be adapted to people's time constraints.

“ We're positioning Uganda as a sports tourism destination. Just imagine enjoying the view across Lake Victoria after a major competition! ,,



Beatrice AYIKORU
Uganda

Secretary-General of the
National Olympic Committee

This phenomenon is accentuated by the digitisation of the sports offer, with many trainers offering live online sessions.

It is interesting to cite the specific example of e-sport, with a global market worth \$1 billion according to Newzoo. Despite what its name suggests, this discipline includes all video game competitions of any type, and includes strategy, combat and role-playing games as well as sports. Ivorian company Paradise Gaming has opened a 4,000 m2 video-gaming complex in Côte d'Ivoire, and for the past four years has been running francophone Africa's biggest e-sport festival: the FEJA (Festival de l'Electronique et du Jeu vidéo d'Abidjan).

The final phenomenon noted by our respondents is the rise in sports tourism: in other words, travel to attend or participate in sporting events. This sector is benefiting from national reforms that encourage tourism (visa facilitation, East Africa visa, etc.), the drop in air prices, and the growing range of professional and amateur events organised on the continent, such as the Great Ethiopian Run and the Two Ocean Marathon in South Africa.

“ E-sport will be one of the most promising areas of development within Africa’s sports economy. Its growth will depend heavily on the countries’ and the continent’s ability to structure it ,”



Hicham EL KHLIFI
Maroc
CEO and co-Founder of Radio Mars

Digitisation of consumption

The second major trend influencing sports issues in Africa is the digitisation of consumption, which redefines the rules of the game and the size of the market.

The high penetration of mobile technology, combined with the development of digital infrastructure, provides stakeholders in African sport with the opportunity to reach more fans with a richer range of content.

By providing uninterrupted data collection, technology helps stakeholders to get to know the fans. The flexibility of digital tools then makes it easy to develop more creative and original products. Digitisation will not replace the physical experience, but it will make it more intense. For example, at professional matches, clubs could project images of spectators on giant screens and write messages to them.

“ Digitisation represents our biggest opportunity: with a single mobile phone, anyone can now reach a community by creating specific content ,”



Kelvin WATT
South Africa
Director of Nielsen Sports South Africa

The advent of local content

The digitisation of modes of participation and consumption explained above results directly in increased demand for digital content. The sports marketing experts interviewed point to three steps.

First, rights holders need to stimulate the creation of local content in order to inform and connect with fans around the world. This responsibility naturally falls to clubs and leagues, and to local athletes too, whose value no longer hinges solely on their performance in their sport, but increasingly on their ability to influence fans. This wealth of content should encourage fans themselves to contribute their videos and comments.

Second, the format of this content will have to be diversified (short, medium, long), as will its subject (discussion, analysis, fashion, etc.), to differentiate it and make it entertaining.

Finally, African media play a major role in distributing this content by using it in their publications or by collaborating directly with the content creators. Nevertheless, one third of respondents cites the lack of local media coverage as the main barrier to the commercialisation and capture of revenue generated by the sector.



“ Creating and promoting local content via social media represents the greatest opportunity for our ecosystem ,,



Prince TEYE
Ghana

Founder de l'African Sports Centre for Data, Research & Technology

Emergence of new economic models

“ Through innovative partnerships, like the one we have with Arsenal Football Club, we encourage fans to take an interest in Rwanda and visit us ,,



Valens MUNYABAGISHA
Rwanda

Former President of the Rwandan National Olympic Committee and the Rayon Sport professional football club

The final major trend for the future of African sports derives from the many lessons learned from this survey: Africa's sports ecosystem needs new economic models if it is to realise its potential for growth. Given the diversity of realities on the continent, it is impossible to envisage just one model.

Five key elements can be integrated into these new models, namely:

- Building on a base of structured amateur and mass sports that generate revenue
- Business leaders defining a clear vision and a coherent strategy
- Collaboration between public authorities and the private sector
- Innovation in the offer
- Leveraging the benefits of digital technology

“ The creative, sports and cultural industries are areas in which Africa has immeasurable resources. It is crucial to capitalise on them to make them genuine vectors of economic growth ,,



Paulo GOMES
Guinea-Bissau

CEO of PGP and Partners and co-founder of New African Capital Partners

Case study: Eyes firmly on the BAL

1. The vision

With more than 500 million fans worldwide and annual turnover of \$8.5 billion, the National Basketball Association (NBA) is a world leader in the sports economy.

The internationalisation of its audience has been matched by that of its players: currently, 10% are of African origin, including Giannis Antetokounmpo, the finest player of the last two years. Conscious of the huge opportunities in Africa (7 of the 20 fastest-growing economies in 2019 according to the IMF), in 2020 the NBA launched the first pan-African professional basketball league: the Basketball Africa League (BAL). Its objective is three-fold: to identify the best African players, enable them to pursue a professional career on the continent, and finally run a financially profitable championship.

2. Investment

The BAL, set up in partnership with the International Basketball Federation (FIBA), is the first NBA affiliate league outside the United States. Like the Champions League in football, the BAL will bring together champions from 12 African countries for 3 months.

Its economic model is similar to that of its American sister. Revenue is generated through media rights (monetisation of content on digital platforms, etc.), licenses, and sponsorship from Nike, Jordan, Wilson, and the Rwanda Development Board. The league also supports African clubs in their professionalisation process to enable them to become profitable and one day come close to the exceptional value of NBA clubs in the US (an average of \$2.12 billion in 2019 – source statista.com).

3. First lessons

Although the BAL's arrival has generated huge enthusiasm on the continent, many barriers to its progress still exist. The inconsistent infrastructure in sport and technology (the internet), the slow pace of bureaucracy, and the difficulty of recruiting staff trained in the sports business are unaccustomed challenges for a North American operator. What is more, Covid-19 has forced organisers to postpone the BAL's inauguration, originally scheduled for March 2020.

Nevertheless, the financial and intellectual investment from the NBA and its partners demonstrates the economic potential of sports in Africa.

Collaboration between sports institutions (FIBA), local authorities and companies is unusual in Africa and opens the way for variations on the continent.

4. Opportunities

The BAL is a major investment in African sports, estimated to make several hundred million dollars over 10 years. The predicted development opportunities include an expansion in participant numbers (from 12 to 24 teams), the creation of the women's BAL, and the setting up of an e-sports league modelled on the NBA 2K league in the United States.

16 recommendations for stakeholders in African sports

A- Train and inform: make the most of the human capital

1 - Produce information and regular, reliable analyses, and create the African Observatory for Sports (AOS)

In an industry characterised by informality, the lack of reliable data on the sports sector and its stakeholders constitutes a major obstacle to development. In fact, without numerical data, stakeholders in sport would not be able to evaluate market opportunities, identify potential partners, or measure the impact of their actions.

This would be the ideal time to set up an observatory for sports led by member organisations representing the diversity of the African sports ecosystem.

Its main tasks would be:

- o To map the ecosystem: stakeholders, consumers, fans, etc.
- o To leverage members' existing data to produce indicators, for example on individual and community participation, sports events, infrastructure, public expenditure, the financial health of stakeholders, and so on
- o To carry out studies of general interest that shed light on public policy then analyse the economic and social impact of initiatives
- o To promote best practices

2 - Invest in economic and social research

Economic and social research provides some possible answers to global problems.

In addition to the data produced by the Observatory for Sport, decision-makers in the sector should also have access to quantitative and qualitative studies conducted by academic researchers and private institutes.

Since respondents rated research institutes among the three weakest stakeholders in the ecosystem (80% feel they are either poorly established or non-existent), investment is needed to:

- o Provide forward-looking research on future trends in the global sports industry
- o Produce analyses on changing needs on the continent to support public strategies (priority area for improvement for 59% of respondents)
- o Analyse the data produced by the Observatory, and those produced by international financial institutions or data measurement and analysis companies
- o Produce case studies in order to learn lessons from existing innovations and best practices in the industry
- o Inform African stakeholders about the best practices observed around the world
- o Measure the impact of public and private initiatives

3 - Create, harmonize and regulate sports management training

Its vital importance makes training a true strategic lever in the development of sport in Africa. This was confirmed by 56% of respondents in the survey who consider training, especially in sports management, to be the third priority for the development of the sports ecosystem. Training would help stakeholders in the sector to better understand its issues, as well as the constraints and objectives of external partners such as sponsors and investors. Consequently, our respondents view the lack of training as the first barrier to creating coherent public policy, to recruiting and retaining qualified staff, and to commercialising products and services that meet consumers' needs. National and pan-African institutions therefore need to:

- o Accelerate the creation of training courses combining theory and practice, that prepare both students and professionals (continuous training) for careers in sport

16 recommendations for stakeholders in African sports

- o Involve companies in selecting formats, such as sandwich courses, and the content taught, in order to prepare graduates for the needs of a constantly changing market

- o Harmonise curricula, content and exams to keep qualifications consistent and thus facilitate hiring by recruiters across the continent

- o Accredite and regulate the educational institutions delivering the qualifications to give them credibility, ensure their competitiveness on the international market, and of course protect the rights of students

4 - Improve the working ethics of sports professionals by establishing a code of ethics and a training policy for industry players

Sports in Africa, and professional sports in particular, has often been criticised for its approach to ethics. The individual interviews conducted as part of this survey almost unanimously revealed the negative consequences of ethical failings on the part of stakeholders in the sector. The recent scandals to hit the African Football Confederation show that the political, economic and legal ramifications of this phenomenon require a holistic strategy. In terms of training, it would be appropriate to:

- o Create a code of ethics for sports professionals

- o Require any new stakeholder to take a training module on this code followed by an exam and certification

- o Penalise violations of the code of ethics

- o Strengthen sports governance and the legislative framework to deter illegal practices, including corruption

5 - Invest in mass and amateur sports so they can be used as development levers for elite sports

Established participation in sport within a recreational setting (mass sport) and as part of a sports association (amateur sport) is vital for the success of professional sport. 32% of respondents identify participation in and the structuring of mass and amateur sports as a priority for strengthening the African ecosystem.

Since training centres and clubs have a prominent place not only in sports training for talents, but also in their human development and vocational guidance, respondents want these structures to be improved to ensure they are equipped to prepare professional athletes and citizens.

To answer this call, the following actions are needed:

- o Launch campaigns promoting the positive impact of sport on the health of every individual, irrespective of their gender and age

- o Promote participation in sport in schools, and encourage amateur clubs to identify talents in this setting (the third area of development according to our respondents)

- o Encourage private investment in amateur clubs and local infrastructure, incorporating criteria for accessibility to the most disadvantaged communities

- o Structure amateur sport and develop its commercial offer

- o Increase African media coverage of local clubs' news: lack of coverage was identified by respondents as the primary barrier to commercialisation

- o Involve professional clubs in promoting mass and amateur participation in sport

- o Offer retraining programmes to professional athletes approaching the end of their careers in order to leverage their skills in the local ecosystem

B - Professionalise sports and make it profitable: view sports as a commercial product

16 recommendations for stakeholders in African sports

6 - Make mass sports the driver for the sports economy

The World Health Organisation and the United Nations encourage regular participation in sport, notably through the Sustainable Development Goals. In addition to its impact on health and social cohesion, mass sport generates greater economic activity than high-level sport, which relies on major events that often make a financial loss.

A number of actions are needed to seize this opportunity for growth:

- o Broaden the base of participants, targeting women and the elderly in particular
- o Build local infrastructure that is accessible to the most disadvantaged communities
- o Generalise participation in sport in schools and provide them with the necessary equipment, with a particular focus on African equipment suppliers who manufacture locally
- o Create and promote academic and amateur championships
- o Develop sports tourism through events for the general public
- o Increase local media coverage of African mass sport

7 - Create a legal, fiscal and economic environment that encourages investment in sport

Like any other sector, sport must provide an attractive environment for investors. However, 41% of respondents identify the weak legal, regulatory and fiscal frameworks as the primary obstacle to the development of the ecosystem. Professionalising the sports economy and making it profitable requires the creation of a safe, stimulating business framework for potential new entrants such as service providers, sponsors and investors. To create such a framework, it would be beneficial to:

- o Encourage specific legal status for stakeholders in sport
- o Protect the intellectual property of rights holders

- o Protect investors (insurance, risk management, court of arbitration), viewed by 41% of respondents as the primary financial barrier

- o Introduce tax exemptions that encourage local investment as well as hiring of local employees and subcontractors

- o Promote sport to attract Foreign Direct Investment

- o Harmonise the legal, fiscal and economic environment of the sub-region

8 - Place fans at the centre of the sports ecosystem

One of the most important paradigm shifts highlighted by this study is the need for all stakeholders in the sports value chain to refocus their strategies on the fans, who are the driving force behind the industry's ability to offer a quality product. Indeed, the interviewees point out that the lack of knowledge of fans' profiles and needs, particularly by rights holders, prevents this genuine capital from being monetised. In this respect, the following actions are necessary:

- o Make the fans' satisfaction central to the creation of the sports offer

- o Take advantage of the rise in the digitisation of consumption to study fans' needs and habits (36% of respondents cite digitisation as the second major future trend)

- o Build a stronger relationship between brands and fans through an appropriate digital marketing strategy: actions, social media, etc.

- o Improve media coverage of African sports to encourage fans to consume local rather than foreign content (the primary barrier to revenue capture according to our respondents)

9 - Be commercially innovative

By refocusing their strategies on the fans' experience, stakeholders in sport will automatically be required to innovate. This is confirmed by 43% of respondents, who note that promoting new methods of consumption is the main trend for the future of the sector.

The following potentially beneficial innovations were suggested during our interviews:

16 recommendations for stakeholders in African sports

- o Influencer programme: non-sporting celebrities promoting the brand or club

- o Corporate Social responsibility (CSR): NBA programme to combat climate change by planting a tree for every 3-point basket scored

10 - Accelerate digitisation

Digitisation provides an opportunity for stakeholders in sport to get to know their consumers through data collection and analysis, to broaden their customer base, and to interact with these customers before, during and after events. Understanding fans' new consumption patterns and producing rich, engaging online content then become key competencies. In this context, e-sport is viewed as an important vehicle for the development of the sports economy in Africa.

To take advantage of this opportunity, the following actions would be required:

- o Upgrade the technological infrastructure
- o Promote training courses in digital technologies, including data science
- o Build stronger links with fans by creating asynchronous media content that is not related to events
- o Make digital platforms attractive and monetise them: social media, websites, the fans' digital experience inside stadiums
- o Structure and develop e-sport

11 - Instill a sense of entrepreneurship in young people as a priority

Africa has the world's youngest population. 30% of our respondents argue that the continent needs to focus more strongly on these young people, a proportion of the population that is increasing every year, and they define youth entrepreneurship as the second priority for strengthening the sports ecosystem.

To make the most of this human capital, the following actions are recommended:

- o Support entrepreneurs during their first years of activity through programmes that include technical and financial assistance from the State and businesses

- o Urge donors to simplify access to funding for young companies

- o Encourage corporate social responsibility by persuading companies to set up partnerships with young entrepreneurs

- o Facilitate access to public contracts for young entrepreneurs

- o Establish a legal, fiscal and economic framework that encourages business creation

- o Offer training in sports management that develops entrepreneurial skills

C- Reinvent governance structures and create innovative economic models: create a new holistic business model based on innovations and public-private collaboration

12 - Reform sports governance structures

The relative lack of transparency in the way organisations in the sports industry are managed hinders its ability to attract investors and sponsors. Defining and implementing a coherent, Africa-wide system of governance would allow best practices to be shared and national actions coordinated.

The following actions could be taken:

- o Create a pan-African sports governance body, the African Sports Steering Committee, to help African governments define and implement their sport policies

- o Separate executive management responsibilities from administrative responsibilities in sports institutions

- o Generalise audits of large organisations

- o Increase the diversity of profiles at executive level in large organisations to include more women, ethnic minorities and civil society

16 recommendations for stakeholders in African sports

- o Peripatetic sports classes to reach the least accessible areas
- o Virtual Coaching
- o Access to players: exclusive access to training sessions and changing rooms, dedication sessions, etc.

13 - Focus on regional collaboration

The integration of African economies has been a political priority for more than 40 years. This ambition led to the creation of eight Regional Economic Communities under the aegis of the African Union, and later the African Economic Community, and from 2021 the African Continental Free Trade Area (AfCFTA). Commercial integration and regional infrastructure are two key elements that can significantly impact the sports economy, in which three-quarters of respondents consider the level of intra- and extra-regional collaboration to be low.

In this respect, a number of initiatives should be taken :

- o Coordinate public authorities' and regulators' strategies at the level of sub-regions or RECs, as called for by 70% of respondents
- o Help African companies grow by reducing the time taken for goods to cross borders, continuing to reduce customs tariffs between countries, and implementing exemption agreements
- o Harmonise the legal, fiscal and economic environments of sub-regions
- o Optimise the use of existing sports infrastructures as well as investment in new infrastructure by sharing capacity between neighbouring countries
- o Create training courses that are the result of partnerships between educational institutions in neighbouring countries (exchange programmes, double degrees, etc.)

14 - Promote Public Private Partnerships

Public-Private Partnerships have demonstrated their many benefits in the infrastructure, telecommunications and energy sectors. The African sports industry, traditionally financed by public authorities, would benefit greatly from the financial and technical contribution of the private sector.

The wide variety of PPPs available offers stakeholders in sport the opportunity to customise this model to their needs, for example:

- o Developing incentivising regulatory frameworks that offer partnership models tailored to projects and local contexts
- o Putting together a bank of projects in the sports sector for potential investors
- o Promoting opportunities for investment in the sector
- o Assistance from local stakeholders in setting up community sports projects
- o Exploring innovative new models to ensure that sports infrastructures are maintained
- o Technical assistance and financial support for young entrepreneurs during the start-up phase
- o Using the sports infrastructure for other events (MICE, etc.)

15 - Use sports as a response to the Sustainable Development Goals (SDG)

The United Nations has set 17 Sustainable Development Goals to address the major global challenges and thus lay the groundwork for an inclusive, prosperous future. In addition to its clear role in improving health and well-being, sport is already helping African countries to make progress towards the objectives of peace, education, female emancipation, and social inclusion.

Indeed, the unique connection sports creates between its participants and its spectators makes it a formidable vector for awareness. Using sport to inform the population about major issues such as environmental degradation therefore has the potential to have a profound impact on people, particularly the youngest.

Specifically, sport could help achieve the following three SDGs:

- o Goal 3 – Ensure healthy lives and promote well-being for all at all ages: the World Health Organisation advocates regular physical activity to prevent physical and mental illness, reduce healthcare costs, and help increase productivity.

16 recommendations for stakeholders in African sports

o Goal 8 – Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all: sports are increasingly contributing to the growth of the African economy through job creation, particularly in training, building infrastructure, and events activities.

For example, Rwanda has announced that it will create 100,000 jobs by 2030.

o Goal 13 – Take urgent action to combat climate change and its impacts: their ability to reach and influence all age groups means that stakeholders in sport can raise awareness among fans and businesses to encourage them to take action to protect the planet. For example, professional clubs are incorporating ‘green’ actions during major championships, by planting a tree for every goal or basket scored by their teams. As well as having positive environmental impact, clubs can enhance both their own image and that of their sponsors.

16 - Capitalise on Africa’s cultural, intangible and natural heritage in promoting sports

Africa’s rich cultural and natural heritage is a source of fascination, appreciated by fans of music and dance the world over. Linking sports to this rich capital represents an excellent opportunity for stakeholders in the ecosystem to offer fans a unique experience. However, collaboration with those involved in culture (traditions, language, performing arts) and tourism (festivals or crafts) calls for innovation in economic models.

We suggest the following:

- o Showcase traditional sports: Senegalese wrestling, Egyptian tahtib, etc.
- o Develop sports tourism: surfing in Cape Verde, golf in Morocco, etc.
- o Create media content around the regions hosting sports events: Tour du Rwanda, Africa Eco Race, Great Ethiopian Run, etc.
- o Incorporate culture and nature into the fan experience: media content in local languages, training camps for runners in the Ethiopian highlands, etc.



Conclusion

For Africans, like people everywhere, 2020 has been dominated by the Covid-19 crisis. The slow-down in economic activity and the infection of millions of people have highlighted structural shortcomings, including a dependence on revenue generated from natural resources, and the fragility of health systems. If the continent is to bounce back in 2021, it is now more important than ever to deploy new levers for development that are consistent with Africa's assets.

Sports are one of these levers, representing an opportunity to capitalise fully on the youth and the athletic talent within the African population. Although many Africans currently view sports as no more than a leisure activity, it is in fact already helping to address the continent's major economic, health and environmental challenges.

This initial survey among 500 stakeholders in Africa's sports economy reveals a fragile, heterogeneous, poorly professionalised ecosystem. Despite the diversity of national situations, three major areas of development emerge, on which joint reflection on a continental scale would be beneficial:

To train and inform: create, streamline and regulate a sports management training programme to prepare young people for the challenges of the sector. Then invest in producing and analysing data to provide these trained professionals with the visibility necessary to initiate investment in sport

Create a supportive business environment and reinvent the governance of sport: create a conducive legal, fiscal and economic framework in order to stimulate activity in the sector, then rethink governance of public authorities and sports institutions to make them more transparent, representative and participatory

Promote sports as a commercial product and innovate in the current business models: consider the commercial dimension of sport, making the fans central to the strategies of stakeholders in the ecosystem, then respond to the new patterns of consumption of sport with an innovative offer that leverages technology and African heritage

Given the constraints on the development of Africa's sports economy, the commitment of governments and all stakeholders in the ecosystem is crucial to realising the sector's economic potential. The levers for making sports a true economic driving force will need to be tailored to local situations in line with each country's specific resources and strategies.

Following this study, Mazars & the ASCI are now working on a second study providing numerical evaluation of the sports economy in Africa.



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