



Invest  
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Building Locally  
Competing Globally

## Global Supply Opportunities for International Sporting Events 2012 - 2022

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# 1.0 Introduction to the Guide

## 1.1 DECADE OF INTERNATIONAL SPORTING EVENTS

Over the next decade, some 20 major sporting events will take place across the globe, worth an estimated US\$50 billion per annum.

Many of these major global sports events will take place in host countries which require significant levels of investment in infrastructure and venues, in order to be able to fulfil their host nation or host city commitments. The FIFA World Cup and the Olympics are key drivers of infrastructure change around the world and are a catalyst for high value investment.

The London 2012 Olympic organisers met the formidable target of delivering the Games on time and within budget, and with opportunities for a tangible legacy.

Future host countries of major sporting events will be keen to look to the procurement model established for London 2012 and avail of the proven expertise of suppliers involved and their ability to deliver world class sporting venues, infrastructure and supporting goods and services.

Apart from the Commonwealth Games, some of the largest sporting events over the next decade will take place outside Europe:

### GLOBAL SPORTS EVENTS

### HOST CITY / COUNTRY

World Student Games	Kazan, Russia, 2013
Commonwealth Games	Glasgow, 2014
Winter Olympics	Sochi, Russia, 2014
FIFA World Cup	Brazil, 2014
Olympics and Paralympics	Rio de Janeiro, 2016
FIFA World Cup	Russia, 2018
FIFA World Cup	Qatar, 2022

Much of the major construction work relating to Glasgow 2014 and to Sochi 2014 is already well underway, but construction overlay opportunities and opportunities at the legacy phase are still open. The majority of events related to operational supply opportunities have not yet been advertised. Many of these will be published in the latter half of 2012 and will continue into 2013.

This Guide to International Sporting Events examines each of these global sports events in turn, beginning with Sochi 2014 and summarises the progress to date on preparations for each one, until the FIFA World Cup in Qatar in 2022.

## 1.2 PURPOSE OF THIS GUIDE

This guide is aimed at Northern Ireland businesses with an interest in supplying to the major international sporting events taking place over the next decade.

Its purpose is to:

- Provide an easy to access, factual calendar guide to the major sporting events of the next decade in a single document.
- Present case studies from local companies who have been successful in bidding for contracts at International Games.
- Present the key infrastructure and venue investments planned for each host country or city.

- Outline the procurement channels in place or proposed for each event.
- Present a series of recommendations for companies interested in pursuing procurement opportunities relating to any, or all of these events.

Each of the events listed within the guide will require support from a wide range of suppliers and subcontractors, so supply opportunities exist at a number of levels.

The guide presents an introduction to International Sporting Events over the next decade. The appendices include a list of additional sources of information giving a more detailed insight into each event.

### 1.3 BOYD BEDDING - SUPPLIERS OF EQUESTRIAN BEDDING TO THE OLYMPIC GAMES

**Boyd Bedding** explains how they came to win business supplying equestrian products to the **Olympic Games**, despite being initially daunted by the tender documentation:

#### CASE STUDY

**Boyd Bedding** is a supplier of equestrian bedding and horse shavings based in Newtownstewart.

Having attended an Invest NI seminar about the CompeteFor procurement system for London 2012, the management team was interested in exploring opportunities for supplying their products to the equestrian events during the Games.

The company registered its details on the CompeteFor website and was subsequently notified about a range of tender opportunities relating to the category of supply they had selected. Amongst the range of tender notices received, one in particular was of interest to Boyd Bedding - a notice for the supply and replenishment of bedding for stables.

Whilst Boyd Bedding exports its products worldwide, this was actually the company's first experience of responding to a public tender.

Janette Nethery, Office Manager explained that the company was quite surprised at the level of detail required in the tender response. "We found the tender application process to be quite daunting initially. We were so busy with our day-to-day business that finding time to respond to the tender was a challenge. However, we decided to go ahead with the bid and were delighted when we were asked to come to a meeting to show samples of our product."

Boyd Bedding is now the sole supplier of equestrian bedding at the Games and has already completed the first stage of its contract - supply to the test events in 2011. This gave the company the opportunity to assess the logistics involved in replenishing its stock during the events. The process ran very smoothly thanks to good management systems within the company, which provided each team with individual accounts detailing how much bedding they had used.

For Boyd Bedding the potential opportunity reaches beyond simply supplying bedding for the equestrian teams at this event. The management team is aware that their "Bluefrog Dust Free Shavings" product will be used by world-class equestrian teams, who want the best possible product for their horses. With a new state of the art factory underway in Omagh, this opportunity for Boyd Bedding to showcase its products has been invaluable.

Boyd Bedding has made many new contacts already; many of the organising staff specific to the equestrian events were involved in the last Games and may well be involved in future events. The company feels that it should continue to benefit from the contacts made and that the prestige of supplying to the Games will support the company's export drive in new markets throughout the Middle East, Scandinavia and Europe.

# 2.0 Major International Sporting Events

## 2.1 THE NEXT TEN YEARS 2012-2022

Non-western countries will be the dominant host nations for the majority of the world's largest sporting events over the next decade. Brazil and Russia are likely to develop reputations as world class global sporting destinations, with each having been the successful bidder for two of the most watched sporting and games events in the world. (Russia will also host its first Formula One Grand Prix in 2014). The most popular global sporting events are the soccer FIFA World Cup and the Olympics, followed by the European Football championships.

The following section provides an "at-a-glance" profile of some of the major international sporting events up to 2022.

## GLOBAL SPORTS EVENTS CALENDAR AND HIGHLIGHTS

### Winter Olympics Sochi, Russia, 2014

**Olympics:** 7th February 2014 - 23rd February 2014

**Paralympics:** 7th March - 16th March 2014

Sochi is a Black Sea coastal resort in southern Russia. The Winter Olympics will be held in two clusters, depending upon the nature of the event - the coastal ice cluster and the mountain snow cluster (30 minutes apart). Already an important tourist destination for Russian holiday-makers, the Russian government sees hosting the Winter Olympics as the first stage in establishing Sochi as a year-round holiday destination and a world class winter sports destination.

**Official website:** [www.sochi2014.com](http://www.sochi2014.com)

#### Key Facts:

- Competition venues include **12 custom built sports centres** at an estimated construction value of US\$6.6 billion.
- The Sochi Olympics will require a **total of 30 venues**, including competition and non competition venues. The overall construction programme includes 235 individual programmes.
- The operating budget for the Games is **US\$1.8 billion**.
- Significant **infrastructure development** is being put in place in Sochi as part of the government's Federal Target Programme, which has the long-term aim of positioning Sochi as a major year-round tourist destination.
- Development programmes include telecommunications, rail, road, energy and accommodation.
- Whilst many of the stadiums' construction contracts have already been awarded, **procurement is still ongoing for "overlay" products and services**.

## Commonwealth Games Glasgow, 2014

**Commonwealth Games:** 23rd July -  
3rd August 2014

The Opening Ceremony for the Games will take place on 23rd July 2014 in Celtic Park in Glasgow. The Games will include 17 different sports, of which 10 are core and the remaining 7 selected for this Games event.

The key venues for the Commonwealth Games are the Athletes' Village and 3 clusters of venues (West End, East End and South Side). The West End venues are the SECC, Kelvingrove Park and Scotstoun Leisure Centre. The East End venues are the National Indoor Sports Arena and the Sir Chris Hoy Velodrome, Glasgow Green, Tollcross Park Aquatics Centre and Strathclyde Country Park. The Athletes' Village is also being constructed in the East End Cluster. The three venues in the South Side Cluster are Ibrox Stadium, Hampden Park Stadium and Cathkin Braes.

**Official website:** [www.glasgow2014.com](http://www.glasgow2014.com)

**Business opportunities website:**  
[www.glasgow.gov.uk/businessportal](http://www.glasgow.gov.uk/businessportal)

### Key Facts:

- The **17 sports of the Commonwealth Games** are aquatics, athletics, badminton, boxing, cycling, gymnastics, hockey, judo, lawn bowls, netball, rugby sevens, shooting, squash, table tennis, triathlon, weightlifting and wrestling.
- The games will require **14 individual venues**; the majority of these (70%) are existing venues.
- Only **2 events will be held outside of Glasgow**; these are the Diving event which will take place at Edinburgh's Royal Commonwealth Pool and the Shooting event which will take place at the MOD's Barry Budden Range near Dundee.
- The **Athletes' Village developer, City Legacy**, was announced in 2009. The Village will be completed in the third quarter 2013. The Athletes' Village will accommodate 6,500 athletes and officials.
- Glasgow 2014 has selected the **Glasgow Business Portal**, operated by Glasgow City Council, as the advertising platform for current and future Games business opportunities. Registration on the Portal is free.
- Over £2 billion will have been spent on **infrastructure upgrades** by 2014, largely on improvements to the M74 and on the East End Regeneration Route.
- Between the bid award and the launch of the Games, some **8 new hotels**, with a combined bedroom stock of 1,445 are expected to open in Glasgow.



## FIFA World Cup Brazil 2014

**Opening match:** Sao Paulo 12th June 2014

**Final Match:** Rio de Janeiro 13th July 2014

The 12 World Cup host cities in Brazil are (from north to south) Manaus, Fortaleza, Natal, Recife, Salvador, Cuiaba, Brasilia, Belo Horizonte, Rio de Janeiro, Sao Paulo, Curitiba, Porto Alegre. The event is expected to attract over half a million visitors. The long distances between match venues mean that there will be a heavy reliance upon air travel, so airport development has been a major feature of Brazil's plans to deliver the World Cup in 2014.

**Official website:** [www.copa2014.org.br](http://www.copa2014.org.br)

### Key Facts:

- Matches will be played in **12 host cities located right throughout Brazil**, from the north west of the country to the far south.
- This will require **12 brand new or significantly renovated stadiums**; one for each of the host cities.
- The cost of the **stadiums construction** alone is expected to be over **US\$2 billion**.
- The World Cup will act as a catalyst for modernising **transport infrastructure** within Brazil, as well as **telecommunications and environmental infrastructure**, such as sanitation. The investment will cost up to £30 billion.
- There are **concerns about progress with venue construction and infrastructure** projects. Planning delays, worker strikes and allegations of corruption mean that Brazil 2014 is currently running behind schedule. Strong criticism of Brazil's progress came as recently as March 2012 from FIFA General Secretary, Jerome Valcke.

## Summer Olympics and Paralympics Rio de Janeiro, 2016

**Olympics:** 5th August - 21st August 2016

**Paralympics:** 7th September 2016 - 18th September 2016

In 2016, Brazil will host its second major global sporting event in as many years and the first ever Olympic Games in South America. This presents a major challenge for Brazil and has put significant pressure on the construction sector. Some of the venues being upgraded for the World Cup, such as the famous Maracana stadium, will also be used in Rio 2016. Rio de Janeiro is expected to host circa 12,500 athletes from 205 countries. The official Rio 2016 slogan is Viva sua Paixão (Live Your Passion).

**Official website:** [www.rio2016.com](http://www.rio2016.com)

### Key Facts:

- The Rio 2016 concept for the summer Olympics is based round **4 zones within the city**; the core of activity will take place in the **Barra**, with 14 venues (including the location of the Olympic Village). The other zones are **Copacabana** (4 venues), **Maracana** (4 venues) and **Deodoro** (7 venues).
- The Maracana stadium will host the opening and final ceremonies.
- **Some of the major infrastructure projects in Rio de Janeiro will already be in place** for the Brazil World Cup in 2014, as will the refurbished Maracana stadium
- The only Olympic venues situated outside of Rio de Janeiro are the football venues in the co-host cities of Brasilia, Belo Horizonte, Salvador and São Paulo.
- The total cost of delivering the venues and infrastructure for the Games is estimated at over **US\$22 billion**. The most significant area of public sector investment will be improving the urban transport network within the country.

## FIFA World Cup Russia, 2018

**Opening Match:** 8th June 2018

**Final Match:** 8th July 2018

The 13 candidate host cities for the World Cup 2018 in Russia are (from north to south) Kaliningrad, Saint Petersburg, Yaroslavl, Moscow, Nizhny Novgorod, Kazan, Saransk, Yekaterinburg, Samara, Rostov-on-Don, Volgograd, Krasnodar and Sochi. All of the cities are in the “European” west of Russia, except for Yekaterinburg.

**Official website:**

[www.fifa.com/worldcup/russia2018](http://www.fifa.com/worldcup/russia2018)

### Key Facts:

- The **2017 FIFA Confederations Cup** will be held in Russia as a prelude to the World Cup in 2018.
- The World Cup in Russia in 2018 will be based upon **5 geographic clusters** (including the stand-alone city of Yekaterinburg), **11 host cities** and **16 all-football stadiums**.
- Luzhniki Stadium in **Moscow will host the opening and final matches**.
- The **final decision on the 11 host cities** for the World Cup in Russia will be made in **September 2012**, but will certainly include Moscow and St Petersburg and very likely Sochi and Kazan because of their role in the 2013 **Universiade** and the 2014 Winter Olympics.
- **Stadiums are already under construction (March 2012)** in Moscow, St. Petersburg, Sochi and Kazan.
- The remaining seven places will be contested by Kaliningrad, Yaroslavl, Nizhny Novgorod, Samara, Volgograd, Saransk, Rostov, Krasnodar and Yekaterinburg.
- The Ministry of Sport and Tourism in Russia has stated that the 2018 World Cup will be the most expensive in the history of the World Cup.

## Summer Olympics and Paralympics, 2020

The host city for the 2020 summer Olympics and Paralympics will be selected in Buenos Aires on 7th September 2013.

The five applicant cities are Istanbul (Turkey), Tokyo (Japan), Doha (Qatar), Baku (Azerbaijan) and Madrid (Spain).

## FIFA World Cup Qatar, 2022

**Opening Match:** June 2022

**Closing Match:** July 2022

This will be the Middle East's first opportunity to host the World Cup. The key challenge for delivery of the tournament will be the measures undertaken to overcome the extreme summer temperatures. This will impact upon many aspects of delivering the event, from stadium design to health and safety measures and grass pitch development. Whilst there have been a number of news stories about changing the dates of the 2022 World Cup to a winter timetable in order to avoid these extreme temperatures, FIFA President Sepp Blatter has stated that it is up to the host nation to make the proposal for a timetable change.

**Official website:**

[www.fifa.com/worldcup/qatar2022](http://www.fifa.com/worldcup/qatar2022)

### Key Facts:

- In comparison to Brazil 2014 and Russia 2018, Qatar 2022 will be a very compact event. **The 7 host cities are all within a 25km radius of one another.**
- Proposed venues include **9 new stadiums** and **renovation of 3 existing stadiums.**
- Total spend on construction leading up to 2022 is expected to top **US\$50 billion**, with the **stadiums expected to cost in the region of US\$4 billion.**
- Qatar has committed to the target of a **carbon-neutral World Cup** and is proposing the use of **innovative environmental technologies**, particularly the cooling technology used to combat the excessive summer heat.
- Other innovations proposed include high quality grass growth under sun shades.
- After the World Cup, **modular sections of the stadiums** will be used to build 22 new stadiums around the world in developing countries.
- **Qatar will host the Confederations Cup in 2021**, which will serve as a test event for the World Cup.

## 2.2 MCAVOY GROUP - SUPPLIERS OF MODULAR ACCOMMODATION TO THE BASKETBALL ARENA AT THE 2012 OLYMPIC GAMES

Eugene Lynch, Managing Director, describes how the **McAvoy Group** set out to win modular accommodation contracts from the **Games**.

### CASE STUDY

Eugene Lynch explains that a key objective for the McAvoy Group in the run-up to the 2012 Olympics was to commit to pursuing and winning a modular buildings contract through the ODA. The Board also had a secondary objective - to benchmark the business against competitors, since they knew the Olympic contracts would attract the leading suppliers in their sector.

Although already very experienced in competing for public sector tenders, the McAvoy Group felt that London 2012 would be a good opportunity to raise the company's in-house tendering capability.

The company began to prepare for the tender process by undertaking a Board level review of its own strengths and weaknesses, in order to work out what might be the competitive edge in pursuing Olympics related projects.

The tendering process was both stringent and time consuming, involving numerous meetings with technical consultants.

During each tendering exercise, the Board constantly re-assessed how the company had performed; through Invest NI they brought in external support to assess their bid responses and ensure that their tender pitches would score highly. From this feedback, the Board found that some of the key strengths of the business were not being presented as well as they could be, which was quickly addressed.

This process soon resulted in the successful appointment to a modular accommodation framework for the Games and then to being awarded a contract to provide modular accommodation for the Basketball Arena.

Eugene Lynch confirmed that the long-lasting impact of the Games for the McAvoy Group will not come from the value of this contract, but from the future business development value of using this project as a very prestigious reference site. The team has also benefited immensely from experiencing the rigorous tendering process and Eugene notes that the procurement practices developed through London 2012 are now becoming more prevalent and are likely to become more widely adopted by contractors in the future.

The McAvoy Group is proud of its achievement in supplying to the Games and Eugene expressed that this sense of pride has been felt throughout the company. Business confidence and motivation is high; the team feels "sharper" and the next challenge is now to keep in place all that has been learnt and continually strive to move to the next level.

## 3.0 Supply Opportunities

### 3.1 PLANNING FOR GLOBAL SPORTS EVENTS

The majority of major global sports events over the next decade will be hosted by nations with emerging markets. Typically in these countries telecommunications, transport, venue and accommodation infrastructure is less well developed, giving rise to greater construction related opportunities than may be the case in a developed market.

Global games and sporting events require a diverse range of works, goods and services, from infrastructure and groundworks, to official merchandise, creative design and temporary signage. Supply opportunities arise at each stage of an event; from the conceptual and planning stages, through project design and construction to the delivery of the actual event and legacy of the event.

The planning timeline for delivery of these events commences many years in advance of the actual event, so for example, construction work for a number of the 2014 new venues in Russia and Brazil is already well underway. The legacy phase of major sporting events may however result in further construction opportunities. Legacy is a recurrent problem for host nations; Russia is assessing the potential to dismantle stadiums after Sochi 2014 for re-use elsewhere, whilst in Qatar demountable stadiums are a key aspect of their World Cup 2022 concept.

### 3.2 PROCUREMENT FOR GLOBAL GAMES

The websites for the major sporting events over the next decade are listed in Section 2. Several websites (but not all) have a specific area for procurement and / or registration of interest in supply opportunities.

- Glasgow 2014  
[www.glasgow.gov.uk/businessportal](http://www.glasgow.gov.uk/businessportal), goods and services for games delivery, including temporary venue infrastructure
- Sochi 2014  
[www.sochi2014.com](http://www.sochi2014.com), games delivery
- Sochi 2014  
[www.sc-os.ru/en](http://www.sc-os.ru/en), venue design and construction through state company Olympstroy
- Brazil 2014  
[www.portal2014.org.br/en](http://www.portal2014.org.br/en)
- Rio 2016  
[www.rio2016.com](http://www.rio2016.com)
- Russia 2018  
[www.fifa/worldcup/russia2018](http://www.fifa/worldcup/russia2018)
- Qatar 2022  
[www.fifa/worldcup/qatar2022](http://www.fifa/worldcup/qatar2022)

Prospective suppliers to global sporting events need to register their interest through the official website of the individual event, where this is available. The supplier will then be notified by email alert when procurement opportunities go live within the categories of supply that they have selected. The winning bidders for larger contracts are generally described as Tier 1 suppliers, in that they supply goods and services directly to the event delivery authority.

Tier 1 suppliers to a number of sporting events are also often required to use the official event website to advertise any smaller packaged contracts that they wish to let on a subcontract basis.

Registration is an important step in assessing the potential business opportunity from each of these sporting events as:

- It provides an opportunity to raise the company profile and promote its specific expertise to the event organisers.
- The profile provided by each registered company allows their expertise and capability to be matched with the most appropriate local tenders.
- It presents companies in the host country with an opportunity to contact specialist suppliers for collaborative or joint venture opportunities.
- Registration is the key mechanism for initiating bidding direct tendering opportunities.

Northern Ireland businesses may not have the experience or resources to compete for Tier 1 supply opportunities, but there may be other opportunities to supply goods and services indirectly and capitalise on the export potential of international sporting events.

This section of the guide outlines the range of goods and services that are typically required for the delivery of major sporting events, such as the Olympic Games or the FIFA World Cup.

### 3.3 CATEGORIES OF SUPPLY TO MAJOR SPORTING EVENTS

UKTI has compiled, and will continue to update, a Springboard to Success directory, ([www.springboardtosuccess.co.uk](http://www.springboardtosuccess.co.uk)) which showcases UK expertise in the global sports projects sector. Inclusion in the directory requires that companies have experience of supplying to several major sporting events, although not necessarily London 2012. Springboard to Success was launched at SportAccord 2011, which was held in London in advance of 2012's Summer Olympic and Paralympic Games.

The broad categories of goods and services required at each stage of the planning and delivery of international sporting events are listed below and mirror the UKTI supply categories used in its Springboard to Success Directory.

The table on pages 18 and 19 refers to the broad categories of goods and services required at each stage of the planning and delivery of international sporting events and mirror the UKTI supply categories used in its Springboard to Success Directory

### 3.4 CUNNINGHAM COVERS - SUPPLIERS OF PROTECTIVE SHEETING FOR THE BEACH VOLLEYBALL CENTRE

David Cunningham is Managing Director of **Cunningham Covers** based in Maghera. He provides some insight into the company's experience of successfully bidding for projects for **London 2012**.

#### CASE STUDY

**Cunningham Covers** is a manufacturer of industrial textiles - tarpaulins, canopies and curtain sides. Almost every product is made specifically to order and applications for the company's products are seemingly endless, ranging from a stage cover at Chessington Theme Park to a huge PVC roof on a large sports hall.

Having already undertaken a number of sports related projects for clients such as Manchester City Football Club, Everton Football Club and a project for Horseguard's Parade, the team from Cunningham Covers immediately identified the potential from the Games.

The company registered on the CompeteFor site, but were then surprised to be contacted directly by the procurement team at LOCOG. They had a requirement for protective cover for the beach volleyball centre.

Given the highly bespoke nature of the requirement the procurement team wished to meet potential suppliers and discuss their suggestions for the best solutions. David provided his ideas on the concept that would work best, ensuring that they were completely tailored to the individual structure.

The company's experience of being a supplier to the Games has been very positive. With bespoke industrial textile products becoming an increasingly familiar feature of major international sporting events, there is a good opportunity to look for business at other sporting events beyond 2012.

Distance is not necessarily a barrier, since Cunningham Covers has already supplied markets as far afield as Africa and Kazakhstan; the main barrier will be the requirement to meet the procurement specifier and understand their needs in as much detail as possible.



## CATEGORIES OF SUPPLY TO MAJOR SPORTING EVENTS

Bidding and Planning	Design and Construction	Event Delivery	Marketing and Media	Human Resources	Legacy
Communications strategy	Architects	Catering Services	Advertising	Interpretation and Translation Services	Educational and Social Projects
Corporate sponsorship strategy	Acoustic Consultants	Corporate hospitality	Audio Visual Services and Products	Corporate clothing uniforms	Legacy Planning
Economic planning and feasibility studies	Building and Construction Contractors	Corporate clothing uniforms	Event Marketing and Branding	Recruitment agencies	Facilities Management
Health safety and environmental planning	Building Materials	Drug testing services and equipment	Broadcasting Services and equipment	Volunteer Strategy and Management	
Insurance services	Building Products	Emergency, Health and Safety Services and Equipment	Licensing, Promotional Goods and Branded Merchandise	Workforce Planning, Training and Delivery	
IT Systems	Construction Management	Event management	Media Consultants and equipment	HR Consultants	
Legal services	Urban and Landscape Design and Consultants	Ticketing and Accreditation Services and Equipment	PR and Mass Communications		
Project Planning	Building Control Systems	Timing	Website design and management		
Risk management and emergency planning	Engineering	Sports equipment			
Security Planning	Fencing	Sports Presentations and Ceremonies Consultancy and Equipment			
Transport Planning	Environmental Impact Assessment and Mitigation	Translation and Interpretation			
	Plant and Equipment	Transport and Logistics Services			
	Sports Surfacing and Turfing	Way finding Signage			
	Lighting	Temporary Structures			
	IT and Tele-communications Services and Equipment	Venue Dressing			
	Interior Design and Fittings				
	Power and Facilities Supply				
	Seating				
	Surveyors				
	Waste and Recycling Services				
	Security Services and Systems				
	Access Control Systems				
	Turnstiles				

## 4.0 Individual Sporting Events

This section of the guide provides a detailed profile of each of the 6 major global sporting events to be held between 2014 and 2022.

### 4.1 WINTER OLYMPICS, SOCHI, RUSSIA 2014

Russia has a long tradition of hosting winter sports tournaments, having hosted a number of World Championships and the 1980 Olympic Games. Sochi has also previously hosted international sporting events and will also host the Formula One Grand prix from 2014.

The Black Sea resort of Sochi in the Krasnodar region will host the 22nd Winter Olympic and Paralympic Games, under the auspices of the Sochi Organising Committee (Soc). There will be both a coastal cluster (Sochi) of venues and a mountain cluster (Krasnaya Polyana). The level of development for the 2014 games is much greater than for the previous winter games hosted by Canada.

A number of leading British companies with experience of the London 2012 delivery are already involved in key Sochi contracts. It was announced in February 2011 that British companies are already the largest foreign supplier to Sochi 2014. Sustainability has been a key feature of the procurement drive for Sochi.

The city of Kazan in Russia will also host the 2013 Universiade Games. This is an international multi-sport event, involving university students from around the world. About 60% of these athletes go on to become Olympic competitors, so it also represents a major event in the global sporting diary.

The run-up to the Sochi Games has not been without controversy; there have been ongoing reports of mafia involvement and corruption surrounding the awarding of key construction contracts. However, Olympic evaluation reports of progress suggest that the schedule for delivery is now largely on track.

### **BASIC FACTS ABOUT SOCHI:**

**Sochi:** Coastal resort on the Black Sea, Krasnodar region in south western Russia. The city stretches 147 km along the Black Sea Coast, making it the longest city in Europe.

**Population:** Krasnodor Region, 5.1 million inhabitants, Sochi 400,000 inhabitants, but attracts several million tourists per annum.

**Local time:** GMT +3 hours

**Currency:** Russian ruble (RUB)

**Travel from Moscow:** 30+ hour train ride

### **ECONOMIC PROFILE:**

Sochi is the largest resort city in the Russian Federation and is situated in a subtropical climate, although it still experiences winter. The mountain region of Krasnaya Polyana is 30 minutes away.

The Sochi economy is based on tourism, although mostly services domestic tourists. There are numerous hotels, cafes, entertainment centres, water parks, marinas, piers, etc along the Sochi coast, often described as the Russian Riviera. Food and manufacturing industries are developing quickly. Public transport is mainly by small buses (marshrustkas), taxis and a small number of buses. Thanks to the Winter Olympics 2014 the local transport system will be significantly developed and modernised.

Home to the summer residences of both the Russian Prime Minister and President, Sochi is also a key business conference destination.

Some 20 km away from Sochi is the conflict zone of Abkhazia and to the north west, the Caucasus mountain region, some of which includes UNESCO protected areas; hosting the Winter Games in the area has raised controversy from environmentalists and President Putin has moved the location of several competition venues.

### **DOING BUSINESS IN SOCHI:**

Forbes Russia ranks Krasnodar on the Black Sea Coast as the top city in Russia for doing business, out of a total of 103 cities (Moscow and St Petersburg were not included, due to their size and the fact that other provincial cities would be unable to compete with them). Krasnodar is well known for its business friendly and supportive environment. Forbes Russia ranked Sochi, a relatively close neighbour of Krasnodar, as 9th best city in Russia for doing business.

Sochi is the largest resort city in Russia and already established as a business conference centre in Russia, hosting seminars, conferences and exhibitions. An international economic forum, the Sochi Investment Forum is held in the city each September and it attracts thousands of foreign visitors to the city.

The new infrastructure investment planned for Sochi 2014 will further strengthen Sochi's position as a Russian business centre and an attractive location in which to do business.

## 2014 OLYMPIC GAMES

The Winter Olympics will take place in two clusters - a coastal cluster (ice events) and a mountain snow zone cluster. The clusters themselves are just 30 minutes travel time apart along the new railway system developed for Sochi 2014.

The coastal cluster concept centres round the construction of the Sochi Olympic Park, covering 800 hectares and situated 25km outside of Sochi city centre. The Olympic Park will include all ice venues, the main Olympic Village, the main stadium for the Opening and Closing ceremonies and the International Broadcast Centre. All ice venues are within walking distance of one another, meaning that visitors have no travel time between events and can attend several different events in a single day.

The Krasnaya Polyana mountain zone contains all the snow and sliding venues, an Olympic Village and a media sub-centre.

The Municipality of Sochi extends from the coast to the mountain zone thus encompassing all Olympic venues under a single, governing body.

The Sochi Winter Olympics will provide a catalyst for investment in the Black Sea region, with the longer term aim of transforming Sochi into a year-round destination for both domestic and international tourists. The Games will also result in the development of Russia's first world-class ski resort and provide a training centre for winter sports in the region.

### Key Organisations:

- The organisation and staging of the Games is the responsibility of **Sochi 2014**, the **Olympic Games Organizing Committee (OGOC)**, initially based in Moscow, but moving to Sochi in 2012.
- **SC Olympstroy** (the state Olympic construction company) is the organisation responsible for management of design, construction, renovation and putting into operation the venues needed for holding the Winter Olympic Games in Sochi 2014 and for development of Sochi city as a mountain climatic resort.

The Olympic Co-ordination Committee reported that it is satisfied with the progress made in preparing the venues and infrastructure for the test events due to be held in 2013.

## KEY VENUES:

By 2014 just over 200 individual projects will be completed in Sochi. Construction on all venues started in 2010 at the latest and facilities are due to be operational by the end of 2012, to allow for numerous test events to take place in 2012 and 2013.

By the end of 2011, circa 70% of all venue construction was complete. The investment budget for construction of venues is US \$806 million, with a further US \$121 million on the Olympic Villages.

- There are 11 venues in total, of which only 4 were existing venues. However, the level of work to be undertaken in the existing 4 venues is substantial.
- Three Olympic Villages are currently being constructed to house athletes during the Games, one in the coastal cluster area and two in the mountain cluster. Building work on the main Olympic Village in the coastal cluster is due to be completed in June 2013. The Mountain Olympic Village will be completed in April 2013. The third Olympic Village (the Endurance Village) will be completed in September 2013.
- The Olympic Media Village in Krasnaya Polyana includes accommodation for more than 2,000 media (2,658 rooms: including 1,544 3-star rooms, 861 4-star rooms and 253 5-star rooms.) The Mountain Media Sub-Centre, which will include a press conference suite, studios and offices for media representatives, will also be located in the Village.

## Sochi Olympic Park (Coastal Cluster):

- The competition venues include ice hockey arena, sliding centre, speed skating oval, cross country / biathlon, alpine skiing, freestyle skiing and snowboard.
- Boshoy Ice Dome will host the Ice Hockey final and has capacity for 12,000 spectators. It will be used afterwards as a multi-sports and entertainment centre.
- Maly Ice Palace will also be used for ice hockey. This venue can be dismantled and re-used elsewhere after the Games.
- The Central stadium will be used for the Opening and Closing ceremonies and will be completed in May 2013. It will be used as a high level football stadium and multi-sports arena after the Games.
- Shayba Arena is another Ice Hockey venue and can host circa 7,000 spectators.
- Sochi Olympic Oval will be used for Speed Skating and can accommodate 8,000 spectators. This venue will be used as a conference and exhibition centre after the Games.
- Iceberg Skating Palace will be used for several events including Figure Skating and Short Track Speed Skating (12,000 spectators). This venue will be completed by the end of 2012. It can be dismantled and re-used after the Games.
- Ice Cube Curling Centre will accommodate 3,000 spectators. This is a moveable venue, which can be dismantled after the Games and re-used in another city.
- Fisht Olympic stadium will be the venue for the Opening and Closing Ceremonies, with capacity for 40,000 spectators.

Other venues in Sochi include:

- Main Olympic Village.
- International Broadcasting Centre and Pressroom, which is destined to become a world class retail centre after the Games.
- Formula One pit lane (after the Olympics it is planned to use the cluster area as part of Formula One street circuit).

#### **Krasnaya Polyana (Mountain Cluster):**

- Biathlon and ski complex.
- Rosa Khutor Freestyle skiing and snowboard park is now being used for test events and will be a venue for world cup competitions.
- Rossa Khutor Alpine Resort, which will be used as a ski resort after the Games.
- Russian National Sliding Centre is due for completion early 2012 and will be used as a National Training Centre after the Games.
- Russian National Ski Jumping Centre.
- Rosa Khutor Plateau Olympic Village.

Development of the International Broadcast Centre will cost US\$269 million. Details of progress against the construction programme can be found at [www.sc-os.ru](http://www.sc-os.ru). Further information is available from the [www.sochi2014.com](http://www.sochi2014.com) website; the media section contains a number of media update reports which outline progress.

#### **KEY INFRASTRUCTURE WORKS:**

At this stage much of the extensive infrastructure development programme, including new road networks, bridge and rail links, has already taken place. The key elements of the infrastructure programme are:

- US\$580 million invested in construction and modernisation of telecommunications in the region.
- A US\$4 billion investment programme for transport infrastructure is in place. Nearly 50 projects, including new roads, bridges, tunnels and railways, are part of the overall transport infrastructure improvement plans.
- By 2014 more than 367 km of new roads and bridges will have been constructed in the region.
- The largest transport infrastructure project planned is a combined road / railway project linking the Adler coastal region to the Alpika Service mountain resort. This will create the necessary transport infrastructure for delivery of goods to the construction sites for the Games.
- The government has implemented a programme for increasing power supply in the Sochi region, including construction of thermal, hydroelectric and electrical substations.
- Construction of the Sochi Light Metro will connect the Olympic Park, the airports and the competition venues in Krasnaya Polyana.
- A new high speed rail link has been developed by Russian Railways.
- A new airport terminal at Sochi (Adler) Airport has already been completed and a runway extension is underway. By the 2014 Games, the airport capacity will have been increased from 900 passengers per hour to 3,800. The Adler to Sochi Airport railway link was completed in December 2011. This railway link will carry 60% of all air passengers arriving in Sochi for the 2014 Games.

- A new off-shore terminal is being constructed at Sochi sea port, while the sea port terminals are themselves being reconstructed.
- A budget of US\$1.3 billion has been estimated for the construction of accommodation. A total of 20,000 new hotel bedrooms are being built for the Games, including accommodation for competitors and the IOC officials.

**Some of the Russian companies involved in delivering these major infrastructure projects include:**

- Basic Element Group - with over 100 companies in a variety of sectors, this company is involved in venue construction, airport and sea port development projects [www.basel.ru](http://www.basel.ru)
- SC Olmpstroy is responsible for delivering the design, construction and management of the competition venues required for the Games.
- Moskonversprom is also involved in design, construction and project management of a number of the Sochi 2014 projects.
- Safe Sochi is a municipal company responsible for purchase of all necessary equipment and solutions for the security of the area during the Games.
- Kamsan SB is a group of companies specialising in security telecommunications, engineering and construction.

**OTHER DEVELOPMENTS:**

Sochi has broken Olympic sponsorship records with a commercial programme worth more than US\$1 billion. Its international partners are Coca-Cola, Atos Origin, Dow Chemical, Omega, Panasonic, Procter & Gamble, Samsung and Visa. General Partners of the 2014 Games are Aeroflot, BoscoSPORT, MegaFon, Rostelecom, Rosneft, Sberbank of Russia, Russian Railways Company, Volkswagen, Group Rus.

**Licensed Goods:**

Sochi 2014 has signed agreements with leading retailers throughout Russia to become the official operators of Sochi 2014 retail sales. The retailers are:

- LLC "Sportmaster" - will open 300 departments in its shops throughout Russia, dedicated to Sochi 2014 merchandise.
- LLC TS "Begemot Hypermarket" - 400 departments will be opened in these children's toy shops, across 7 federal districts in Russia.
- LLC "Uvenko Invest" - will organise the sale of licensed products in 400 vending machines in the sales offices of the official 2014 Games Partners.
- In December 2011, Megafon opened the official online Sochi 2014 online shop.



## **PROCUREMENT:**

Sochi 2014 launched its procurement portal in 2008. To participate in the Sochi 2014 tenders, complete an application indicating the category of goods or services that corresponds to the company's business field. If the business area of interest does not correspond to the categories listed, companies are advised to register under the "other" business field.

Tenders for the Sochi Organising Committee are published on [www.sochi2014.com](http://www.sochi2014.com) (scroll to bottom of website home page for section on procurement) while construction related opportunities, including those related to legacy are the responsibility of SC Olympstroy and some tenders are also published on the site [www.sc-os.ru](http://www.sc-os.ru)

**Companies interested in becoming construction suppliers at Sochi, or any other major sporting event may register their interest through the High Value Opportunities Programme managed by UKTI ([www.ukti.gov.uk](http://www.ukti.gov.uk)). UKTI can also provide validated lists of contractors appointed by SC Olympstroy.**

Procurement of overlay products for Sochi 2014 is due to begin later in 2012 (see below).

## **UKTI ASSESSMENT OF OPPORTUNITIES IN SOCHI:**

The Business Club (through UKTI) recently hosted a mission to UK by the Sochi 2014 organising Committee, focusing in particular on overlay items. Grigory Selishev, Head of Overlay Development Division, gave a list of Overlay elements that they are looking for:

- Electrical Generators and Distribution
- Tents
- Modular Buildings and Cabins
- Fencing and Barriers
- Temporary Lighting systems
- Scaffold
- Temporary Seating
- Temporary Walls and Partitions
- Temporary Restrooms
- Containers and Structures
- Water and Waste Services
- Canopies and Shelters
- Trailers
- Stairs and Ramps
- Temporary Bridges
- Commentator and Press Positions
- Video Positions and Platforms
- Heating, Ventilation and Air Conditioning
- CCTV and Lighting Masts
- Fabrication Shop
- Staging
- Flagpoles
- Systems for people with disabilities
- Asphalt, Gravel and other ground covers
- Fire Protection Systems
- Floor Coverings and Temporary walking paths
- Painting



## **FURTHER CONTACTS FOR SOCHI 2014:**

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Invest NI can provide further relevant contacts for interested Northern Ireland businesses within the Global Sports Projects Team at UKTI and Invest NI/ UKTI overseas networks located in the target overseas market (visit [www.ukti.gov.uk/sectors/globalsportsprojects](http://www.ukti.gov.uk/sectors/globalsportsprojects)). These contacts can offer practical market entry advice and further in-market contacts.

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### **Tender department:**

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## 4.2 FM ENVIRONMENTAL - SUPPLIERS OF ENVIRONMENTAL PRODUCTS

Northern Ireland company **FM Environmental** has been doing business in **Russia** for a number of years and is familiar with the Sochi region. FM Environmental's Export Director Eamon Fitzpatrick provides some insight into the opportunities and challenges of doing business in Russia.

### CASE STUDY

Russia is now one of **FM Environmental's** most important and growing international markets. Eamon Fitzpatrick confirms that it's by no means an easy market in which to do business. It's a vast country with nine different time zones which means travelling can be expensive and time consuming.

Russia can also be very bureaucratic and often slow in terms of decisions. It pays, therefore, to have an experienced representative on the ground there to help in identifying opportunities and to deal with the bureaucracy.

FM Environmental's success throughout Russia is the outcome of an investment over 10 years in building relationships at many levels. Existing and potential customers now know that the company is committed to the market, is interested in their country and culture, and is really serious about doing long term business with them.

The company has an established distribution network over eight regions, including Siberia and covering all the major cities. There's also a great deal more to Russia than Moscow and St Petersburg. Sochi, for instance, is like the French Riviera, a huge city with excellent hotels and other facilities.

As well as finding new business, the network enables the company to service the requirements of customers quickly and effectively.

Eamon advises that companies interested in Russia shouldn't expect to win business immediately. It requires a very extensive commitment that has to include regular visits and a willingness to develop relationships. This commitment really can pay off and Eamon now has many good friends in Russia who are keen to see the FM Environmental business grow there.

Among the many positive aspects of doing business in Russia is their practice of paying 'up front' for products and services they value. As a result of what is an important part of their business culture, FM Environmental has not experienced any problems over payment. Overall, Eamon's experience has been that Russia is a great place in which to do business.

### 4.3 COMMONWEALTH GAMES, GLASGOW, 2014

In 2014, Glasgow will host 71 countries and territories and more than 6,500 athletes and officials across 17 sports at the XX Commonwealth Games. Glasgow 2014 will be the biggest multi-sports event that Scotland has ever hosted.

2014 has been described as the year in which “Scotland welcomes the world”. In addition to the Commonwealth Games, 2014 will also see Scotland host the 40th Ryder Cup at Gleneagles in September.

Glasgow has recently announced its intention to submit a bid to host the Youth Olympic Games in 2018 and has also commenced discussions with the organisers of the Tour de France about hosting the event in 2017.

#### **BASIC FACTS ABOUT GLASGOW:**

Glasgow, on the River Clyde, is the largest of Scotland’s cities, with a population of 590,000. The wider Glasgow / Clyde valley area has a population of 1.75 million. Situated 42 miles from Edinburgh. Glasgow is home to over 11% of Scotland’s population.

#### **ECONOMIC PROFILE:**

Glasgow is one of Europe’s top 20 financial centres. In the ten years to 2005, Glasgow was one of the fastest growing cities in the UK. Key business sectors include Financial and Business Services, Tourism and Events, Low Carbon Industries and Engineering, Manufacture and Design.

#### **2014 COMMONWEALTH GAMES:**

Glasgow 2014 Ltd is the official name for the Organising Committee, the company set up to deliver the XX Commonwealth Games. Games partners for Glasgow 2014 are the Scottish Government, Glasgow City Council, Commonwealth Games Federation and Commonwealth Games Scotland.

The cost of delivering Glasgow 2014 has been estimated at £523.6 million. Glasgow City Council is providing £344 million in funding for the Games, while the Scottish Government is providing £80 million. Ticket sales, broadcasting and merchandising will contribute the balance of the budget. The Commonwealth Games Federation Co-ordination Commission visited the city in April 2012 to evaluate progress and reported that Glasgow 2014 is on track and on budget.

The Glasgow 2014 Sports Programme was published in May 2012. The 17 Glasgow 2014 sports are:

- Aquatics, Athletics, Badminton, Boxing, Cycling, Gymnastics, Hockey, Judo, Lawn Bowls, Netball, Rugby 7s, Shooting, Squash, Table Tennis, Triathlon, Weightlifting and Wrestling.

#### **KEY VENUES:**

The Bid for Glasgow 2014 was based on the principle that 70 per cent of the venues required for Glasgow 2014 were in place.

A total of 14 venues will be used throughout the games, including the Athletes’ Village, of which only 3 will be new venues, purpose built for the Games. There is also a satellite cluster of venues outside Glasgow, comprising of the Royal Commonwealth Pool in Edinburgh, Barry Buddon Shooting Centre in Angus and the Strathclyde Country Park.

Construction on the Commonwealth Games Athletic Village began in June 2011. It will accommodate 6,500 athletes and officials during the Games. The Village is situated in Glasgow's East End in the heart of one of Europe's largest regeneration areas. Post Games, this area will provide 700 new homes of which 300 will be for social rent from local housing associations and 100 will be a mixture of mid market rent and shared equity homes. The Athletes' Village will be built by the City Legacy Consortium, which is made up of developers and contractors CCG, Cruden, Mactaggart & Mickel and W H Malcolm. ([www.citylegacy.co.uk](http://www.citylegacy.co.uk))

The estimated budget for the three new venues was £200 million:

- National Indoor Sports Arena (Badminton Venue) and Sir Chris Hoy Velodrome (Track Cycling Venue) at Dalmarnock. In addition to the indoor facilities, the velodrome also includes a 1km outdoor, closed road cycle circuit. Both venues are on track to open in October 2012. The contractor is Sir Robert McAlpine.
- The 12,500 seat Scottish Hydro Arena (based at SECC, Anderston) will be host venue to two of the games events. Situated west of the city centre, the arena will host the gymnastics competition and netball finals in 2014. It is due to open in 2013. The Hydro will be the largest entertainments venue in Scotland and, after the games, will play host to around 140 events per year. Scottish Hydro has committed to invest £1.5 million over the next ten years in further developing the venue.
- Cathkin Braes Mountain Biking Circuit (Mountain Bike Venue), Cathkin Braes Country Park. This will be Glasgow's first international standard mountain biking course.

A number of existing venues are currently undergoing substantial upgrades / expansion for 2014:

- Tollcross Aquatic Centre (Swimming Venue). The expansion includes a new 6 lane, 50m warm-up pool; 5,000 seats, of which 2,000 will be permanent, a new poolside control room, new fitness, health and dance suites, new changing facilities, new community facilities. Barr Construction (Glasgow based) is currently undertaking the construction work. The project began in June 2011 and will continue until summer 2013.
- Scotstoun Leisure Centre (Squash and Table Tennis Venue). The venue upgrade takes place in two phases. Building work on the addition of a new squash centre began in April 2012.
- Glasgow Green is the venue for the Hockey events. Owned by the Glasgow City Council, Glasgow Green is close to the City Centre near the River Clyde and is the oldest public park in Scotland. New facilities will include 2 synthetic floodlit hockey pitches/ changing rooms; spectator seating for 5,000 will be available for the games, of which 500 will be permanent. Construction works were due to start in March 2012, with the contract awarded to City Building in Glasgow.
- Kelvingrove Lawn Bowls (Lawn Bowls Venue). Expansion involved upgrading of bowling greens to international standard and provision of a refurbished pavilion. Works were due to complete in 2011 and were carried out by Fairways Sportsgrounds. Professional Sportsturf Design Scotland was chosen to select the most appropriate grass varieties.
- Kelvin Hall (Boxing Venue) is undergoing general refurbishment.

- Hampden Park, Scotland's National Football stadium will host the Track and Field Athletics events. New works include the upgrade of stands; the pitch must also be raised for laying the track and then returned to normal after the Games. The stadium will also host the Closing Ceremony of the Games. Planning applications for these works were submitted in Spring 2012.
- Scotstoun Stadium (Athletics Training Venue for Glasgow 2014). Major upgrade of athletics and rugby stadium.
- Toryglen Football Centre (Athletics Training Venue for Glasgow 2014). Development of indoor and outdoor regional football centre.

#### **OTHER VENUES:**

- The 60,000 seat Celtic Park, located in the East End adjacent to the Athlete's Village will host the Opening Ceremony.
- Ibrox Stadium, with a capacity of 50,000 will host the Rugby Sevens competition.
- Royal Commonwealth Pool is situated in Edinburgh and will host the diving competitions.
- Barry Budden Shooting Centre is on the east coast of Scotland and owned by the Ministry of Defence.
- The Scottish Exhibition and Conference Centre will host Judo and Wrestling; the International Broadcast Centre and Main Press Centre will also operate out of the SECC.

#### **KEY INFRASTRUCTURE WORKS:**

Much of the focus for regeneration in the city of Glasgow is in the East End, which is now home to the Athletes' Village.

- The Clyde Gateway Initiative is an Urban Regeneration Company (URC) based in the East End. The URC has a 25 year Business Plan. The Clyde Gateway Business and Operational Plans outline the proposed projects to be funded.
- The M74 improvement works were completed in February 2012 by Interlink at a cost of £600 million.
- The East End Regeneration Route (EERR) is a new road that connects the M74 with the M8 / M80 and opened in June 2011. Carillion was involved in constructing a new bridge over the railway. Farrans and I & H Brown were also involved in the carriageway and footway construction.
- Redevelopment of Dalrnock Station - an £11m funding partnership by the URC, GCC, Strathclyde Passenger Transport and ERDF. Work began in September 2011 for completion by Autumn 2013. The contractor is C Spencer Ltd.

## **PROCUREMENT:**

Glasgow 2014 Ltd, the Organising Committee of the Glasgow Commonwealth Games, is responsible for procuring the goods and services required to deliver the Games; these requirements will amount to hundreds of direct contracts, and thousands of indirect sub-contracts, covering goods ranging from sports equipment to creative design, and catering to temporary venue infrastructure.

Contracts linked to the Glasgow 2014 Commonwealth Games (both events related and construction opportunities) are published through the Glasgow Business Portal ([www.glasgow.gov.uk/businessportal](http://www.glasgow.gov.uk/businessportal)). The portal is being delivered jointly by Glasgow City Council and the Organising Committee (Glasgow 2014). Larger contract opportunities will also be published in Public Contracts Scotland and the Official Journal of the European Union.

In order to receive information via alerts on new opportunities, news and events, interested businesses should ensure that a company profile is completed and uploaded to the portal. As of March 2012, over 18,000 users had registered on the Glasgow Business Portal; 7,000 of these registrations are by Glasgow based firms.

A "Business Readiness" questionnaire is available on the site to assist smaller companies, with less experience of tendering. The questionnaire will help to identify areas of support required to enable the business to compete more effectively for tenders. Support is available from Buyer Engagement Teams ([bet@glasgow.gov.uk](mailto:bet@glasgow.gov.uk)).

In addition to contract opportunities directly linked to the Commonwealth Games, the Glasgow Business Portal also includes notices of contracts related to a number of other significant infrastructure projects planned for the city, for example, opportunities from the £800 million New South Glasgow Hospital and Buchanan Galleries. Forthcoming tender publications will include Glasgow School of Art and Lauriston Housing Development.

Discussions are also taking place about linking the Business portal to Ryder Cup procurement, although no decision has yet been taken.

Glasgow City Council has developed a policy of CBiP (Community Benefit in Procurement). Community Benefit accounts for 10% of the overall score in the evaluation of tenders.

## **ASSESSMENT OF OPPORTUNITIES IN GLASGOW:**

Whilst the main Tier 1 construction contractors have now been appointed, each Tier 1 contractor is mandated to publish Tier 2 & 3 supply opportunities via the Glasgow Business Portal, so new construction related contracts will continue to be announced. Glasgow City Council recommends that interested Tier 2 suppliers monitor the portal for further opportunities and ensure that their company profile is updated to allow them to receive relevant email alerts.

The majority of operational and event specific opportunities are still to be awarded. To date £271 million of Games related Tier 1 contracts have been awarded across 61 contracts. Of this, £246 million has been awarded to Scottish based firms and more specifically, £181 million to Glasgow based firms. These Tier 1 contracts have to date generated a further 191 sub-contract opportunities.

At a March 2012 procurement presentation, representatives from Glasgow 2014 and Glasgow City Council gave some examples of the types of products and service required during the Games. **They confirmed that 90+ procurement categories have been identified so far. As yet, two thirds of the £523.6 million Games delivery budget remains uncommitted and still to be awarded.**

A significant proportion of operational contracts will be advertised in the second half of 2012, with the majority of supplier contracts likely to be in place by Autumn 2013 after a period of review, selection and appointment. These include:

- 4200 private security guards
- 500 merchandise product lines supplied
- 100 tonnes of fruit and vegetables
- 6,500 beds
- 550 temporary toilets
- 250,000 uniform items supplied
- 8km of bandages supplied
- 3.2 tonnes of waste produced per day
- 2 million meals
- 60 scheduled daily deliveries

The procurement team estimates that Cleaning, Catering and Waste, for example, will advertise 70+ individual contracts, ranging in size from several thousand pounds to hundreds of thousands. These contracts will include recycling, logistics systems, snacks, delivery of meals and many more.

Other contracts still to be awarded include:

- Temporary Seating (Mid 2013)
- Marquees / Tents (Mid 2013)
- Portable Buildings (Mid 2013)
- Fences (End 2013)
- Exhibition equipment (End 2013)
- Sports equipment (End 2013)
- Broadcast Lighting (Early 2014)

Glasgow 2014 is still recruiting for staff; as each function area becomes staffed, this will lead to more detail being available on each of the procurement categories.



## **FURTHER CONTACTS FOR GLASGOW 2014:**

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Invest NI can provide further relevant contacts for interested Northern Ireland businesses within the Global Sports Projects Team at UKTI and Invest NI/ UKTI overseas networks located in the target overseas market (visit [www.ukti.gov.uk/sectors/globalsportsprojects](http://www.ukti.gov.uk/sectors/globalsportsprojects)). These contacts can offer practical market entry advice and further in-market contacts.

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## 4.4 FIFA WORLD CUP, BRAZIL, 2014

The World Cup, the sixth for Brazil, will be conducted across 12 host cities throughout the country. The pace of economic growth in Brazil is already putting pressure on existing infrastructure capacity. The logistical challenge of staging such a complex event across numerous host cities is exacerbated by the sheer size of Brazil. This will require very significant infrastructure investment to facilitate the movement of large numbers of players, fans and press across the country.

Work on the Brazilian stadiums has already begun in the majority of host cities. FIFA continues to express concern that activity is lagging behind target dates for both stadium construction and wider infrastructure improvements.

In October 2010, Brazil's Sports Minister, who was leading preparations for both the FIFA World Cup 2014 and the summer Olympics Rio 2016, resigned amidst allegations of corruption. A new Sports Minister has been appointed and concerns over bribery allegations were such that a number of sporting construction contracts have been cancelled, putting further pressure on Brazil to meet the venue completion targets.

Brazil has a very well developed construction sector. However, the pace of investment in infrastructure not only through sporting events, but also from PAC 2, the country's own federally funded accelerated growth plan, has put pressure on the capability of the sector, which may lead to collaborative opportunities for UK contractors and their supply chains.

### **BASIC FACTS ABOUT BRAZIL:**

**Area:** Brazil is the fifth largest country in the world and its area is almost half the entire size of South America. Brazil is often described as a continent within a continent and is only slightly smaller than the United States of America. It comprises 26 states, with significant regional variation, as is to be expected in a country of this size.

**Population:** 190 million. The south east region is the most populated in Brazil, accounting for 40% of the country's population.

**Capital City:** Brasilia is the capital of Brazil, although São Paulo is the largest city (11.2 million).

**Other Major towns:** Rio de Janeiro (6.3 million) is the second largest city in Brazil. The South East of Brazil, which includes both Sao Paulo and Rio de Janeiro is the region of Brazil likely to be of most interest to would-be exporters.

**Regions:** Brazil is a federal republic, split into 5 regions and 26 states. The 26 states each have their own government and therefore a strong influence over decision-making for the World Cup in states where matches will be played.

**Languages:** Brazilian Portuguese (not Spanish); Brazil is the only Portuguese speaking country in the Americas. English not universally spoken.

**Currency:** Real (BRL)

## **ECONOMIC PROFILE:**

Brazil has one of the world's most rapidly developing economies and a GDP per head that is greater than either India or China. Brazil, together with Russia, India and China, make up the so-called BRIC economies and has the potential to be one of the most dominant economies in the world by 2050. Brazil is the 7th largest economy in the world and by far the largest economy in South America. Brazil is also part of the Mercosur trading block, which has total population of 240 million people.

Brazil is the UK's largest trade partner in South America and approximately 100 Irish companies provide exports to Brazil worth €213 million.

The economy in Brazil is performing well, despite the recession, fuelled by strong domestic demand. For the first time, a majority of Brazil's population is middle class, making Brazil the largest luxury goods market in South America. Growth was only briefly affected by the world recession and the economy is currently projected to grow at a rate of 5% per annum.

Agriculture is a major sector of Brazil's economy, accounting for 6% of GDP. Nearly a quarter of the world's coffee comes from Brazil and the country is also one of the world's leading producers of sugar cane. Accounting for roughly one-third of the GDP, Brazil's industries include automotive, machinery and equipment, textiles, shoes, cement, computers, aircraft, and consumer durables. Brazil is now a larger scale car manufacturer than Germany.

In addition to the investment stimulated by both the FIFA World Cup and the Olympics in Rio de Janeiro in 2016, Brazil's national oil company Petrobras will invest US\$224 billion in oil exploration and development between 2010 and 2015. Energy is also a priority area of expenditure for the government, under its accelerated growth plan (PAC).

Already under pressure from a burgeoning economy, the country's infrastructure challenges are now further exacerbated by the additional investment required to host two global sporting events, the World Cup in 2014 and the Olympics in Rio de Janeiro in 2016. Brazil still has much work to do to meet its delivery commitments for these events; there is a lack of qualified professional staff at all levels within the construction sector and a need for world class expertise in a range of specialist construction areas.

## **DOING BUSINESS IN BRAZIL:**

Despite its resilient economy, with higher projected GDP than Europe or the US, Brazil is a challenging market in which to do business, currently ranked just 126th place (out of 183) in terms of "Ease of Doing Business" by the World Bank.

The most frequently cited barriers to doing business in Brazil are language difficulties, corruption and the cost of doing business, often referred to as "Custo Brazil". Reports show that these factors make starting a business in Brazil much slower than in many other South American countries.

Although the business culture does vary from north to south of Brazil, the common feature of the business culture throughout the country is the importance of personal relationships and good contacts. Initial meetings might be quite formal, but become less so as the relationship progresses. Business dress code is quite formal and smart.

Appointing an agent or distributor based in Brazil is highly advisable for companies who wish to begin to do business in this market. Brazil is quite a bureaucratic market; local knowledge and personal contacts of a local partner can help business to progress more quickly. It is also advisable to bring a Brazilian interpreter to meetings.

### **BRAZIL 2014 WORLD CUP:**

The 64 World Cup matches will be played in 12 cities across the country, with Sao Paulo hosting the Opening Match on 12 June 2014.

The 12 Brazilian host cities for the World Cup are São Paulo, Rio de Janeiro, Belo Horizonte, Porto Alegre, Brasília, Cuiabá, Curitiba, Fortaleza, Manaus, Natal, Recife, and Salvador.

There have been numerous concerns that Brazil's preparations for the World Cup are lagging behind projected timetables and stadium construction costs have escalated.

The anticipated direct investment in the Brazil 2014 World Cup is US\$70 billion, of which over US\$40 million will go towards the development of the urban transport network. This investment contributes to making Brazil one of the fastest growing construction markets in the world.

Key organisations involved in delivery of the 2014 World Cup are:

- The Brazil 2014 Local Organising Committee (LOC) / Comite Organizador Local (COL) is in charge of delivery of the World Cup. The Local Organising Committee is funded by FIFA and has responsibility for successful delivery of the World Cup. However, the COL does not directly contract works and services.
- FIFA also has host city agreements with each of the 12 cities selected. These agreements define the responsibility of the host city in respect of delivering its obligations towards FIFA. The host city (along with stadium owners) has responsibility for contracting works and services.
- Planning and organisation for the World Cup therefore comprises 3 levels of decision-making - city, state and federal.

LOC members include:

- President -Ricardo Teizera
- General Manager - Joana Havelange
- Director of Operations - Fabio Starling
- Communications - Rodrigo Paiva
- Legal Advisor - Francisco Mussnich
- Legacy and Social Responsibility - Luis Carlos Peterson
- Security - Hilario Medeiros
- Transport - Elaine Felske
- Competition and Team Services - Frederico Nantes

## **KEY VENUES:**

The total planned investment in stadiums for the World Cup is estimated at US\$3.5 billion. When Brazil became the preferred bidder FIFA said that none of its existing stadiums would be suitable to stage 2014 World Cup matches.

Three new stadiums are being built, the rest are in the process of being significantly upgraded. Construction is underway at all the stadiums hosting matches in the World Cup, but arenas in Sao Paulo, Natal and Manaus are unlikely to be ready in time for the 2013 FIFA Confederations Cup, a dry run for the World Cup. Of the 12 stadiums, 9 are publicly owned, including some PPPs and 3 are privately owned.

The venues are geographically very dispersed throughout Brazil, ranging from the Arena Amazonia in Manaus in the north-west of the country to Porto Alegre in the south-east. The distance between the most northerly match venue and the most southern is over 3,000 km. Starting in the north and moving south, the host venues and cities are listed below.

- Arena Amazonia, Manaus. The 12th largest city in Brazil, with 2 million inhabitants, Manaus is situated in the state of Amazonas. The existing Vivaldao stadium will be turned into the 42,000 seater Arena Amazonia at a cost of US\$287 million. The stadium is scheduled for completion in June 2013. The contractor on this publicly funded project is Andrade Gutierrez.
- Castelao Stadium, Fortaleza, is one of the main tourist destinations in north-east Brazil. This existing stadium will be refurbished to hold 67,000 fans by 2014 at a cost of \$358 million. The stadium should be complete by December 2012. The contractor consortium is Consorcio Arena Multiuso Castelao.

- Estadio das Dunas, in Natal, which is the capital of the Rio Grande Del Norte state. The existing stadium has been demolished to make way for a new stadium, with a 42,000 capacity. The new stadium is due for completion by December 2013 and will be built at an estimated cost of US\$201 million. The contractor for this PPP project is OAS.
- Arena Pernambuco, Recife, which is the capital of the Pernambuco state in the north east of Brazil. The area surrounding the arena will be developed into a commercial complex featuring restaurants, shops, cinema complexes and a residential complex. The Arena will host 5 World Cup matches and will be developed at a cost of almost US\$267 million. The level of investment in the stadium and the surrounding area has earned Recife the title of Cidade da Copa or World Cup City. The tier 1 contractor on this project is Oldebrecht.
- Arena Fonte Nova, Salvador will be a new, purpose built stadium with a capacity of 56,000. The arena will be surrounded by new restaurant, shopping facilities, car parks, hotels and concert hall. This is a public private investment joint venture. The total investment projected is circa US\$340 million and is due for completion by the end of December 2012. The contractor on this PPP project is SPE Fonte Nova Negocios e Participacoes.
- Arena Pantanal, Cuiaba, which is the capital of the state of Matto Grosso and exactly in the centre of Brazil. The stadium, which will host 4 matches, will have a seating capacity of almost 43,000. It is being built with a strong focus on sustainability, earning it the nickname of The Big Green. Investment in the stadium will be US\$261 million. The multi-purpose stadium will be reduced in size after the World Cup and used as a conference and exhibition venue. The new pitch is due to be planted in May 2012. The contractor consortium is Consorcio Santa Barbara / Medes Junior.
- Estadio Nacionalis located in Brasilia, which is the capital of Brazil. This will be the second largest stadium of the World Cup, capable of seating 71,000. The stadium will be complete by the end of 2012 in time to host the opening match of the FIFA Confederations Cup in 2013. The anticipated investment is US\$428 million. The tier 1 contractor is Consorcio Brasilia 2014.
- Estadio Mineirao is situated in Belo Horizonte, the sixth largest city in Brazil. The existing stadium will undergo a complete overhaul before hosting 4 of the World Cup matches in 2014, including one semi-final. The work to be undertaken will cost US\$245 million and will result in an upgraded 67,000 capacity stadium. The main contractor on this PPP project is Consorcio Minas Arena S.A. (Construcap, Egesa and HAP Engenharia).
- The Maracana in Rio de Janeiro will also be used as a host venue in the 2016 Olympics. This stadium will host 7 games, more than any other venue. It will be able to host crowds of almost 77,000 during the World Cup.

Already Rio's second most popular tourist attraction, the renovation will cost US\$405 million. The contractor consortium is Consorcio Maracana 2014 (Oldebrecht, Andrade Gutierrez, Delta).

- Itaquerao stadium in São Paulo, the business and financial centre of Brazil, will host the Opening Match. The green field site stadium is not scheduled for completion until 2014. Its overall capacity will be almost 68,000, of which 20,000 seats will be temporary. The Sao Paulo stadium is likely to cost US\$192 million and is a privately run project. The contractor is Oldebrecht.
- Arena de Baixada, Curitiba, capital of the state of Parana and the most populated city in the south of Brazil. Already renovated in 1999, this is considered to be one of Brazil's most modern stadiums. This stadium will cost US\$107 million. The stadium is due for completion by December 2012.
- Beira-Rio in Porto Alegre, which is the sub-tropical capital of the state of Rio Grande de Sul. The main feature of this renovation project is the installation of an innovative metal roof to cover the stands, turnstiles and ramps. This privately run project is forecast to cost US\$75 million and is due for completion in December 2012.

The Brazilian Ministry of Sports released a statement in January 2012 confirming that 7 of the 12 stadiums would be complete by the end of 2012. Whilst the major construction projects have already been awarded, opportunities are likely to remain for specialist suppliers right up to and beyond 2014.

## KEY INFRASTRUCTURE WORKS:

Although Brazil boasts one of the largest and fastest growing economies in the world, investment in the country's infrastructure has been low, especially in comparison to the other countries. France, for example, has a larger railroad network than Brazil, despite being just one thirteenth of its size. The World Cup, followed by the Olympics in 2016 are the catalysts for an overhaul of the transport infrastructure network, but progress is hampered by bottlenecks in the system, from planning bureaucracy to resources and expertise.

The government's second accelerated growth plan (PAC2) is currently being implemented. Between 2010 and 2014 a total of US\$569 million will be spent on logistics, energy and social and urban infrastructure projects throughout Brazil.

Some reports suggest that only half of the infrastructure projects promised will actually be complete by the World Cup in 2014.

- The Brazilian government stated in March 2012 that 42 out of its 51 transport projects planned for the World Cup would be complete in 2013.
- US\$3.3 billion will be invested in airport infrastructure and modernisation in the 12 host cities. This has been a priority issue as the key airports are over-congested. A number of airports have recently been privatised in a bid to have the necessary upgrades in place for 2014, but serious delays in getting a number of projects underway are causing concern. Only 2 out of 13 airports are currently on track for completion by the start of the World Cup. Infraero, ([www.infraero.gov.br](http://www.infraero.gov.br)) the Government state owned agency which operates the country's airports, is investing around US\$ 2.3 billion to expand and modernise the terminals in readiness for 2014.



- Improvements to the rail network include a Rio to São Paulo high speed “bullet” train, an upgrade to São Paulo’s metro system, a metro link between São Paulo and the airport, new metros for Porto Alegre and Belo Horizonte.
  - Brazilian ports have seen a 50% rise in freight volumes since 2000 and a large number of applications for port development projects suggest that growth in this sector will continue.
  - An estimated US\$11 billion will be invested each year in telecommunications in the run-up to the World Cup. This will include fixed line network expansion, broadband Internet and 3G mobile high-speed networks implementation.
  - Hotel infrastructure will be required in each of the 12 host cities. Sao Paulo is the best prepared but big cities like Rio, Brasilia, Recife, Salvador and Belo Horizonte still have to increase their capacity. In Rio, 17 hotels have to be built between now and 2014. The Accor Group is planning a major expansion (145 hotels) in Brazil over the next 5 years.
- **Porto Alegre**
    - The city is implementing a number of urban mobility projects, including road widening, improved bus routes, including a link to the airport, several BRT projects linking the city centre to the suburbs, several bus terminal projects and installation of a road bridge.
    - An expansion of the airport’s passenger terminal is due to begin in June 2012.
  - **Recife**
    - There are 5 urban transport projects specifically linked to the World Cup.
    - A new airport control tower is underway.
    - A new port terminal is to be built, along with improved road access.
  - **Rio de Janeiro**  
(see next section on Rio 2016)
  - **Sao Paulo**
    - A major new light railway project began in 2011 with 18 km of track and 18 new stops.
    - There are 8 individual projects to be completed at Sao Paulo’s two airports, the Guarulhos and Viracopos.
    - A regeneration project for the Port of Santos was due to commence in early 2012, creating new quays and an internal road.

The key infrastructure projects planned or underway in each of the host cities are;

- **Brasilia**
  - The airport is the third busiest in Brazil and requires an expanded passenger terminal, improved access and expansion of taxiing areas. The tender for this work was published in 2011.
  - Brasilia will also develop a light railway. Contractors are Consorcio Brastram.
- **Belo Horizonte**
  - The city has a portfolio of 8 urban mobility projects of which 4 are BRT, 3 are road improvements and the last relates to improved traffic monitoring.
  - The city’s airport will benefit from a refurbished passenger terminal and improved access and taxiing areas.
- **Cuiaba**
  - The federal government is providing funding for 3 BRT routes.
  - The passenger terminal at the airport is being expanded and new parking areas added. Work was due to commence in January 2012.

- **Curitiba**
  - The city has 9 urban mobility projects currently underway, including BRT extensions, bus station and terminal improvements and improved arterial road linkages.
  - The airport's passenger terminal runway and taxiing area is being expanded. The tender for the terminal work was published in December 2011.
- **Fortaleza**
  - The urban mobility projects include a number of new BRT links and metro stations.
  - The capacity of the airport passenger terminal is being expanded by 45%; work commenced in the fourth quarter of 2011.
  - Upgrades to the port include a new passenger terminal, new quays, road access and parking; work commenced in mid 2011.
- **Manaus**
  - The city's urban mobility projects include a monorail link and a new BRT line.
  - The airport passenger terminal will receive an upgrade and improved road access is also planned. Work is underway, but not expected to be complete until December 2013.
  - The port will benefit from an extension to its floating quays, while passenger and baggage handling facilities will be extended and upgraded.
- **Natal**
  - The city had two major road extension projects, although these are now complete.
  - A new airport is being built, the second tranche of which is the passenger terminal due for completion in 2014.
  - Existing buildings in the Port of Natal will be turned into a passenger terminal, with the project only due to commence in the first quarter of 2012.

## **PROCUREMENT:**

The Brazilian tendering process can be frustratingly bureaucratic, although the Brazilian government recently passed new legislation to make tendering more flexible. This was in a bid to speed up the lagging procurement process for both the World Cup 2014 and the Olympic Games 2016.

Online bids for goods and services are promoted by the Federal Government via [www.comprasnet.gov.br](http://www.comprasnet.gov.br). Suppliers enrolled in the Supplier Registry System (SCIAF) receive access to all ongoing and future bids. Procurement of major infrastructure projects will be co-ordinated by each of the 12 host cities state and municipal governments. To keep up-to-date with progress visit [www.fifa.com/worldcup](http://www.fifa.com/worldcup)

Information on procurement of services for World Cup 2014 can be obtained from the Local Organizing Committee. However, the LOC has no direct procurement role. This is devolved to the host city organisers whether state, local or joint organisers. In the case of the privately owned stadiums, procurement is managed by the owner clubs and their main contractor. Obviously these contractors have longstanding supplier relationships already in place. However, key areas of interest for procurement are in innovation and new techniques.

Documentation on the FIFA website includes:

- Advice on Tendering for a Playing Surface
- FIFA Preferred Producer Information



### **UKTI ASSESSMENT OF OPPORTUNITIES FOR BRAZIL 2014:**

UKTI has produced a report entitled "The Brazilian Construction Market", which highlights some of the main opportunities for UK businesses in relation to Brazil 2014:

- Building overlay
- IT, data and systems (smart technology)
- Sustainability and legacy issues
- Temporary structures
- Stadium security
- Transport master planning
- Energy and power generation
- Security planning
- Accommodation

The rapid expansion of the country's infrastructure means that there is a shortage of skills in a number of areas, such as project management.

### **FURTHER CONTACTS IN BRAZIL:**

**Invest NI Contact:** Teresa Madden,  
Manager, Latin America Market  
Email: [teresa.madden@investni.com](mailto:teresa.madden@investni.com)  
Direct T: +44 (0) 28 9069 8067

Invest NI can provide further relevant contacts for interested Northern Ireland businesses within the Global Sports Projects Team at UKTI and Invest NI/ UKTI overseas networks located in the target overseas market (visit [www.ukti.gov.uk/sectors/globalsportsprojects](http://www.ukti.gov.uk/sectors/globalsportsprojects)). These contacts can offer practical market entry advice and further in-market contacts.

#### **Brazilian Chamber of Commerce for Great Britain**

32 Green St, London, W1K 7AT

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Rachel Dias Azevedo, Sector Manager,  
Infrastructure and sports sector manager

#### **Brazil 2014 Local Organising Committee**

2014 FIFA World Cup Brazil™ Organising Committee

Avenida das Américas, 3500 Toronto 1000  
7th Floor

Barra da Tijuca Rio de Janeiro RJ Brazil  
22460-102

Tel: +55 21 2432 2014

Fax: +55 21 2432 2025

Chairman: Jose Maria Marin

## 4.5 OLYMPICS AND PARALYMPICS, RIO DE JANEIRO, 2016

Rio de Janeiro will host Brazil's second international sporting event in as many years and is the first South American country to host the Olympics and Paralympics. The proposed additional investment in the city to facilitate the Games is US\$ 11 billion.

Rio hosted the Pan-American Olympic Games in 2007, so over half of its required stadiums for 2016 are already built. The 2016 Games will result in a further 20 facilities being built and will include a complete turnkey hospital within the Olympic Village.

Rio 2016 is the Organizing Committee but most of the efforts and decision-making power will be concentrated at city government level.

### **BASIC FACTS ABOUT RIO DE JANEIRO:**

**Location:** South east coast of Brazil on the Costa Verde (Green Coast). It is the most visited location in the southern hemisphere.

**Population:** 6.3 million

**Rio de Janeiro:** Second largest city in Brazil

**Airports:** Santos Dumont Airport and Antonio Carlos Jobim Airport.

**Time:** 3+hours GMT

### **ECONOMIC PROFILE:**

Sao Paulo is the largest city in Brazil and a much larger economic centre than Rio de Janeiro. However, recent oil discoveries and the successful Olympic bid mean that Rio's economy is now growing at a faster rate than that of Sao Paulo and performs above the national average.

Rio is the country's energy capital and home to oil company giant, Petrobras, the largest company in Brazil. It is also the centre of Brazil's IT industry and the country's main steel production centre.

Some of Rio's major business sectors include textiles, food and beverage, iron mining, processed foods, computer goods, telecommunication and tobacco. Rio is also home to the Bolsa da Valores do Brasil, the second most active stock market in the country. Some of the worlds' biggest pharmaceutical companies like Merck, Roche, Arrow, Darrow, Baxter, Mayne, and Mappel have their headquarters in Rio.

The city's economic growth strategy is developed on 5 key sectors - infrastructure, energy, IT, creative industries and media and industry (e.g. steel production).

Rio ranks 12th out of the most expensive cities of the world (2011), ahead of London, Paris and Milan. Rio also has the most expensive hotel rates in Brazil, and the daily rate of its five star hotels are the second most expensive in the world after New York City. The city is Brazil's most popular tourist destination. The port of Rio de Janeiro is Brazil's third busiest port for cargo and is Brazil's central port for cruise ships.

Rio has suffered from chronic under investment in infrastructure and housing. It has a reputation as a dangerous city, even by Brazilian standards, although murder rate statistics are decreasing, the result of police clampdowns on the city's favelas ahead of the Olympic Games. (Rio's Olympics legacy bid prioritised sports, infrastructure and urban regeneration).

### **DOING BUSINESS IN RIO DE JANEIRO:**

As in the rest of Brazil, doing business is strongly oriented towards personal relationship building, so socialising and networking are important steps to establishing business relationships. Doing business requires a long term commitment to the market and investing time to build good relationships at a local level.

Business dress in Rio de Janeiro tends to be more formal and smart than in other areas of Brazil.

Traffic congestion is not as bad as in Sao Paulo, but it is important to leave plenty of time between meetings; even though meetings frequently start late, the visitor is expected to arrive on time.

### **RIO 2016:**

The 2016 Olympic Games will be the catalyst for investment of £4.1 billion.

Two key agencies are responsible for the organisation and delivery of the 2016 Olympics - Rio 2016 (the Organising Committee of the host city, equivalent to LOCOG for London 2012) and Autoridade Publica Olimpica (equivalent to the Olympic Delivery Authority for London 2012).

- The APO will coordinate, approve and monitor the planning and delivery of capital works and the legacy aspect of the Games. There have been delays in appointing a Head APO, which has had a knock-on effect in rolling out the delivery plan.
- In addition to its organising committee role, Rio 2016 is responsible for the construction of temporary venues and temporary adaptations; these will not commence until 2014.
- Rio 2014 - 2016 is a public company with responsibility for coordination of all World Cup 2014 and Rio 2016 games related projects within the city, including infrastructure and transport.

A Host 2 Host agreement was signed between the UK and Brazil in 2010, the purpose of which is to ensure knowledge transfer and the share of business opportunities between the two events. Rio 2016 will be hoping to benefit from the expertise developed in London 2012 across a range of areas including construction, procurement, security, crowd movement, communications etc.

Two new sports, rugby and golf, have been added to the Rio 2016 Olympics.

## KEY VENUES:

The venue Master plan for Rio 2016 was completed in 2011.

The city will have 4 clusters (Barra da Tijuca, Deodoro, Maracana and Copacabana). 11 permanent and 6 temporary sport installations will be constructed in addition to a programme of modernisation of existing venues. The estimated budget is US\$508 million. Barra da Tijuca will host the majority of the events for Rio 2016 and will also house the Olympic Village.

International firm AECOM, the firm that built the London 2012 Olympic Park has also won the contract to build the Olympic Park in Rio de Janeiro.

The temporary venues to be constructed for Rio 2016 are:

- Copacabana Stadium - Beach Volleyball, \$10m.
- Copacabana Fort is an existing structure to which will be added a temporary stand - Swimming, Triathlon, \$9m.
- Flamengo Park - Race walking, Road Cycling, \$8m.
- Riocentro Hall 6 - Weightlifting, \$17m.
- Olympic Hockey Centre - Hockey, \$12m.
- Mountain Bike Park - Mountain Biking, \$8m.
- Olympic Aquatics Centre (Barra) is listed as a permanent building in the Rio 2016 Bid Evaluation report, but will now be a temporary centre instead, with a capacity of 18,000 - Swimming.
- Gloria Marina will be a temporary stadium, built to hold up to 10,000 spectators - Sailing.

UKTI reports (Game On) that the Brazilian market is not well placed to deliver the most ambitious of these temporary structures, whilst British expertise is now well proven through London 2012.

The 2016 Olympic Park will host most of the sports competitions in 2016 and also the International Broadcast Centre and the main Press Centre. There are significant construction opportunities in the post Games phase, when a large proportion will be commercially developed.

The new / existing sports venues required for Rio 2016 are:

- Olympic Training Centre (Barra) - a new permanent venue with 4 Halls.
- National Equestrian Centre (Deodoro) - an existing facility, built for the 2007 Pan American Games will be expanded.
- Deodoro Arena will be a 5,000 capacity arena which will remain in legacy - Modern Pentathlon, Fencing, \$41m.
- Olympic Tennis Centre (Barra) will be a new permanent venue in the Olympic Park. Temporary stands will be built for the Games - Tennis, \$46m.
- Olympic Whitewater Stadium is a new permanent facility for 8,000 spectators that will remain in legacy - Canoe, Kayak, \$26m.
- Olympic BMX Centre (Deodoro) will have temporary capacity for 7,500 and will remain in legacy - Cycling, \$6m.
- Golf Course - Golf course to be designed by US company Hanse.
- International Broadcasting Centre (Barra) will have a total area of 55,000 sq m, \$110m.

- Main Press Centre (Barra) will have 1,000 workstations, office space and an auditorium, \$92m.
- Riocentro, Pavillion 2, Rio's main exhibition and conference centre, with a capacity of 9,000 will undergo refurbishment, although works will be temporary - Boxing, \$4m.
- Riocentro, Pavillion 3 will host 5,000 spectators - Table tennis, \$6m.
- Riocentro, Pavillion 4 will have capacity for 6,500 spectators - Badminton, \$6m.
- Olympic Arena, an existing Olympic sized arena built for the Pan American Games in 2007 - Gymnastics, \$4m.
- Maracanazinho Arena was refurbished for the Pan American Games and will be further extended for the World Cup and Rio 2016 - Volleyball, \$2m.
- Maracana Stadium is already being significantly refurbished for the World Cup - Ceremonies, Football, \$5m.
- Olympic Velodrome (Barra) was originally built for the 2007 Pan American Games - Cycling, \$39m.
- Olympic Stadium Joao Havelange was built for the Pan American Games and will be expanded from 45,000 to 60,000 for the Olympics - Athletics, \$52m.

Carvalho Hosken is the contractor for the Olympic Village and Olympic Park.

## KEY INFRASTRUCTURE WORKS:

The total projected infrastructure investment will be US\$11 billion. The IOC (International Olympics Committee) visited Rio de Janeiro in March 2012. Its assessment was that Rio de Janeiro is making good progress across its infrastructure and venue development programme. Many of Rio's planned infrastructure improvements are likely to be in place by 2014, since Rio is also a World Cup 2014 host city.

- A BRT (Bus Rapid Transport) system will be implemented in the city to connect the planned clusters and airport as well as modernisation and extension of metro lines with a total estimated cost of US\$2.6 billion. After the Games the city should have well over 50 km of new BRT lines.
- Extension of metro system - target is that by 2016 50% of journeys into the city will be by public transport, up from its current level of 16%.
- Regeneration of the Port of Rio and surrounding district, to include the landmark Pier Mauá, which will become the focal point of a major new leisure complex. The redevelopment of the port of Rio will involve an area of up to 5 million square metres and will transform the port into a key entertainment and tourist district to include new facilities for cruise ships, hotels, a conference centre and back office areas. The area will include 5,000 residential flats, 200 4\* hotel rooms, 500 room 5\* hotel and serviced flats with 500 rooms.
- The capacity of Rio's airport will be increased from 15 million passengers per year in 2011 to 25 million by 2014 and will involve refurbishment of the existing passenger terminals and construction of two satellite terminals.

- Improvements to the social infrastructure are a key part of the city's legacy bid and this will involve the integration of some of the city's informal housing settlements. The programme will run until 2020 and will address housing, transport needs, water and sanitation.
- A range of security projects are underway to improve and professionalise security arrangements for the Olympics.
- Hotel capacity will be increased to up to 50,000 rooms for the Games, some of which will be provided through cruise ships and the Olympic Village. Current hotel capacity is 25,000 rooms. Much of the new hotel capacity in the city will be concentrated in the Barra da Tijuca.
- Tenders for water and sanitation in the state of Rio are published by CEDAE, the state water and sewerage company at [www.cednae.com.br](http://www.cednae.com.br) (Licitacoes)
- Diario Oficial Journal of the municipality of Rio de Janeiro, with information on municipal tenders.

### **UKTI ASSESSMENT OF OPPORTUNITIES FOR RIO 2016:**

The UKTI has published a report entitled "Construction in Brazil", which outlines some of the key areas of opportunity for UK businesses for Rio 2016:

- Masterplanners
- Architects
- Accessibility specialists
- Environmental consultants
- Infrastructure engineers,
- Sustainability and Legacy specialists
- Building services
- Supplies (seating, lighting, signage, audiovisual equipment)
- Temporary Structures

### **PROCUREMENT:**

In 2010 the government passed an amendment to the existing laws regulating public tenders, which allows preferential conditions for Brazilian companies tendering for public projects, depending upon the local employment and wealth generating potential.

Companies interested in procurement opportunities from the Rio 2016 Olympic Games should register their business at [www.rio2016.com](http://www.rio2016.com)

Other sources for public tenders include:

- Diario Oficial da Uniao - a national portal with information on tenders released by the federal government at [www.portal.in.gov.br](http://www.portal.in.gov.br)
- Tender portal of the State of Rio de Janeiro with information on tenders released by all state departments at [www.governo.rj.gov.br/licitacoes](http://www.governo.rj.gov.br/licitacoes)

## **FURTHER CONTACTS IN RIO DE JANEIRO:**

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Direct T: +44 (0) 28 9069 8067

Invest NI can provide further relevant contacts for interested Northern Ireland businesses within the Global Sports Projects Team at UKTI and Invest NI/ UKTI overseas networks located in the target overseas market (visit [www.ukti.gov.uk/sectors/globalsportsprojects](http://www.ukti.gov.uk/sectors/globalsportsprojects)). These contacts can offer practical market entry advice and further in-market contacts.

### **Rio Organising Committee**

Av. das Américas  
899 Rio de Janeiro  
RJ 22941150  
Brazil

Organising Committee Staff:

- Procurement Director: Fernando Cotrim
- Infrastructure Integration Director: Alexandre Techima
- Director of Transport: Regina Oliveira
- Sports Policy and Operations Manager: Rodrigo Garcia
- Sports Venue Design Manager: Gustavo Nascimento
- Manager of Licensing, Retail and Concessions: Sylmara Multini

Rio 2016 has a LinkedIn company page, which includes profiles for a number of staff.

### **Rio Negocios**

Rua da Candelária, nº 9 - 10º andar -  
Centro,  
Rio de Janeiro - RJ - CEP 20091-904  
Brazil

Tel: +55 (21) 3031-4001

Email: [info@rio-negocios.com](mailto:info@rio-negocios.com)

This company is similar to Think London and has been set up to promote the city of Rio to foreign investors and help in dealing with the bureaucracy of setting up a business in the city. UKTI has good links with Rio Negocios and can provide contacts.

### **UKTI in Rio de Janeiro:**

Marcelo Tavares

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## 4.6 CLIVE RICHARDSON LTD - SPORTSGROUND CONSTRUCTION SPECIALISTS

Clive Richardson Ltd specialises in sportsground construction for a wide range of different sports, including football pitch construction. Clive Richardson owner of Clive Richardson Ltd - explains how the economic downturn in Ireland spurred the company on to look for opportunities in Europe and further afield.

### CASE STUDY

Clive Richardson Limited has a lengthy track record of working on famous sportsgrounds, including Aviva (Lansdowne), Croke Park and training grounds for football clubs such as Manchester United and Fulham. 2012 has been a pivotal year for Clive Richardson Ltd (CRL) in terms of its success in winning contracts for international sporting events.

Not only has CRL won London 2012 related business for 2 key events, it has also been successful in winning football pitch contracts for Euro 2012 in both Poland and Ukraine. The company has completed the installation of two new pitches in Ukraine, including the Kiev based venue for the final of Euro 2012.

CRL found that its contract in Ukraine ran relatively smoothly, although Clive cautions that the level of bureaucracy there can be frustrating. CRL was able to overcome the bureaucratic challenges by partnering with a locally based company. This experience though, should be useful when exploring further opportunities through Sochi 2014 and World Cup 2018. CRL is already planning to participate on the Invest NI trade mission later in 2012.

Asked about the company's experience of tendering for both London 2012 and Euro 2012, Clive said "We had plenty of previous experience of tendering, but not at this level. We were pleasantly surprised to find that there were very few companies out there, even in Europe, who could do what we do."

Clive also had a few words of advice for companies interested in this market who may be put off by the documentation involved. He said "Our advice is quite simple; do not under-estimate your own talent and expertise. We were able to get to grips with it quite quickly. We found that we were able to compete with companies with much stronger tendering experience than we had because we could demonstrate such a range of hands-on expertise."

The next obvious market for CRL is Brazil and the 2014 FIFA World Cup. Initial market investigations began two years ago, when the company commissioned research to identify the key companies in the industry in Brazil, with a view to partnering with them. Since then promising links have developed with a number of contacts, leading to several visits to Brazil by CRL. There have also been several return visits by the Brazilians to Annaghmore in Co Armagh. CRL also found its attendance at Soccerex in Brazil very useful.

Clive advises companies who are new to doing business in Brazil to be prepared to commit to a long term strategy. He was aware before visiting Brazil that it can take quite a while to build trust and relationships, but even so, he has still been surprised by the reality. "It doesn't matter whether you are the best at what you do, people still want to spend time getting to know you. You need to show a real willingness to engage as a partner to invest and demonstrate a long-term commitment".



## 4.7 FIFA WORLD CUP, RUSSIA, 2018

Russia will host the FIFA World Cup for the first time in 2018. The largest country in the world, Russia has circa 1,200 airports and 44 million telephone lines, facts which serve to underline the logistical complexity of doing business in Russia.

Russia's FIFA World Cup proposals included plans for 13 new stadiums across the country and renovation of 3 existing ones (all in Moscow). Four host stadiums will be located in Moscow; the remaining 12 candidate cities are located across Russia, for example in St Petersburg, Yekaterina, Novogorod and Sochi, the host city of the Winter Olympics 2014. In September 2012, a decision will be made on the final 11 host cities. The cost of stadium construction alone has been estimated at US\$3.82 billion.

The event also requires high value infrastructure support, including hotels, railways and airports. US\$35 billion will be spent on new rail and road infrastructure, airports, stadium construction and telecommunications networks.

### **BASIC FACTS ABOUT RUSSIA:**

**Area:** 1.8 times the size of the USA

**Population:** 143 million

**Capital City:** Moscow

**Other Major towns:** St Petersburg (second largest city in Russia), Kazan in the east (officially named the Third Russian Capital). There are 12 cities in Russia with a population of over 1 million.

**Languages:** Official language is Russian; English is a second language for approximately 20% of the population.

**Time zones:** 3hours+ GMT (Kaliningrad) and 4hours +GMT (remaining match locations, except Yekaterinburg). 6hours + GMT in summer time Yekaterinburg.

**Currency:** Russian Ruble (RUB)

**GDP Growth:** +4.3% (2011) In 2009/10 Russia's per capita GDP was higher than any of the other BRIC countries.

The Commonwealth of Independent States (CIS): Comprise the countries of Russia, Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Tajikistan, Turkmenistan, Ukraine and Uzbekistan has a population of 271 million consumers.

### **ECONOMIC PROFILE:**

Russia is a vast market, stretching over 9 time zones. The Russian economy is based on oil, natural gas, metals and timber, accounting for 80% of Russian exports. Russia is committed to changing from an oil-oriented economy into a technology oriented economy. Since 2003 exports of natural resources have been decreasing in economic importance, due to the significant growth in demand from the domestic market. In recent years the growing consumer market has contributed to strong growth in retail, telecommunications and property.

Russia is one of the world's largest importers of meat and dairy products and the world's 8th largest grocery market. It also has one of the most dynamic retail sectors, with 700 new shopping centres scheduled to open in Russia by 2012.

Russia is an important overseas market for UK companies; UK exports to Russia are circa £3.5 billion and rising quickly. The value of Irish exports to Russia is €520 million (ICT, food & drink, pharmaceuticals). Russia is an attractive target export market, because it has less competition in many sectors than in other countries.

### **DOING BUSINESS IN RUSSIA:**

The sheer size of the Russian market makes it a daunting prospect for would-be exporters. Transport infrastructure outside of the main cities is very under-developed in many areas, making this a logistically challenging market. Developing business opportunities in Russia requires a commitment to invest time and resources; it is necessary to re-visit the market regularly to develop relationships with contacts and customers.

The practical barriers to doing business in Russia include high levels of bureaucracy and customs delays. For those companies that do persevere and learn about the market, there can be excellent long-term opportunities.

Business meetings tend to be quite formal, while conservative business dress is the norm. Punctuality is expected of visiting foreigners. It is also common for business meetings to get heated. Written back-up material is also useful and quick follow-up by the potential exporter is also expected.

Relationship building is important, as is the appointment of a reliable local agent. It is difficult to do business in Russia without the help of local connections and a local partner who can steer the business through the bureaucracy of the system.

### **RUSSIA 2018 WORLD CUP:**

The 2018 FIFA World Cup Russia Local Organising Committee was founded by the Government of the Russian Federation and the Football Union of Russia in January 2011.

The Local Organising Committee (LOC) is the body responsible for preparing and staging the FIFA World Cup in Russia in 2018.

As with Brazil 2014, host cities will play an important role in delivering their FIFA World Cup commitments. However, the final 11 host cities will not be decided until September 2012.

## KEY VENUES:

Russia has noted that all the venues selected for the World Cup will be connected by high speed rail link and that none are further than a 2 hour flight time from Moscow. The projected stadium construction and renovation budget is US\$3.8 billion, with the largest proportion of this spend taking place after 2013.

The 16 candidate World Cup stadiums in Russia are located in 5 geographic clusters - the Central, Northern, Volga, Southern and Urals clusters. Some 80% of the total population of Russia live within close proximity to a host city. The candidate host cities are all within the European part of the Russian Federation. In addition 20 viewing events will be hosted in other cities across Russia.

Russia 2018 chairman Vitaly Mutko has stated that the country will stage the FIFA World Cup in 12 stadiums across 11 cities with the final makeup of the tournament expected to be formalised in September 2012.

- The Central cluster includes 3 existing stadiums Luzhnik Stadium (Moscow), Dynamo Stadium (Moscow), Spartak Stadium (Moscow) and 1 new stadium in the Moscow region.
- The Northern cluster includes Kaliningrad and St Petersburg.
- The Volga cluster includes Kazan, Nizhny Novgorod, Samara, Saransk, Volgograd and Yaroslavl.
- The Southern Cluster includes Krasnodar, Rostov-on-Don and Sochi.
- The Urals Cluster will have just 1 venue in Yekaterinberg.

All stadiums will have grass pitches and will be built between 2011 and 2017. All of the new stadiums have been designed to be downsized after the World Cup. Luzhnik Stadium will host the opening and final matches.

- **Moscow Region: New Stadium.** The new stadium will have seating capacity of 44,000. It will be built on a 64 hectare site, including a variety of sporting facilities, three training pitches and separate athletic roads. Investment US\$260 million.
- **Moscow: New Stadium.** Situated 14 km from Moscow city centre, the Spartak stadium will be developed to a seating capacity of 47,000. The site will be a multi sports venue occupying over 125 hectares and including training facilities. A new metro station and roads will be built to provide access. The stadium will become home to FC Spartak after the 2018 World Cup. Investment US\$290 million.
- **St Petersburg (Northern Cluster): New stadium.** The stadium will be part of a sports-entertainment complex in Victory Park on Krestovsky Island. (Already completed) Investment US\$415 million.
- **Kaliningrad (Northern Cluster).** Located in the far north west of Russia, close to Poland, the Kaliningrad stadium will be a waterfront venue, with capacity for 44,000. Investment US\$210 million.
- **Kazan (Volga Cluster): New Stadium.** Also a waterfront venue, the Kazan stadium will have a seating capacity of 45,000, but it will be built in time for the 2013 Universiade Games (World Student Games hosted by Kazan). Sport infrastructure is already well developed in Kazan and it has been called the capital of sport in Russia. Investment US\$250 million.

- **Nizhny Novgorod (Volga Cluster): New stadium.** The stadium will have a seating capacity of almost 45,000. A dedicated marina will provide ferry access to the stadium. Investment US\$240 million.
- **Samara (Volga Cluster): New Stadium.** The stadium will have seating capacity for 44,000. Investment US\$180 million.
- **Saransk.** A small city with a population of only 300,000, but due to have a striking 45,000 all-seater stadium. Investment US\$180 million.
- **Volgograd (Volga Cluster): New stadium.** Built in the city formerly known as Stalingrad, this 45,015 all-seater stadium will be the centrepiece of a vast new park close to the Mamayev Mound WW2 memorial. Investment US\$210 million.
- **Yaroslavl: New Stadium.** Situated in the heart of Yaroslavl, this is another visionary proposal. Once built it will hold 44,042 fans and will be home to FC Shinnik Yaroslavl. Investment US\$200 million.
- **Krasnodor (Southern Cluster):** This 50,000 seating capacity stadium will be the third largest of the tournament. Investment US\$260 million.
- **Rostov-on-Don (Southern Cluster): New Stadium.** This stadium will be located on a 52 hectare site. Investment US\$240 million.
- **Sochi (Southern Cluster):** This will be a host venue for the 2014 Winter Olympics as well as the World Cup. Its capacity should be 47,659. Investment US\$225 million.

The following stadiums will undergo major renovation in advance of the World Cup in 2018:

- **Moscow:** The Luzhniki Stadium will be the centre of the 2018 World Cup tournament. Already designated a 5 star football facility by UEFA, this stadium will host the Semi-final and Final matches. Renovations planned include increasing seating capacity to 89,000 and sinking the pitch level by 5 metres. Investment US\$240 million.
- **Moscow:** Dynamo, home to Dynamo Moscow is 6km outside the city centre and will be expanded to a seating capacity of 45,000. The original stadium was closed for demolition in 2008, with the new stadium scheduled to open by 2016. Investment US\$280 million.
- **Yekaterinburg (Urals Cluster):** Already a football hub within Russia, Yekaterinberg has 17 stadiums and 12 sports schools. Investment US\$160 million.

#### Venue Specific Team Hotels and Team Training Sites:

- Russia must provide 32 Venue Specific Team Hotels (VSTH), equating to two per stadium, 6 of which are still to be built.
- Russia must provide 64 Venue Specific Training Sites, equating to 4 per stadium. Renovations to sites proposed will include lux lighting, enlarging training rooms and converting to grass pitches.
- Russia has proposed 72 Team Base Camps. These hotels must be of 4 star or 5 star quality and 7 still remain to be built. Team Base Camps also require upgrading to lighting, seating, pitch conversions to grass etc.

## **KEY INFRASTRUCTURE WORKS REQUIRED:**

- The distance between match stadiums will put pressure on the existing airport infrastructure, so investment in this area was committed within Russia's bid to host the World Cup. The capacity of the three Moscow airports and the St Petersburg Airport will be doubled by 2016. The capacity of Sochi and Kazan airports will be quadrupled by 2018. Russia will spend US\$2 billion on airport upgrades before the World Cup.
- Russia will have to build 4,791 miles of roads and lay 1,257 miles of rail track by 2018, at a cost of about US\$22 billion alone, it is estimated.
- A high speed rail link will be built between Moscow, Smolensk and Krasnoye by 2016.
- A new motorway connection will be built between Moscow and St Petersburg.
- Combined road and rail investment in advance of the World Cup will be circa US\$ 35 billion.
- The information and telecommunications networks in some regions will be upgraded.
- Investment of US\$11 million has been committed to developing Russia's tourism infrastructure, mostly accommodation. New accommodation is planned in all of the host cities, except St Petersburg. The total existing room capacity of all 13 host cities is currently 85,000 rooms, which exceeds FIFA's requirements. However, more than half of these are in Moscow and St Petersburg and in both cities there is a lack of 3\* star accommodation, with most hotels 4\* and above. The cities with the greatest need to increase capacity are Saransk and Kaliningrad.

## **PROCUREMENT:**

Companies interested in finding out more about supply opportunities for the World Cup 2018 are advised to send an information request to [info@loc2018.com](mailto:info@loc2018.com). The LOC office has advised that online procurement portals are not yet developed.

## **UKTI OPPORTUNITIES IDENTIFIED:**

UKTI organised a Global Sports Projects trade mission to Russia in March 2012 to meet decision-makers involved in the delivery of the World Cup 2018. These decision-makers have indicated their interest in meeting companies with expertise in all aspects of construction, but especially:

- Sports stadiums and transport infrastructure
- Legacy planning
- Project Management
- Event organisation
- Crowd movement planning
- Security consultancy and equipment supply
- Sustainability and Governance

## FURTHER CONTACTS IN RUSSIA:

**Invest NI Contact:** Eleanor Butterwick,  
Manager, Russia market  
Email: [eleanor.butterwick@investni.com](mailto:eleanor.butterwick@investni.com)  
Direct T: +44 (0) 28 90 69 8033

Invest NI can provide further relevant contacts for interested Northern Ireland businesses within the Global Sports Projects Team at UKTI and UKTI Invest NI/ UKTI overseas networks located in the target overseas market (visit [www.ukti.gov.uk/sectors/globalssportsprojects](http://www.ukti.gov.uk/sectors/globalssportsprojects)). These contacts can offer practical market entry advice and further in-market contacts.

## Local Organizing Committee:

Chief Executive: Alexy Sorokin  
Deputy Chief Executive: Alexander Djordjadze  
Director for Planning and Project Management: Dmitry Mosin  
General inquiries and information: [info@loc2018.com](mailto:info@loc2018.com)  
Telephone: +7 495 660 49 80  
Fax: +7 495 221 3386

2018 FIFA World Cup Russia™ Media Office

Phone: +7-495-660-49-80  
Email: [media@loc2018.com](mailto:media@loc2018.com)

The Local Organizing Committee will also work with the Olympic Games Transport Directorate to deliver the transport services concept for the World Cup (see Sochi 2014 for contact details).

Irina Karabanova  
Senior Trade & Investment Adviser  
UKTI Moscow  
Tel: 007 495 956 7454  
E-mail: [irina.karabanova@fco.gov.uk](mailto:irina.karabanova@fco.gov.uk)

## 4.8 FIFA WORLD CUP QATAR 2022

In 2022 Qatar will be the first Arab state to host the FIFA World Cup, while Doha is also one of the bidding capital cities for the Olympic Games in 2020 (the 2020 Olympic host city won't be announced until September 2013).

Spearheaded by the Emir, Qatar is keen to establish itself as a global sporting destination and has been host to a number of international sporting competitions. The country is already host to some 27 international sporting events annually. Qatar is also home to the elite ASPIRE Academy for Sports Excellence, one of the largest indoor sports facilities in the world.

### **BASIC FACTS ABOUT QATAR:**

**Area:** 11,435 sq km (Roughly half the size of Wales)

**Population:** 1.7m (An estimated 80% of the population are expatriates)

**Capital City:** Doha (80% of the population)

**Other Major towns:** Ras Laffan, Al Khor, Mesaieed, Dukhan and Al Rayy

**People:** Arab, Sunni Muslim majority.

**Languages:** Arabic (official), English (also widely-used)

**Religion(s):** Islam

**Currency:** Qatari Riyal (QR); 1 QR = 100 Dirhams

**Time Difference:** GMT +3 hours

**Temperatures:** Average temperature during the World Cup tournament is unlikely to fall below 37°C during the day and 32°C in the evening.

**Weekend:** Friday and Saturday. Working hours vary during the holy month of Ramadan.

### **ECONOMIC PROFILE:**

Qatar is now one of the richest countries in the region, due to its exploitation of oil and gas resources. In 2010 the country had the highest growth rate in the world. It is the UK's fourth largest market in the Arab world, accounting for over £1 billion in UK exports in 2011. This figure has more than doubled in a few years. With a stable government, Qatar is a potentially attractive export target market.

The country now needs to diversify away from oil and gas, hence its aim to become a world-class destination for global sporting events.

Qatar currently attracts 1 million tourists per year and is projecting an increase of 20% by 2015.

Qatar has an ambitious infrastructure development plan which will see the completion of new oil and gas facilities, ports, New Doha International Airport, stadiums and many new roads, hotels, and sports infrastructure to support the 2022 World Cup. There is increasing interest in sustainable building.

The country has remained largely untouched by the political upheaval experienced by many other countries, including Qatar's near neighbour Bahrain. Qatar is seen as one of the most politically stable countries in the region.



### **DOING BUSINESS IN QATAR:**

Qatar has a highly family oriented culture and attaches great importance to traditional Arab and Islamic values. Whilst it is fine to ask general questions about the family as part of the introduction process, avoid asking directly about female members of the family.

Meetings can be quite informal; they may be interrupted by telephone calls and often start later than scheduled. Meetings in the evening are quite usual.

Even though English is widely spoken it is not safe to assume that the host will speak English, so use of a translator is advised. Prospective suppliers can demonstrate their commitment to the market by learning some basic phrases in the language, although becoming familiar with the Arabic alphabet can be challenging. Always take time to look at a business card when it is presented. Don't offer to shake hands with a woman in a business meeting; however it is perfectly acceptable to shake hands if proffered by the female.

Traffic congestion in Doha can be heavy, so it is important not to schedule too many meetings for one day. Ask for landmark directions to a meeting, which can be more useful for taxi drivers than the actual address.

### **QATAR 2022 WORLD CUP:**

This has been planned as a "compact" World Cup, with all venues within easy travelling distance of one another. All the stadiums are/ will be situated along the eastern and northern coast of Qatar and transport links are already good. Organisers say that the compact nature of the event means that spectators can watch several matches a day.

The competition will take place in the months of June and July, the two hottest months of the year. This fact has influenced a number of the proposed plans for delivery e.g. all stadiums will be climate controlled and specific precautions will be taken to avoid health and safety related problems due to the heat. Renewable energy sources will be widely used throughout the venues, with the organisers predicting that Qatar 2022 will be the first completely carbon neutral FIFA event.

The Qatar Supreme Committee is responsible for all aspects of delivering the venues and infrastructure required for the World Cup. This includes responsibility for building competition venues and coordination for non-competition venues required by FIFA, in addition to major infrastructure works such as the New Doha International Airport and the proposed nationwide metro network. The Supreme Committee has appointed CH2M Hill as programme manager.



## KEY VENUES:

Many of the new stadiums to be built have been designed by German company, Albert Speer & Partner. The searing heat of Qatar means that all stadiums will need to be fully equipped with air conditioning. Climate controlled technology will keep temperatures at a comfortable level during matches. All stadiums must also have grass pitches.

The new build programme runs from 2011 to 2021. After the World Cup in 2022 temporary modular structures on some stadiums will be dismantled and donated for re-building 22 new stadiums in developing countries around the world.

- **Al Daayen: New stadium.** Lusail Iconic Stadium will have seating for 80,000 and will host the opening match, quarter final and semi-final matches and final match. It is not due for completion until 2019. Investment US\$662 million.
- **Doha: New stadium.** Sports City Stadium 44,000. Investment US\$883 million.
- **Doha: New stadium.** Qatar University Stadium 40,000. Investment US\$300 million.
- **Doha: New stadium.** The Doha Port Stadium will have capacity for almost 50,000. Investment US\$202 million.
- **Al-Khor City (50km north of Doha): New Stadium.** The Al-Khor Stadium will have a total capacity of 45,330, with 19,830 of the seats forming part of a temporary modular upper tier. Investment US\$251 million.
- **Al-Wakrah city, Southern Qatar: New Stadium.** The Al-Wakrah stadium, to be located in Al-Wakrah city in southern Qatar, will have a total capacity of 45,120 seats (currently 20,000 capacity). The stadium will also contain a temporary upper tier of 25,500 seats. The stadium will be surrounded by large solar panels. Investment US\$286 million.
- **Umm Slal, South Eastern Qatar (40 miles from Doha): New Stadium.** The new Umm Slal stadium will be built to a capacity of 45,000. Investment US\$251 million.
- **Al-Shamal: New Stadium.** The Al-Shamal Stadium will be built to a capacity of 45,000. The exterior of the stadium has been designed to resemble a traditional "dhow" fishing boat. Investment US\$251 million.
- **Al-Rayyan: New Stadium.** The Education City Stadium will have capacity for 45,350. Following the World Cup the stadium will be downsized to 25,000 and used as the venue for the University Hockey team. Investment US\$287 million. The stadium will have easy access via high speed rail (Bahrain just 50 minutes away).

The following stadiums will undergo major renovation in advance of the World Cup in 2022. The programme for renovation runs from 2012 to 2020.

- **Al-Rayyan:** The El-Gharrafa Stadium will undergo major renovation to achieve a capacity of 44,740. Built in 2003 the Al-Gharrafa stadium currently has a capacity of 25,000. Investment US\$135 million.

- **Al-Rayyan:** The Khalifa International Stadium will be re-developed to a capacity of 62,000. This stadium will host quarter final and semi-final matches. Investment US\$71 million.
- **Al-Rayyan:** The Al-Rayyan stadium will be renovated to a capacity of 44,740. Investment US\$135 million.

#### **Fan Fest Areas:**

- A dedicated Fan Fest area will be located within the Education City with several satellite Fan Fest Zones located in other host cities.

#### **Venue Specific Team Hotels and Team Training Sites:**

- Qatar has proposed a very different solution to the traditional venue specific World Cup plans. It has suggested that, given the very short travel distances between match venues, only the Team Base Camp is required.
- The bidding team proposed 64 five-star training camps based on two models: the pairing of 32 hotels with 32 training sites and the other of two villages containing 16 clusters each of luxury houses, facilities and a training pitch. Only 10 of the 64 currently exist.

A new International Broadcast Centre will be built by 2020.

Competition related events will be held in the Doha convention Centre which is currently under construction, but not due for completion until 2017.

#### **KEY INFRASTRUCTURE WORKS REQUIRED:**

The overall investment in related infrastructure in Qatar to host the world cup is US\$140 billion.

- A new city of Lusail, an extension to Doha, will be constructed at a cost of US\$28 billion.
- The New Doha International Airport is currently undergoing a US\$11 billion expansion. The first two phases of development are scheduled for completion in 2012; the third phase will be complete by 2015. The new airport will be the primary air gateway for the entire tournament.
- Qatar is planning to issue 19 construction contracts worth US\$1bn for the Qatar railway project, including the metro and GCC network, between 2011 and the end of 2012. Overall expenditure on the rail network up to 2022 is expected to be circa US\$25 billion. The combined rail / metro investment will be closer to US\$49 billion.
- The Nationwide Metro network of 340 km is due for completion by 2021 and will be built in 4 phases.
- Construction of a new Doha port is currently scheduled for completion in 2023 at a cost of US\$7 billion. This project will involve the re-development of 20 square kilometres and will enable cruise ships to berth at the port.
- The road network will be further developed, involving investment of US\$20 billion.
- The 45 km Qatar - Bahrain Causeway road is scheduled for completion in 2013 at a cost of US\$4 billion.

- 30 new hotels for teams are proposed, all but 13 of which will be built after 2016. All will be situated within 20km of a stadium. A total of 65,000 new hotel rooms will be built in Qatar before the World Cup.
- An additional 140 new hotels will also be constructed, ranging from properties with just a few rooms to several with more than a thousand rooms. This includes a cruise ship project in Al-Wakrah which will have 6,000 rooms.
- Qatar's World Cup Accommodation Plan is heavily dependent upon new construction.

#### **PROCUREMENT:**

It is still very early days for Qatar 2022 preparations, most of which remain at the planning stage. The Supreme Committee has only recently appointed (March 2012) CH2M Hill as project managers.

However, for ongoing infrastructure projects procurement for public and private building has remained very traditional, with lowest price a key feature. Chinese firms have recently won a number of large port related infrastructure projects at highly competitive prices. Most large infrastructure projects are publicly funded, with PPP models yet to appear.

#### **FURTHER CONTACTS IN QATAR:**

##### **Invest NI Contact:**

Claire Gadd, Regional Manager for Gulf  
Email: [claire.gadd@investni.com](mailto:claire.gadd@investni.com)  
Direct T: 028 9069 8123

Invest NI can provide further relevant contacts for interested Northern Ireland businesses within the Global Sports Projects Team at UKTI and Invest NI/ UKTI overseas networks located in the target overseas market (visit [www.ukti.gov.uk/sectors/globalsportsprojects](http://www.ukti.gov.uk/sectors/globalsportsprojects)). These contacts can offer practical market entry advice and further in-market contacts.

##### **British Embassy Doha**

PO Box 3 Doha Qatar  
Email: [ukti.doha@fco.gov.uk](mailto:ukti.doha@fco.gov.uk)  
Tel: +974 4496 2000  
Web: [www.ukinqatar.fco.gov.uk](http://www.ukinqatar.fco.gov.uk);  
[www.ukti.gov.uk/qatar](http://www.ukti.gov.uk/qatar)

# 5. Recommendations for Businesses interested in Opportunities for International Sporting Events

## 5.1 ASSESSING THE OPPORTUNITY

Delivery of the London 2012 Games has generated a great deal of interest from the host cities and countries of future global games events in the expertise and capability that UK and Irish companies can offer. Global games is now emerging as a major target export sector, to the extent that UKTI now has its own Global Sports Projects sector team.

The 5 largest events over the next decade will be hosted outside Europe, in countries which require very significant levels of investment in competition venues and the wider infrastructure required for travel, accommodation, energy. Given that 4 of these will be hosted in just two countries, there is potential to use these events as a springboard to longer term opportunities not related to the sporting events sector.

Whilst potential opportunities are significant, the distance from market inevitably means that the approach to targeting opportunities will be very different to that adopted by local suppliers to London 2012.

For most businesses the best mechanism for targeting sporting opportunities in overseas markets will be to establish relationships with local companies which already have strong sporting experience and are likely to win projects directly.

The key challenge is to achieve credibility in markets where the business has no track record and is going in cold, so doing business through a local partner is usually advised, but in any case may be a legal necessity.

Invest NI can help to establish some of these initial contacts through its programmes for exhibitions and trade missions. With access to a network of UKTI and other consultants in each market, Invest NI can commission research to identify the most appropriate contacts for client businesses and to try to set up meetings accordingly.

This approach, using local contacts who are thoroughly familiar with the market, can help to reduce the time and expense of trying to research these emerging markets independently.

Invest NI also has direct contacts within UKTI's Global Sports Projects Team and has access to the wide range of sports related research that they have produced and which is regularly updated. A list of the most relevant UKTI publications for each of the markets listed in this report is included in the Appendix.

## 5.2 FOLLOW-UP ACTION POINTS

For companies interested in exploring further the potential opportunities from International Sporting Events there are a number of action points to be considered:

- a. Make the Invest NI Client Executive aware of company interest in the global games market; the Invest NI Trade team can then provide relevant information on forthcoming international sporting events developments, such as seminars, trade missions, exhibitions, new market reports, and in-market support.
- b. Register on the UKTI website which will provide access to new contract opportunities, market reports on global games opportunities and highlight forthcoming targeted events - [www.ukti.gov.uk/export/sectors/globalssportsprojects](http://www.ukti.gov.uk/export/sectors/globalssportsprojects). Whilst UKTI can provide access to highly experienced in-market contacts, it is advisable to initially make this request through the Invest NI Trade Executive who can follow up with UKTI on the company's behalf.
- c. Register the company's details in the procurement section on the event specific website; complete the necessary company profile to ensure the company is notified about relevant tender opportunities.
- d. Not all of the event websites provide this facility yet, particularly for events which are still some way off, so check out opportunities to sign up for the latest general news alerts on the site.
- e. Invest NI can provide access to support for client companies seeking to improve their tendering skills and their "business readiness" for tendering. Invest NI has just published a new guide to tendering which is available from the Invest NI Trade Team.
- f. Companies with previous experience of working on major sporting events should check out the Springboard to Success Directory [www.springboardtosuccess.co.uk](http://www.springboardtosuccess.co.uk). A directory sign-up facility is available at [http://fs4.formsite.com/allscenes/ukti/secure\\_index.html](http://fs4.formsite.com/allscenes/ukti/secure_index.html). Sign-up involves completing a questionnaire about the company and its previous experience of supplying to major sporting events.
- g. Initial market research on a target market of interest could help to identify specific opportunities for the company's product / service. Invest NI may be able to support the commissioning of market research through its Export Development Service.
- h. Obviously the best way to assess the potential of a new target market is to visit the market in person; participants on Invest NI trade missions benefit from support through in-market contacts that will set up meetings with potential partners or buyers who match the profile specified by the participant company. The Invest NI trade mission calendar is available at [www.investni.com/tradecalendar](http://www.investni.com/tradecalendar)

### 5.3 H&J MARTIN - FIT-OUT PACKAGE FOR INTERNATIONAL BROADCAST CENTRE

Daniel Chesney, Business Development Manager at H&J Martin, was closely involved in pursuing tender opportunities for London 2012.

#### CASE STUDY

The H&J Martin team is very excited and extremely proud to have successfully won two prestigious projects within the Olympic Park on behalf of LOCOG. As a leading contractor, H&J Martin are familiar with the tendering process for public sector projects. The company found the CompeteFor registration process was very simple and straightforward to complete, however this made it difficult to deliver a strong online sales pitch, which would stand out from some of the very well established national contractors based in GB.

The company submitted a number of Pre-Qualifying Questionnaires, but were not shortlisted for some time. The strategic view within the business was “persistence and effort will pay off”, winning just one prestigious project from the Games would cement the company’s credentials for competing for other large projects in the future.

In addition to submitting PQQs and pricing, the business development team was proactive in seeking opportunities to engage with LOCOG and learn about the procurement process. The company attended every Invest NI Olympic Games related seminar that they could. The team believes that this helped them to better understand the award criteria, since they used each event as an opportunity to ask questions from procurement teams. Regular attendance at these events also demonstrated their commitment to winning Games related business.

The business quickly realised that procurement teams needed to demonstrate “local” benefit from the Games, so it set up its first office within London.

The company’s experience of working on the International Broadcast Centre and the Main Press Centre has been very positive, with the main surprise being the unprecedented security clearance for the Games and the implications this has for working on-site.

Already the longer term impact of having worked on Games projects is becoming clearer; the company now has had the opportunity to build its profile through these contracts and has demonstrated its excellent performance on-site. The business believes that this will position it well for competing against much larger contractors for some of the legacy contracts.

In terms of future international sporting events, the company is already looking with interest at Brazil, as well as the other BRIC countries. It will develop its knowledge of market opportunities by working closely with Invest NI and believes that participating on trade missions is the best way to quickly assess market potential and build in-market relationships.

# APPENDICES:

## Further Sources of Information

### (I) INVEST NI TRADE MISSION PROGRAMME

Date	Details	Contact:
March 2013	Trade mission to Russia	eleanor.butterwick@investni.com

### (II) EXHIBITIONS

Exhibition	Location	Date
<b>Soccorex Global Convention 2012</b>	Rio de Janeiro, Brazil	24-28 November 2012
Soccorex is the world's leading football event, which will be hosted in Brazil this year, for the third year running.		
<b>Expo Estadio</b>	Sao Paulo, Brazil	21-23 November 2012
Expo Estadio is the biggest event in Latin America with focus on infrastructure and equipment for sports arenas and stadiums. Parallel events are Expo Esporte, an event for sports equipment and services; Expo Urbano, an event for urban development; Expo Parking, an event for parking, and TranspoQuip, the biggest event in Brazil for transportation infrastructure.		
<b>Sport Accord</b>	Russia	2013
The actual venue for the Sport Accord Conference in 2013 has not yet been officially announced. The conference will definitely be held in Russia, quite possibly in Sochi, which has expressed interest in hosting the conference in advance of the Winter Olympics 2014.		
<b>International Sports Security Conference</b>	TBC	2013
This annual conference attracts sports security decision-makers and practitioners. The 2012 event was held in Doha.		

## (I) FURTHER READING

<b>Brazil:</b>
- Brazil Business Guide, UKTI
- It's All to Play For, Infrastructure Opportunities in Brazil, UKTI
- Game On, Progress in Brazil's Preparations for the FIFA 2014 World Cup, UKTI
- Brazil's Moment to Shine, Opportunities for UK Business in the Rio 2016 Olympic and Paralympic Games UKTI
- Britain's Brazil Moment: Opportunities in the 2016 Olympic Games
- Brazil, Opportunities for UK Businesses in the Ports Sector, UKTI
- Transport Infrastructure Sector in Brazil, UKTI
- Environment and Water Opportunities in Brazil, UKTI
- Food & Drink Opportunities in Brazil, UKTI
- Construction Sector in Brazil, UKTI
<b>Russia:</b>
- Guide to Doing Business in Russia, UKTI
- Olympic Opportunities in Russia, UKTI
- Construction Industry in Russia, UKTI
- Rail Opportunities in Russia, UKTI
- Airports Opportunities in Russia, UKTI
- Transport Sector in Russia, UKTI
<b>Qatar:</b>
- 2022 FIFA World Cup, Bid Evaluation Report, Qatar
- Qatar Business Culture, UKTI
- Doing Business in Qatar, UKTI
- Alif Baa, Kristen Brustad, Mahmoud Al-Batal and Abbas Al-Tonsi (Basic Arabic language and phrase book)
<b>General:</b>
- FIFA Evaluation Reports from the Bidding Countries for the World Cup are available on the FIFA website ( <a href="http://www.fifa.com">www.fifa.com</a> ).
- Olympic Committee Evaluation Reports from the bidding countries are available in the documents section on the Olympic website ( <a href="http://www.olympic.org">www.olympic.org</a> ).
- A number of the official websites provide opportunities to follow their progress on Twitter and Facebook.
- LinkedIn has an open discussion group called Doing Business in Brazil (Brazil 2014).



## **(I) EMAIL ALERT PROVIDERS:**

- [www.sportbusiness.com](http://www.sportbusiness.com)
- [www.sportcal.com](http://www.sportcal.com)
- [www.aroundtherings.com](http://www.aroundtherings.com)
- [www.insidethegames.com](http://www.insidethegames.com)
- [www.gamesbids.com](http://www.gamesbids.com)
- [www.majoreventsint.com](http://www.majoreventsint.com)

## **(II) SPRINGBOARD TO SUCCESS (WWW.SPRINGBOARDTOSUCCESS.CO.UK)**

This online directory highlights the UK's major sporting event expertise. It is designed to be the go to source of information for any company/government abroad looking to deliver major sporting events and will have a high profile with visiting Buyers during the upcoming Olympic Games, the World Cup, Commonwealth Games etc.

It is a valuable opportunity for companies to be included in a marketing tool for business which has a high profile presence both with UKTI, and government ministers who regularly meet with and promote UK companies to their international counterparts.

Please see this site for more information. [www.springboardtosuccess.co.uk](http://www.springboardtosuccess.co.uk). Details can also be registered online at [https://fs4.formsite.com/allscenes/ukti/secure\\_index.html](https://fs4.formsite.com/allscenes/ukti/secure_index.html)

The directory will have an international audience, consisting of:

- Future host and bidding cities and governments of major events
- Organizing committees of major events
- Private sector - supply chain

It is a useful guide to the various categories of expertise required for sporting events and it also gives a clear profile of those companies in the UK with the greatest expertise in the global sports market. For some Northern Ireland companies, targeting these companies as a subcontractor may also be an attractive route to access global sporting events opportunities.

## **(III) BRITISH BUSINESS CLUB: (HTTP://BRITISHBUSINESSCLUB.INNOVATEUK.ORG)**

An online, one-stop-shop, the British Business Club provides up to date details of networking events, business activity, news and potential partners around international sports events, boosting the opportunities for UK companies to make valuable international business connections. Further information can also be found on the UKTI website.



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