

Issue 6

Covid-19 Resilience and Impact on Global Football

“the tip of the iceberg”

Club Services

Index

1 /	First Impact	03
	• Executive summary	
	• Countries covered through deep-dive interviews	
	• List of abbreviations	
2 /	Mitigation	06
	– Important Covid-19 events in the region connected with the football industry	
	– Regional Covid-19 Impact overview	
	• Clubs	
	• Competitions	
	• Players	
	• Supporters	
	• Broadcasters	
	• Sponsors	
	• Governing Bodies	
	1. Asian Football Confederation (AFC)	06
	• Case studies: Beijing Guoan & Football Delhi	
	2. Confederation of African Football (CAF)	18
	• Case studies: Kenya & Mauritius	
	3. Confederation of North, Central American and Caribbean Association Football (CONCACAF)	30
	• Case studies: MLS & Haiti	
	4. South American Football Confederation (CONMEBOL)	34
	• Case studies: Club Bolivar & Venezuela	
	5. Oceania Football Confederation (OFC)	43
	• Case studies: New Zealand Women's Football & Sydney FC*	
	6. Union of European Football Associations (UEFA)	52
	• Case studies: Israel & Belgian Pro League	
	<i>*On a football governance level, Sydney FC belongs to the AFC confederation, but the authors felt it fit better in the Oceanian section due to many parallels</i>	
3 /	Looking Ahead	58
	• Possible long-term effects	
	• Positive examples and key learnings	

1. First Impact

Executive Summary

Even though the entire world knows the story and timeline of the Coronavirus pandemic by now, including its roots in Asia, in the world of football it could easily be assumed that European football has been the most heavily impacted by the pandemic crisis due to its size and importance. Yet, the crisis that has followed in the wake of Covid-19 covers the football economy in its entirety.

Whilst we were aware that the football governing bodies were suspending on-field football activity across all confederations around the world back in Spring 2020, and that football everywhere was struggling in these difficult times, it was only when we started looking into the details, that we understood just how varied and challenging the situation still is in different parts of the world. By gathering all the individual responses at continental, regional and national level for this publication we began to see how complex the different environments were, which shaped the status of the domestic and international game for all the stakeholders in their pandemic response.

In combining these experiences and the lessons learned from various parts of the world, we saw clearly that in many cases the pandemic became a stress test, challenging the already fragile football ecosystems. These were all operating in different contexts, but we found patterns and the fact that they were experiencing similar issues is what makes them all a part of the wider global football community.

Overall, there were many differences between different regions. In part, this is one of the reasons why, when drawing up the content of the chapters of this publication, there was a decision taken against a strict application of traditional football geography through the six confederations. Instead, the objective is to look at some of the territories and regions in a more geographical fashion, where territorial and/or cultural proximity was of more relevance than a membership in one or another football confederation.

In the European context, many believe that there are huge differences between different traditional parts of the continent that are part of UEFA. But these differences actually pale into insignificance when one considers the situation in other confederations such as the AFC or CAF, where the entire operation needs to be carried out on a territorial and regionalised basis even under normal circumstances.

On a domestic level, one of the main factors behind the differences was probably down to how national governments tackled the pandemic, rather than necessarily the will of football authorities. This was universal, although the nature and quality of responses obviously varied at football governance level as well, with some associations being extremely proactive, and others choosing to sit and wait. Nevertheless, the ownership status of clubs, as well as their business models, are also critical to understand the depth and nature of economic impact. Particularly as in some parts of the world the association membership or “sócio” model is more prevalent than in others, and therefore the reliance on supporters, attendance and match day are more or less significant.

Another observation is that there may be a few regions of the world that were operating on a pretty much border-free level internally, such as that within the European Union, where national lockdowns and imposition of internal borders for the first time in many years was felt extremely keenly. In most other places, national borders are far more robust in normal life, so the football industry may have not quite felt the same difference between pre and post-Covid situations.

Having stated that, the reduction of international mobility was also affecting football across the entire world, particularly at international and continental level. Many continental competitions suffered delays, disruption or even cancellation. It has also impacted the ability of some of the traditional or emerging talent buying leagues to sign new players, which in turn has created an effect on talent-producing countries that rely on selling their players abroad to balance the budgets.

Logistical, operational and financial difficulties were particularly concentrated around Spring 2020, but in some places were also in place through Summer and into Autumn, when the second wave began hitting some parts of the world. Beyond those temporary challenges, what was of more lasting significance for the football industry has probably been the uncertainty that this pandemic generated. With all revenue streams of football affected in one way or another, one might question the validity of football's current business model, or at least pose the question on whether football as a broadcast product only is viable in its full pre-Covid shape.

It would be easy to list many of the difficulties and challenges that were faced by all the different stakeholders of football in various parts of the world and make this into a relation of negative case studies. But football is a resilient beast, and it would therefore be logical to finish this introduction with a few positive notes.

Firstly, it was wonderful to see that there was a clear pattern of knowledge and experience transfer between different parts of the world in terms of learning from the experiences (and mistakes!) of others. This was followed up by an implementation of proven solutions, especially in areas such as the return to play.

Secondly, in many parts of the world clubs quickly realised that their pre-Covid salary levels were unsustainable within a pandemic scenario, and moved to mitigate this, in many cases with the participation of players themselves in the process. This not only highlights the importance of having representative stakeholder bodies to tackle such issues, but also the fact that in the end many people and organisation care about the football industry and its long-term wellbeing.

Thirdly, crises for some can be opportunities for others, and in football, difficulties off the field for clubs usually mean more chances and opportunities of play for young and local players. If this trend, which has been documented in some countries across the world, remains also during the recovery phase, it should bode well for the development of new and exciting generations of fresh talent across the world. Perhaps also encouraging clubs to come back to their roots through an increased focus on the products of their own academies and youth development systems.

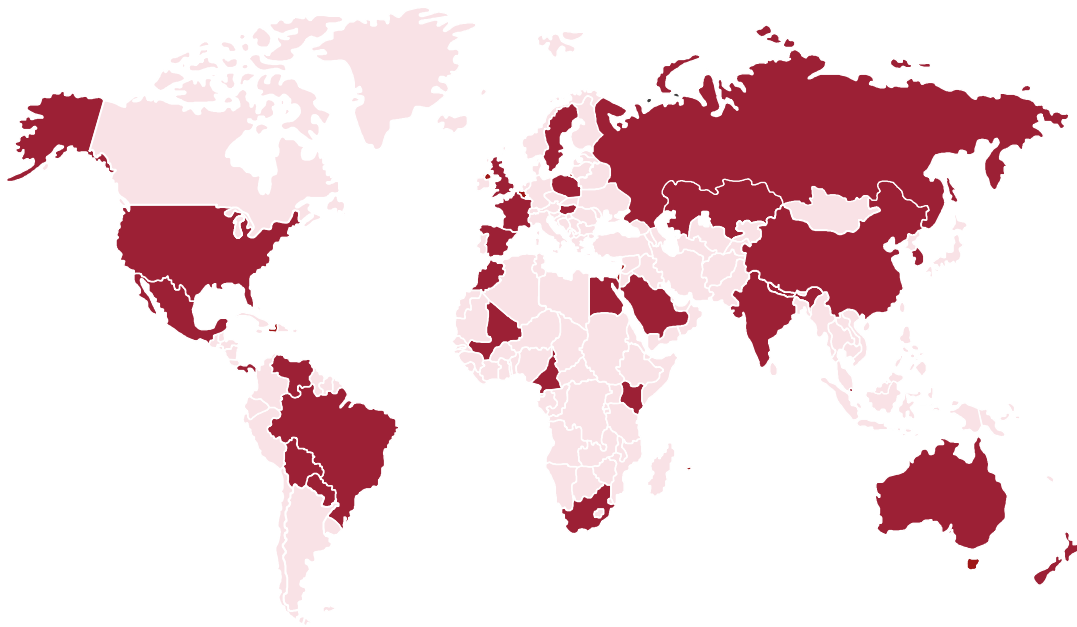
And finally, despite the many negative and challenging experiences that Covid-19 has brought the world, it has also paved the way to a hopeful new future for football. One where errors of the past are corrected, lessons are learned, and innovative solutions and development opportunities are embraced. For the good of the game!



Olivier Jarosz, Managing Partner Club Affairs

“The global analysis of football in this Issue 6 covers a multidimensional perspective. Our team talked to men's and women's football executives, players, coaches, sponsors, supporters, referees, broadcasters across the world's continents. It has strengthened our vision of a Think Tank to be the optimal place for an independent platform to share and provide advice to passionate people working in clubs, leagues, national associations and governing bodies, to rejuvenate the football leadership with a new wave of energetic, non-partisan people.”

Countries covered through deep-dive interviews



Issue 6 List of Key Abbreviations:

- Coronavirus disease 2019 (Covid-19)
- Asian Football Confederation (AFC)
- Confederation of African Football (CAF)
- Confederation of North, Central American and Caribbean Association Football (CONCACAF)
- South American Football Confederation (CONMEBOL)
- Oceania Football Confederation (OFC)
- Union of European Football Associations (UEFA)
- Fédération Internationale de Football Association (FIFA)
- Council of Southern Africa Football Associations (COSAFA)
- Fédération Camerounaise de Football (Fecafoot)
- Fédération Congolaise de Football Association (FECOFA)
- Africa Cup of Nations (AFCON)
- Championnat d'Afrique des Nations (CHAN)
- South Africa Football Association (SAFA)
- Major League Soccer (MLS)
- Fédération Internationale des Associations de Footballeurs Professionnels (FIFPro)
- World Health Organisation (WHO)
- United Arab Emirates (UAE)
- Bolivian Football Federation (FBF)
- Venezuelan Football Federation (FVF)

2. Impact of Covid-19 on football

1.1 AFC (Asia)

“Learning new tricks at an (in)opportune time.”

Regional Covid-19 Impact Overview

The Covid-19 pandemic traces its origins to the Asian continent. The spotlight of the global football ecosystem is in Europe due to the positioning of the sport’s major stakeholders in this continent and arguably, the glitz and glamour of football coming from there. Considering the two premises that the attraction factor of Asian football is weaker compared to European football and that most football leagues in Asia are not spectacles that span out across two calendar years; is it then reasonable to conclude that Asian football has not been greatly affected by this pandemic? What if we were to add another premise to our above assumption?

The professional leagues across Asia have had considerable time to learn from the practices employed by other professional leagues around the world to develop a strategic plan to aid their mitigation processes suitably. This may seem to strengthen the conclusion we arrived at above. However, the reality is sometimes far from the documental argumentative analysis.

There have been considerable impacts on football’s state of play across the Asian continent. The financials involved have taken a significant hit, difficulties have arisen in organisation and operation and new regulatory laws have needed to be drawn.

Yet, as the title of this section suggests, new approaches were learned, and some innovations were introduced to global football from Asia. However, one is left to wonder why it took an inopportune time of a global pandemic for such transformations to take place.



Emile Heskey, 62 caps for England National Team

“As an immediate impact, we saw that football is ultimately subject to national laws and regulations rather than just its own governance. We tend to focus at the top of the pyramid but we also need to act for the bottom of the pyramid, as lower-tier clubs are on the brink of collapse. These clubs are an integral part of their community so their crucial role needs to be taken more into consideration in the football pyramid.”



AFC Timeline

23 January 2020 – The Government of Hong Kong cancels the Lunar New Year Cup 2020

24 February 2020 – The South Korean K-League postpones matches of the 2020/21 season scheduled to begin in February

3 March 2020 – Thai League 1 games are postponed

11 March 2020 – Iraqi Premier League 2019/20 season is suspended

14 March 2020 – The Stars League 2019/20 season in Qatar is suspended

17 March 2020 – Bangladesh Premier League 2020/21 season is cancelled

24 March 2020 – Singapore Premier League 2020/21 season is suspended

27 March 2020 – Liga 1 in Indonesia is suspended

18 June 2020 – UAE Pro League 2019/20 season is cancelled

30 January 2020 – The Chinese Football Association announces the postponement of the start of the 2020/21 season scheduled to start in February

25 February 2020 – All matches of J1 League in Japan are postponed until 29 March

9 March 2020 – AFC Champions League matches are postponed to later dates

13 March 2020 – Malaysian Super League 2020/21 season is suspended indefinitely

14 March 2020 – The All-India Football Federation announces that all Hero I-League matches have been suspended and the Hero Indian Super League final will be played behind closed doors

19 March 2020 – Oman Professional League 2019/20 season is suspended

24 March 2020 – The Football Federation of Australia announces that 2019/20 season will be postponed until further notice

16 April 2020 – Hong Kong Football Association announces that matches of 2020/21 season are postponed

10 September 2020 – AFC cancels second tier AFC Cup

Clubs

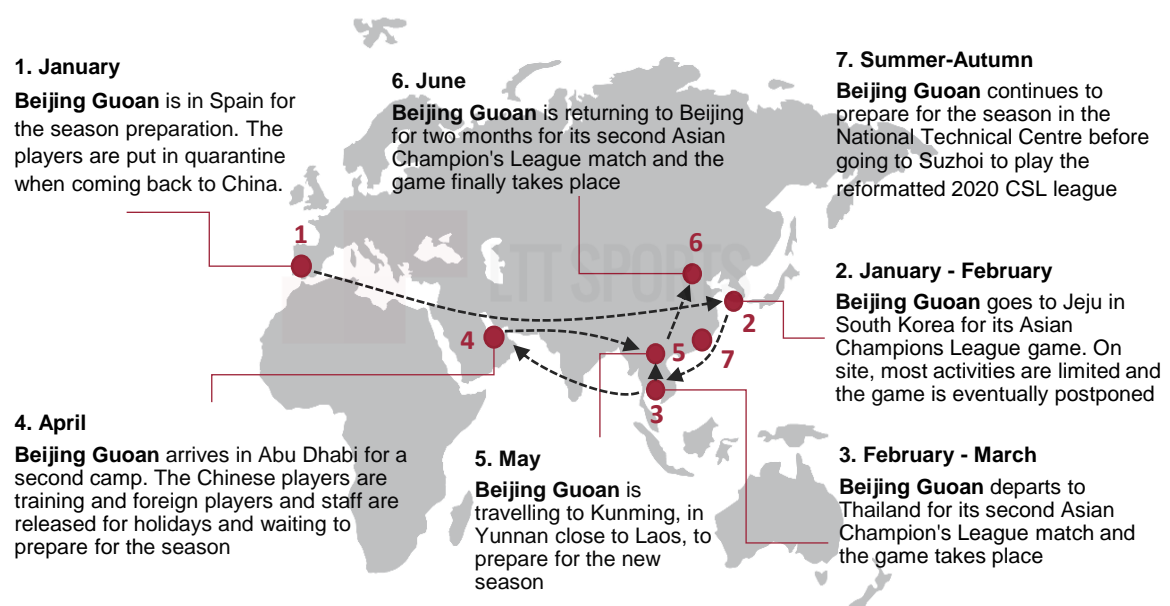
The finances associated within the football ecosystem in Asia are relatively lower compared to the figures of the top-5 leagues in Europe. The glamour of the game in the European continent has attracted many Asian investors. However, investment in Asian football was never prolific, and during a time of uncertainty and setbacks in every industry, investments to re-energise the game in Asia have not seen any returns. In addition, clubs have faced an unprecedented hit due to the loss of matchday, sponsorship and broadcast revenues.

Multiple reports from the press suggest that many football clubs across the continent stood down their players and staff with no payment. In Australia, reports have highlighted the decision of the A-League clubs not to pay the players whilst the season was suspended. Though full details are not available, an agreement seems to be in place between the stakeholders in Australia and professional players, who agreed to take a pay cut when the A-League season resumed.

In China, the story is a bit different. Unlike Europe, the 2019 football season in China had already concluded before the pandemic hit. As such, issues arising in competition management can be considered to be less complex than in Europe. By the time football in China was allowed to return, the league already had an understanding of the practices adopted elsewhere.

An official announcement from the Chinese Football Association in April explained the potential of a wage cut across all three tiers of Chinese football. Notably, Xinjiang Tianshan Leopard FC, a club in the second tier of professional football in China, announced that it had to dismiss its women's team due to operational difficulties caused by Covid-19.

In India, although the Indian Super League started in 2013, the clubs participating in this tournament are still finding their ground. Professional football in India is still taking shape, and most clubs in the league do not break even. The pandemic will have worsening implications on the economy of most of the Indian clubs barring a few who have managed to secure substantial investment backing.



Case Study: Beijing Guoan, Chinese Super League (CSL)



“A global voyage to find a hub”

The above map graphic shows the events of Beijing Guoan and the various travels of the team before the CSL bubble experience. The Chinese club management observed that European countries started to implement lockdown measures and requested its staff to relocate to Asia. Out of the five technical staff, only two were able to enter China PR and arrive in Beijing. As a result, the two of them had to take care of the training sessions for an extended period while continuing to receive indications remotely from Europe from the ones that were unable to enter the country. As from mid-April, when the situation was under control, the players and staff started to have a more normal life. They were based in the Kunming (Yunnan) region close to Laos, which reported fewer cases of infections, so they decided to stay there until the end of June. The league experienced several postponements, and finally, the Chinese Football Association decided to split the 16 top-tier CSL teams into two groups based in the hub cities of Dalian and Suzhou equipped with several hotels and pitches. Groups were made based on the 2019 final ranking of teams one to four, and 14 games were played with a return leg only a few days between them. The first phase of the competition was staged running from 22 July to 28 September. As a result of the league, the second phase included the top eight teams that went into a play-off round in Suzhou to continue the final round, and the bottom eight teams were competing in a relegation round in Dalian. Beijing Guoan concluded their domestic season on 11 November, finishing third in the league.

Key lessons

The Chinese “bubble” (or the equivalent of “3 World Cup format”) is not comparable with how the competitions have been carried out in Europe. The Final 8 European club competition formats were less restrictive since for instance in Lisbon the players of the competing teams were still able to have leisure time on the beach. Beijing Guoan played until the Semi-final, while the final took place on 16 November. After this, the team travelled to Qatar to potentially play the final which is set to be played on 19 December against Persepolis FC, the winners of the Western path played in September, which also had several games postponed*. From a media perspective games were shown during primetime on CCTV5 and PP TV, with a dynamic interaction on Social Media. Currently, around 2000 fans can attend the games, and 1000 fans can travel to the games for each team. So far, no players have been tested positive for Covid-19 (except for a few coming from outside of China).

**Al-Hilal had to withdraw from ACL as they had more than 30 cases of Covid-19 in the squad*

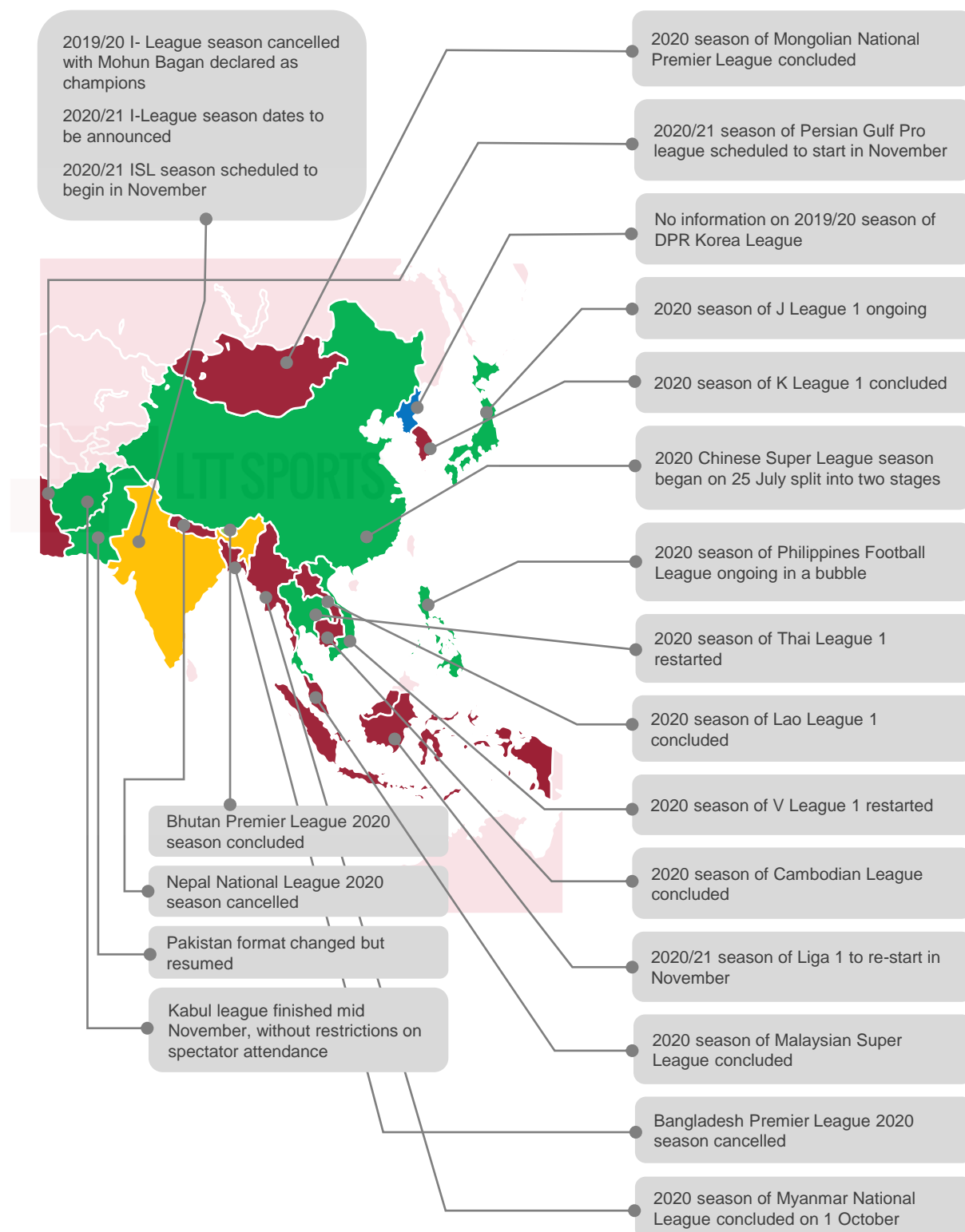
Competitions

Most football leagues across the continent have had to either extend the completion of the ongoing season or delay the start of a new season. In India, the 2019/20 season of the I-League was suspended, with Mohun Bagan declared as champions. The Asian Football Confederation (AFC) has had to reschedule the dates of their continental events once it became clear that the pandemic was affecting their ability to organise these competitions. Furthermore, the AFC U-16 and AFC U-19 championships have both been postponed until 2021.

Complexities involved in coordinating the five zones of AFC led to the cancellation of the 2020 AFC Cup. The AFC Solidarity Cup was also cancelled and is set to be played in 2024.

Due to travel restrictions imposed between countries, Brunei DPMM FC announced that they are unable to travel to Singapore to compete in the Singapore Premier League, so the competition therefore resumed without the title holders.

East Asia



A time for innovation – learnings from Asia

Whilst it is clear that Covid-19 has brought disruption to the smooth functioning of the football ecosystem, all is not lost. Often, global football enthusiasts look West to learn, and to get perspectives on development and innovations.

Though Asian football has not spent the entirety of its time in the august company of football elites elsewhere, some practices adopted across Asia show ambition and deserve recognition.

Return of fans

The Taiwan Mulan Football League, a professional women's football league, was amongst the first to reopen its doors for the return of fans to spectator sport when it began spectator admission by the end of May.

The Chinese Taipei Premier League allowed the return of fans in June with comprehensive protocols like name-based admission, socially distant seating arrangement facilities and thorough disinfection of facilities.

In Japan, the Nippon Professional Baseball League and the J-League allowed the return of up to 5'000 fans or 50% of the stadium's capacity, whichever was smaller, in July.

The South Korean K-League 1 saw the return of fans in August, when stadiums opened up at 10% capacity. Fans were also allowed to return to attend competitive football in China PR in a Chinese Super League match between Shanghai SIPG and Beijing FC in August.

Players

The AFC launched the AFC Stay Active Campaign to build a support system for fans to improve their well-being while promoting the physical distancing guidelines initiated by the World Health Organisation. Several professional football players across Asia joined this initiative to empower the physical and mental health of fans during these challenging times.

Indumathi Kathiresan, a professional football player for the Indian national women's football team responded to the call of work for her nation by draping a state police uniform and administering order on the streets in the fight against Covid-19.

More than 100 professional footballers, coaches and match officials led the AFC's break the chain campaign to promote standards of hygiene and social distancing measures.



Moya Dodd, 24 caps for Australia, former Matildas' vice-captain and former FIFA Council Member

"When all football paused, those with the most had the most to lose. Those who had less found some new opportunities amid the disruption, as old habits were broken and new innovations emerged. Reduced overall revenues will continue to be challenging for all of football, but the women's game has survived bans, neglect and ridicule for over a century. It has always found a way, and it will find its way in the Covid-19 world, too."

Welfare of coaches

In India, the All India Football Federation collaborated with the Sports Authority of India and arranged online coaching refresher courses for football coaches across the country. The United Arab Emirates Football Association also initiated several online workshops and webinars for football coaches all over the country.

In Japan, the Japanese Football Association organised online coaching courses and also arranged an online license refresher course for coaches from 47 member associations and a 'D' level coach license course for all staff members of the association.

Social Responsibility

Several football organisations across the Asian continent offered a helping hand in the crisis. The Bangladesh Football Association launched a 'feeding the poor' programme. By working closely with the ministry of health in Myanmar, the Myanmar Football Association helped provide accommodation to citizens returning to the country and in requirement of quarantine.

The national training centre of the Korean Football Association was opened to house patients who contracted the virus. The Bhutan Football Association donated to the Royal Kidu Foundation while the Football Association of Australia teamed up with the International Federation of Red Cross to support state mitigation measures. In Nepal, the All Nepal Football Association offered the use of its facilities for quarantine purposes. The Japanese Football Association voted to donate their AFC Dream Asia Award to the initiatives of the International Federation of Red Cross. The Guam Football Association used their 2019 AFC Dream Asia Awards winnings to donate equipment to a hospital in Guam. Senior members at the Football Association of Singapore and their national team coach voluntarily set up a foundation to support low-income families and children during the pandemic.

From a continental perspective, the AFC partnered with the International Federation of Red Cross to deliver assistance to communities that were affected by the pandemic.

Innovations

To encourage the enthusiasm of its fans during the pandemic, the Chinese Football Association launched an online grassroots programme titled 'Football for all Challenge'. Sixteen professional players from Chinese Super League clubs became ambassadors of this programme.

More than 1'500 amateur players from age groups between four and seventeen participated in an online learning programme launched by the Hong Kong Football Association with the initiative to engage with young players during the pandemic lockdown.

In Cambodia, an inventive format of football called 'Social Distance Football' was launched. The new structure was put together by IndoChina Starfish Foundation, a partner of the AFC. Concepts of the game enforce a two-metre physical distance between players who are also required to wear masks. Players must compete within their zones and those breaking the rules are sent to quarantine. Other rules include having your temperatures taken before the game and players required to wash hands.

Governance

The Korean K League 1 was the first major competition in Asia to resume following the suspension of the league due to pandemic. The Asian Football League, along with the K League's management, organised a webinar for other member associations of the federation to learn the best practices associated with resuming their domestic leagues.

Additionally, the AFC also collaborated with FIFPro in the development of mitigation strategies to counter the social and economic impact of Covid-19 on professional football in the region.

An interview with Shaji Prabhakaran, President of Football Delhi



“Sowing the seeds for a vibrant city”

Shaji Prabhakaran is the President of Football Delhi Association, a state-level football association in India and Director of Delhi United SC, a professional football team playing in the second division of the I-league in India. He previously served as the FIFA South Central Asia Development Officer. He is the author of the highly acclaimed book ‘Back to Roots: A Definitive Guide to Grassroots & Football Development’.

Q: The Covid-19 pandemic has without doubt disrupted the functioning of the football ecosystem. How does one plan a mitigation strategy in such situations to bring the game back to a state of smooth functioning once again?

A: Planning strategies in such situations does not help. What is important is to innovate and come up with endeavours to engage the community (players, coaches, referees, fans and professionals working in the industry). It is key that the community is engaged and initiatives brought about to make them feel assured that this phase will pass.

Q: How has the pandemic affected the Indian football ecosystem?

A: The biggest impact of the pandemic has been on players and referees. The players are going through a phase that could affect their emotional state of well-being with a lot of uncertainties looming. The referees of the game are also facing such problems. Most of the clubs in India have been hit by the pandemic. Matchday revenue in India is lower compared to the global landscape. When the season restarts, this revenue is diminished and an important revenue generation factor for the clubs is lost. Therefore, clubs in India need support. There is a feeling that sponsorship revenues for the clubs might decline. New innovative ideas need to be developed to bring in more sponsorships for the clubs.

Q: When the ISL season restarts, how will the clubs manage the costs associated with the team management and what support is provided by the tournament organisers?

A: The costs of the testing process will be taken care of by the tournament organisers. Since the proposed restart mechanism involves the tournament being held in a bubble format, travel costs for the clubs will come down. Since there will not be a homestand, brand costs will come down and there will be a centralised way of marketing. These measures can benefit the clubs in the short term.

Q: Could you shortly describe the activities Football Delhi has carried out during the last few months?

A: Football Delhi has really tried to innovate and improve its mitigation strategies to overcome the challenges caused by the pandemic. We have conducted an e-summit with the headline, ‘Making Delhi a Vibrant Football City’. The honourable Minister of State of the Ministry of Youth and Sports in India, Shri. Kiren Rijiju, the General Secretary of AFC Mr Dato’ Windsor John, and the President of the All India Football Federation Mr Praful Patel participated during the summit, amongst many others.

Football Delhi also launched a virtual skills competition and an e-football competition for schools, youth and also an e-football league to further engage with the youth and the football community through popular e-football games.

The Executive Committee of Football Delhi also decided not to charge any registration fees for player enrolment and waive the fees for football academy accreditation and licensing processes until 31 March 2021 to lessen the financial burden on players, clubs and academies in the wake of the Covid-19 pandemic

Q: What are the plans of Football Delhi for the future?

A: Currently, we have 240 teams playing in our golden league. We want to raise this number to 400. We also wish to continue our e-football competitions in schools and colleges. We would also like to organise a premier division league in Delhi as our top division league where top-ten teams from the current senior Division league will participate starting next season.



Kumar Thapa, Former Coach of the Nepal Women's National Team

“In Nepal, we have not played football on the highest level for more than seven months. The friendly game against Bangladesh is our first since the lockdown started back in Spring. Even the women's team is not playing and even not allowed to train. The effects of Covid-19 on football are running quite deep. For instance looking at Bhutan, the league restarted but this time without foreign players. The effects of the pandemic have really become a game changer for many years to come.”

1.2 Middle East

“Government assistance for clubs and leagues”

Regional Covid-19 Impact Overview

As a region where the virus was prominent but not as aggressive as certain other parts of the world, the effects of Covid-19 in the Middle East were overall not as negative as in other regions. The soft blow witnessed is partly due to governments' effectiveness and willingness to assist leagues and clubs throughout the pandemic.

The reality of Covid-19 fully hit the world of football in mid-March, where the spread of the virus began to gain momentum. By the end of March, leagues were effectively ordered to suspend their seasons in the Middle East, and a few leagues resulted null and void. The consequences that bore down on leagues and clubs were felt through a decimation of operational and commercial revenues. With fans banned from entering stadiums and broadcasting matches suspended, matchday revenue through ticket sales, food and beverage sales and merchandise sales plummeted. Clubs that were predominantly relying on matchday revenue were hit the hardest.

Additionally, broadcasting contracts were ultimately affected, with many clubs and leagues renegotiating certain aspects of existing deals. The uncertain timeline of when leagues would resume led to fixture congestion and tense negotiation between parties. Creative and innovative ways of operating to manage and complete leagues and cup competitions were ultimately designed to ensure a safe return of football in 2020. Overall, while it certainly was affected, the state of Middle Eastern football came through a testing period with relatively mild scars.

Clubs

This section will solely focus on Arab clubs competing in leagues in the Middle East, as well as Arab clubs in the African continent, which also form part of this particular ecosystem. The effects of Covid-19 varied in the region, with smaller clubs feeling the brunt of the pandemic. Leagues and clubs in Saudi Arabia and Egypt, for example, were given significant assistance from their respective governments. For instance, in correlation with the national health chamber, the Saudi Arabian Football Association appointed health officials designated to individual clubs to observe the full operational process and return to play procedures. A government-backed payment relief package was given to all clubs to soften the financial blow and the League itself also received a similar package from the government. The number of sponsorships also remained, however, with a 20% discount. Overall, the Saudi Professional League and its clubs fared far better than the rest of the world.

In Egypt, the model encounters unique situations presented to the country, playing in the African continent while also identifying as an Arab team with Middle Eastern roots provides a different aspect and sets of challenges. In Egypt, matches have been played behind closed doors for almost seven years, so the consequences of matchday revenue losses have been handled by the clubs for several years. When the government barred fans from matches around the world this year, the Egyptian League had already derived procedures and policies and could therefore adapt far quicker due to their experience of the lack of spectators.

However, when one source of revenue is taken away, the natural reaction is to rely heavily on other sources instead. Broadcasting and commercial revenues become crucial, which is where the Egyptian clubs encountered the consequences of the pandemic crisis. As a result of the pandemic, sponsors started to renegotiate the outstanding amounts to the league and its clubs. Uniquely, the model in Egypt does not allow sponsorship and TV-rights to be sold separately, consequently sponsors minimised the number of contracts remaining, with the broadcasters following suit meaning that clubs suffered a significant loss of financial revenues in both sponsorship and broadcasting. The planning of fixtures also presented another set of challenging aspects, as clubs were unhappy with the lack of pre-season matches and the heavily congested fixture list. On the positive side were the contracts of players. In recent years, player wages have been significantly inflated, with clubs paying over the odds but the pandemic saw the deals decrease to a more healthy and sustainable level for clubs.

It is therefore interesting to note that while some leagues cancelled their seasons and others chose to continue, the financial health of most clubs in the Middle East remained relatively intact. This is mainly down to the support of governments and a willingness to work cohesively to manage damage limitations

Competitions

Primarily, most domestic competitions resumed over the Summer, with a few exceptions. The confederation competition games were completed in a bubble-type tournament style similar to the one adopted by the NBA. There were only a few instances where teams had to forfeit matches due to positive tests, but overall competitions that resumed were completed.

At the time of publication of this issue, most leagues have begun their 20/21 season. The lessons learned from the initial first wave in March have prepared domestic leagues and continental competitions for a new way of competing and organising games. With the 2022 World Cup qualifiers set to begin, the consequences of finishing the 19/20 season and the quick turnaround of the 20/21 season will be noticeable. Fear of player burnout and injury is real not only for the clubs but for the leagues as well.

Players

There has been a relative dip in transfer activity in the region, which was expected. With many countries closing their borders, and with extreme quarantine measures, coupled with the financial blow that clubs suffered, clubs spent less as a result. However, as mentioned above, player contracts in individual leagues stabilised to reflect an accurate value in player quality when previous inflated agreements were renegotiated, which could only be perceived as a positive and sustainable outcome in a bleak period.

With the uncertain and volatile situation in the world of football currently, clubs have become more conservative in signing longer and more lucrative contracts. While some might argue that the value of player contracts being reduced is something negative, it is also important to understand that the way the market was heading was creating a wide disparity between clubs. This inevitably would have led to the bubble bursting at some point, and that could have produced a more drastic impact on the state of play in the Middle East.

Supporters

With the gust of the second wave already hitting Europe, leagues and clubs in the Middle East are steadily implementing procedures to combat the effects. With most leagues already playing behind closed doors and many borders remain closed, many clubs and leagues have been forced to adopt more creative approaches for fan engagement. Many leagues have begun to stream matches through apps and interactive systems.

For example in Saudi Arabia, the Saudi Professional League has signed an agreement to play live games at cinemas to allow fans to watch them there. In Egypt, matches are being streamed via apps that have already been partnered through local broadcasters. However, there is no doubt that fans attending matches in stadiums remains essential for the game. While Egypt has been accustomed to playing matches without spectators, other countries are slowly getting to grips with matches being played behind closed doors.

Broadcasting and Sponsors

The suspension of global international competitions in mid-March changed the club football landscape and broadcasting in the Middle East suffered as a result. However, interestingly, it has not been as severe as in the rest of the world. This could be because larger leagues command larger slices of broadcasting revenue. According to representatives from the Saudi Professional League, the government's Sports Ministry controlled the broadcasting rights for all matches, therefore the government covered all broadcasting revenue. In terms of sponsorship, all contracts with leagues and sponsors were reduced by 20%.

Governing Bodies

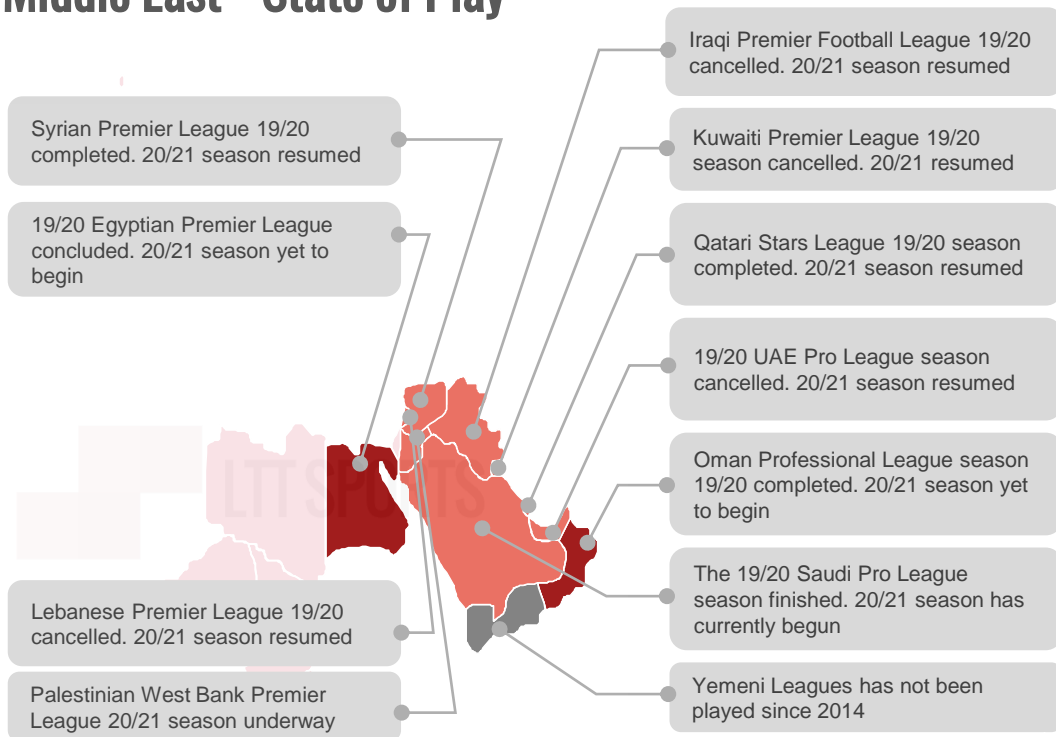
What has been evident when analysing football in the Middle East is that governments were quick to assist clubs and leagues in mitigating the financial impact of the pandemic. The Ministries of Sport in both Saudi Arabia and Egypt helped leagues and clubs with financial bailouts, as well as medical assistance with rigorous testing put in place to ensure a safe return to play. For instance in Egypt, the government covered the cost of testing and protocols that allowed for a relatively smooth transition.

In order to use the time of the lockdown to further develop, the Saudi Arabian Football Federation organised online sessions inviting instructors from various academies and clubs to share footballing philosophies and training methodologies. The federation also designed various online courses such as sport psychology, sports nutrition and exercise physiology. Similarly, in Qatar, the AFC 'A' diploma course, which was suspended due to the outbreak of the virus, was able to continue online.

Meanwhile, the UAE Pro League used social media to start a ten-day football skill challenge. For every football skill video that was uploaded to Instagram, the league pledged a donation to the Fund of The United Arab Emirates – Homeland of Humanity. The United Arab Emirates Football Association also launched an initiative for the country's residents to emphasise the need to adhere to safety measures put in place by the government.

In Egypt, the pandemic has allowed the League and clubs to reflect and analyse on the optimal way forward. Before the pandemic, there was a vigorous debate on whether to have a separate professional committee to manage the competition independently from the Association. Clubs have realised that the best way forward for the League's overall health and future is to form an independent committee to run the League. With clubs still run by a series of Boards of Directors, to professionalise and legitimise the game, an independent committee was chosen to lead the League for the future.

Middle East - State of Play



2. CAF (Africa)

“Many countries, and as many ways to tackle a problem”

Regional Covid-19 Impact Overview

At the time of writing this chapter in early November, Africa had reported 1'674'592 cumulative cases of Covid-19 with 1'380'488 recoveries and 40'493 deaths, and has probably been the least affected region in the world. The worst-hit areas of the continent are found in Southern and Northern Africa, with South Africa recording about 50% of the cumulative cases and fatalities. Other countries that have been heavily impacted by the pandemic are Morocco, Egypt, Ethiopia, Nigeria, Algeria, Ghana, Tunisia, Kenya and Cameroon.

While Covid-19 has severely impacted the football industry globally, the pandemic certainly did not spare Africa. Most African football competitions were suspended in March and April, significantly impacting an already fragile, underdeveloped and highly fragmented sector. As a former CAF Secretary-General put it, Covid-19 has served as an amplifier of existing weaknesses within the African football ecosystem characterised by poor governance, low or unpredictable revenue, lack of data and poor scheduling.

2.1 Eastern Africa

Across East Africa, there was a pattern of disparity in the implementation of Covid-19 control measures. While there is no single template for the application of the respective containment measures, Uganda and Rwanda took proactive actions ranging from lockdown to swift public health measures that helped contain the pandemic. Kenya registered mixed outcomes despite having employed partial and targeted efforts, such as speedy contact tracing exercises and cessation of movement. Tanzania and Burundi opted for an open Covid-19 control strategy alongside questioning or downplaying the WHO's Covid-19 guidelines.

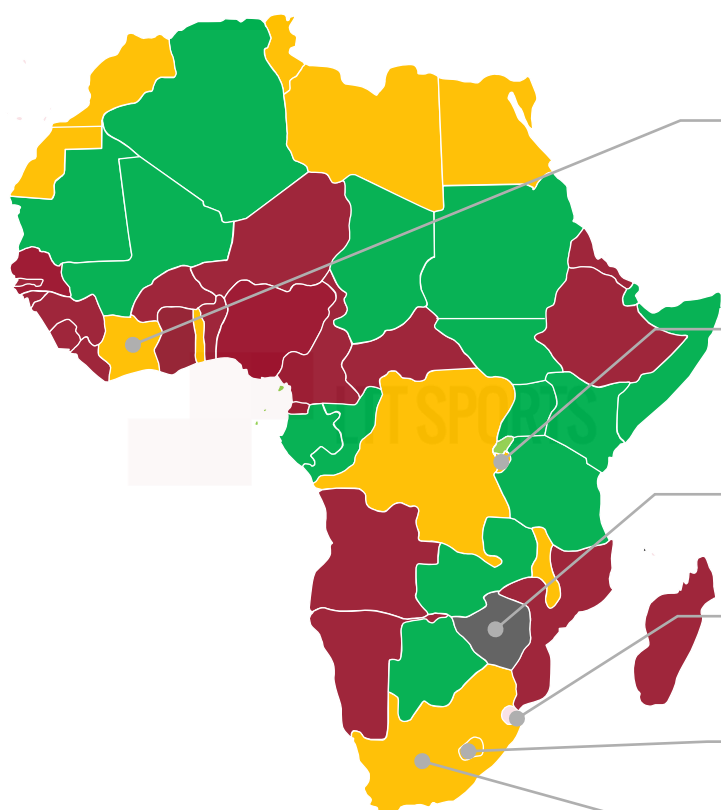
Football's reaction in the abovementioned five countries reflected the national response, with Uganda and Rwanda being the first to suspend their leagues following government directives while Burundi did not suspend its sporting activities at all. Both first and second division leagues were allowed to continue despite issued warnings regarding contact sports and crowding. Though the Ministry claimed to have put measures in place to ensure Covid-19 protocols were observed, the emerging photos and videos gave evidence of a different scenario. On 21 May 2020, a crowd of about 10'000 spectators were present to enjoy a thrilling match between Musongati and Athletico Academy at the Stade Ingoma. Each person's temperature was measured and sanitisers were sprayed on their hands, but the fans did not observe social distancing as recommended. The neighbouring countries questioned this approach taken by Burundi and Tanzania. Interestingly, in recent FIFA international friendlies played across the world in October, the two teams conveniently played each other.



Hicham El Amrani, Former CAF General Secretary and General and Managing Director HEA Sports

“More than ever, governments are looking at football with an additional angle at the confluence of politics, economics and society, and many States provided support in the past to football without proper accountability. In Africa, we have the necessary conditions, people and energy to overturn the effects of the pandemic, and we are working hard to use this as an opportunity for a new start, making sure we put the human capital and good governance at the centre of our actions”

Africa



The 2019–20 season of Ivory Coast's Ligue 1 was interrupted after 20 match days (out of 26) and the league standing of that day was retained to determine the final league table and the winner of the league season

The Burundi league did not stop during the "first wave" and was only suspended as from 5 April. The league was finalised between 30 May until 24 June

The Zimbabwe Premier Soccer League did not start in 2020

The Premier League of Eswatini suspended with Bantu FC declared champion

Lesotho Premier League suspended with Young Buffaloes FC proclaimed champions

South African League suspended

Voided Leagues

Angola
Benin
Burkina Faso
Cameroon
Cape Verde
Central African Republic
Comoros
Equatorial Guinea
Eritrea
Ethiopia
Gambia
Ghana
Guinea - Bissau
Guinea
Liberia
Madagascar
Mozambique
Namibia
Nigeria
Niger
Senegal
Sierra Leone

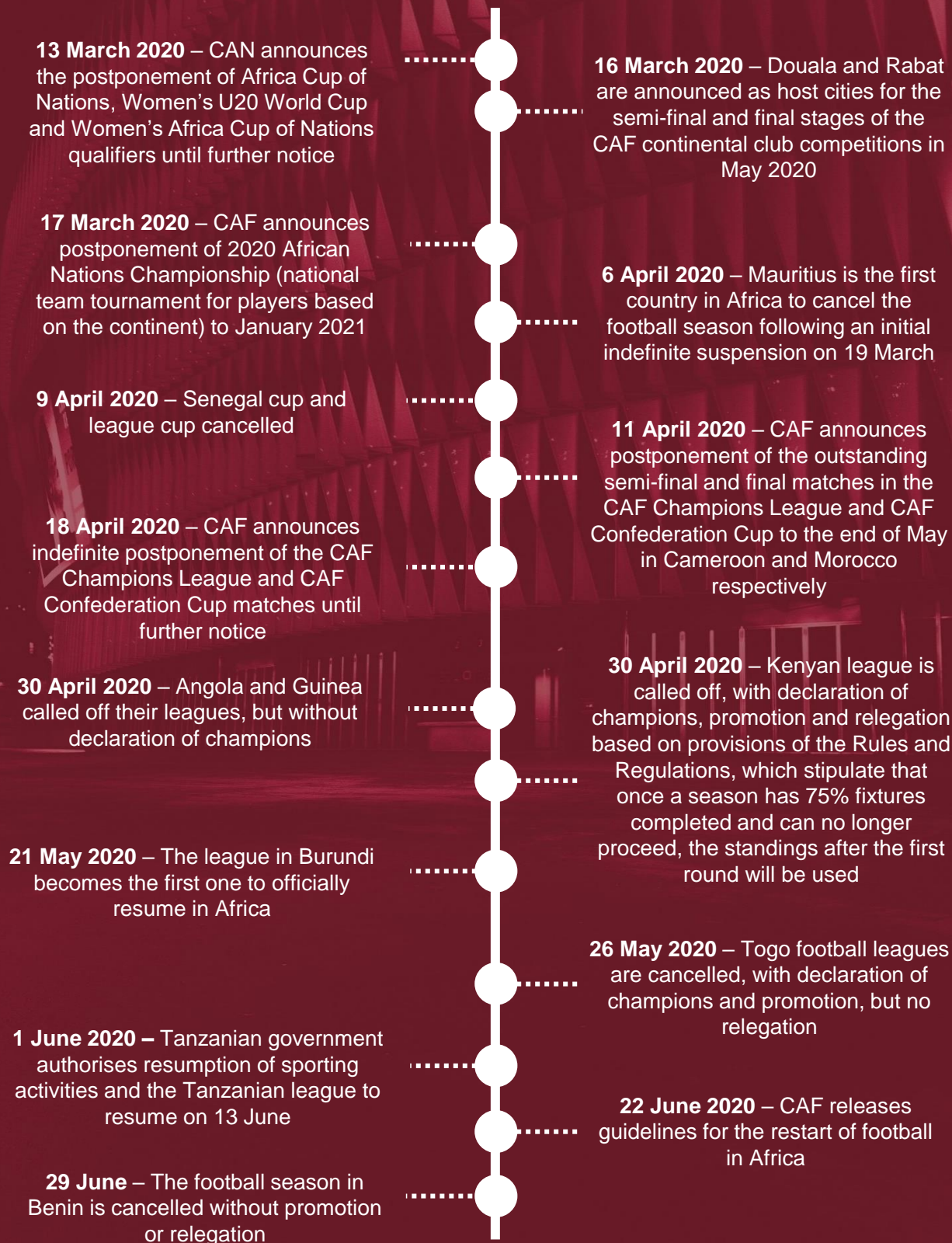
Completed Leagues

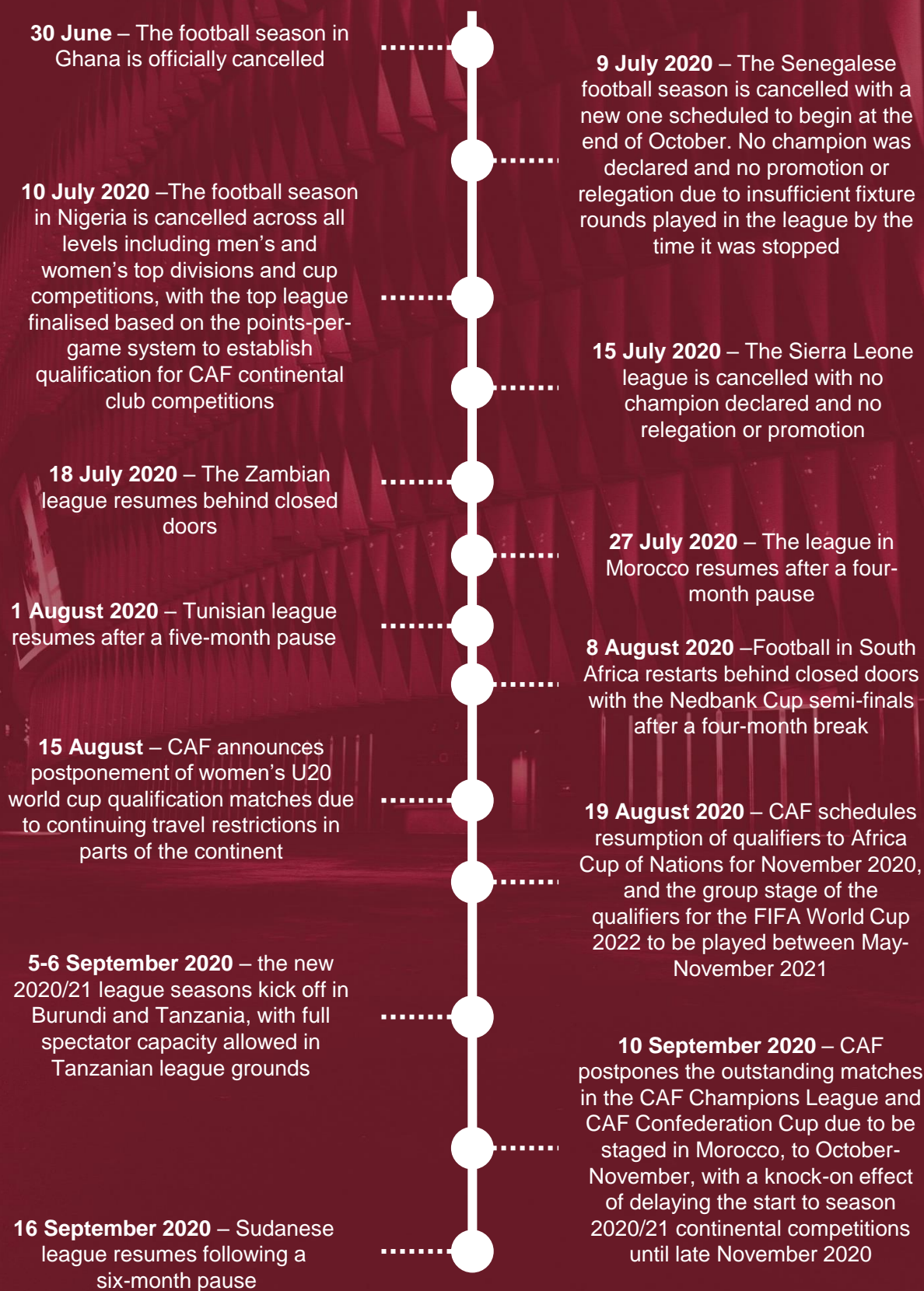
Algeria
Botswana
Chad
Congo, Dem. Rep.
Congo, Rep. of the
Djibouti
Gabon
Kenya
Mali
Mauritania
Mauritius
Rwanda
Seychelles
Somalia
Togo
Sudan
South
Uganda
Zambia

Leagues ended

Burundi
Côte d'Ivoire
Dem. Rep. Congo
Egypt
Lesotho
Libya
Malawi
Morocco
South Africa
Tanzania
Togo
Tunisia

CAF Timeline





Tanzania, on the other hand, suspended their football leagues for three months and resumed on 13 June after the country's president cleared all sports to resume from 1 June. The matches were slow, Covid-19 measures were observed (for instance social distancing, wearing of masks, and fumigation of the field before and after the game), and children and the elderly were prohibited from attending.

The Tanzanian league is among the most competitive and has one of the highest viewership in Africa. During the lockdown, the Tanzanian league could provide an alternative for football fans in the continent, before European competitions resumed. Their social media presence increased and the two major fan engagement events amplified this, with Simba S.C. and Yanga, the two biggest clubs in the country, staging fan days that had filled the stadium.

Case Study: Kenya



“An enforced pause can also be used for positive ends”

The chain of events in Kenya takes a rather different turn. The Football Kenya Federation suspended all football activities in the country again following government directives. Sports venues were being shut down, as most are run by the government, and various government agencies were also closed. Subsequently, football clubs suspended their training as well, following a government directive. Many football players were unfortunately limited to individual training, which is rather an ineffective style of practice of team sport.

The football calendar in Kenya also received a huge blow since Kenya recently adopted the FIFA August-May format which had clubs, players, and the federation all making sacrifices to make it a reality. There was no mid-season break in the 2017-2018 season, and the off-season break was also removed to allow immediate commencement of the 2018-2019 season to catch-up with the newly installed calendar. As things stand now, and with no concrete communication on when the top Kenyan league will resume again, the same catch-up could be forced to happen again. It was stressful for the players who had to endure playing games without proper rest periods, clubs had to adjust and manage playing games consecutively, but also for the sponsors who consequently had to spend more.

Among the highlights of the year was the federation elections in Kenya. The pandemic disrupted this process, and even after it was conducted in mid-October, many say it was not an ideal process. Dates were shifted continuously, and it was hard to run the event since no football activities, including registration of clubs, were ongoing. It is therefore fair to say that Covid-19 had an effect on the elections and the results.

With no football matches being played in Kenya, the focus shifted to governance and organisational structures, from sponsorship negotiations to control politics to boardroom wrangles. The Kenyan Federation took over the running of the top league from the Kenya Premier League Ltd, which was a move that resulted in numerous court battles. However, with fewer activities on the field, the federation had ample time to search, negotiate, and secure two big deals from Nigerian betting firm BetKing, becoming official sponsor, and Startimes, becoming official Broadcaster. Several clubs also managed to use the time during lockdown to look for new sponsorship deals. Kenyan champions Gor Mahia and their arch-rivals AFC Leopards both managed to get better sponsorship deals from betting firm Betsafe.

The Kenyan Government through the Ministry of Sports and the Federation are in talks about the return to play formula. The most recent indication of progress was when the Federation released the 2020-2021 fixture list with dates of resumption. The Ministry is supportive and considering how many players that are financially dependent on football, funds were made available to help players from the community playing in less prominent clubs. A monthly stipend was also released to various clubs to help players who would not have otherwise received their monthly wages.



Eric Abidal, 67 caps for France National Team and former FC Barcelona Technical Director

“Over and above the economic loss of not having football supporters in stadiums, it is the whole live match experience that we are terribly missing with an empty venue. The fundamental quality of games seems to diminish, and undeniably fans and supporters are the greatest factor allowing players to surpass themselves and offer top quality performance on the pitch. I do hope that fans' voices will soon resound again in the grounds, and clubs can hear them again, too.”

Player Welfare

In Kenya, players have been the most affected of all stakeholders. As the leagues are not entirely professional, most footballers depend on match and training allowances. The Covid-19 crisis has exposed the unsustainability of footballers' careers, leaving clubs looking to the government, FIFA and other well-wishers to survive during this period.

The Football Foundation for Africa initiated a survey that was carried out by the Kenya Footballers' Welfare Association to assess the impact of Covid-19 on players' livelihoods. The results indicate the precarious nature of the football industry in Kenya. Over 60% of the players surveyed are on short-term contracts of between three to twelve months. Around 70% of clubs in the survey had immediately ceased to pay salaries and allowances, indicating that they are not really operating as going concerns.

The pandemic crisis has resulted in the closure of sporting facilities including gyms and stadiums. Many players are, therefore, not able continue their regular football practices. In the case of Burundi and Tanzania, the players will retain their physical fitness and competitive edge compared to the players in lockdown, like in Kenya, who will take longer to regain fitness even after the resumption. Lack of physical football activities may also cause mental health impacts, with players running the risk to fall into depression. In Kenya for example, some players have opted to move to other jobs that will guarantee them earnings before football resumes and some may not return to football. Other good players are moving to Tanzania, where they hope their footballing careers can continue.

Governance

Not surprisingly, there was little, or no communication from any clubs and the Kenya Premier League (KPL) also displayed a lack of professionalism when the crisis hit. There were also conflicting directives regarding the status of the top league with the Federation declaring its termination and communicating the same to CAF. The KPL, the body mandated to run the league, objected to the halt, choosing to wait for the Government to give further directions. In the end, the decision of the Federation prevailed as KPL's five-year mandate to run the top tier also expired in September.

In August, the Government in Kenya unveiled *Guidelines for the Resumption of Sporting Activities during Covid-19* with football categorised as a low-risk contact sport. However, there has been no clear communication on the implementation, leaving stakeholders to make tentative arrangements on the resumption of the league. The Federation has announced a “possible” return in mid-November awaiting further guidance from the Government. The lack of finance and personnel resources is evident. In a recent interview, the CEO of newly promoted Nairobi City Stars said clubs could not afford testing, a mandatory requirement of the protocols issued by the Ministry.

The Economic Impact of Covid-19 on Football in East Africa

In the simplest terms, there are three main income streams for football leagues: broadcasting which is not fully utilised in Africa, commercial revenue including sponsorship and advertising partnerships, and matchday revenue. Clubs across the region were already financially weak as these revenue streams are not adequately developed, save for a few top clubs such as Tanzania's largest clubs Simba S.C. and Yanga.

In Rwanda, eleven top league clubs immediately suspended player contracts and did not pay players from April. They cited communication from sponsors, who put deals on hold following the crisis and the resulting uncertainty, as the reason for the move.

Burundi has recently started strict screening and observation of Covid-19 protocols. With this trend, their stadiums will have a limited number of people allowed in.

In Kenya, grassroots football was allowed to continue with friendly matches and tournaments where facilities were available. Although risky, it should be of interest to football stakeholders to see how they can tap into the enthusiasm and ability of the grassroots to self-organise, and to drive further investment at that level.

Most East African clubs source their sponsorship from local companies. When there are no football matches being played, the sponsors are not putting in more money, which causes problems for the clubs since sponsorship makes up a significant proportion of their revenue. In the case of Kenya, most clubs are suffering because they have difficulties to find sponsors in this Covid-19 period.

Betting Companies

At the moment, the sector that seems to be the most interested in football is the betting industry. During the pandemic, Betsafe came in as shirt sponsors for two of Kenya's biggest clubs: AFC Leopards and Gor Mahia. At the same time, the Kenyan Football Federation announced BetKing as sponsors of the newly constituted FKF Premier League. Sportpesa continues to sponsor Tanzania's Simba and Yanga. Betika, another betting firm, was the only corporation providing a relief fund for players during the pandemic, paying Premier League, National Super League and Women's Premier League players KES 5'000 (appr. \$50) in what some may consider a move bordering on a conflict of interest.

The Social Impact of Covid-19 on Football East Africa

Football is a social event that brings people together. For the majority of fans, football is now limited to the screen, so there is no more chanting, dancing or enjoying time with friends in the stands.

For Tanzania however, it could not get any better. It is more vibrant now, mainly because all eyes are on them and the community seems to be cohesive after the resumption. The social and emotional excitement of fans in Tanzania is running high.

Major sporting organisations have shown their solidarity with efforts to reduce the spread of the virus. For example, FIFA has teamed up with the WHO and launched a "Pass the message to kick out coronavirus" campaign led by well-known football players. Governments in the region have engaged a few local footballers for the same message at a local level, but, as noted earlier, in the East African region the impact and response to the pandemic varied, with the football authorities mostly dependent on government directives.



Pierre Issa, 55 caps for South Africa National Team, currently FIFA Intermediary

“The lack of live matches, the deception of not seeing the entire environment around a football game and talking to the presidents, the sports directors, players and fans: this is what I miss the most. As intermediaries, our work is always on the phone even though before buying or selling a property it is always better to see the house in person and not through a video conference. At first, players were very worried about getting infected, nowadays they are worried about getting injured. Just look around at how all the fixture lists are saturated!”

2.2 Southern Africa

Southern Africa is no exception to the general trend of a football landscape nearing the edge of chaos. But through experience and resilience, there is great possibility to adapt to the ever-changing circumstances and to prepare to cultivate alternative plans and business models.

Southern Africa has recorded the highest number of Covid-19 cases of the entire continent to date, with South Africa by far being the worst-hit country. South Africa also happens to have the most developed football ecosystem on the continent. However, the initial reaction to the outbreak of the pandemic can only be described as “naïve” since many thought it was going to pass quite quickly so club activities were at first allowed to continue as usual. However, the situation escalated rapidly resulting in a lot of uncertainty within the football circles.

The first victim of the pandemic was the World Football Summit in Africa, an event that was coming to the continent for the first time. It was supposed to take place on 17-18 March and the announcement of its postponement was made only the week before, on 12 March. With such short notice, it is evident that the impact must have been severe for both organisers and attendees. It is worth noting that the first cases of Covid-19 in South Africa were actually reported in Durban, the host city of the event.

The lack of communication between the league and individual clubs was seen as the root cause for uncertainty. Since part of the clubs’ budgets are supported by broadcast revenue and other sponsorships of the Premier Soccer League (PSL), it was unclear how things would proceed. At club level, a reorganisation was crucial with sponsors also having to adjust to the situation. For instance Cape Town City F.C. was able to negotiate pay cuts with both players and non-playing staff. Meanwhile, some other clubs were still able to fulfil their obligations.

However, the pandemic also brought the differences of the South Africa Football Association (SAFA) and PSLs to the forefront, with SAFA initially objecting to PSL’s return to play. SAFA claimed to be putting the players’ safety and welfare first by ensuring the PSL had complied with all Covid-19 safety requirements and at some point, SAFA’s health compliance officer even received death threats.

In the end, they were able to resume the league in South Africa as well as the cup competition called Nedbank Cup in a controlled environment that resembled a mini World Cup in the city of Johannesburg. For six weeks, they played the semi-finals of the cup competition, followed by PSL’s remaining matches and the finals of the Nedbank Cup at the end. The conclusion of the football competitions was well executed and involved several stakeholders, including local government authorities, the hospitality industry, the health services and the football stakeholders.

Case Study: Mauritius



“Choosing safety over football”

Mauritius, the island nation in the Indian Ocean about 2'000 kilometres (1'200 mi) off the south-east coast of the African continent, illustrates well how governments' strong stances on Covid-19 can have adverse consequences on the beautiful game's smooth running and completion in 2020.

On 18 March 2020, the first three cases of Covid-19 were registered in Mauritius. Consequently, on 19 March, the borders were closed. With the escalation of cases, a curfew was imposed on 20 March, and eventually, a complete lockdown was implemented on 24 March.

Mauritius and its sporting bodies also stood firm against the pandemic. On 6 April 2020, Mauritius became the first country in the world to cancel their football season with immediate effect due to the coronavirus outbreak. In a move that set a global precedent, the Mauritius Football Association ordered the complete termination of all football leagues in the country for the 2020 season.

Whilst Mauritius has become an emblematic African champion of proper prevention and response to the coronavirus (only 441 reported cases on the island so far), the country has made a clear-cut choice between football and safety by prioritising the latter. Mauritius' strict ban on sporting competitions caused not only harm to its footballing environment but also to the whole of the Southern African region, thus resulting in collateral damages.

As we speak, Mauritius imposed a 14-day quarantine to all passengers travelling to the island. As a result of those strict regulations, the Council of Southern Africa Football Associations (COSAFA) had to review their schedule and operational planning for the whole of the 2020 season. Three significant events were initially scheduled to take place in Mauritius this year, namely the COSAFA Senior Women Championship as well as the Men's U17 and Men's U20 Championships, which will all now be played behind closed doors at Nelson Mandela Bay Stadium in South Africa from 3 November to 13 December 2020.

From a pure financial perspective, relocating all three events to the same empty venue in South Africa will undoubtedly result in severe losses for COSAFA, also raising questions on how the three events will be able to secure sponsorship when most events are played within a short period of time at the same neutral venue. In addition, broadcasters will also need to readapt the planning to accommodate COSAFA's new schedule. Mauritius has already withdrawn their participation from the events, and quite possibly the Seychelles and others could be prone to follow. Indeed, some of the questions will probably be answered only when the tournaments kick off.

2.3 West Africa

Africa as a continent can be considered one of the least developed globally and is also counted amongst the most disadvantaged. In this section we look briefly at the effects of Covid-19 on the football scene in West Africa, as well as the mitigation steps taken towards recovery. Between March and April, most West African football associations were forced to suspend leagues indefinitely, following directives from their respective national governments. Two months down the line and most, if not all, had officially cancelled the ongoing season. This decision came along with several consequences, mostly economic on footballers and other stakeholders within the football industry, such as, for example, pay cuts and players going unpaid.

Most teams in the Nigerian Professional Football League were shielded from these drastic financial ramifications. This is because the majority of the teams are state-owned, and the laws of the land safeguard labour relations. However, privately-owned teams like the Yobe Desert Stars suffered a different fate where both players and the technical bench were forced to take a 75% pay cut. In neighbouring Ghana, players from Ashanti Gold were the first to voluntarily offer to take pay cuts, which were in the margin of 20 percent. Asante Kotoko, the best team in Ghana, was not left behind and players and staff volunteered to a 30% pay cut.

Football federations in most of the West African countries were against players taking pay cuts and tried to push for full salaries to help footballers. An example is a circular letter from the Burkina Faso football federation that declared players should be paid by their clubs according to their contracts. National governments also tried to lessen the burden by extending periods of filing tax returns by an additional two months, and waived penalties on tax debts outstanding until 30 June. This was for instance done by the Government of Ghana.

The cancellation of leagues had a ripple effect on other stakeholders of the football sector in these West African leagues as well. Listed below are some of the stakeholders affected directly:

- Food, snack and drink vendors who normally set base/shop both in and out of the stadia were rendered jobless;
- Transporters, both public transport vans and motorbikes since people were no longer ferried to and from the stadium;
- Sport betting companies because no games were played and therefore bets could not be placed;
- Companies that depended on the league for brand promotion lost visibility of the same;
- Leagues lost revenue from sponsors and advertising;
- Merchandising personnel were out of business;
- Ticket providers did not have the ability to trade.

With government-issued protocols demanding action, most leagues were cancelled and declared null and void. Preparations of regional and continental tournaments like the WAFU Nations Cup and CHAN respectively were also disrupted. The following countries cancelled their leagues with no winner and no team being promoted or relegated: Gambia, Liberia, Senegal, Benin, Sierra Leone, Burkina Faso, Nigeria, Ghana, Niger and Cape Verde.

The following leagues had declared winners along with promotions and relegation: Ivory Coast, Togo and Mauritania.

Even with the cancellation of leagues, nations were still required to produce representatives for the CAF continental championships. Most leagues declared the number one and two teams at the time of cancellation as their representatives in the 2020-2021 CAF Championship. Nigeria used the points per game system to decide the top two clubs. This method brought about suspicion and faced a lot of opposition and criticism but was eventually implemented.

Over and above the economic effects, players are also human and their mental and social welfare is also paramount. There was a lot of pressure on players to provide comfort for their families since they are the breadwinners. Some even had to go to the extent of dealing with the anxiety and mental health of their relatives.

As for that dormant period, players were required to follow WHO directives on the prevention of contracting the virus. Some were also given programmes to stay fit in readiness for the new season. However, most federations have yet to decide on a commencement of the new season, and others have been postponing the start in cases of having previously set dates since they still require the go-ahead from their respective governments.

It remains to be seen how the clubs will comply with resumption protocols once they are given the green light given that most countries are financially deprived. Will their governments and FIFA hand out stimulus packages and funds to sustain pre-competition tests and other requirements for every other match week? Or will the laissez-faire and reactive approach win the day?

2.4 Central Africa

CAF officially suspended football activities in March and left the decisions on domestic leagues entirely on the governing football bodies of each country in its jurisdiction. This was different from how the regional body handled the deadly Ebola outbreak where instead of cancellation of football, matches were relocated to safer locations to avoid the regional threat. With the statement, the football governing body gave leagues a deadline on 5 May to inform on how they would proceed.

In contrast to East Africa, the reaction from Central Africa concerning the Covid-19 pandemic was unanimous as the Central African countries moved swiftly to stop all sporting activities in various countries.

On 17 March, the Government of Cameroon took strict measures to limit the movement and gathering of people in response to the pandemic. Reacting to these measures, the Executive Committee of the Cameroonian Football Federation (Fecafoot) decided, as of 18 March, "the suspension until further notice of all competitions organised under its control: friendly matches, professional championship, amateur championships, women's championship, youth championship, Cameroon Cup, beach soccer and futsal". Fecafoot affirmed that the decision was in line with the ones already taken by FIFA and CAF for international competitions.

In the region, Cameroon has been the most heavily affected by the pandemic. The Central African nation was set to host the 2020 African Nations Championship for continent based players in April this year. No further clear communication or date as to when the tournament will be played has so far been made. Apart from the international tournament, the Cameroonian leagues have been affected tremendously by the pandemic. With all stakeholders ready to resume and return to play, there are no plans, measures, or negotiations announced for the resumption of the football as of yet.

The most affected in the industry here are once again the players, mostly through financial issues and in regards to their health, both mental and physical. Players in Cameroon, like in most parts of Africa, have to keep fit by training on their own and, as earlier mentioned, it is a difficult task as football is a team sport that requires opposition and team cohesion. Unlike Kenya, where clubs have smoothly returned to team training, there is not much information on how teams would train in Cameroon, as the silence is too loud as many would say.

The Cameroonian Government rolled out a Solidarity Fund to support all victims of the Covid-19 pandemic with approximately \$1.7m released for this cause. The fund was intended to assist industries that were affected by the pandemic. Through Fecafoot, professional football leagues received some of the money followed also by a tax relief. Apart from the government fund, Fecafoot, in collaboration with other stakeholders, was able to release approximately \$75,000 relief money that was to be distributed to 1'000 players and coaches in the top leagues.

It is also worth mentioning here the efforts of former African star players who stepped in to help the football industry. Didier Drogba offered his health facility for Covid-19 patients and activities while Cameroonian legend Samuel Eto'o donated food supplies to the Football Association to be shared among the players to help them cope during these hard times.

DR Congo (DRC) became the first country in Africa where football competitions were brought to a halt because of the pandemic. After confirming their first case of Covid-19 infection and fresh from battling the Ebola disease, the country's Football Federation (FECOFA) issued a statement suspending all football leagues in the country. The club TP Mazembe was declared as winner having topped the league for most of the season. On the contrary, the neighbour country Guinea stopped the league with no declared champion. There is currently negotiations on the return to play formula ongoing after the Federation formed a committee to discuss a safe resumption of sporting activities.

Players across the DRC have similar problems and challenges as those in their neighbouring Central African countries. DRC has been vocal in the suspension of football and was the first to suggest the cancellation of the CHAN 2020 tournament in Cameroon. Some of their players, including Cedric Bakambu who now runs a Foundation in Congo to help communities and footballers cope with Covid-19, have come out strongly to suggest that the 2021 AFCON should also be postponed to allow proper preparations.

Wealthy business people own most of the Central African clubs, which leads to questions on who has the ultimate say in the decision-making since clubs depend on funds from these individuals. With the current pandemic, many of the owners have backed off and withdrawn funds to support their clubs. With no funds from sponsorships and broadcasting, nor from the owners, the operations of clubs have been left hanging including the payment of wages for players and coaches. It is hard to think of an immediate resumption considering football operations in the top league require money to function. It is predicted to be a very slow resumption because many clubs will struggle to get back to their usual way of operations.

One of the things exposed by this pandemic is the issue of contracts signed by players. Many players are not receiving their salary and cannot contest through legal means. The issue of player wages has been handled differently by the various Central African countries. Firstly, we have clubs that, despite the pandemic, pay their players the salaries they are due. Secondly, there are some clubs, which when drawing up contracts, had foreseen situations of force majeure. Therefore, these clubs apply the clauses in the contracts and pay only part of the salaries they had initially fixed.

Finally, we have clubs that do not pay their players at all and cite Covid-19 as a reason for the default payment of salaries. Contracts are also linked to the football season, and some clubs stopped paying players because the season was cancelled. Unfortunately, this latter category is where most of the African players and clubs fall into.

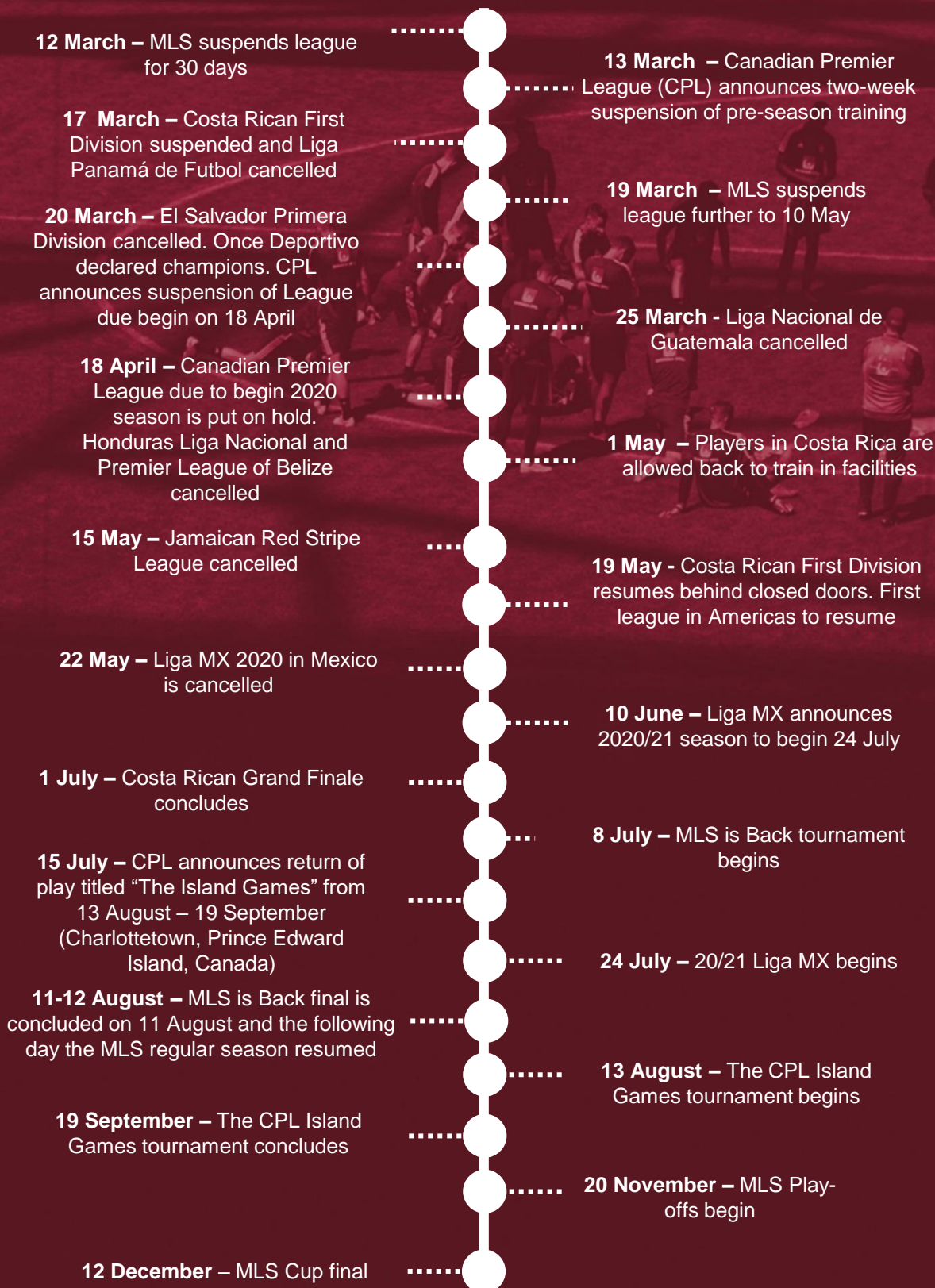
Relief funds released by either governments or federations are used to cushion the top leagues and the top players only. This leaves the other smaller leagues that also use football as a means of income with no viable recourse.



Viktor Kassai, Hungarian former FIFA International Referee

"Refereeing is a rather conservative function, but operating in the new era of Covid-19, we had to adjust quickly as this time required special adaptation. So while we would never have thought about implementing some ideas so quickly under normal circumstances, they became obvious necessities within a short space of time and we have realised now that these new solutions can actually work. Having said that, refereeing matches without spectators also produces less adrenaline, specially for referees who are working in top leagues usually with big crowds could be strange to officiate in empty stadiums. Maybe in the end it leads to lower levels of concentration, which, in non-professional refereeing structures dominated by part-time referees mainly paid per game, could lead to additional stress."

CONCACAF Timeline



3. CONCACAF (North & Central America)

“An opportunity to do things that you think you could not do before”

Regional Covid-19 Impact Overview

Similar to how the world's rotation makes the day-break first in far East Asia, slowly making its way across the various time zones across the globe, the Covid-19 impact wave was reaching the shores of America last wreaking havoc across many industries, and American sports. CONCACAF is the confederation of North and Central America as well as the Caribbean with 41 National Associations, from Canada in the north to Guyana, Suriname and French Guiana in the south.

This makes the Confederation a congregation of national associations with quite diverse structures and sizes, in various stages of development. Staging international competitions within the region is therefore challenging in the best of times and now with different requirements from each country made even more complicated. The different conditions and environments have all lead to varying experiences and responses to the crisis. For instance, in Nicaragua, the government downplayed the effects of Covid-19 and long tried to deny the grave pandemic situation.

But just like President Obama's chief of staff Rahm Emanuel famously stated in 2008: “*You never want a serious crisis to go to waste*”, the pandemic has also been used as an accelerator for progress since many key players looked at it as a time for great innovations and new creative solutions. Association football, or “soccer” as it is commonly referred to in America, is still being seen as a new emerging sport with plenty of investment opportunities. This in stark contrast to the somewhat conservative approach of preserve and protect that is more common in the so called Old Continent.

Therefore, the pandemic crisis has been used as a leverage for faster implementation of for instance new digital solutions and innovative format changes. With FIFA awarding its most prestigious tournament, the FIFA World Cup in 2026, to the joint bid of the US, Mexico and Canada, this comes with great expectations of not only helping the beautiful game grow in popularity in North America, but also making the quality of the sport better. With six years to go, the excitement is already being built up and will unite and encourage collaboration between the confederation and the host nations of football's main tournament. There is an overall optimism and anticipation going forward, that hopefully will trickle down and help elevate and develop the smaller countries of the associations.

Clubs

Despite this positive outlook and steady growth in recent years, clubs in North and Central America suffered greatly and was heavily impacted economically and sportingly by the measures put in place to combat the pandemic. Domestic leagues were put on pause and football in Latin America was pinpointed by FIFA as being particularly affected by losses incurred, mainly as a result of revenue mix and season timing. The losses incurred in matchday income, sponsorship and broadcasting needed to be covered by innovative solutions, massive expenditure cuts or by relying on wealthy private owners for bailouts.

Important to keep in mind is also that in several of the Central American countries, the national team is much more important to local fans than the clubs, due to historic rivalry and national pride.

Ligue Haïtienne



“When inaction leads to fragility”

Haiti is a case worth highlighting mainly because of two reasons: it was one of the countries with a low number of Covid-19 positive cases reported, and football in this Caribbean island nation is a social and community sport rather than a business.

As the pandemic spread all over the continent, Haiti stopped its football activities mid-March for precaution, and returned to play on the first weekend of September. The clubs were not able to pay the players and staff for four months, and there was no support from the Football Federation, even regarding health measures. Don Bosco FC was the only club testing its players before the return to play. The Federation's light-touch approach mirrored the Government, as the first health measures were implemented in the country only at the end of October.

Nothing really changed after the restart regarding how football was operating. The football environment was the same, spectators were allowed in stadiums without any specific rules and fans behaved as if nothing was happening.

Football in Haiti is a social and community sport, therefore, there are no external sources of income besides matchday revenue. Without health measures being implemented during the pause of the football league, and now with the number of Covid-19 cases increasing, football will have to close its doors if the situation gets worse. Should that happen, in a country living on the poverty line, some clubs may not be able to operate fully again.

Competitions

One of the great opportunities and solutions to mitigate the effects of the pandemic crisis, has been the innovative adaptations and modifications of competition formats. In what has previously been seen as something set in stone, conditioned by a tight and congested international calendar, has now been the key to successfully adapt and leverage football in many countries.

The MLS and NWSL were the first two contact sport leagues to return to action in the US after the pause of professional sport due to the pandemic with innovative “bubble” solutions, staging games inside a tightly controlled environment. This concept proved an immediate success and was copied to other professional sports in America. However, some teams were sent home after having positive cases in their squads and the second league USL was cancelled its Champions Final 2020.

Another big change announced in the midst of the crisis was the Mexican league, Liga MX, declaring their intention to close the league and enter into a franchise model similar to that of MLS. Liga MX and the MLS are already in close collaboration both with a strategy to not overlap league matches and with two bi-national competitions. With the planning ahead of the FIFA World Cup the two leagues are on a path to a potential merger which could bring additional business opportunities. The current season of Liga MX was also shortened with a few games less and instead introducing a play-off with the top clubs to end the season but has been disrupted due to Covid-19 cases in the squads of participating clubs.

The pandemic has also made international club competitions in the region difficult, forcing a delay to the start of the CONCACAF League due to positive tests in the squad of a participating club from Belize. The CONCACAF Champions League (SCCL) has also been pushed forward but with the aim that the tournament will conclude by the end of the year, with a centralised version among the possibilities, in order to send a participant to the FIFA Club World Cup in Qatar in February 2021. At a confederation level, the format of the FIFA World Cup qualifying hexagonal was forced to change by CONCACAF to an octagonal in response to the coronavirus pandemic in order to determine the World Cup qualifiers by the originally planned date.

Players

The global health crisis has put a particular spotlight on player health, both in regard to health and safety measures to avoid placing players in situations where they could be infected or spread the virus within squads, but also in the discussions around format and calendar due to the congested match schedules while playing for both club and country. In the poorer parts of the region, the players that are able to play professionally are often not only sustaining themselves, but also many family members and relatives which often count up to 50-70 people per player. Therefore, by cutting the salaries of players will not only affect the player and the immediate family, but potentially the livelihood of several relatives as well.

In recent years, player development has improved, and scouting has increased widely from the region. Following the finals of the UEFA Champions League, the US men's national team proudly tweeted about having a record 10 American players in the group stage of the 2020-21 tournament. This development is mainly because of the growth of the MLS and Liga MX, but players from Central America are also moving south to the major clubs in South America. In the Caribbean, the tendency has been that players from former Dutch and French colonies use the pathway and the historic link to go straight to European clubs.



Marie-Elise Obas, Don Bosco FC Vice-president

“The competition stopped mid-March and we returned on the first weekend of September. Normally, we should have started training six weeks before the return of the competition, but we only had two weeks. We were trying to establish a communication with the Haiti Football Federation so that they would stipulate testing for everyone, but we did not succeed. We ended up being the only ones to test players before getting back on the field.”

Supporters

Like in so many other places around the world, the return of professional football after the lockdowns has been conditioned on strict protocols and the staging of games behind closed doors. The regulations have varied slightly due to regional policies, but across the various countries there has not been a possibility for more than 20-30% attendance at most. Since this hardly is self-sufficient in terms of achieving matchday costs to be breakeven, many clubs have simply decided to not allow spectators in their stadiums.

Broadcasters

While many professional sports leagues in America was struggling with viewership numbers once sports was allowed to return in action, the TV ratings for the NWSL went up an impressive 493% bump in viewership this summer after a change of main broadcaster in the US.

However, the harsh reality for most leagues across the region was difficult discussions with broadcasters on rebate deals due to changes in format with less games than initially planned. For instance in Mexico seven rounds of matches were lost due to the rescheduling of the Liga MX season and the refund discussions were taken care of by the clubs since the clubs negotiate their TV-rights individually. Though, the league supported its clubs with further investments in technology and a joint project with EA Sports to have the players competing in a live broadcasted FIFA tournament during lockdown.

Sponsors

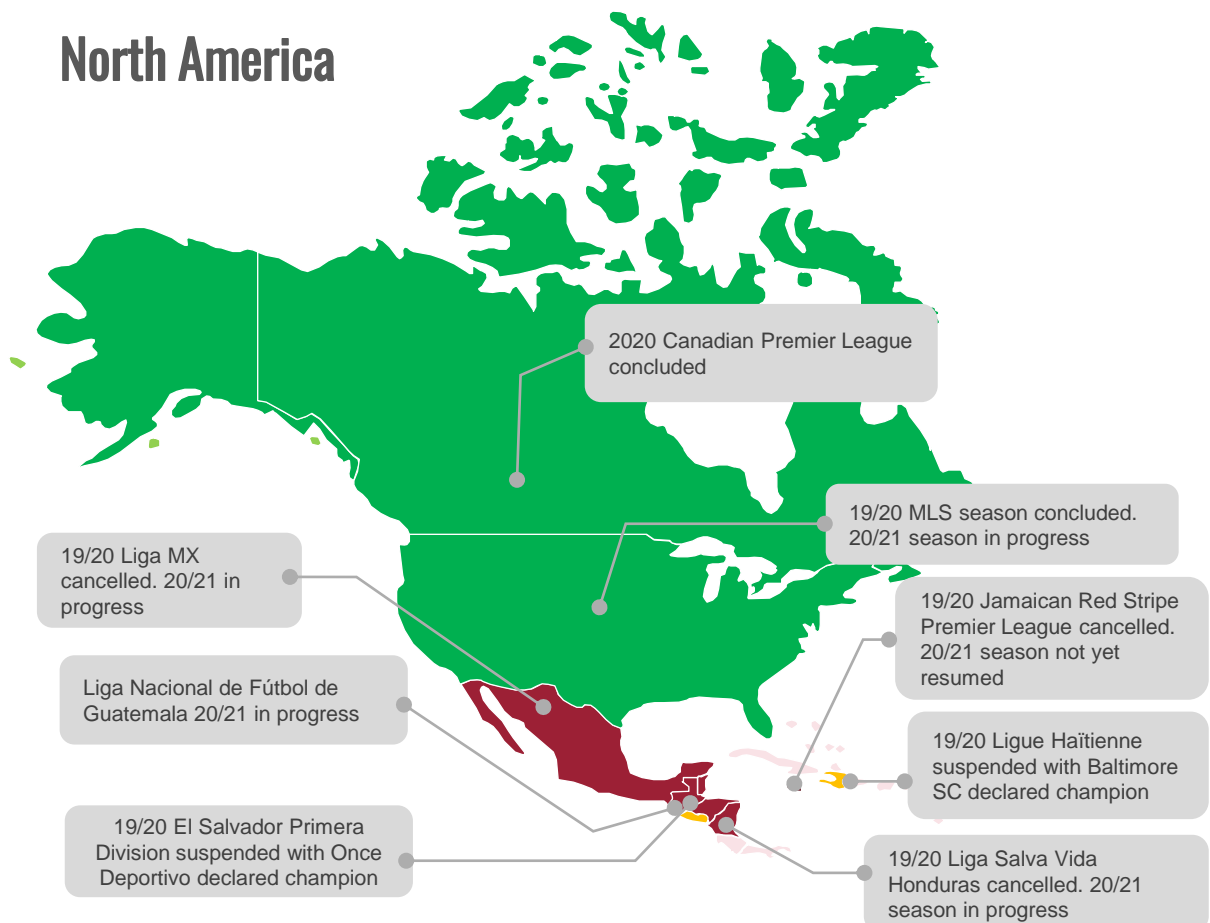
Similar to the refund discussions on TV-rights, less games being played also affected the sponsorship deals signed by clubs. With the loss of match day income due to no fans at the stadium, club shirt sales have gone down to around 30-40% of what it used to be. Sponsors have been working with the clubs to find other innovative ways to find value and compensate for lost property, for instance through virtual solutions and adapting their advertising to suit broadcasting to a greater extent.

Governing Bodies

As a response to the pandemic shock, CONCACAF among the other confederations at the FIFA level drew up a Covid-19 relief plan, which was not just relief from a monetary standpoint, but also a statutory one in terms of helping out with contracts and other urgent matters. They also assisted their member associations to put in place protocols and helped fund the testing of players and staff according to its extensive protocol to be able to resume competitions.

Other interesting developments overcoming the traditional limitations of football geography was the invitation of the Asian Cup champion to participate in the 2021 and 2023 CONCACAF Gold Cup tournaments as a guest under a memorandum of understanding between the two football governing bodies. Qatar is therefore set to make its debut appearance in the competition that was postponed to July 2021. However, the confederation competition will likely miss many top players, due to the constant negotiating between the two souls of the sport; the club game and the international game since the players will probably be taking time off ahead of the 2021-22 European club seasons.

North America



Case Study: Major League Soccer (MLS)



“Setting the tone in US sport restart”

As a closed league, without promotion or relegation, the MLS faced a different set of challenges compared to other football leagues across the world. Having adopted a similar model to the one famously adopted by the NBA, the creation of the tournament called “MLS is Back”, made it possible to close out the season in a timely and effective manner. The tournament was organised in Florida in an enclosed and controlled environment with a strict protocol of testing and limiting movement. This enabled the league to meet their broadcasting and sponsorship minimums and helped to minimise the economic knock-on effects of the pandemic crisis. However, contracts over sponsorship were still needed to be negotiated, and the clubs and league still faced significant losses.

MLS is Back

The MLS is Back tournament was the first major league in North America to return to play and created the first bubble that we saw copied by various other leagues and sports. Only two teams were sent home due to positive cases, FC Dallas and Nashville SC. Soon after the conclusion of the tournament, the new season began. The league adopted a policy where clubs could allow spectators at matches only if permitted by the state it resided in. However, club employees have noted that fans are still wary to come back to the stadiums which lead to clubs that were allowed to have spectators in the stadium at an individual capacity rarely reached the maximum quota.

Black Lives Matter

With the pandemic and The Black Lives Matter (BLM) movement both unfolding in Summer 2020, the MLS faced a wide range of social and economic challenges. The BLM movement illustrated the social and racial divide in the US and teams returning to play were given a chance to express their support for BLM and voice their thoughts. However, in the first match back between FC Dallas and Nashville SC, as players gathered to take a knee during the anthem, fans began to boo and voice their displeasure. While the league and clubs have supported the BLM movement, the social disconnection still runs deep across the US.

Covid-19 mitigation and resilience approaches

Due to agreed partnership assets and the need to recoup lost revenue, the Covid-19 crisis forced teams to implement different strategies. One of these solutions adopted by most organisations was virtual advertising boards. Partners also became more reluctant to participate in traditional sponsorship models which lead clubs and the league to find new ways to become more broadcast-friendly in their partnership approach in the future. There will have to be some creativity in making up their assets.

With the rare exception of the National Women's Soccer League (NWSL), nationally the broadcast numbers went down for every sport league-wide, and the MLS was no different. One of the reasons for this could be broadcast congestion. The MLS traditionally plays their season at a separate time of the year than that of the NFL, NBA and NHL games so the competition for viewership at present is reaching peak levels.

The MLS model should be applauded for its efficiency and effectiveness. The league concluded its season in a timely manner and is currently in the middle of completing the current season. Faced with a unique blend of social and global issues, the MLS has come through in a dignified manner. A season that was once in turmoil seems to have turned out to be relatively healthy.

4. CONMEBOL (South America)

“Covid-19 challenging the football passion, who will win?”

Regional Covid-19 Impact Overview

Due to the Covid-19 pandemic crisis, the football business in CONMEBOL is facing its biggest challenge in modern time. Football competitions were stopped in March, creating a break and disruption for all areas of the industry. New unknown and unprecedented times began when South America, the passionate football continent, temporarily paused its beloved sport to try to mitigate the pandemic that hit the continent very strongly.

The beautiful game in South America faces a challenge that goes beyond the football business itself. At the peak of the pandemic on the continent, six countries were among the ten most affected countries in the world. Even so, football was still able to restart in the continent when the countries that were the least affected were the first ones that could return to play, as the football industry needed to get back to business quickly.

The number of Covid-19 cases remains high, and South America still has four countries with the most infections in the top ten on the worldwide ranking at the moment of writing, however the situation fluctuates significantly in various regions. An overall perspective shows a continent almost devastated economically and socially by the virus, but along the threat of a second wave the football competitions are currently allowed to continue, apart from the exceptional case of Bolivia that has not resumed yet.

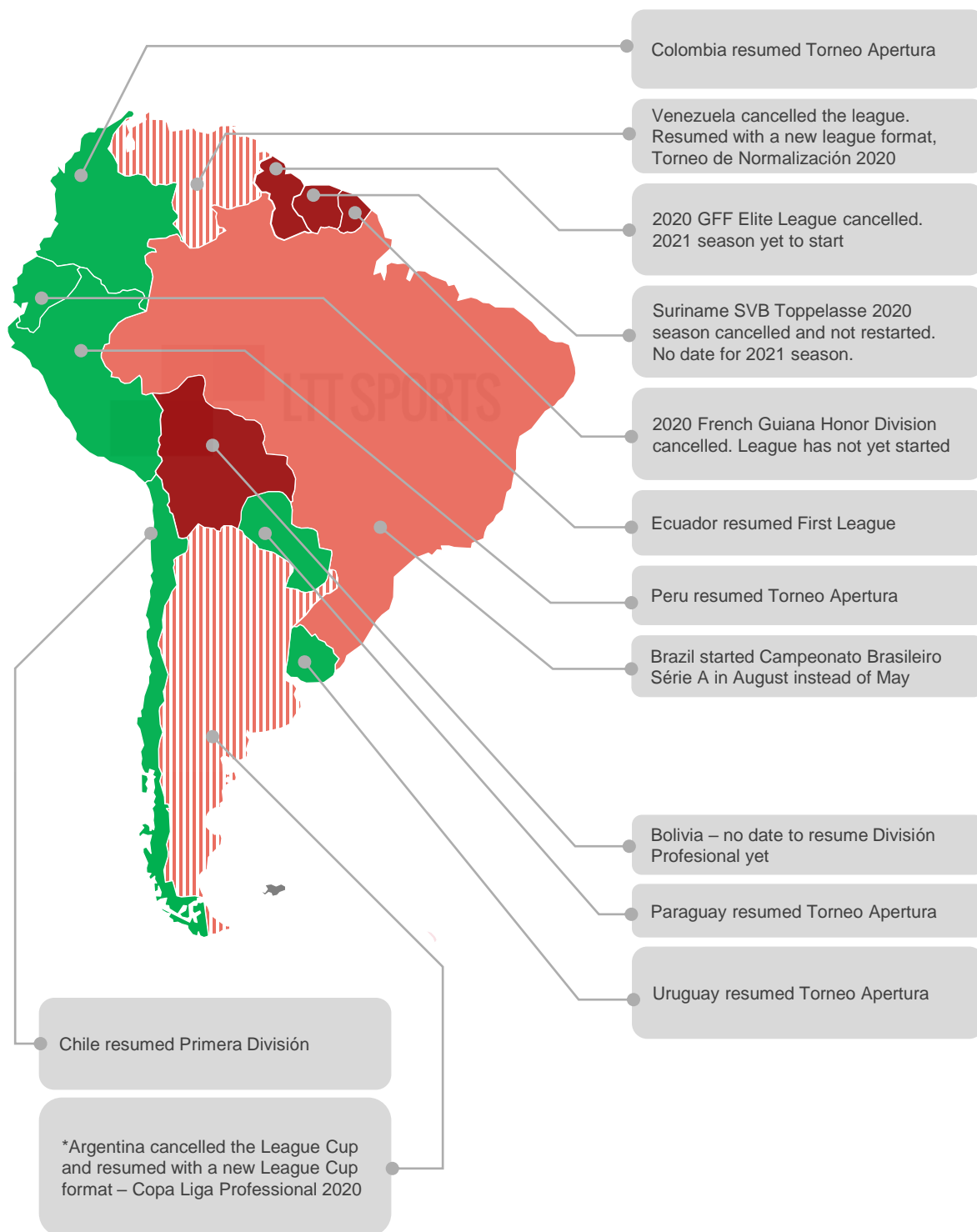
Clubs

The impacts of the pandemic crisis have been severe in all areas of the football industry, with particularly large repercussions at club level. The pause in all championships across South America was enforced in the continent that lives and breathes football and the passionate football fans were all finding themselves in lockdown without a single football match being played. This had consequences on the clubs' overall financial situation, and even though the impacts vary from country to country, it also depends on individual club business and ownership models. The majority of clubs in this confederation operate with a membership structure, the so called 'sócio' model.

In the case of Brazil, in the middle of the crisis and during the pause of football, the losses were estimated around 1.3 billion Reais as reported in a study published by EY. All clubs suffered a big financial impact and this, consequently, will potentially create a bigger gap between the big and small clubs. The big ones, such as Flamengo, Palmeiras and Grêmio, were better prepared to face the time of crisis because of how they are economically structured and managed. The smaller clubs will struggle with the upcoming challenges, especially since many of them already are burden with heavy debts. Clubs the likes of São Paulo FC and SC Corinthians can rely on their great supporter base of dedicated 'sócios', even though the clubs can still be quite vulnerable. Particular cases, such as the club EC Bahia with a smaller regional dimension, will be better prepared to face the adversities as it has been in a process of restructuring for a couple of years prior to the pandemic.

Without being able to rely on steady sources of revenue and while facing significant expenses due to operational costs and new rules related to health and safety, some clubs are already reconsidering their participation in tournaments. This was the case in Venezuela where two clubs, Zulia FC and LALA FC, chose to not participate in the new format of the competition since it would be too risky both health wise as well as financially. If some clubs are already taking such a decision, the future could turn out to be quite turbulent which would require planning and mitigation strategies, which seems to be hard for a continent badly affected by the pandemic.

South America



4. CONMEBOL (South America)

"Covid-19 challenging the football passion, who will win?"

Dates when the football competitions were forced to stop:

27 February Copa Sudamericana played (CONMEBOL competition)	7 - 8 March Ecuador, Paraguay; Argentina (League Cup), Peru, Uruguay	11 – 12 March Bolivia and Venezuela	12 March Copa Libertadores
14 March Brazil (State Championships)	17 March CONMEBOL Statement re postponement of Copa America		

Return to Play Dates:

21 July Paraguay (Torneo Apertura)	22 July Brazil (State Championships)	8 August Uruguay (Torneo Apertura)	14 August Ecuador
18 August Peru (Torneo Apertura)	29 August Chile	12 September Colombia (Torneo Apertura)	15 September Copa Libertadores
18 September Colombia (Torneo Apertura)	8 October South American Qatar 2022 Qualifiers	14 October Venezuela (Torneo de Normalización 2020)	27 October Copa Sudamericana
30 October Argentina (Copa Liga Profesional 2020)			

Women's football clubs were heavily affected as well, but it is necessary to look at them from another perspective. As the majority of women's clubs in South America are not professional, it is therefore expected that the investments have not been vastly reduced. Instead, the setbacks regarding the investment in development deserves to be noticed, especially if taking into consideration the decision of CONMEBOL to temporarily suspend the rule obliging every team participating in an international club competition to have a women's football team and youth development system.

One of the major outcomes from this crisis is the collaboration of the clubs around the continent when sharing their experiences and knowledge on how to best face these problems and mitigate the consequences. The current situation might seem dark without reliable income, but hopefully this notion of unity can lead to a better football environment in the future.

Competitions

At the beginning of the pandemic all the competitions were forced to stop. The lockdown measures imposed made it impossible to continue to play at the peak of the pandemic. Facing the economic consequences of these drastic measures, the return to play was planned with great urgency. The decision to return can only be explained by the economic urgency to keep the business moving. Copa Libertadores is an interesting example as some clubs playing in it had not yet restarted their domestic competition, such as for instance Argentina and Bolivia.

At senior level, Bolivia is the only country where football has not officially returned on a domestic level, but youth competitions at all levels across the continent have been amongst the most affected, as the majority of competitions have not been able to resume. In particular, the younger age groups are not even allowed to train due to health and safety measures. This may prove to be a delayed threat for the economic model of a continent that excels in exporting its top footballing talent abroad.

Despite the return of almost all the competitions the future is still unknown. The continent is still on its first wave of the pandemic, and the cases may yet increase. The risk of postponements of matches are a high possibility at a national and international level with the Copa Libertadores and Copa Sudamericana being played across borders meaning that the players have to travel between countries with a high number of positive cases.

Regarding national team competitions, the FIFA World Cup qualifiers were postponed from March to October and the Copa America tournament was postponed to June 2021. The women's U-20 CONMEBOL competition was also postponed.

Players

With the interruption of the competitions, the players face a difficult situation. The sporting impact is keenly felt, with no competitions or collective training allowed, players face a struggle to maintain their fitness and mental focus while in lockdown. The effects of this situation will be seen on the field.

With the financial impact of the non-competition situation, many clubs tried to reduce player salaries, in some cases unilaterally. In some countries the players reached agreements for a salary reduction and a beneficial mutual agreement for both parties. In others, the situation was more complicated with examples of clubs that still have not paid its players for a long period of time.

On the women's side it is essential to point out that the majority of women's clubs in South America are not professional, therefore, there were not many changes brought by the pandemic. The players are usually connected and united to fight for better conditions as was the case in Colombia when the league restart was announced. The players who have been working for a position in the Colombian football stakeholder panorama gathered and wrote a joint letter to the league, acknowledging the delight of returning to play but stating that they will continue their work for better conditions and professionalisation.



Case Study: Club Bolivar, Liga de Fútbol Profesional Boliviano

“From uncertainty to global football?”

If there is one word to describe Bolivian football at the moment, it is uncertainty. Bolivia is the only National Association of CONMEBOL that have not restarted its domestic league yet, and there is so far no date envisaged for the return to play.

In this special case of Bolivia, Covid-19 is not the only reason why this is taking time, even though the virus also played a part as the storyline unfolded. In July, the President of the Bolivian Football Federation (FBF) passed away after contracting the coronavirus, which unleashed an internal power struggle between the two vice-presidents Fernando Costa and Marcos Rodríguez both trying to claim the position. The political tension has also been fuelled by the ongoing sales process of media rights. Last year, the Federation reclaimed control over the TV-rights of the top division from 2021 onwards, stripping the clubs of the possibility and the power to negotiate their own broadcast rights.

Costa proclaimed himself to take up the presidency according to the statutes, but Rodríguez was the president recognised by CONMEBOL. However, Rodríguez has been charged with allegations of corruption and while attending the World Cup qualifying game between Bolivia and Ecuador on 12 November, he was arrested by the police and taken into custody in the city of Santa Cruz. Two days later, on 14 November, Fernando Costa was elected as president by the FBF congress. The political turmoil in Bolivian football with the FBF going through such an economic and institutional crisis has affected the clubs participating in the national league as they have still to find an agreement for the league to restart. The clubs, along with other problems, are currently operating without any viable sources of revenue, and the situation will only get worse if the league does not return soon. As for the players, they are being affected both at performance and psychological levels. Performance-wise, players have not been able to prepare in a competitive match setting and the players playing internationally can already sense the difference in fitness and competitiveness within the continental competitions. It is also essential to analyse the players psychologically, as they are training without knowing when they can return to play at the domestic level. Therefore, this creates uncertainty both related to their income and future career.

Club Bolivar seems to be somewhat of an exception currently in Bolivia. The club has already returned to play at international level in Copa Libertadores and after finalising in third place in the group stage, Club Bolivar was qualified to Copa Sudamericana which will offer them the opportunity of two more games before the end of the year. But what makes Club Bolivar stand out in relation to other clubs in Bolivia is the long-term plan ahead.

In parallel, Club Bolivar has also been exploring the potential of global link-ups, which would elevate the club to a whole new level. To go along with a new alliance announcement, Club Bolivar is also working on their Centenario plan, a strategic roadmap leading up to 2025 when the club commemorates its 100th anniversary. The club has the vision to be the most dominant in Bolivia and a reference in South America on both a sportive and a managerial level. As part of the plan, Club Bolivar would like to update its infrastructure to bring about all the conditions and assets to be a continent leader. An alliance on an international level will allow the club to share knowledge, infrastructures and assets with leading clubs around the world to develop their business on and off the pitch.

Bolivian clubs may be living unprecedented and uncertain times, but for Club Bolivar a new global adventure will begin shortly.

As football business suffered setbacks and saw its assets depreciate in various areas, player transfers were not an exception, especially in South America. The continent is very well known for exporting its young talents, historically to Europe but more recently with a significant focus on Asia. This is a great source of revenue for clubs in South America, in a substantially being the main revenue stream of many clubs, and the cornerstone of their finances. If we consider the case of Brazil, a study from EY estimates a reduction from 25% to 40% of player transfers revenue. If this is how clubs are sustaining themselves in normal times, the future seems unstable in coming years.

As a result, the South American market will possibly look to their academies in order to take advantage of their talents. This could potentially lead to a reduced income from the player sales but can increase the quality of the national and international competitions within the continent. Nevertheless, the intercontinental transfer market will probably continue to produce a large amount of transfers, and only time will tell us how this is going to be.

Supporters

South American football is well known for the passionate and vociferous supporters around the continent. In a time when people are adapting to a new way of watching football that is played behind closed doors with artificial sounds, in South America it seems this process may take longer. With no spectators allowed in stadiums, there is still no date settled for the return of the fans to the stands.

Alongside this challenging situation, the financial crisis aggravates the panorama. Fans are also losing economic spending power, not to mention that some South American countries have a large population on or even below the poverty limit. This could lead to a lower investment and spending from the fans and one striking example comes from Brazil where a major club has already lost 40'000 of its sócios due to the crisis.

Therefore, clubs will probably have to adapt to the new economic situation of their fans in order to receive income from this revenue stream both in the short and long term. With less economic power and with no possibility to go to the stadium, the clubs' digital transformation is seen as a way to create a source of revenue and to keep the fans engaged.

Broadcasters

For many, the conclusion has been that a lockdown coupled with spectators not being allowed in to the stadiums would equal a greater TV audience. Consequently, an increase of revenue should therefore be expected to come from broadcasting. This might seem as a natural consequence, but there is also a negative side to it. With the financial crisis impacting football fans all over the world, it may lead to a drop in TV sports subscriptions. Taking into consideration the study by EY done in Brazil, the commercialisation of TV sports subscriptions pay-per-view is expected to drop between 30%-40% until the end of the year.

However, broadcasting was the only area that continued most of its payments to the clubs and leagues during the lockdown period without live matches. This was one of the main pillars to sustain clubs as the vast majority of them are dependent on these rights, since this is the biggest revenue stream for the clubs in South America.

But with reduced economic spending power on the TV consumers side, the broadcasting industry will also have to reinvent itself to face future adversities. At the same time, it is one of the few industries that has a clear potential to grow due to the traditionally high demand for football, especially while fans are not being allowed in the stadiums.

Broadcasting also promises to generate more revenue in the future as the young generations are more attached to the digital platforms, and the market acknowledges that. More than ever, there is an interest from other continents to broadcast South American football and vice-versa, especially through OTT platforms. The examples of DAZN, OneFootball and Facebook Watch broadcasting continental competitions and the fact that the South American market was the first one where UEFA Champions League TV-rights were sold to Facebook are seen as proof of the paradigm broadcast migration to the digital world.

This trend has also been beneficial to women's football, offering visibility and exposure. The newly signed agreements in Brazil with both the Facebook and Twitter platforms to broadcast league matches are promising to become a platform for the growth of the women's game.



Therese Sjögran, 214 caps for Sweden National Team and FC Rosengård Sporting Director

“Football is very much built up on a set of routines and with a fixed schedule, but this year we found ourselves thrown into something we never would have anticipated. For a long time we had to handle uncertainty since we didn't know when the season would be able to start. We learned the importance of flexibility and adaptability, for instance with the irregular and busy match schedule it was important to adapt trainings to ease the burden on the players.”

Sponsors

South American football is well known for its extensive sponsorship portfolio, and this is also a significant challenge for football in the aftermath of the Covid-19 crisis. Some sponsors cancelled their contracts and others, which were ready to invest in clubs before the pandemic, took a step back and did not go further with a possible deal which was seen as a clear consequence of the pandemic.

There were many examples of sponsors breaking contracts in this period. For instance in Brazil, specifically in Rio de Janeiro, a big olive oil brand broke its contract with the four major clubs in the city; Botafogo, Flamengo, Fluminense and Vasco da Gama. In Colombia, the club Envigado FC lost all its sponsors apart from one when the pandemic crisis hit.

On the women's football side, the impact has been positive in some cases as the brands are approaching players, clubs and competitions. In Colombia, a football country with turbulent past regarding women's football, the league started with a new sponsor. In Brazil, Puma sponsored all Palmeiras players, and Guaraná, which has been a long-standing sponsor of the Brazilian football association CBF, announced its support to women's football, especially through activation of their products. The soft drink brand promised to give a space on their cans to other brands who pledge to support women's football in the country. This action not only exposes the brand and grows the game, influencing other brands to join the movement, but also shows and reinforces its social responsibility, becoming a win-win sponsorship activation setting an example to other brands around the continent and beyond.

Digital transformation of the clubs, just like in the case of fan engagement, can be the solution to limit the loss of sponsors. It could also be an opportunity for smaller brands trying to enter in the football market if they can invest a lower amount of money and grow their brand and image.

The conversations around the sponsorship market may be all about dropping values and breaking deals, but in fact, we have also been witnessing investments during pandemic times in different assets within the industry. The example of the SC Corinthians stadium naming rights agreement and the break of the Neymar's Nike deal, with Puma investing in the player soon after, are both signs that brands are still looking for opportunities.

Case Study: Venezuela



“Using the pandemic as a time to reinvent the competition format”

Venezuela was the only country in South America where the domestic league was cancelled, and a new tournament with a brand-new format was started. Even though they managed to return to play, the situation is still unstable, especially at a governance level. In August, the president of the Venezuelan Football Federation (FVF) passed away, and the authorities arrested his successor in mid-November.

Professional football in Venezuela was brought to a halt in mid-March, and with strict lockdown measures the players were all forced to stay at home training through online fitness programmes delivered by the club staff. In order to find a new form of return to play to finish the season, a new league format was created called Torneo de Normalización.

Although the pandemic strongly hit the country causing an unprecedented situation, the new competition format was not received well by all clubs. Not all clubs were in favour of a new format, but the majority of them agreed it was necessary to return to play and finish the league to secure the international spots for next season. In the end, the two clubs LALA FC and Zulia FC decided not to participate and the FVF decided not to punish or relegate the two teams.

The tournament is played in a bubble format, and each team play every three or four days. The players have a tight schedule and need to be confined at their hotels which can be a challenge at a psychological and physical level. The Venezuelan first league also has a requirement obliging the clubs to have a youth player (U-17) in the team squad, but the youth competitions have not returned to play yet, which can be a deterrent in the players' development.

The situation was already a challenge for the Venezuelan clubs, but the pandemic delayed even more the development plans. Taking into consideration the rather unique position in South America where football actually has been second to baseball as the most popular sport until very recently, and the majority of the clubs have a recent history, this unrequested break was an unwelcome obstacle in the development of the league and football overall in Venezuela.

New competition format

The competition is played by 17 teams divided in two groups. The groups are confined in two “bubbles”. Group A is composed by nine clubs and Group B by eight clubs. At this stage, each team plays each other in double-leg fixtures, although still within the safety of the bubble.

The first four teams of each group proceed to the next stage of the tournament which consists of one group with eight teams playing against each other only one time. The eight participating clubs are guaranteed international club competition qualification for the next season.

The first and second team from the previous stage play a final match to find the champion of the tournament and there is no relegation.

Governing Bodies

With the football industry struggling in these difficult and challenging times, all areas were in need of proper support from its governing bodies. And a lot is being done to allow these competitions to continue, especially taking into consideration that the football teams are allowed to cross closed country borders in order to fulfil fixtures.

To dovetail the FIFA relief package announced globally to help all confederations, CONMEBOL, which had previously reported record revenues for 2019, supported its member associations in various ways. The record revenue reported from last year allowed the South American Confederation to create a reserve fund, which permitted a more significant assistance to its clubs. Aggregated to that, CONMEBOL helped the clubs who are taking part in the international competitions, providing 60% of the participation rights and prize money in advance.

As the return to play in international football was one of the main priorities for CONMEBOL, the Confederation also funds all the club expenses in their participation, to guarantee health and safety.

Format Overview: The case of the League Cup in Argentina - Copa Liga Professional 2020



A new revised format of the Argentinian league cup was created in order to decide the qualification for the confederation club competitions when the previous tournament was cancelled. The tournament is played in six zones to create the “bubble environment” for health and safety with the following format:

Fase Clasificación (Qualification Phase)

24 teams were divided in six groups of four teams. The groups will be play each other in a home and away format with the two teams from each group qualified to the next phase.

Fase Campeonato (Championship Phase)

Two Groups with six teams in each, only playing home matches (with each team play five games)

Final Fase Campeonato (Championship Final Phase)

The winners of the two groups play each other in the final of the league cup with the champion qualifying to Copa Libertadores 2021 and the runner-up playing the winner of the Competence Fase in a final game to qualify to Copa Sudamericana 2021

Fase Competencia (Competence Phase)

The two teams of each group that didn't go through in the Qualification Phase play a similar format as the Championship Phase. The ultimate winner then play against the team who lost the Championship Final Phase and the winner of this game qualify to Copa Sudamericana 2021.

5. OFC (Oceania)

“Battling Covid-19, promoting football”

Regional Covid-19 Impact Overview

Oceania may be among the smallest of the global football confederations in terms of participating members, and certainly the smallest in terms of population and prevalence of football. Nevertheless, it also felt the full brunt of the Covid-19 pandemic, just as its larger peers have done in the past months.

One particular factor that makes this region especially interesting is that the few countries in the world that have reportedly kept the virus out find themselves within the Oceanian zone, and many of these countries are also members of the local confederation, the OFC. It might seem as if that should have been the basis for relative normality in the domestic football industry, however, keeping the virus out (or suppressing it) meant rather strict national lockdown measures. Which both impacted the ability to practice football as a team sport, and the very strict national quarantine regimes also made travel between different countries of the region almost impossible, thereby impacting international football.

Over the past years, Oceanian football has been experiencing successful growth and there were new challengers emerging to the traditional domination of clubs from New Zealand, building up a head of steam for future development within the region. The Australian A-League, even though technically operating within AFC for football reasons, was also showing signs of consolidation and maturity. This has provided an interesting focal point for quality in the entire region, both in terms of operational and sporting excellence and it will remain to be seen how the growth trend will be affected in the coming years.



**Andrei Arshavin, 75 caps for Russia National Team
& FC Zenit Director of Youth Football Development**

“On a global level clubs will certainly be hit financially, meaning fewer resources in the industry with less money for players and at the same time clubs will have to enlarge their squads as thinking only about the starting eleven will not be safe enough. On top of that, with five substitutions allowed, it might be an important game changer in terms of tactics, as coaches will have a bigger opportunity to mix the technical and tactical components, or to play with a physical part to compensate.”

OFC Timeline

9 March – Tri-Nation international friendly matches involving the national teams of the Solomon Islands, Tahiti and Fiji postponed by Fiji Football Association

18 March – U16 Youth Solomon Cup in Solomon Islands deferred

20 March – New Caledonian Football Federation suspends football activities throughout the country including its Mobil Super League Championship

21 April – OFC Nations Cup 2020 cancelled

5 June – The OFC U-17 Women's Championship 2020 cancelled

25 June – Vanuatu Football Federation (VFF) announces that the season suspended in March will return. The men's National League Championship will begin in August with the National Super League starting in September

4 September – OFC Champions League 2020 officially cancelled

19 November – OFC's Executive Committee nominates Auckland City FC as the OFC's representative to participate in the FIFA Club World Cup 2021

12 March – New Zealand Football cancels matches against Oman and Bahrain

20 March – The Fiji FA postpones all scheduled matches

20 March – The Tahitian Football Federation has decided to suspend all activities throughout the territory of French Polynesia until further notice

14 May – OFC releases statement saying the men's OFC U-19 Championship, that was scheduled to be played in Samoa in July, will not be held before October 2020. The OFC Champions League 2020 quarter-finals have been postponed until September 2020, a further decision regarding OFC U-17 Women's Championship will be made on 2 June

28 July – OFC releases statement saying: The men's OFC U-19 Championship will now be played in Samoa in January, the men's OFC U-16 Championship has been postponed until April 2021, OFC Futsal Champions League that was due to be played in December has been cancelled.

Women's Youth Development Tournament 2020, originally scheduled for May, is also cancelled

Clubs

Many football clubs in Oceania were already operating with the handicap of football not really being the number one sport in many of the participating nations. Including Australia, all of the domestic competitions in Oceania were affected by postponements and cancellations. At the height of the lockdowns, clubs were unable to carry out even basic activities such as training, let alone play matches just like their counterparts across other continents. As football is primarily a semi-professional and amateur undertaking in Oceania, discounting the A-League, it could be argued that resources needed to maintain such clubs in existence are lower than in the case of fully professional outfits with significant operational and player costs. On the other hand, such clubs are also more vulnerable given that they depend greatly on volunteer efforts and the general goodwill of local communities.

Competitions

Over the course of Spring-Summer 2020, Oceanian football competitions went through a similar cycle of pause and return to play as other leagues across the world. By late Summer most of the domestic leagues were either started after a delay and cancellation of the previous season, or restarted to play to a finish.

Other alternatives were also organised, such as in Tonga where the league was cancelled but the Challenge Cup was played. All continental OFC competitions were stopped, including the OFC Champions League 2020 which reached its knockout rounds prior to March lockdowns. It was deemed impractical to complete due to continuing travel and quarantine restrictions in the region, and was cancelled without a championship being awarded leaving the decision on Oceania's representative in the FIFA Club World Cup being remitted to the organisers.

An interesting situation developed over the Summer in Australia, where the A-League is not within the OFC perimeter in football governance terms, but certainly is located in Oceania geographically. It also includes the presence of a franchise from New Zealand, which created very specific challenges for the club itself and the competition organisers in the restart phase under Covid-19 restrictions in Australia and New Zealand respectively. In the end, Wellington Phoenix had to decamp to Australia for the conclusion of the 2019-20 season due to the inability to complete the fixtures within the existing quarantine framework, and will have to return to Australia for a longer period during season 2020-21 as restrictions are yet to be lifted.

In the domestic New Zealand competition, Covid-19 has also had quite a significant impact. It has affected a number of aspects including the composition of the division as several clubs were forced to merge in order to arrive at a smaller league of eight clubs, instead of the original ten clubs. In addition, relegation was removed from the format to grant more security to participating clubs in a similar way to the solution applied in Mexico, but with the moratorium being for only a single year.

An Interview with Helena Dorczak – Governance, Risk & Compliance Manager, Sydney FC



“Include, encourage, respect and support”

About Helena Dorczak

Helena Dorczak is the Governance, Risk & Compliance Manager at Sydney FC, a professional football club competing in the A-League in Australia. She is also a member of the Women's Football Council at the Football Federation of Australia with previous work experience from the Football Federation of Australia.

Q: Could you please provide an insight on how the Covid-19 pandemic affected the timeline of footballing events in Australia?

A: There are two professional top-flight leagues in Australia, the men's A-League and the women's W-League. The W-League completed its competition before the lockdown was imposed in Australia and about 88% of the A-League matches were completed as well. The league would normally finish in May, however due to the new restrictions because of the pandemic, the league was suspended in March and the reboot happened in June. All the staff had to work from home and no community level sporting activities or trainings took place during the period.

Q: How were the training activities of the team during this period managed by the club?

A: The club organised Zoom training sessions for the players during the lockdown period. Also, there were regular check-ins with players to ensure their mental health wellness during a situation which was tough for everyone. We also had regular talks with our Chief Medical Officer to check on any symptoms for Covid-19. There were also some innovative challenges we did during this period on TikTok to keep the players active and engaged.

Q: Were there any state support measures in place?

A: Yes, the Government supported us very well throughout. There is a government scheme in place for all employees at the club. The Football Federation of Australia was also supportive with the measures put forward.

Q: When the league restarted, what was the format and regulatory measures put in place?

A: The league re-started in a hub mode. All the teams from the A-League came to New South Wales and were part of a hub in Sydney. There was a full training phase implemented and multiple Covid-19 tests done. The club trained for four full weeks under this protocol. All matches were played behind closed doors and only for the finals there was a return of fans with a 25% attendance standard. Strict temperature checks were done, and questionnaires were also in place, which was checked both by the club and the Federation.

Q: How did Sydney FC support its players during this period?

A: Our mission at Sydney FC is always to support our players and work closely with them in a family spirit. We offered excellent support towards our players in these tough times. The Players' Union in Australia provided support to members of the coaching staff, players and their families. At Sydney FC, we have a long association with Beyond Blue, an organisation in Australia aimed at providing support and mental health well-being aid. Together with them, we organised initiatives to support the mental health well-being of our players and staff.

Q: Has the loss of ticketing and matchday revenue been a big concern?

A: For us at Sydney FC, our fans come first, and we were certainly sad in not having fans back to our stadium. There was a balance between the loss of revenue associated with matchday income and the stadium operational costs going down as well. We hope to have fans back to our stands soon, at Sydney FC, it is our family spirit that keeps us going.

Players

Just like their peers right across the world, many players in the Oceanian region were facing a situation where they could not practice their sport for a number of months during 2020 due to various government or state restrictions, lockdowns and quarantines. Unlike most other continents, professional football is limited and most players even at the top level are semi-pros or even amateurs, which places additional pressure on them as lockdown affected not only their ability to play, but also to work and earn a livelihood outside of the game.

The economic impact of the Covid-19 crisis was most clearly felt in Australia, which is the biggest competition of the region with a professional set-up and a CBA between the clubs and players, as well as a salary cap. With reduced revenues from broadcasting and sponsorship, and no revenues from matchday, salary caps in the A-League went down quickly from AUD 3.2m per season to 2.1m in season 2020-21. This led to an exodus of senior and foreign players on higher wages, and an as-yet unresolved battle over a new CBA for a competition that is due to begin in December. Interestingly, and fairly expectedly, this has led to a dramatic growth in playing opportunities for younger locally trained players, who enjoyed more playing time during the post-lockdown conclusion of season 2019-20.

Case Study: Women's Football in New Zealand and the Pacific



“Equality of access and opportunity”

Women's football was greatly impacted by the Covid-19 crisis, but it is necessary to understand that the majority of leagues are amateur and still in the development phase. Therefore, in some cases it is rather impossible to gather data to evaluate all the impacts. Although the situation is not favourable, there is always light at the end of the tunnel and by awarding the FIFA Women's World Cup 2023 (FWWC 2023) to the cross-confederation co-hosting associations Australia and New Zealand is already promising to be a milestone for the women's game in OFC. The successful “As One” campaign that won the bid was a pledge of collaboration and preparations ahead of the tournament is already underway.

New Zealand has been seen as an example worldwide on how to manage the pandemic, both on and off the pitch. The Government created an alert plan divided by levels to apply health and safety measures according to the situation in the country, and the New Zealand Football Federation mirrored the same method, adapting it to football. Each region can stop or resume its football activities according to the levels established by the Government or Federation.

Alert Level 3 & 4 - No football or futsal activity is allowed to happen

Alert Level 1 & 2 - Football and futsal activity is allowed as long as the relevant measures are followed for the respective Alert Level

The regional leagues could eventually return to play and were completed, with each region having a representative to play in the National New Zealand League that started at the end of October. Despite the pandemic, development and equality resonate in New Zealand, so before the women's national league started, it was renamed to align with the men's competition. The both leagues share the same naming sponsor and women's tournament is now called the ISPS Handa Women's Premiership.

As the pandemic is now under control in the country, the players no longer have to be tested before starting football activities. They only need to comply with the measures imposed by the Government.

Regarding the women's football national team, it is already qualified for FWWC 2023 as a host nation. The last time the Ferns played together was at the beginning of March at the Algarve Cup tournament. As most of the national players are based abroad, the logistics of playing international friendlies is now considered to be too risky health-wise and further complicated by strict quarantine measures.

With FWWC 2023 on the horizon, New Zealand works towards development and equality in football by giving the conditions for the women's game to grow. All over the OFC region new opportunities for the game are emerging, with the Solomon Islands becoming a great example of a women's national league that was recently organised in the country for the first time, finishing in November. This is proof that despite the impact of the pandemic, mitigation efforts are bringing back the women's football momentum. Even more investments and a rapid development is therefore expected in the region, and with the FIFA men's World Cup being expanded with more teams, there is hope that one of these additional spots can be taken by one of the OFC countries in the future.

Supporters

Supporters of football in the Oceanian region were amongst the people to bear the brunt of restrictions in the aftermath of the lockdowns and lack of football action, especially considering the highly local and familial nature of most of Oceanian football. It is also worth considering that football, even though not necessarily a minority sport here, typically is a secondary-level sporting code in most of the Oceanian countries. Therefore, it might not be at the top of the agenda for government-level decisions, as rugby might be.

The lack of action on a continental and international level, coupled with relatively few leagues in the region being televised, deprived supporters of action even when the games were restarted. Fans of the New Zealand national team were particularly affected, as its planned high-profile games in Belgium and England during Autumn 2020 had to be cancelled due to travel restrictions and issues surrounding mandatory quarantining.

Broadcasters

The broadcasting panorama in the Oceanian region is dominated by Australia and New Zealand, with their respective national leagues and national teams being the main drivers of the market. The A-league lockdown from March onwards led to a situation where the existing breakthrough media rights deal dating from 2017-18, and which still had three more seasons to run until 2023, was cancelled by Fox Sports citing force majeure, and a period of frantic negotiations ensued to salvage some of the deal by the league. In the end, a much smaller stop-gap agreement was reached with Fox for just over half of the amount in the deal that was terminated, to cover only the finish of season 2020-21 and the season after. The format of the competition and its placement within the calendar is now being put on the table for future years, which would undoubtedly affect the value of media rights in the highly competitive and unique Australian sports market.

Across the Tasman Sea, and despite the launch of the 2020-21 season with possibility of spectators attending games, the New Zealand league will for the first time be broadcast in its entirety rather than just at the play-off stage. All in all, 75% of matches will be shown by Sky Sport for free, and only one game shown via the paid channel in the men's league, with two games shown on the paid channel in the women's league.

Beyond the larger Oceanian nations, since 2017 the bulk of broadcasting capacity in OFC competitions and domestic leagues was done through streaming platform MyCujoo, which in 2019 signed a two-year exclusive agreement with the confederation and was providing free-to-consumer content from across the island nations. The recently-announced purchase of MyCujoo by Eleven will be seen with great interest across the region, as it could pave the way for increased global exposure for the right kind of product.

Supporters

Football finances in Oceania typically represent the more traditional and basic type of football business, where local sponsors and communities are very important for club wellbeing. This means that the health of the domestic economy is going to be reflected very quickly and very directly in the ability of sponsors to provide funds to their sponsored clubs and bodies. For example in Australia, the biggest and most highly corporatised environment for sport marketing in the region, forecasts were made for around a 25% drop in value of key assets of clubs. A highly volatile market where many medium and large-sized companies included sport sponsorship within their activity portfolio may no longer be willing or able to do so in the future. Overall, this would mean a double whammy for clubs. Not only having to review their pricing policy on assets, but also having a much weaker market of potential sponsors to go to, should they need to find alternatives to existing partners.

Governing Bodies

Football governing bodies in the Oceanian geographical region have to deal with many challenges stemming from the status of football in the territory, as well as its environmental conditions. OFC finances and projects are strongly dependent on distributions from both FIFA and UEFA, as well as support from the national governments of Australia or New Zealand. August 2020 saw an undoubtedly very welcome announcement from the confederation of increased grants to its member associations over the coming two seasons, aimed at helping them overcome current economic and developmental challenges. It will remain to be seen whether this injection of cash, predominantly stemming from FIFA's coffers, will be enough to enable football keep its positions in Oceania as other sports are also facing similar issues but without the resources of FIFA as a fall-back. Maybe it could even be use as a springboard for further development, especially with the draw of important forthcoming events such as the FIFA Women's World Cup 2023 scheduled to be held in the region.

At the same time, the domestic environment in the largest Oceanian country of all, Australia, remains far from peaceful. There are unresolved issues between many of the key stakeholders of the sport process, such as the national federation, national teams, leagues and the players' association. A financial crisis for sport is brewing due to reduced revenues across many of the streams, which leads to fewer resources.

It is at this moment where the value of leadership becomes more important than ever. Not to find the money and plug the budget gap, but to unite people under a constructive common vision and make fair decisions that all parties can accept even if they may not be fully satisfactory to each individual.

Format Overview: The case of OFC Champions League 2020



A tournament cancelled due to travel restrictions imposed by the Covid-19 Pandemic

The OFC Champions League is the premier men's club football competition in the Oceania region organised by the OFC. 16 teams from the eleven member associations of OFC take part in a single year tournament. The teams are divided into four groups of four, with the top two teams progressing to the quarter-finals and further forward on a home-away basis.

Participating teams for the 2020 edition:

Fiji: Ba, Lautoka
 New Caledonia: Magenta, Hienghene Sport
 New Zealand: Eastern Suburbs, Auckland City
 Papua New Guinea: Lae City, Hekari United
 Solomon Islands: Solomon Warriors, Henderson Eels
 Tahiti: Venus, Tiare Tahiti
 Vanuatu: Malampa Revivors, Galaxy
 American Samoa: Pago Youth
 Cook Islands: Tupapa Maraerenga
 Samoa: Lupa o le Soaga
 Tonga: Veitongo

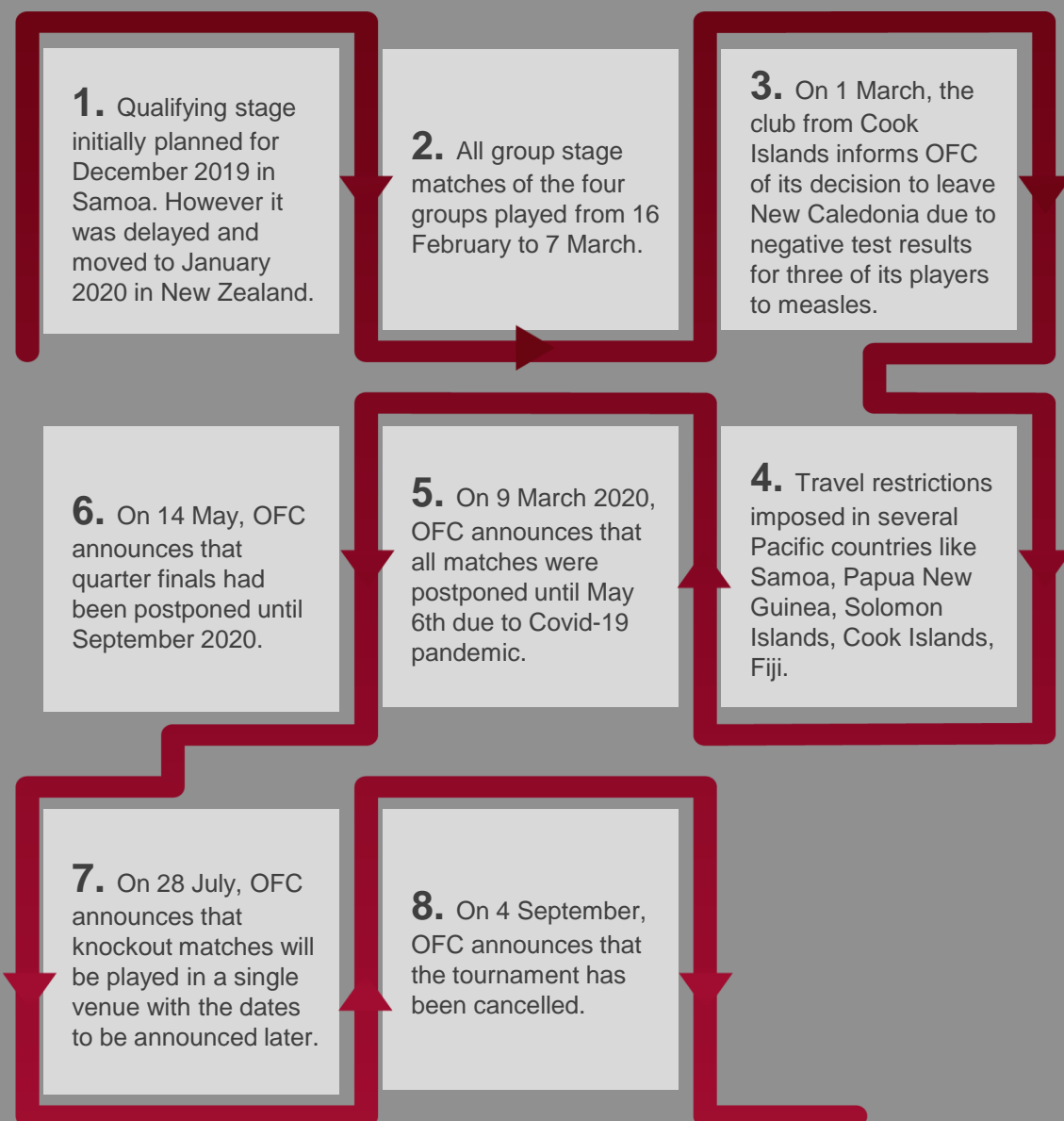
Host Countries:

Qualifying Stage: New Zealand
 Group Stage: Papua New Guinea, Vanuatu, New Caledonia, Tahiti

Originally Planned Schedule vs Reality

PHASE	ORIGINAL DATE	WHETHER HAPPENED OR NOT
Qualifying Phase	25 – 31 January 2020	Yes
Group Stages	16 February – 7 March 2020	Yes
Quarter-Finals	4 – 5 April 2020	No
Semi-Finals	25 – 26 April 2020	No
Final	16 May 2020	No

The OFC Champions League cycle of events as it happened:



Current Status:

The OFC's representative at the 2020 FIFA Club World Cup in Qatar, which would originally have been the winners of the OFC Champions League 2020, was confirmed on 19 November as Auckland City, based on a ranking of participating teams following the completed group stage.

6. UEFA (Europe)

“Now is the winter of our discontent”



Gaizka Mendieta, 40 caps for Spain National Team

“When Covid-19 first hit we were definitely caught by surprise and totally unprepared, but we could have probably anticipated the second wave better. Whilst the world of football stopped, clubs should have taken the time to analyse how they work, what are their processes and objectives. Nowadays, more than ever, they should really take time to learn from past experiences and mistakes, in order to improve their methods and seize the opportunity to rethink their business model, with competent support. This is also a great opportunity for clubs to refocus on their youth academies, and capitalise on all the benefits the development of their grassroots can bring on sporting, social and economic levels.”

Regional Covid-19 Impact Overview

The area covered by the European football confederation has probably seen the highest-profile impact of Covid-19 on football, where disruption has been ongoing in different parts of the continent since February 2020. Coupled with the fact that the global football industry is heavily Europe-centric in terms of its revenues, biggest clubs and top competitions, it means that the fall-out from the crisis in Europe will go a long way towards shaping the overall impact on global football as a whole.

Disruption within football in Europe has gone along several main routes. Some of them industry-wide and global in nature, others country-specific, as the force of government-level decisions has leveraged an unprecedented influence on the affairs of football.

Amongst the global effects we have seen widespread economic hardship for clubs and national associations that have been deprived of the matchday income as a significant source of revenue, whilst at the same time having to bear the costs of an enforced shut-down in Spring 2020.

Another common challenge for the industry across the continent has been the sporting and operational disruption levelled at the game through fixture instability. Games have been called off and re-scheduled, teams have been unable to travel for matches, and entire international squads had to be quarantined. This has at some instances led to that top-level matches, rather than a contest between the best players, becoming a contest between the players that are Covid-free at the given moment.

Moving from a continent-wide to a more local level, one of the main challenges for the football industry to deal with currently is the increasingly disparate and fragmented local environment, within which it is very challenging to organise and maintain even national, let alone continental competitions, without compromising on quality, common approaches and fairness.

Overall, when we previously assessed potential scenarios in which the pandemic could develop over the months following March 2020, we plotted three main scenarios: optimistic, realistic and pessimistic. What we have seen, though, is a mixture of the three happening in different parts of Europe at different times. This has brought an added element of complexity following a relatively simple period when all of the continent apart from one country was closed for football business.

Clubs

As the entire football industry has been affected by the pandemic, football clubs of all sizes have suffered its sporting, economic and social impact. Nevertheless, despite some worrying signs and warnings of impending doom, European professional clubs have generally proved to be quite resilient in returning to operations, finishing or restarting domestic and continental competitions and maintaining a high level of functional solidity in difficult times. Which quite surprisingly even resulted in a more active transfer market than probably envisaged back in March or April.

Covid-19 has been delivering a significant stress test for the business model and strategy of all professional football clubs. But, ironically, it could be argued that those clubs with a higher business focus or a long-term strategy in place were actually the ones more significantly affected in comparison to those that operate within a short-term horizon under normal circumstances, too. In some countries, the reaction has been full of sarcasm: “we have always had Covid-19 and we shall always have Covid-19”, highlighting that the pressures of managing clubs in smaller markets, without high media, gate and transfer income has always been a struggle, so 2020 has not really brought anything new.

Nevertheless, one important issue regarding football clubs in Europe that has been particularly highlighted by the ongoing crisis is the growing gap between the “haves” and the “have-nots”. This is not only horizontal across different countries, but also vertical between the larger and smaller clubs within one league. In Europe you regularly see leagues with a more than 20- or 30-times differential between the biggest and smallest club budgets. The turbulence of 2020 has accelerated the exposure of emerging fault lines between clubs that can sustain their business into the future, and those that operate in a precarious environment based on a hand-to-mouth operational model, which does not leave any room for manoeuvre in the face of a global crisis.

Competitions

Despite a few notable exceptions, the completion of most domestic championships during the Summer, which dovetailed with the resumption and successful delivery of the UEFA club competition finals in a revised format, and the immediate follow-up with the UEFA club competition qualifiers for season 2020/21, brought an air of optimism to the European game, which peaked around early September. Some problems of individual teams forfeiting matches due to infections in their squad, and the logistical challenges that affected everyone, with reduced travel capacities, quarantine threats, testing regimes and match dislocations to neutral venues seemed not to affect the overall positive spirit.

By mid—to-late September, though, the second wave had firmly arrived on the continent, and earlier hopes of a reasonably quick return to “normality” were dashed in country after country. Restrictions on spectators were not lifted as scheduled, rather were they re-imposed, and temporary league suspensions might become more common as Autumn and Winter roll on.



Mbo Mpenza, 56 caps for Belgium National Team

“For some clubs in Belgium it seemed more opportune not to resume the league following the lockdown, as both operationally and cost-wise it did not seem optimal to them. Beyond that, for football the period we are living in is simply revealing which clubs are organised, which pretend to be, and those for which it is going to be really tough without proper support.”

It seems that most domestic competitions have entered season 2020/21 hoping for the best. The restart happened without much concrete planning, such as studying the viability of all clubs taking part, or re-examining the competition format itself, in case more long-term restrictions are brought back. Especially bearing in mind the need for a prompt finish to the current season in May 2021, in order for a timely transition to the postponed national team competitions in the summer.

Case Study: The Belgian Pro League



“Désenchantée/Ontgoocheld”

When Covid-19 started spreading in Europe, Belgian football faced several challenges at the same time. One of them was that in early Spring the country was hit hard during the first wave without a permanent government in place, so the decision was made to nominate an ad interim national executive. The football institutions had to deal with the temporary government in place, and the Pro League aimed to finalise the phase before the play-off rounds, but once the quarantine was announced it was obvious that there would be no chance to restart the leagues.

As no sport activities were permitted during the Spring lockdown, Pro League became the first domestic league in Europe to be cancelled, which made global headlines. A decision was made to proclaim Club Brugge as the league champion, in a fairly collegial way that all clubs accepted, whilst public opinion also supported this initiative.

However, UEFA had another perspective on the decision as this, in their view, early cancellation of the domestic Belgian league could have had an influence on the decision in other countries. Ultimately, this would have affected the qualification of the clubs for the European club competitions that in the case of cancellation would be decided administratively rather than on the pitch. On top of that, the club Waasland-Beveren filed a complaint to the main state sports body questioning the fact that they were administratively relegated. In the end, they managed to retain their position in the First Division A following a court ruling which found a consensus with the league along with the promotion of K Beerschot VA and Oud-Heverlee Leuven.

To complete the First Division B, Club Brugge fielded a youth team creating additional challenges with the ongoing reform of the second division. The entire situation went from one controversy to another, which led to much public disquiet. But at the same time, the football authorities were caught between a rock and a hard place, finding their options to be limited despite seemingly acting in a decisive way at the early stage of the pandemic.

During the same period, it was announced that Eleven Sports became the main media rights holder of the Pro League. Whilst OTT access is not a problem across the country, in order to have access to TV broadcasts, consumers have to sign up through local broadcasters to watch the games. As broadcasters are not selected on a national level nor on a regional one, but rather at a local city level, some subscribers were not able to have access in the early stages, adding to football's travails.

In the end, due to its early finish of the 2019/2020 season, the Pro League was one of the first domestic championships in Europe to kick off the new season this summer. Initially the games took place behind closed doors, but quite quickly the stadiums were opened to a limited amount of spectators before the second wave of Covid-19 infections became apparent. An increasing number of Covid-19 cases amongst players in certain clubs meant that some clubs struggled to have enough players fit for some domestic games. However, despite having a second lockdown being imposed in the country, the newly-elected Government decided that professional football could continue albeit without spectators in the stadiums and by respecting a robust protocol.

Players

The summer transfer window of 2020 was forecasted to be the most complex in living memory both for clubs and for players, and it certainly proved challenging, both from a sporting and financial perspective. Most of the buying markets showed reduced levels of activity, although possibly not the depths that pessimists were forecasting, with FIFA figures showing a drop of international transfer activity of around a third by value.

Player valuations according to market monitors such as Transfermarkt experienced a large drop in the aftermath of March 2020, but recovered by summer and in some cases even exceeded the peaks of mid-season 2019/20. Although it is important to keep in mind that these valuations are one thing, and the real fees paid by clubs is something else. Interestingly, amongst the top paying leagues in Europe (the top 5), there has been a lower than expected shift towards signing players on free transfers, with only a 6% change from 2019 to 2020, which must have also helped to hold player values at a higher level.

Beyond transfer fees and moves, the key factor in regard to players in Europe has been increased volatility. From empirical evidence, outside of the top clubs and top leagues, contracts are becoming shorter and lower-value. At least for the coming season as clubs prefer to back-load their spending, whilst working conditions are shaped by unpredictability due to Covid-19 outbreaks, postponed matches, enforced testing regimes, disrupted training processes and mid-term uncertainty as clubs become more and more desperate with no end to the pandemic in sight yet.

Supporters

Supporters remain outside of the football stadiums in most European countries, and over the coming winter it is likely that restrictions may be reimposed at least in some of the countries where a “return to normal” might have been on the cards as late as September 2020. With the second wave of the health crisis enveloping Europe, it was a move against the current when UEFA decided to allow up to 30% of spectators at European club competition group stage matches, and it remains to be seen how many games will actually see any spectators at all.

Clubs across Europe at the moment are preoccupied about keeping engagement with their supporters in the new conditions, where the live match day experience in the stadium is not available as a key resource, and digital means have become the only method for two-way communication. This is enabling a lot of creativity within the more innovative clubs in social media, marketing, digital engagement or match day enhancement. There has also been a move towards using new technologies such as streaming even at the lower levels of the game, but it remains something that clubs seem to throw at their supporter base. Moreover, the crisis has not yet become a catalyst for more engagement of football supporters in the governance of the game, or active consultation of fans by their clubs as regards to the future.

Nevertheless, football fans must surely remain the main source of hope for the industry going forward, and, directly or indirectly, hold many of the keys as to the future development of the game in Europe. Football business has for many decades taken support of fans for granted, almost as a limitless resource. But recent studies from US and Europe are suggesting that younger generations are less interested in sport in general, and football in particular, which means that clubs and competition organisers will have to think very quickly to ensure a continued level of support moving forward.

Broadcasters

The European broadcast market had been going through a period of flux even before the pandemic hit, but events of the last nine months have surely added a further element of volatility to the already complex picture.

For many observers, the poster event of European authorities' influence on the football industry was the Bosman case, but of probably equal long-term importance was the way in which competition organisers were ordered in the early 2000s to sell their media rights in packages and avoiding exclusive concentration in single hands. By 2020, it has delivered a continental market where several big entries ended up in failure, consumers are paying ever-increasing prices and the make-up of the different rights to various leagues and European competitions in different territories is becoming more complex than the Times crossword.

Postponing or losing fixtures altogether has not been helpful to broadcasters, and there was a €1bn+ estimated rebate claimed by broadcasters from the main domestic and international competitions such as the English Premier League, German Bundesliga or the UEFA Champions League, whilst in the case of incomplete leagues clubs had to also forego part of their budgeted TV revenue in compensation.

Looking ahead, fixture volatility, a perceived decrease in quality, or a lack of match atmosphere in an empty stadium, which is difficult to mitigate with fake crowd noise or an artificial crowd painted in using computer game technology will most likely lead to a re-evaluation of existing TV deals. It also remains to be seen when the long-anticipated entry of GAFAN will materialise, or whether new large-scale players will be able to sustain their entries.

Sponsors

Sport sponsorship in Europe should have been worth more than €30bn per year in 2020, but the fallout from Covid-19 has led to several important situations developing. Both rights owners and sponsors themselves seek some stability and consistency for future months and years, whilst delivery mechanisms have also seen their fair share of disruption due to the pandemic, too.

First of all, a scenario without any football matches being played in the vast majority of the continent between March and May provided a frightening glimpse of the vulnerability of professional sports to a 'black swan' event. Specifically for sponsors, the resulting outcome has not only been a loss of visibility and expected return on investment during the severe lockdowns, but also paved the way for potential conflicts with rights owners over due compensation.

In general, the current sponsorship panorama remains uncertain and highly conditioned by individual circumstances. At the same time this has presented interesting opportunities for new entries, more personalised services and, effectively, a "buyers' market", where some smaller brands with resources can find a short cut to higher-end partners, which otherwise would have probably been unreachable under normal circumstances.

Another critical shift has been in how clubs and competition organisers are increasingly embracing digital solutions when faced with the need to operate remotely and without a presential match day setting. This actually opens up fundamental opportunities for the evolution of sports marketing and sports sponsorship going forward, moving away from the face-to-face to a more digital approach, which undoubtedly will have a major impact on the state of the market in years to come.

Football Governing Bodies

Football governing bodies, including federations, leagues and other important stakeholders in the pyramid of football governance, are currently facing the same challenges as the clubs. But, as ultimate stewards and guardians of the game, they also have a much bigger responsibility for the overall state of the game, all during a period when economic power has been consistently shifting towards the large professional clubs for the last several decades.

Despite quick commitments from FIFA and UEFA to support their national associations in the aftermath of the lockdown, many football associations in Europe are already facing important financial shortfalls as games cannot be staged with full or even partial crowds, leading to lower revenues but relatively few opportunities to significantly cut costs at short notice, as international games still need to be organised.

Some European national associations and/or domestic leagues have resorted to requesting economic support from the state, either directly to the sport industry or as part of a support package for culture and entertainment. Others have chosen to take out loans, whilst others still could be able to benefit from the economic solvency of their domestic big leagues.

What is hard to doubt though, is that the aftermath of the Covid-19 crisis has the potential to re-draw the power balance within European football on a continental and domestic level. Some stakeholders may see their influence and decision-making power within the game grow stronger, whilst others may see it slip away, depending on how much they contribute to saving the industry in financial terms. The economic health of UEFA will be a critical factor in how this situation develops.

Case Study: Pandemic response in Israel



“We just need to get through this season”

Israel was one of the few countries within the UEFA zone and globally to experience two lockdown periods of different scale in the period between March and October, which impacted on football for the completion of season 2019/20 and the beginning of season 2020/21.

In the second lockdown, there was a national confinement and the league directly recommended clubs to keep players fit via online lessons, as they could not take part in organised exercise outdoors.

Decision-making was predominantly led by government intervention and directives, sometimes leading to policy U-turns and changes of approach. For example, when the second lockdown was instituted, it was envisaged that all the top division teams would have to comply, thereby making impossible the participation of teams in European competition matches. However, at the last moment the two clubs that were taking part at the time in UEFA club competition qualification, Maccabi Tel Aviv and Hapoel Beer Sheva, were allowed to continue training and their matches could take place.

The other clubs affected by the closure either complied or attempted to find alternative solutions, which included such ideas as overseas training camps, or a more creative idea of “inventing” a European competition to play in, as government measures allowed teams to train if they were participating in international tournaments. When the league could resume at the very end of October, players were able to return to training only two weeks prior to the restart date.

On the economic front clubs saw the need to significantly reduce their player salary spending, and this was actually reinforced by government intervention, which linked distribution of financial aid in compensation for lost ticketing revenue to reducing professional football budgets by 20-30%.

3. Looking Ahead

As we went through our virtual global tour of world football, it was difficult not to be impressed by the sheer variety of approaches to very similar challenges that were applied in many parts of the world. But at the same time, there were a number of common threads, which undoubtedly have the potential to shape the global football industry for many years and even decades to come.

1. The role of governments and national authorities

We mentioned this in our previous Issues, and it remains an important point; it was not a secret that politics and football have long been aligned with one another, and in some countries across the world they have produced important alliances. But for the first time in generations the public authorities across the entire world have had such a direct and decisive impact on the game itself. From demanding a halt to the game being played, to in many cases acting as the last resort for financial help and assistance, governments and national authorities in many territories around the world have held the fate of both participation and professional football in their hands for the last ten months. Clearly, this situation will eventually be resolved, but it remains to be seen how the authorities will disengage themselves from the game, or whether they will use this opportunity to demand fundamental change in how the game is organised and run. One argument for the latter approach might be the fact that, through providing state-level assistance to struggling clubs, governments in many countries have been exposed to traditional football management practices, lack of information and long-term focus, and may wish to address this via this opportunity.

2. Sharing information and knowledge

“A problem shared is a problem halved” goes the saying, and we have seen that in many cases where the domestic football industry was able to sail through the current crisis in a smoother way, this was really down to good collaboration between different stakeholders. Those who recognised each others’ challenges and were able to accommodate them in their quest to find an optimal solution. Information on return to play solutions has been a particular example of how good ideas developed, tried and tested in one part of the world, were finding their way to other locations through an active exchange and process of sharing based on goodwill and a mutual interest in seeing football restart. This spirit of pandemic collaboration should not be forgotten as soon as things return to relative normality. It should be maintained and strengthened, because the results it could deliver in good times may be even more spectacular than a solid RTP protocol.

3. Muted voice of key participants in the football process (and product!)

Despite the previous point, some crucial stakeholders in the football industry are still not being fully heard during this crisis. In particular, this means players and supporters, whose welfare, contribution to the game and role within football governance are still not fully aligned. The pandemic showed us all how players could be prevented from doing their job professionally, and how supporters could be prevented from following their passion. Now, in the restart and adjustment phase, many clubs that rely on revenue directly from supporters are finding it difficult to mitigate the losses and unrealised income of playing behind closed doors or with restricted capacity. Discussions on new models of spectating, both in venues and through media, are driven primarily by commercial considerations and do not really take into account football’s culture and the wishes of fans. For players, from not being able to play at all, they are increasingly facing the opposite challenge of playing too much in a short space of time, with schedules being compressed, and formats not favouring flexibility. The voices of both of these groups will need to be heard very quickly.

Positive examples and key learnings

It would be easy to list many of the difficulties and challenges that were faced by all the different stakeholders of football in various parts of the world and make this into a relation of negative case studies and negative examples. But football is a resilient beast, and it would therefore be logical to finish this final section of the publication with a few positive notes:

1. Economics of football: in many parts of the world clubs quickly realised that their pre-Covid salary levels were unsustainable within a pandemic scenario, and moved to mitigate this, in many cases with the participation of players themselves in the process. This not only highlights the importance of having representative stakeholder bodies to tackle such issues, but also the fact that in the end many people and organisations care about the football industry and its long-term wellbeing. At the same time, this situation is a unique opportunity to assess the entire ecosystem of global football, and attempt to plot a more inclusive, fair and sustainable course into the future. Not all clubs and leagues can rely on a business model based purely on media rights revenue, but all clubs are content providers, and good-quality content has the potential to be valued equally, whether it comes from a top-5 European league or from an Oceanian football outpost.

2. Crises for some can be opportunities for others, and in football, difficulties off the field for clubs usually mean more chances and opportunities of play for young and local players. If this trend, which has been documented in some countries across the world, remains also during the recovery phase, it should bode well for the development of new and exciting generations of fresh talent across the world. Perhaps it could also encourage clubs to come back to their roots through an increased focus on the products of their own academies. Youth development systems could not only serve to guarantee future generations of talent, but also bridge the growing gap between many clubs and their local communities that do not see a connection between themselves and expensively assembled squads of players from across the world on short-term contracts. In turn, this could also help boost club finances through optimised player transfer mechanisms and talent flows.

As a final thought, despite the many negative and challenging experiences that Covid-19 has brought the world, it has set the scene for a hopeful new future for football. One where errors of the past are corrected, lessons are learned, and innovative solutions and development opportunities are embraced through shared opportunities rather than monopolisation of resources and privatisation of solutions. For the collective good of the world's favourite and most beautiful game!

Acknowledgments

Many of our interviewees for this Issue 6 wished to remain anonymous but we would like to thank all of them, and also extend our gratitude to the following voices for their valuable input and contribution:

Eric Abidal
Andrei Arshavin
Sandro Barreto
Carlos Benavides
Helena Dorczak
Hicham El-Amrani
Dimitri Farbos
Geremi
Maximilian Grünewald
Emile Heskey
Pierre Issa
Gaizka Mendieta
Mbo Mpenza
Marie-Elise Obas
Shaji Prabhakaran
Jerry Santo
Mohamed Soumaré
Kumar Thapa
Jax Tran Van
Ruben Villavicencio
Kevin Yalale-Matufueni

Pictures provided during interviews

LTT Sports constructs bespoke solutions based on football expertise from the inside and corporate industry standards from the outside at strategy, operational and field levels, as well as a visionary conceptual understanding of the universally shared needs of the football industry in a fast-evolving landscape. We could not find a better partner to collaborate with on these Issues than Club Affairs. Not only do they have an impressive network after visiting more than 200 clubs from leagues all over the world, but they have a genuine interest and deep understanding of the full football ecosystem.

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