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The quest for gold

**A pathway to Olympic glory for
the Arab world**

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EXECUTIVE SUMMARY

When it comes to hot favorites at any major sporting event, we tend to think of individual athletes and teams. Yet the surest winner is the country holding the event. On average, host nations of Summer Olympic Games win about 20 more medals than they did four years earlier,¹ and nine of the 15 countries that have hosted the Olympics since 1948 have set their all-time highest medal total.² A regional example of the phenomenon is Qatar, which won 32 medals at the 2006 Doha Asian Games compared with just 17 four years earlier.³

The reasons behind these performance spikes are numerous, from the raucous support of home crowds to the fact that host countries automatically qualify for all team and many individual events. Yet another primary factor in that success level is focus: Host nations want their athletes to excel. And focus can be applied by any nation. Arab countries could benefit from taking a more systematic approach to developing athletes and investing in their future success, whether they host the Olympics or not.

How can the region's countries achieve greater sporting success? Below, we provide a roadmap for Arab countries to achieve Olympic success, creating a self-reinforcing ecosystem from grassroots participation to the identification and development of high-potential talent and the emergence of world-class athletes, all underpinned by strong governance and coherent strategies that allocate resources efficiently and maintain accountability.

Achieving sporting success is not easy, but it's worth the effort given its tangible and intangible benefits, which include driving economic performance, generating political and diplomatic influence, encouraging social cohesion, instilling national pride, and inspiring citizens. Besides: Isn't it simply time for more Arab athletes to stand on the medal podium? The region's anthems should be ringing around the world.

A CHALLENGE—AND AN OPPORTUNITY

There's something special about any major sporting contest. But the relative scarcity of global events such as the Olympic Games and the FIFA World Cup makes them truly exceptional. For athletes, representing one's country is an honor. And for countries, realizing athletic dreams brings rewards well beyond the playing field.

Nations often rally behind their athletes, creating a shared emotional experience that transcends regional, political, or social differences. In this way, sporting success fosters a sense of national pride and unity, strengthening a country's national identity. It can drive social cohesion by promoting inclusivity, diversity, and social integration and inspire marginalized groups to engage in sports.

Yet Arab countries have struggled to achieve significant success with their national athletes. Although the 22 nations that make up the Arab League⁴ constitute about 5.9 percent of the global population,⁵ their athletes have collectively won just 1.4 percent of the total medals awarded at the past five Summer Olympic Games—or roughly 71 medals out of 5,000.⁶ Almost two-thirds of those medals have been won by North African Arab countries, particularly in track and field and combat sports.⁷ And although the most successful nations at the Olympics—such as the United States and China—tend to have larger populations, smaller countries often overperform relative to their size (see *Exhibit 1*).

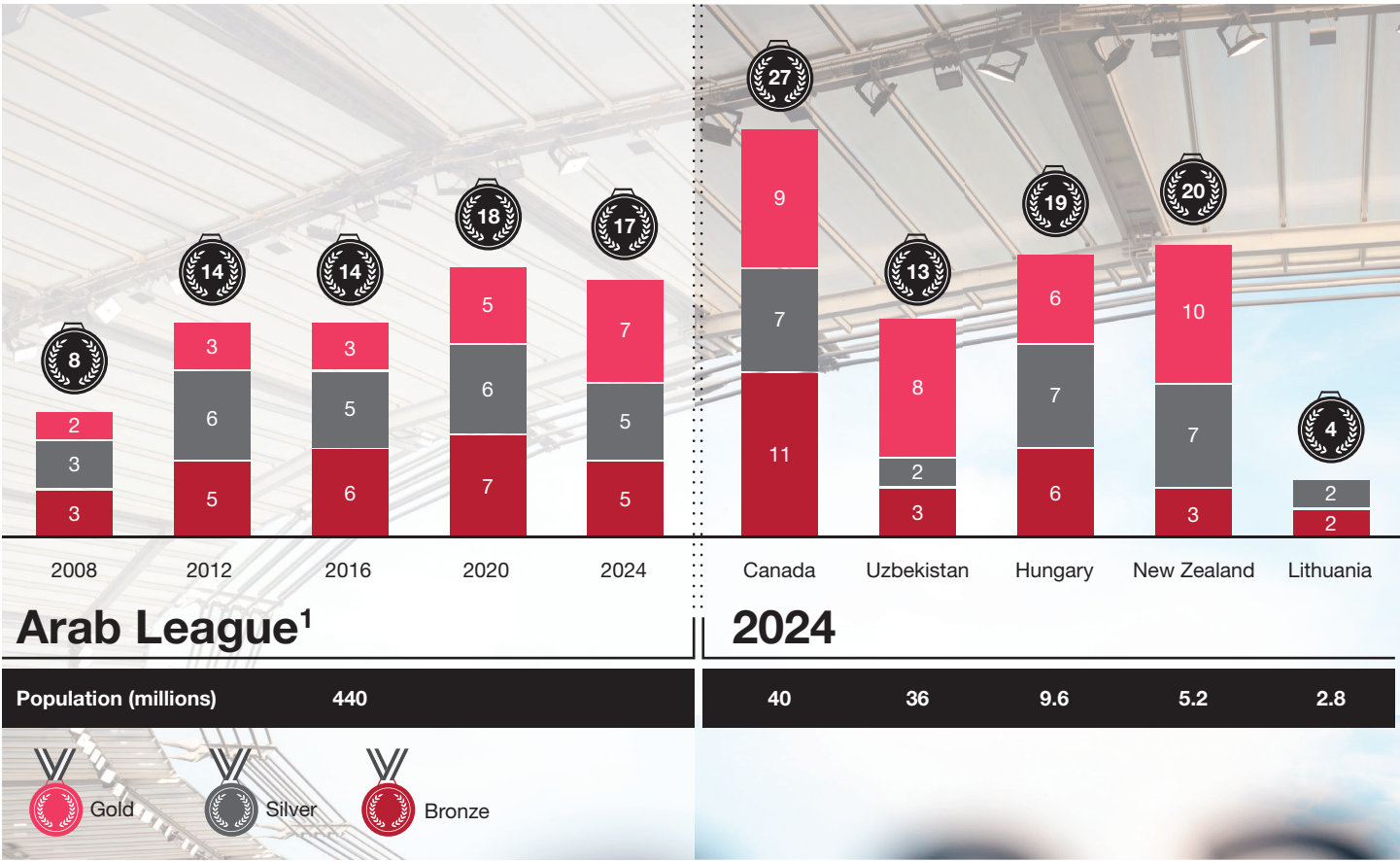
Qatar has already announced a formal bid for the 2036 Summer Olympics, and both Egypt and Saudi Arabia have expressed interest in hosting either that event or the 2040 Olympics.⁸ Yet Arab countries do not need the incentive of hosting the Olympics to take action.



EXHIBIT 1

Many smaller countries dramatically outperformed at the 2024 Paris games, providing inspiration for Arab nations

Medals won by country



¹ Arab League countries are Algeria, Bahrain, Comoros, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Somalia, Sudan, Syria, Tunisia, United Arab Emirates, and Yemen.
Source: <https://www.unescwa.org/sites/default/files/pubs/pdf/demographic-trends-arab-region-1950-2030-english.pdf>; <https://www.espn.com/olympics/summer/2024/medals>; <https://www.olympedia.org/>

A ROADMAP FOR OLYMPIC SUCCESS

Sporting success can redefine a country's global image, just as Jamaica's sprinting dominance elevates the island's profile far beyond its size, spurring tourism and global fascination. Winning on the world stage unlocks commercial opportunities, as global brands are eager to associate with champions and pour sponsorship money into national sports ecosystems. Additionally, as more people engage, the wider sports environment flourishes—creating jobs in coaching, sports science, facility construction, tourism, and event management.

Perhaps most importantly, successful athletes serve as role models who encourage grassroots participation, particularly among youth. This, in turn, can lead to improved public health, reduced obesity rates, and lower long-term healthcare costs. For example, Sport England estimated that every £1 (US\$1.28) invested in community sports and physical activity generates more than £4 (US\$5.12) in value for the economy and society. In short, investing in sports is not a feel-good luxury—it is a strategic lever for economic and social development.⁹

These potential benefits are already known by many Arab countries, which have in recent years hosted a growing number of major sporting events. For example, the FIFA World Cup was hosted by Qatar in 2022 and will be held in Saudi Arabia in 2034. But the ability of the region's nations to achieve success proportional to their population is hindered by multiple interrelated factors:

- **Insufficient strategic planning and investment.** Nations with high medal counts typically implement systematic Olympic strategies, including targeted investment in sports with strong medal potential and clearly defined stakeholder roles and responsibilities. Most Arab countries struggle to achieve sustainable success as a result of misaligned governance, the lack of long-term plans, and fluctuating funding.
- **Limited sports infrastructure and investment.** Many Arab countries lack the high-quality training facilities found in nations with stronger Olympic traditions. Investment often prioritizes sports such as football over Olympic disciplines such as track and field, swimming, or combat sports. And although wealthier nations including Qatar, the United Arab Emirates (UAE), and Saudi Arabia have recently increased spending on elite sports development,¹⁰ these initiatives are relatively new and may take time to yield significant results.
- **Deficiencies in coaching and sports science.** Arab countries have scant access to world-class coaching and sports science support, including nutrition, injury prevention, and recovery strategies. The region's scarcity of such support often necessitates that athletes train abroad, which can be financially and logistically challenging, as well as emotionally difficult for young athletes far from home.
- **Inhibiting societal and cultural factors.** Historically, limited female participation in sports has reduced the talent pool. Progress has been made—for instance, Qatar included female athletes in its delegation for the first time at the 2012 London Olympics—but social and

institutional barriers remain for women and girls. Additionally, many Arab societies prioritize education and traditional career paths over professional sports, discouraging youth from pursuing full-time athletic careers.

- **Challenges politically and economically.** A number of Arab nations have experienced conflicts, instability, and economic crises, disrupting sports programs and limiting resources for athletes. Countries including Iraq, Libya, Palestine, Syria, and Yemen have faced significant challenges affecting their participation in international competitions and the development of sports infrastructure.

Numerous countries around the world have improved their Olympic performance by adopting a variety of strategies that Arab countries can learn from (see *Exhibit 2*). For example, France established its National Sports Agency to centralize expertise and provide more rigorous oversight. In July 2020—four years ahead of the Paris games—it launched “Ambition Bleue” (“Blue Ambition”), ultimately reaching its objective of making the country a top five performer at the Olympics and a top eight performer at the Paralympics.¹¹ Similarly, the Australian Sports Commission’s “Winning Edge” strategy focused on expanding its talent pool from the grass roots, creating a robust pipeline of talent feeding into elite sports,¹² and UK Sport’s “Mission 2012” doubled down on sports in which it had had historical success, leveraging its strengths to maximize medal gains.

These nations demonstrate what’s possible when countries take a deliberate approach to achieving sporting success. It’s time for Arab nations to draw their own roadmap.

EXHIBIT 2

Smaller nations take targeted approaches to achieve Olympic success

Medal philosophies for smaller Olympic committees

01 Doubling down on sports with historical success	02 Expansion of talent pool from grassroots level	03 Opportunistic and targeted investments in selective sports
Countries concentrate resources on one or two historic or culturally dominant sports Jamaica 2.8 Million >> All medals since 2012 in athletics (sprints and relays) Mongolia 3.5 Million >> Almost all medals in combat sports (wrestling, judo, boxing) Georgia 3.7 Million >> Historic dominance in wrestling, judo, weightlifting Botswana 2.5 Million >> All medals in athletics (sprints and middle-distance)	Countries emphasize youth sports culture and school systems, then focus investment on emerging talent New Zealand 5.3 Million >> Consistent medal spread across rowing, sailing, cycling, athletics, rugby sevens, canoeing, golf, triathlon Slovenia 2.1 Million >> Diverse medal spread including judo, canoeing, climbing, cycling, rowing, sailing Croatia 3.9 Million >> Club system feeding medals in team sports, rowing, athletics, tae kwon do, shooting	Countries concentrate resources in under-contested sports or where a single athlete can break through Estonia 1.4 Million >> Medals in fencing (two female in 2020), rowing (2016, 2008), discus throw (2012, 2008) Hong Kong 7.5 Million >> Medals in fencing (2024, 2020), swimming (2024, 2020), table tennis (2020), karate (2020), cycling (2020, 2012) Singapore 6.0 Million >> Medals in sailing (2024), swimming (2016), table tennis (2012, 2008)

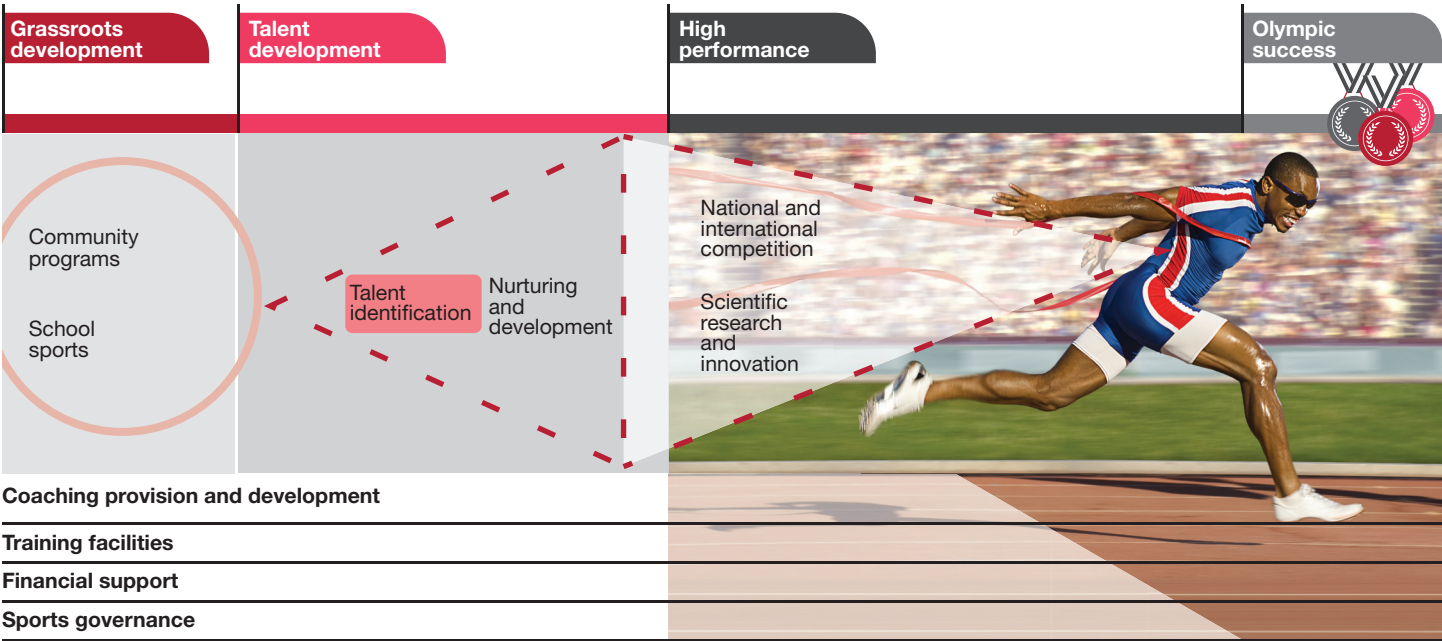
Note: Countries highlighted based on population data from World Bank Open Data, cross-referenced with results at the latest four Olympic Games using data from <https://www.olympedia.org/>.
Source: Strategy&

THE THREE PHASES OF ATHLETE DEVELOPMENT

Talent matters, but it will not by itself get an athlete or team to the podium. A whole ecosystem needs to be in place to encourage grassroots participants, identify and develop talent with elite potential, and evolve athletes into high-performance competitors. The ecosystem also must include coaching and development, training facilities, and financial support, all overseen by sports governance (see *Exhibit 3*).

EXHIBIT 3
Olympic success depends on an entire ecosystem

Roadmap for Olympic success



Source: Strategy&

1. Grassroots development

The initial stage of sports participation and development occurs at a community level and involves engaging young children and beginners in sports activities. Its focus is not on winning, but on fostering love for the sport, teaching fundamental skills, and promoting physical activity.

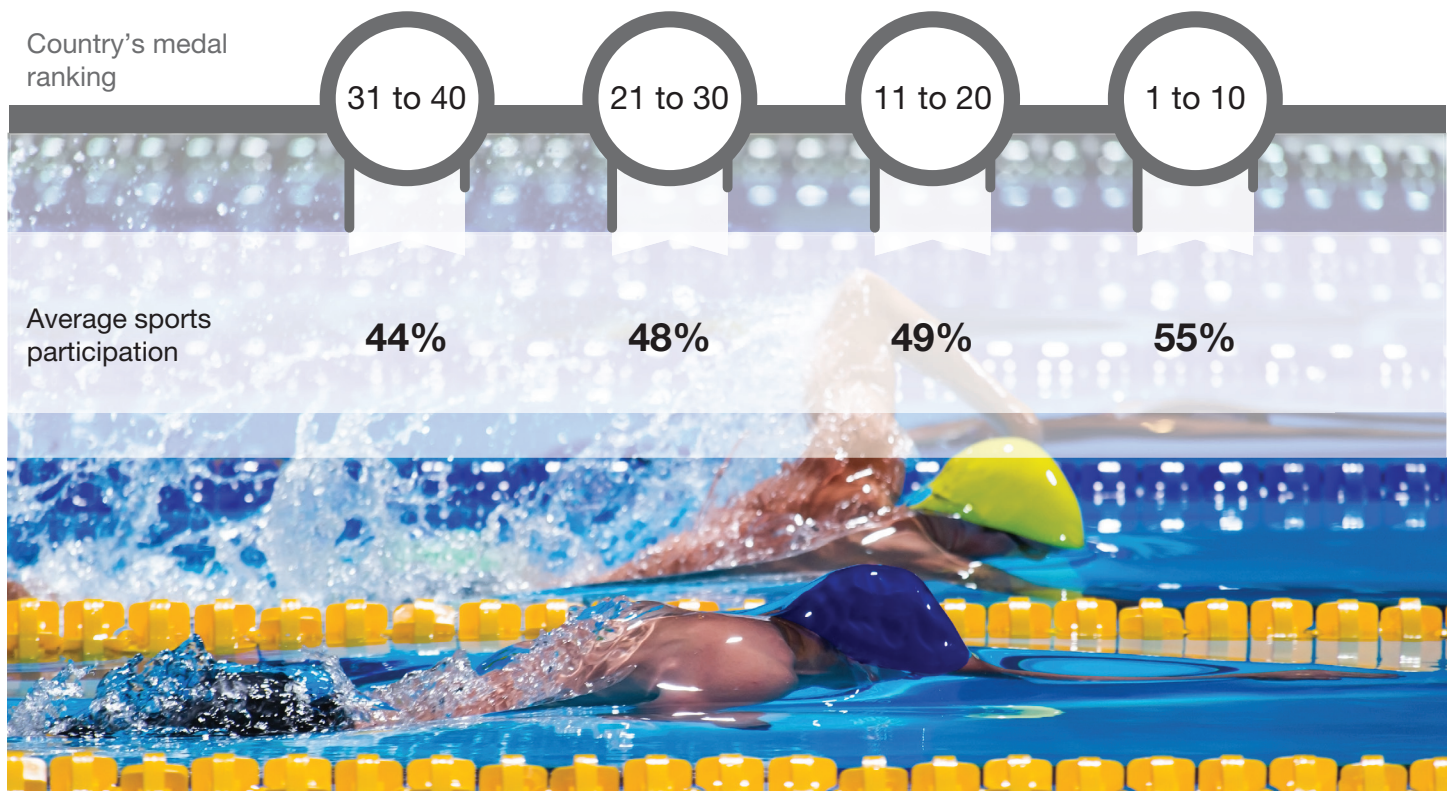
Clubs, schools, universities, and community programs play a foundational role at this stage, acting as critical platforms for talent identification and early competition by offering structured pathways for young athletes to develop through inter-school and inter-university contests. These competitions provide an essential bridge between grassroots participation and higher levels of organized sports, ensuring a robust and sustainable talent pipeline.

It should be recognized that investing in sports participation and physical education is valuable in and of itself from a social and public health perspective. In countries where organized sports are in their infancy, participation may need to be prioritized simply to attract young people to play. But the more participants there are, the larger the talent pool and the better the odds of identifying potential future champions (see *Exhibit 4*).

EXHIBIT 4

Countries with higher rates of early sports participation win more Olympic medals

Average sports participation relative to a country's medal ranking at the Tokyo Olympics



Note: Rankings are based on the Tokyo Olympics Medal Tally (<https://www.olympedia.org/>).

Source: "Move to Be Well: Global Economy of Physical Activity" Report, 2019, Global Wellness Institute; Strategy& analysis

2. Talent development

No single factor determines sporting success. Some athletes, like Tiger Woods, are prodigies, demonstrating mastery at an early age and going on to reshape the nature of their sport. Others are late bloomers, finding success only after years of struggle. Yet one thing we know is that molding raw talent into world-class performance takes time, which is why talent development is so critical.

Talent identification

It's difficult to identify a causal relationship between elite sporting success and an early spotting of talent, but it's also generally accepted that talent identification plays a vital role in improving the odds of success. Timely identification allows young athletes to be provided with the appropriate training, coaching, and support in the critical early years when many skills are best learned. Although the predictability of talent differs by sport and varies with age—sports with just one or two skill variables (such as rowing and cycling, for instance) have high predictive value relative to multi-skill disciplines (such as tennis or football)—early intervention ensures there are avenues such as training and competition to confirm an athlete's potential, and minimizes the chance of overlooking important factors that contribute to high performance.

Risks remain, though. Early specialization can accelerate skill mastery, but it also may increase rates of injury (especially through repetitive strain and overuse) and burnout. It can also limit athletic development by focusing an athlete on one sport, and the pressure to perform may reduce the athlete's enjoyment and hinder interaction, harming social and psychological growth. On the other hand, late specialization fosters overall athleticism and longevity but may delay peak performance in sports that require early technical development. In addition, although some disciplines (such as gymnastics and figure skating) demand early commitment, others (such as middle- and long-distance running, triathlon, and football) may benefit from a multisport foundation before the athlete chooses to focus on one sport.

Nurturing and skills growth

Once athletes are identified as having Olympic potential, their long-term success depends on how they are nurtured and developed. Every identified athlete needs a personalized development plan tailored to their strengths, their weaknesses, their growth trajectory, and the specific demands of their sport. Two key determinants of success are ensuring athletes have the time to train, particularly those balancing athletic and education commitments, and providing them with the necessary financial resources so they do not have to work to pay for their sporting expenses.



Many talented athletes work part- or full-time, as they are unable to support themselves through earnings from their sport. That may reduce the trajectory of their development. Aware of this pattern, leading nations approach the development and well-being of elite athletes holistically, from the identification of their talent through the conversion of that talent into top-level performance, to their eventual withdrawal from competitive sports.

By putting measures in place at various transition points, countries can help prevent athletes from leaving their sport and can minimize the perceived risks of a sporting career. In this way, nations can maximize the number of talented athletes achieving their full potential. Examples of measures that can be taken include: supporting athletes to continue their schooling alongside training, reducing dropout rates due to uncertainty about their future; having young talents join teams sponsored by the military or police, allowing them to train at a high level while receiving financial support; providing monthly stipends to reduce financial stress and enable full-time training; delivering career counseling, university scholarships, and job placement assistance; and transitioning retired athletes into coaching, management, and other roles within the sports organizations.

The final example underscores the need to develop programs that support athletes after their competitive careers, which is typically an area requiring significant improvement.

3. High performance

Two factors begin to play a critical role late in the talent development phase before becoming essential in the final stage of evolving toward Olympic success. The first is the ability of athletes to participate in highly competitive events, especially those hosted by their native countries. The second is investment in scientific research and innovation that can drive athlete performance. Both of these are enabled by the use of individual performance development plans to ensure that each athlete's specific needs are understood and addressed.

(Inter)national competitions

Competition is essential to athlete development. Both national and international competitions expose athletes to factors training can't replicate—such as high pressure, tactical challenges, and performance benchmarks—to help them grow physically, technically, and mentally. At the highest competitive level, the ability of athletes to adapt to competition conditions ultimately determines success. Without structured exposure to progressive competition, athletes may struggle to transition from developmental to elite levels.

International competition is even more valuable for countries that host events, for several reasons:

- **Increased athlete quotas and direct qualification.** Many international sporting events, including the Olympics, allocate automatic qualification spots or additional athlete quotas to the host nation. This means more local athletes can participate, even those who might not have qualified through regular ranking or qualification pathways. This gives a larger pool of athletes exposure to high-level competition, accelerating their development and allowing them to compete against world-class talent in a familiar setting.

- **Cost-effective exposure for athletes.** Competing internationally is expensive, involving travel, accommodation, and logistical expenses. Many countries—especially those with limited resources—often send only a few elite athletes to international competitions, reducing the number who gain experience at this level. Hosting international events removes these barriers.
- **Long-term infrastructure development.** Hosting a major international competition requires sports facilities, training centers, and organizational capabilities. If planned strategically, these investments can create a long-term legacy by providing top-class infrastructure for national teams, training camps, and future events, rather than being a one-off expense. In addition, such infrastructure can attract future international events as well as training camps from other nations and can enhance the overall competitiveness of local athletes.
- **Higher standards and more motivated athletes.** Hosting world-class competition creates a high-performance environment that can inspire and push national athletes to elevate their own levels. Further, it can build public awareness and enthusiasm for sports, increasing grassroots participation.

National competitions are also a vital stage in any athlete's development, for reasons including:

- **Forming a foundation for athlete development.** A well-structured national competition system provides a clear pathway for athletes who want to progress from grassroots levels to elite competition. Regular, high-level domestic competitions allow athletes to gain competitive experience, refine their skills, and develop the psychological resilience required to perform under pressure.
- **Bridging the experience gap.** If national competitions are not highly competitive, athletes may struggle to adapt to the intensity and demands of international events. Countries with strong national leagues and competitions give their athletes regular exposure to high-level competition.
- **Creating a competitive culture.** High-quality national competitions foster internal competition among athletes, ensuring that only the best earn international opportunities. This helps create a deep talent pool, allowing for more strategic selection for international events.
- **Attracting international participation.** If a country's national competitions reach a high standard, they can attract foreign athletes or coaches, further increasing the competitive level.



Investing in sports is not a feel-good luxury—it is a strategic lever for economic and social development.



Scientific research and innovation

Scientific research and innovation have become integral to elite sports development, serving as a key source of competitive advantage for nations aiming to achieve or sustain high-performance success. Leading countries have dedicated national research centers to both conducting independent research involving training methodologies, injury prevention, nutrition, biomechanics, and recovery, and coordinating national research efforts. Examples include the UK Sports Institute; the Australian Institute of Sport; and France’s Institut National du Sport, de l’Expertise et de la Performance (INSEP).

The use of sports science increases as athletes reach higher levels of performance. At the elite stage, where small margins determine victory, scientific research contributes significantly through advanced biomechanical analysis designed to optimize technique, physiological and metabolic assessments to tailor training, and recovery and injury prevention strategies to maximize longevity. When a nation continually integrates new scientific advancements such as artificial intelligence and virtual reality into its elite sport programs, its entire system benefits, contributing to long-term performance (see Exhibit 5).

EXHIBIT 5
Sports science integration enables objective and data-driven performance monitoring and evaluation

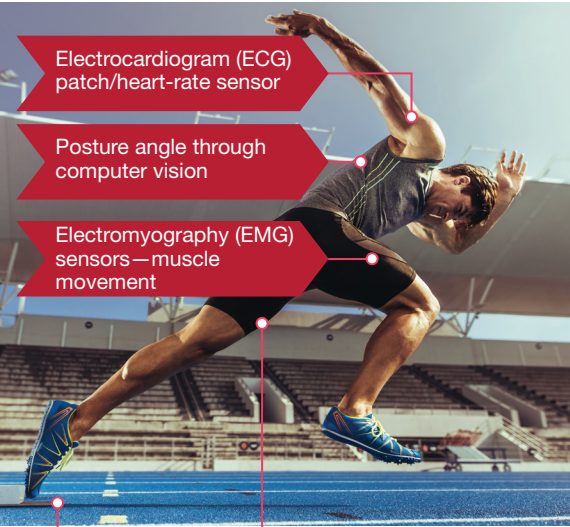
Sports science integration



Note: Illustrative example developed by Strategy& Middle East.
Source: Strategy&

How sports science optimizes athlete performance

Sports science integration—key parameters for 200-meter sprinter

Metrics and measurements	Category	Parameters— 200-meter sprint	Sensors/setup required
	Biomechanics	- Explosive power (start) - Speed, acceleration, and velocity - Force applied - Stride length - Strides per second - Running posture - Center of gravity	- GPS sensors 9-axis—accelerometers (joints) or computer vision - Force plates/smart footwear - EMG sensors for tracking muscle movement
	Physiology	- Heart rate and heart-rate variability - VO₂ max - Anaerobic threshold - Recovery (short term and long term) - Sleep quality	- Heart-rate sensors (ECG) - VO₂ max masks
	Sports nutrition	- Body chemical composition - Insulin reactions to food intake - Hydration levels	- Continuous glucose monitors for insulin reactions - Sweat and temperature sensors for hydration levels
	Sports psychology	- Focus and concentration - Mental conditioning - Brainwave monitoring	- EEG sensors for brainwave monitoring - Psychometric profiling surveys

Depending on force measurement, angle of start, and stride parameters, a high-performance coach can direct functional strengthening of the lower body, correct the athlete's position, improve rotational movement, and more 	Phases in 200 meters	0 – 10 M	11 – 100 M	101 – 170 M	171 – Finish
	GRF (in pounds)	600	725	890	900
	Velocity (in meters per second)	12	11	10	11
	Stride length (in meters)	2.1	2.3	2.5	2.6
	Strides per second	3.9	3.5	3.7	4.1

Note: Illustrative example developed by Strategy& Middle East. GRF = ground reaction force.
Source: Strategy&

COMMITTING TO OLYMPIC SUCCESS

A series of actions can provide a stable foundation for both the talent development and high-performance phases of athlete development. These begin with quality coaching and extend through providing training facilities and financial support. Strong sports governance is essential in all these factors.

Coaching provision and development

Coaching quality is one of the most consequential factors in Olympic medal success. Elite coaches play a crucial role in developing athletes and refining their performance, and countries that invest in coaching education, support, and professionalization tend to perform better at an international level.¹³ Leading nations provide structured support for coaches through three elements.

- **Continual professional development** includes access to cutting-edge training methodologies, sports science, and psychology to improve coaching effectiveness, along with well-developed coach education systems comprising regular courses, workshops, and mentorship programs to ensure that coaches are abreast of the latest trends.
- **Financial compensation and recognition** are critical to making elite coaches feel appreciated. Higher pay allows coaches to dedicate more time to athlete development, and some countries have career pathways for coaches that provide incentives for long-term commitments.
- **Professionalization of coaching as a career** recognizes coaches as key strategic figures with leadership experience, sports science knowledge, and management skills. It helps nations compete in what has become a global race to secure the best coaches to gain a competitive edge. For instance, France's Agence Nationale du Sport (ANS) implemented a plan aimed at attracting top-tier coaches, both domestic and international, by offering financial incentives and advanced training.¹⁴ In addition, the increasing ease of international mobility has led to a worldwide market for elite coaches and performance directors. Finally, professionalizing coaching provides retiring athletes with an option to remain involved in a sport after the close of their competitive career, helping them maintain a sustainable income while allowing fellow athletes to benefit from their knowledge.

High-quality training facilities

Advanced training facilities are a fundamental requirement for elite athletes, who need access to high-quality training environments at all times. Investment in high-performance training centers provides several direct and indirect benefits that contribute to elite sport success. These include reducing negative factors that affect athlete development, such as by allowing athletes to train closer to home, as well as maximizing positive outcomes through achieving economies of scale or simulating real competition environments.

Most nations recognize the imperative for such facilities. However, the way these facilities are structured and made accessible varies widely across countries, reflecting their unique sports systems and funding models. In general, there are two models:

Centralized national training centers

Some countries concentrate their elite training programs in a single or a few major facilities, offering a multisport training environment with state-of-the-art support. These institutes—such as Japan’s Institute of Sports Sciences—provide an all-in-one solution that integrates training, sports science, nutrition, and athlete support services.

Decentralized national training networks

Some nations adopt a distributed approach with multiple high-performance centers spread across different cities or regions. Such facilities often specialize in particular sports but are linked through a national network. Canada follows this approach, for example, while the Netherlands has a hybrid model with one national training center and several multisport training hubs.

Financial support

Financial support is perhaps the most critical determinant of success in elite sports. Although the relationship between investment and outcomes is complex and influenced by strategic allocation, efficiency, and global competition dynamics, nations that allocate substantial resources toward their athletic programs often achieve higher levels of international success.

Investment and success correlation

In preparation for the Paris 2024 Olympics, France significantly increased its sports budget. In 2019, the government established ANS and committed more than \$125 million annually to enhance the salaries and training of approximately 1,000 athletes with strong Olympic prospects. The result? France won 64 medals at the Olympic Games, including 16 gold—its best performance in the modern Olympic era. Other countries are doing likewise: Ahead of the 2028 Los Angeles Olympics and Paralympics, UK Sport announced a record investment of £330 million (US\$422 million), targeted at more than 50 sports.¹⁵

Strategic allocation of resources

Allocation strategies differ from country to country. The U.K., for example, prioritizes funding for sports with a higher likelihood of medal success, which helps it allocate resources efficiently by maximizing the return on investment.¹⁶ Other nations, such as Italy, may distribute resources more evenly among all sports. This funding strategy aims to balance the pursuit of excellence with the promotion of widespread sports participation, in turn creating a sustainable sports ecosystem that nurtures talent from the ground up.

Escalating investments amid global competition

As more nations amplify their investments in elite sports, maintaining previous levels of success requires increased funding. For example, Great Britain won fewer gold medals at the 2024 Olympics than it did four years earlier¹⁷ despite increasing its financial commitment. The return on investment varies among countries, underscoring the importance of not only the amount of funding but also the effectiveness of its utilization.

Sports governance

Sports governance does not directly yield success in elite sports but serves as a precondition for sustained achievement. Without an effective governance structure, nations struggle to implement coherent strategies, allocate resources efficiently, and maintain accountability.

What do we mean by *governance*? The term encompasses processes and policies that ensure efficient decision-making, transparency, and accountability to create an environment where elite sports can thrive. Without clear roles, responsibilities, and strategic direction, even the most well-funded sports programs may underperform—and governance needs to evolve to remain fit for purpose, adapting to the demands of modern elite sports. Critical success factors include:

- **A nationally coordinated and clear strategy** making sure that all stakeholders—government agencies, national governing bodies (NGBs), and private-sector partners—work toward common goals. An example is the U.K.’s “No Compromise” approach via UK Sport, which has long prioritized investments in sports with high medal potential.¹⁸
- **Simplicity in governance and communication** among strategic bodies to avoid excessive bureaucracy and conflicting responsibilities. For instance, the Australian Sports Commission works with the Australian Institute of Sport (AIS) to drive high-performance success while maintaining clear separation of strategic oversight and operational execution.¹⁹
- **Government as an enabler, sports professionals as deliverers.** Governments should provide policy frameworks, funding, and oversight but allow sports professionals (coaches, administrators, and federations) to execute plans. For example, France’s ANS took over the elite sport strategy from the government, allowing experts to lead implementation.²⁰
- **Clear performance targets and accountability**, with sanctions and rewards for organization performance.



- **Focus on outputs and outcomes rather than process**, keeping achievable results as the priority. For example, the Dutch high-performance system prioritizes athlete-centric development, measuring success in terms of podium finishes rather than bureaucratic compliance.²¹
- **Long-term planning horizons** aligned with Olympic cycles (four to eight years) rather than short-term political agendas. For instance, Japan developed a 10-year sports strategy leading up to the Tokyo 2020 Olympics,²² prioritizing consistent investment and talent development.
- **Involvement of key stakeholders**, underscoring the collaboration of NGBs (which provide technical sport expertise), government bodies (funding and policy support), the private sector (commercial investment), and athletes and coaches (on-the-ground execution). Denmark's governance model is an example, as it ensures close cooperation between local municipalities, NGBs, and national sports agencies.
- **Modernized NGBs** that are transparent, accountable, and professionally managed. For example, the U.S. Olympic & Paralympic Committee (USOPC) underwent major governance reforms after athlete complaints about safety, athlete rights, and funding allocation.²³
- **Collaboration with the private sector** to expand funding opportunities, enhance innovation, and create sustainable elite sports ecosystems. An example is China's collaboration with corporate sponsors and tech firms, such as Alibaba's investment in digital performance analytics for athletes.



Talent matters, but it will not by itself get an athlete or team to the podium. A whole ecosystem needs to be in place.

ADAPTING THE ROADMAP TO MEET SPECIFIC NEEDS

Although the broad approach for driving Olympic success is consistent, the specific paths taken must reflect each nation's unique context. Several Arab nations have already embarked on this journey, implementing promising initiatives that reflect a strategic shift toward long-term athletic development and international competitiveness.

Saudi Arabia, through its Vision 2030 agenda, has established the Mahd Sports Academy, an ambitious project designed to identify and develop young talent across key Olympic disciplines, supported by high-profile advisory figures including football manager José Mourinho. This effort is bolstered by the Saudi Olympic and Paralympic Committee, which is investing to professionalize national federations and support high-performance athletes through the Saudi Olympic Training Center, which leads, invests in, and supports elite sports in Saudi Arabia and prepares athletes for peak performance at global events.

Qatar's Aspire Academy has become a regional model for elite talent development, combining academics with sports training and producing Olympic medalists such as high jumper Mutaz Essa Barshim and 400-meter hurdler Bassem Hemeida.²⁴ Aspire operates closely with the country's School Olympic Program, a nationwide grassroots initiative engaging tens of thousands of students annually across 25 Olympic sports, feeding top talent into national programs and federations. This ecosystem is complemented by the world-class Aspire Zone, an integrated sports complex including the Aspire Dome and Aspetar Orthopaedic and Sports Medicine Hospital, providing integrated athlete care and cutting-edge sports science support.

Egypt, building on its historical strength in sports such as weightlifting, wrestling, and taekwondo, launched the National Talent and Olympic Champion Project to identify and nurture young athletes in its priority sports. Its Olympic Training Center in Maadi, which was recently upgraded to international standards, provides centralized, multidisciplinary facilities for national teams. Similarly, Morocco's Moulay Rachid National Sports Center and National Athletics Institute serve as key development hubs, supporting the country's strong tradition in athletics and boxing. In Jordan, the National Coaching Certification Program, developed in partnership with Canada, is professionalizing coaching standards across sports, ensuring a pipeline of qualified coaches to support athlete development.

Results at the Olympic level are still limited, but Arab countries' commitment to growing participation and building sport ecosystems reflects a long-term strategy to expand the talent base and lay the foundation for future success. The region's ambitions are clear: Arab countries are aligning high-level policy with targeted investments in coaching, infrastructure, athlete welfare, and competitive exposure. Their success will ultimately depend on sustained focus, strategic prioritization of sports with the highest medal potential, and the ability to scale from promising initiatives into systems capable of consistently producing world-class athletes.



Data plays a critical role in helping nations understand their starting point, identify priority areas, and set realistic expectations at the national level. If one looks at the historical number of participants and medals won at Junior World Championships in the eight years leading to an Olympic Games, the Senior World Championships in the four years leading to an Olympics, and at the Olympics itself, it is possible to have an indicative idea of the typical athlete pipeline required on the pathway to success for a given sporting discipline (see *Exhibit 6*). Although “black swan” outcomes—unexpected outliers—can occur, particularly in disciplines like combat sports, building a consistently successful system requires nations to avoid relying on anomalies.

Leading nations also use data to project the progression of individual athletes over time, comparing their trajectories against historical benchmarks and current peers. This enables more accurate short-term predictions of medal potential and provides a stronger basis for strategic planning. In addition, it helps define the athlete’s performance plan, with milestones to be reached at each age to keep the athlete on track for a medal.



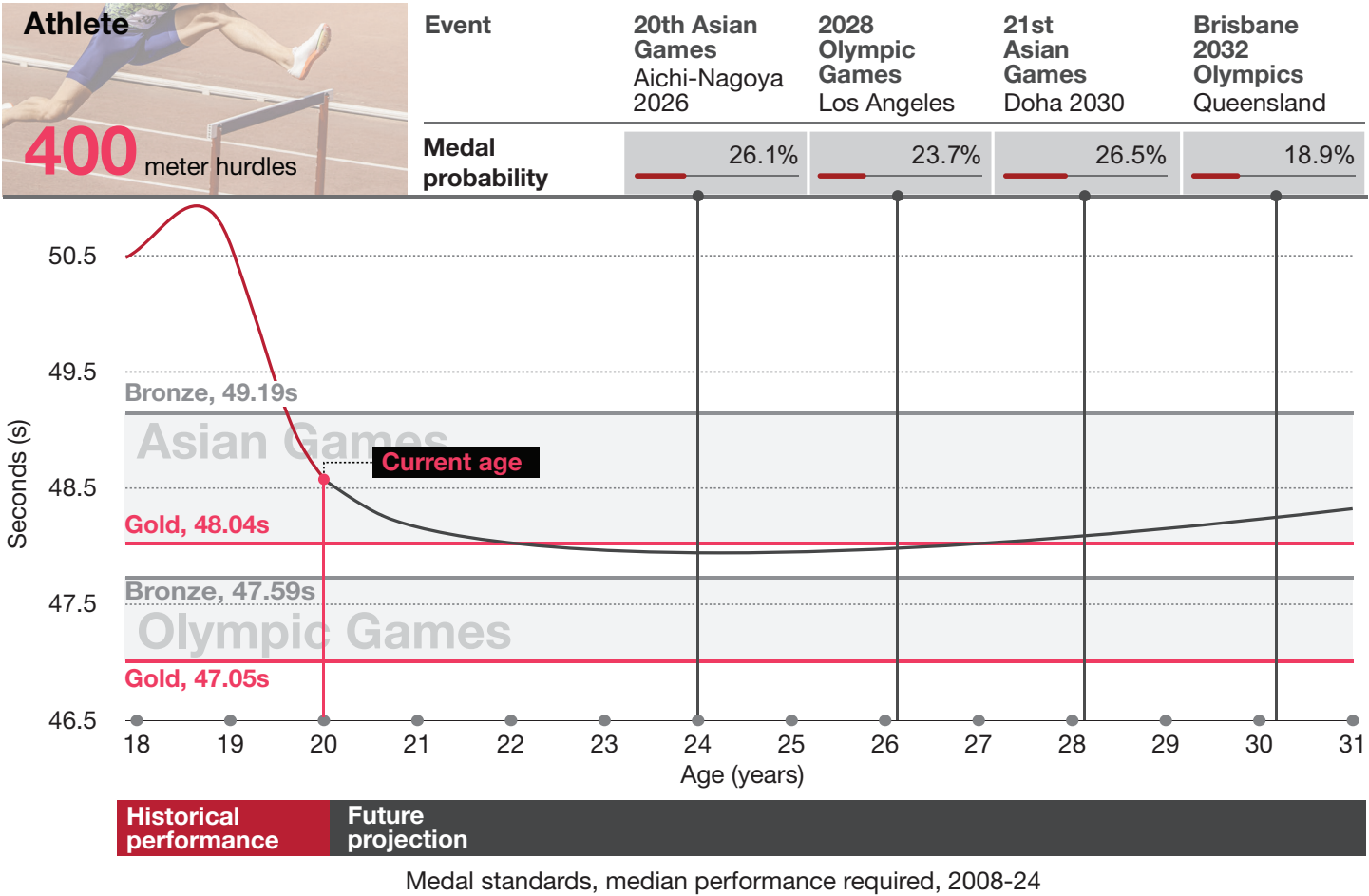
EXHIBIT 6

Data can help nations understand the pathway to Olympic success

Correlation between participation and medal count for 1 and 2 Olympic medals in athletics



Athlete performance projection and medal probability



Note: Illustrative example developed by Strategy& Middle East.
Source: Strategy&

CONCLUSION

By adopting a structured, long-term approach to talent development and high-performance support, Arab nations can cultivate a new generation of athletes capable of competing on the world stage. In so doing, they can leapfrog other countries by learning from international experience, tailoring approaches to local contexts, and quickly working to achieve Olympic success commensurate with the region's share of the global population. It will not be easy. Many countries are investing heavily and becoming more successful, and a finite number of medals are available to be won. But it's essential to join the race.



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