

COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS

FOREWORD

When we talk about professional football, most people automatically think of the elite competitions: top leagues, continental club competitions and the FIFA Club World Cup[™]. But they are only the tip of the iceberg and, while these competitions rightly command large international TV audiences and attract significant financial investment, there is a much larger ecosystem out there.

This Comparative Analysis of Second and Third Divisions is a landmark study of how second- and third-tier competitions and the participating clubs are run. From competition format and the number of spots on each league table to naming and broadcast rights and the existence of a solidarity mechanism, this snapshot of each of these competitions builds up a picture of worldwide trends in football away from the big money of the top leagues.

For readers' ease of reference, please note that the featured countries have been organised in alphabetical order, starting with Argentina and ending with Wales. Wherever financial values have been applied, the currencies have been converted to US dollars, in order to ensure uniformity across the report. Given the volatility of the foreign exchange market as a consequence of the COVID-19 pandemic, these figures should be considered approximations. As a final note, the member associations selected for this comparative analysis were the top 25 in the FIFA/Coca-Cola Men's World Ranking at 9 April 2020, which was the starting month of this endeavour. Needless to say, the placing that appears on the information page for each country reflects that applicable at the time of publication, in accordance with the 7 April 2021 update to the ranking.

We hope that the visualisation of data and the accompanying analysis in this study will help readers build their understanding of the state of professional football today and provide inspiration for the further development of second-and third-tier competitions throughout FIFA's 211 member associations.



Emilio García Silvero Chief Legal & Compliance Officer

Ornella Desirée Bellia Head of Professional Football



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INTRODUCTION

This report provides a snapshot of the state of professional football* in a range of very diverse territories: from the ever-booming domestic market of Brazil, where passionate fans will gladly watch football at every level, to England, where famous clubs with strong local traditions play in each tier of the Football League and attract interest at home and abroad.

Among the more immediate findings are that a clear majority of competitions are played across two years (e.g. August to May) and that the number of participating clubs in third divisions is significantly higher (almost double on average) than it is in second divisions. Meanwhile, the most popular competition format is a home-and-away league structure followed by play-offs to determine the champions and promotion spots. It is also interesting to note that Argentina and Wales have two separate tournaments within their third divisions.

Competition organisers of second divisions tend to be leagues (52%), while the majority of third divisions (73%) are run by the national association. A hybrid set-up exists among second divisions, whereby the national association organises the competition and assigns all marketing rights to a league.

In terms of sales, second-tier competitions fare better than third in assigning broadcast rights, with 79% of second divisions having national deals and 52% selling rights internationally. Third divisions, perhaps naturally, also have significantly stronger domestic rights sales (58%) than abroad – just 15% of those competitions sell international broadcast rights, and there are only four countries (England, Sweden, Uruguay and the USA) whose second and third divisions sell rights both nationally and internationally.

Still within the broadcast rights realm, there are three scenarios that can take place: 1) rights are only sold nationally, 2) rights are sold nationally and internationally, 3) rights are not sold nationally or internationally. In this sense, the breakdown for the second division is, respectively, 25%, 54%, and 21%, whereas in the third division it is 42%, 16%, and 42%.

There is also a greater appetite among sponsors to pick up the naming rights to second divisions (56%) than to third divisions (19%), and they are most likely to come from the betting sector.

In this context, it is interesting that 64% and 46% of second and third divisions, respectively, have solidarity mechanisms for participating clubs.

Perhaps the largest disparity is in the average revenue per club, with second-tier clubs bringing in USD 8.5 million and those in the third tier earning USD 1.8 million, representing a drop of 79%.

Thanks to the visual representation of the data behind each key performance indicator, readers can more easily see the differences between the second and third tiers in each country, as well as between nations.



* The information in this report is based on the planned formats for the respective competitions in 2020 and/or 2021, as provided and confirmed by the respective competition organisers. However, changes may have been made on the ground as a result of the COVID-19 pandemic and the formats may also vary in future seasons.

FIFA/COCA-COLA WORLD RANKING



	9 April 2020	
RANK	TEAM	TOTAL POINTS
1	🕕 Belgium	1765
2	France	1733
3	📀 Brazil	1712
4	🕂 England	1661
	👙 Uruguay	1645
6	🍮 Croatia	1642
7	Portugal	1639
8	🔵 Spain	1636
9	Argentina	1623
10	🔵 Colombia	1622
11	🕕 Mexico	1621
12	Switzerland	1608
13	🕕 Italy	1607
14	Netherlands	1604
15	ermany	1602
16	🛟 Denmark	1598
17	🕒 Chile	1579
17	🕒 Sweden	1579
19	🗕 Poland	1559
20	\star Senegal	1555
21	🕕 Peru	1544
22	👙 USA	1542
23	💓 Wales	1540
24	🔵 Ukraine	1537
25	💿 Venezuela	1517

	7 April 2021	
RANK	TEAM	TOTAL POINTS
1	🛑 Belgium	1783
2	France	1757
3	🧿 Brazil	1743
4	🕂 England	1687
	Portugal	1666
	🔵 Spain	1648
7 1	🕕 Italy	1642
8 †	Argentina	1642
9 ↓	👙 Uruguay	1639
10 ↑	🕀 Denmark	1632
11	🕑 Mexico	1630
12 🕇	🛑 Germany	1609
13 ↓	Switzerland	1606
14 ↓	😂 Croatia	1606
15 ↓	🗕 Colombia	1601
16 ↓	Netherlands	1598
17 🕇	🚱 Wales	1570
18 🗍	🔶 Sweden	1570
19 ↓	🕒 Chile	1570
20 ↑	👙 USA	1555
21 ↓	🗕 Poland	1550
22 🕂	🕑 Senegal	1542
24	🔵 Ukraine	1516
27 🗼	🕕 Peru	1512
30 ↓	💿 Venezuela	1501

FIFA COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS



FINDINGS: VISUAL SUMMARY



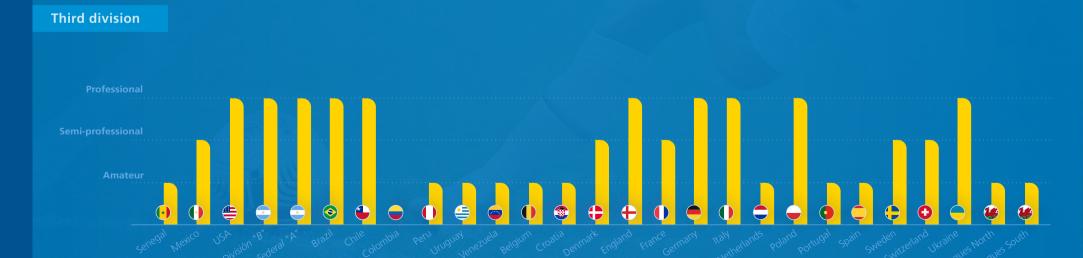
FIFA COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS

7 7 Football

COMPETITION STATUS

Second division

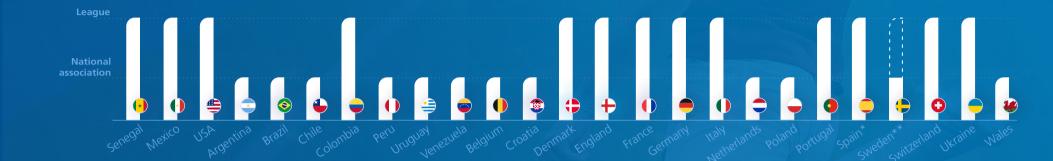






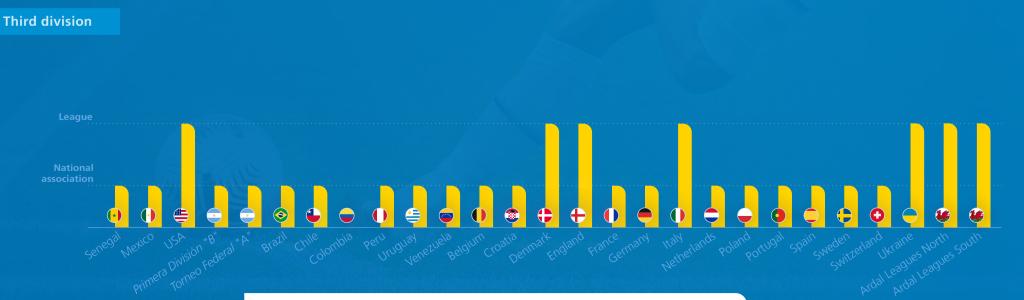
COMPETITION ORGANISER

Second division



* LaLiga is a member of the RFEF. As such, the competition is organised by LaLiga in coordination with the RFEF. **

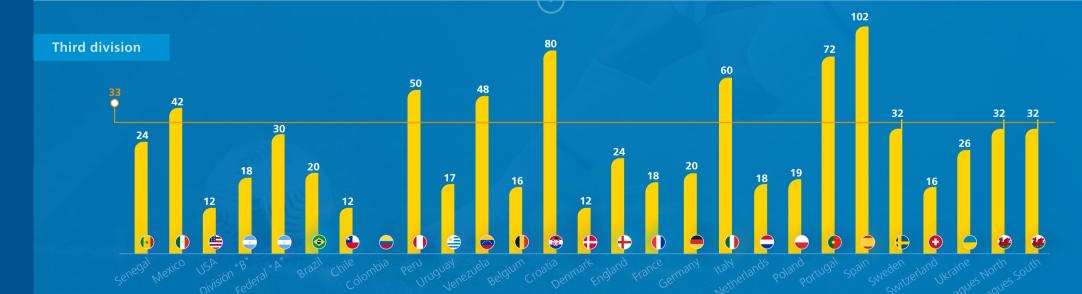
* Hybrid model.



NUMBER OF TEAMS

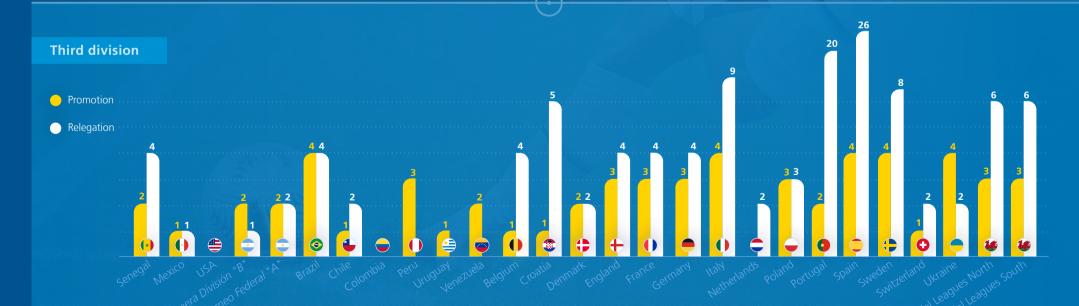
Second division





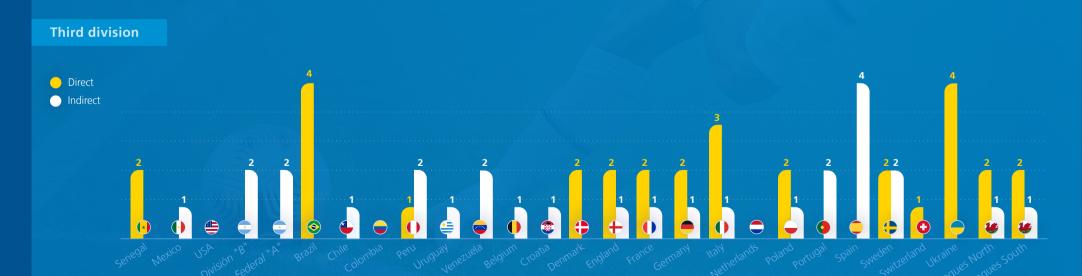
PROMOTION AND RELEGATION BERTHS – OVERVIEW







PROMOTION BERTHS Second division Direct Indirect Company C



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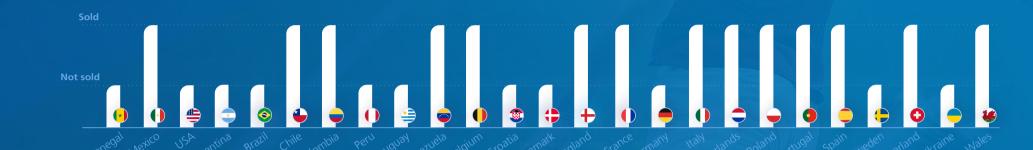
COMPETITION FORMATS

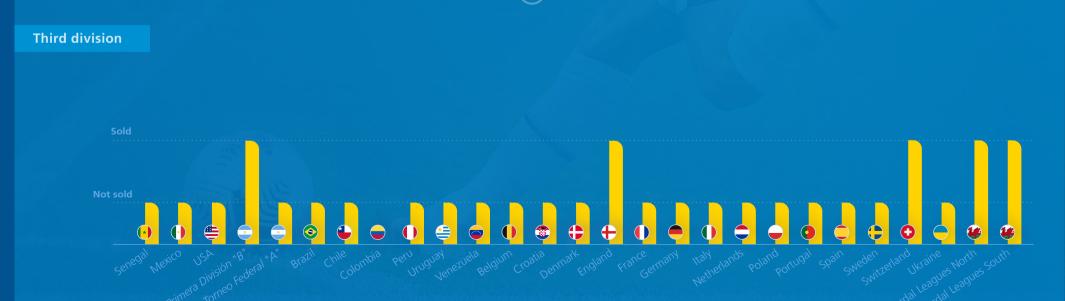
Second division Third division Home and away Home and away + play-offs Home and away + play-offs + mini-league Home and away + mini-league Single round robin + play-offs 8% Single round robin + mini-league + play-offs 4% 4% Double home and away + play-offs 4% 8% 8% 8% % % 1 0 1 0 • 1 2 2 \bigcirc 2 $\overline{}$ **24%** 23% 2 • 2 S 🕹 🏽 🕨 🗕 🏈 6 6 $\begin{array}{c} \textcircled{} \bullet \bullet \end{array}{} \bullet \textcircled{} \bullet \textcircled{} \bullet \textcircled{} \bullet \textcircled{} \bullet \r{} \bullet \r{}$ 12 14

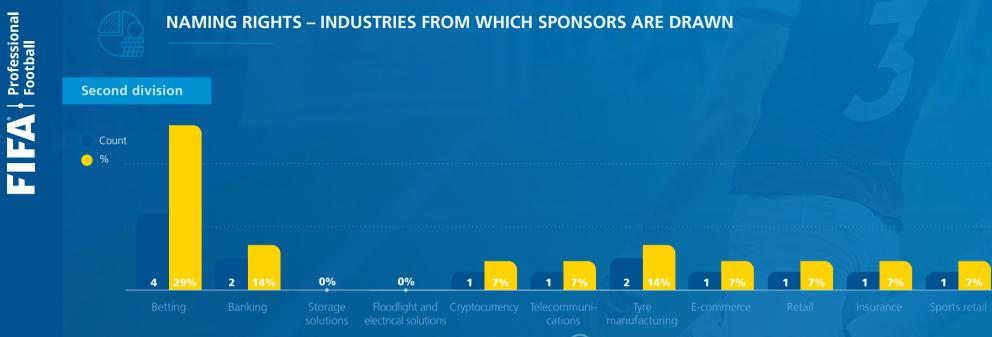


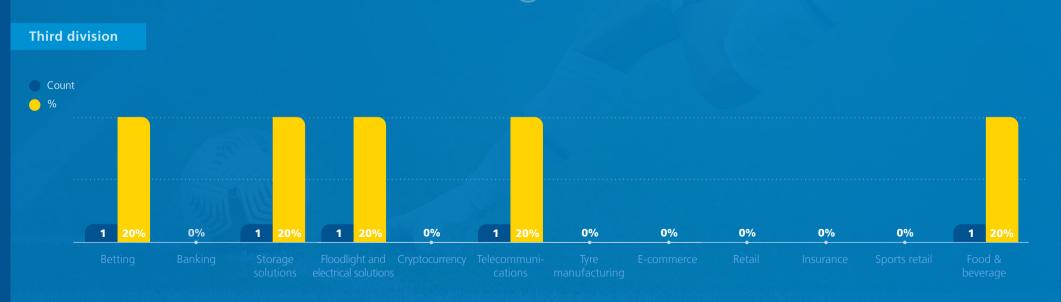
NAMING RIGHTS – OVERVIEW

Second division

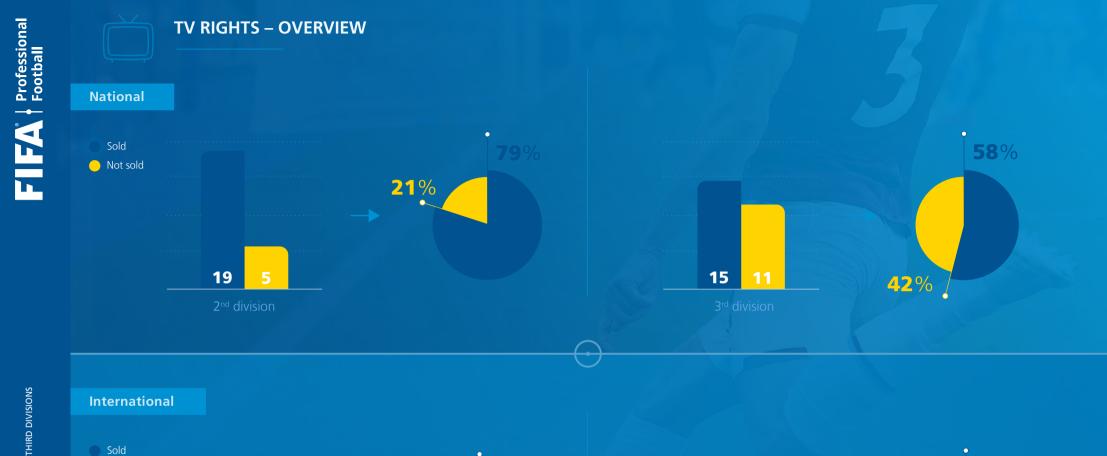


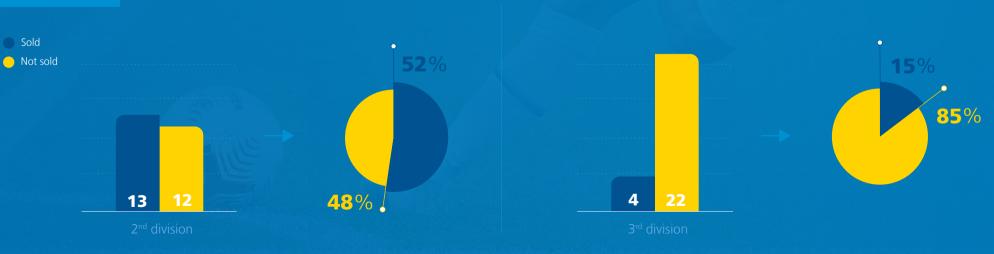






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FIFX Professional

NATIONAL TV RIGHTS

Second division



* Not applicable because national TV rights are individually sold by clubs

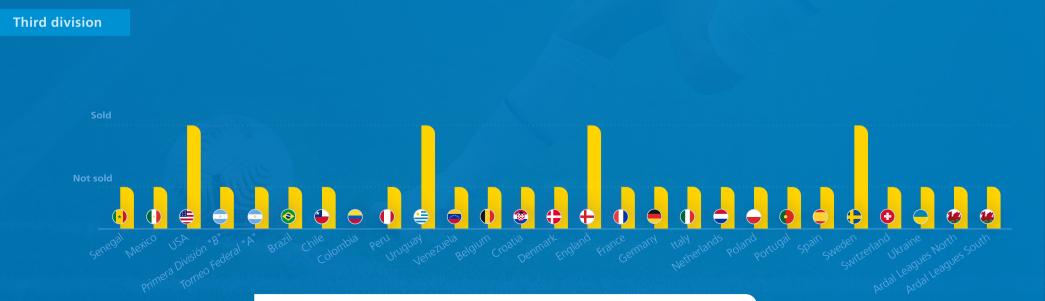


FIFA Professional

INTERNATIONAL TV RIGHTS

Second division





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SOLIDARITY MECHANISM

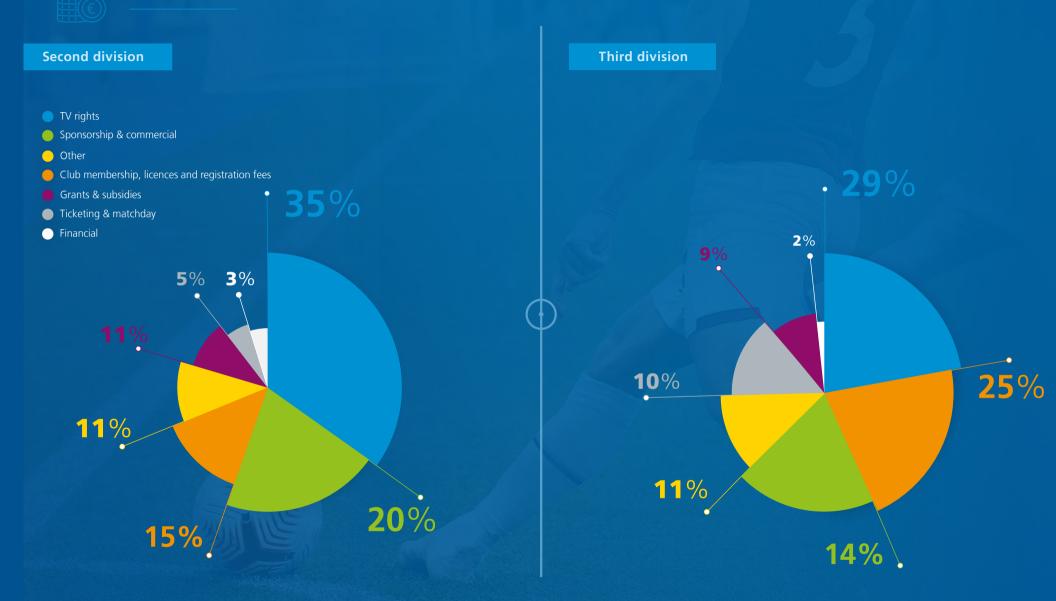
Second division





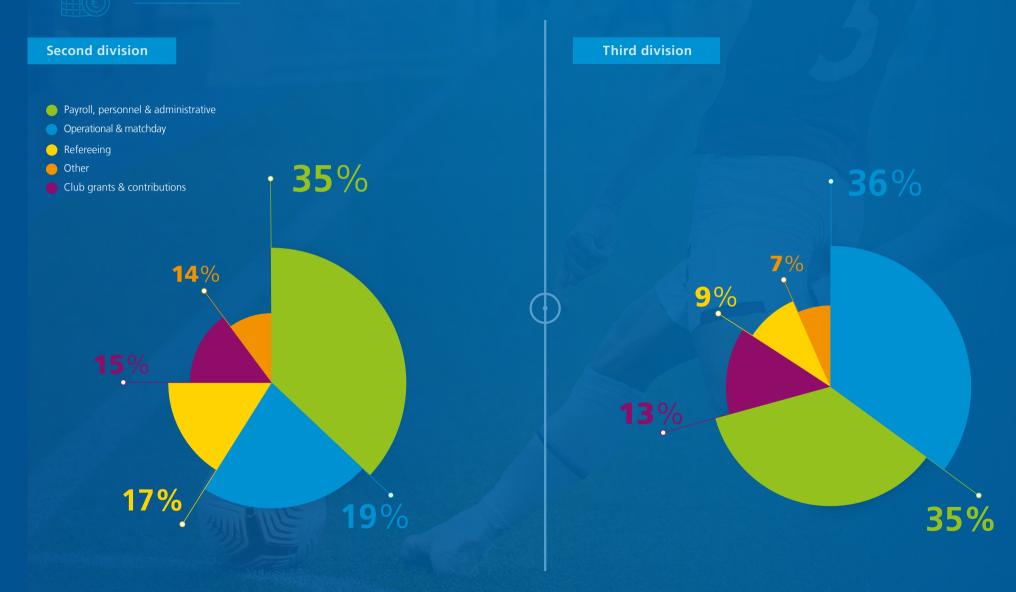
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AVERAGE REVENUE STRUCTURE OF COMPETITION ORGANISERS



FIFA COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS

AVERAGE COST STRUCTURE OF COMPETITION ORGANISERS



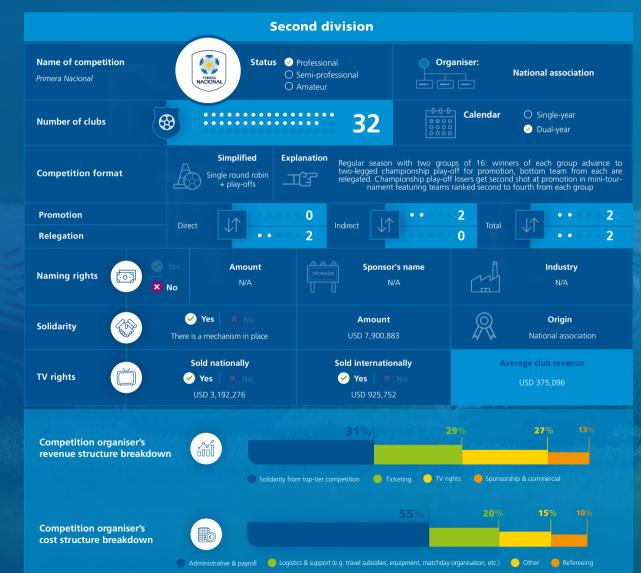




FIFA COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS

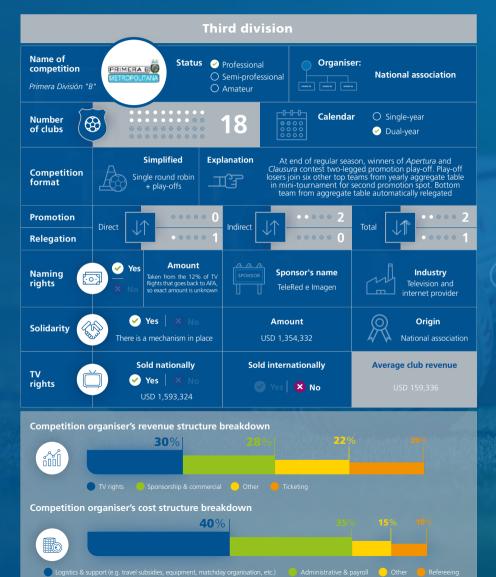
**		Member association	Abbreviation	FIFA/Coca-Cola World Ranking
AA	CONMEBOL	Argentinian Football Association	AFA	8

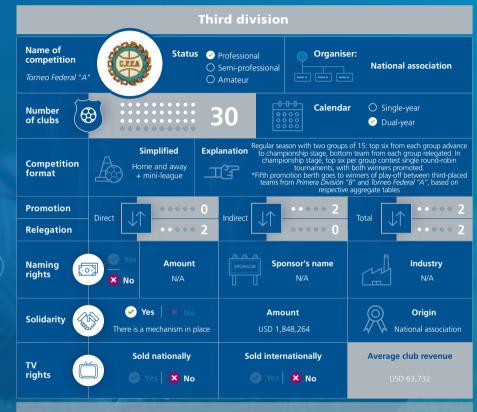
ARGENTINA



Professional Football







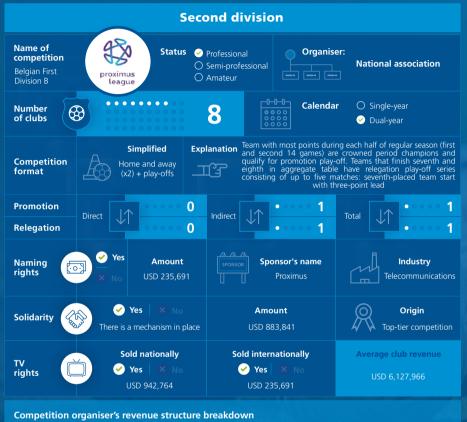
Competition organiser's revenue structure breakdown

Information
Competition organiser's cost structure breakdown

Information not available

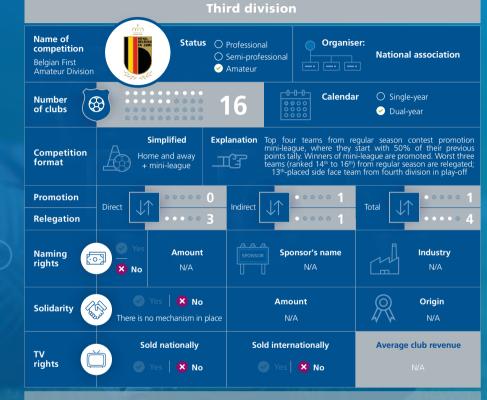
Information not available

) 🙆	Member association O Belgian Football Association	Abbreviation O KBVB	FIFA/Coca-Cola World Ranking ···O······ 1	BELGIUN









Competition organiser's revenue structure breakdown

iii)

No significant sources of revenue can be reported

Competition organiser's cost structure breakdown



No significant sources of costs can be reported



Member association
0
Brazilian Football Associa

Abbreviation	FIFA/Coca-Cola World Ranking
o	·O·····
CBF	3

BRAZIL



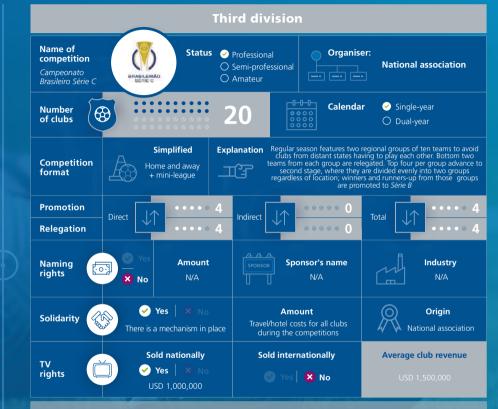




The operational revenues of Série A, B, C and D (first division to fourth division) are bundled together. No specific split per division is possible

Competition organiser's cost structure breakdown

The operational costs of *Série A*, *B*, *C* and *D* (first division to fourth division) are bundled together. No specific split per division is possible



Competition organiser's revenue structure breakdown



The operational revenues of *Série A, B, C* and *D* (first division to fourth division) are bundled together. No specific split per division is possible

Competition organiser's cost structure breakdown



The operational costs of Série A, B, C and D (first division to fourth division) are bundled together. No specific split per division is possible

Professional Football	

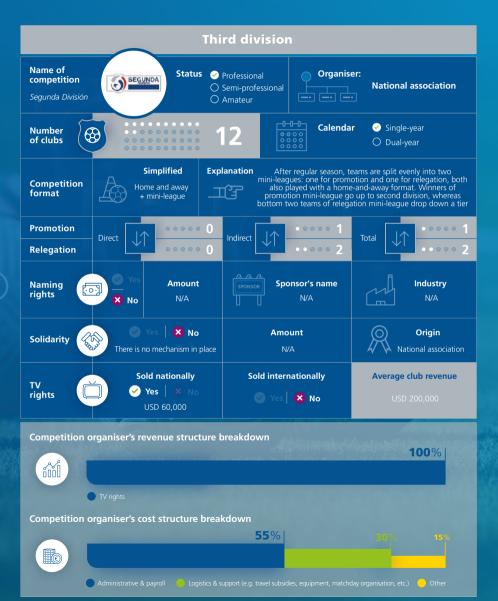
	_Seco	ond division	
Name of competition Campeonato Primera B	Status ©		niser: National association
Number of clubs		16 Caler	ıdar
Competition format	Simplified Exp	lanation Traditional home-and best teams are promo	-away regular season, in which two ted to top tier and bottom team are relegated
Promotion Relegation	Direct	Indirect	Total
Naming rights	Yes Amount	Sponsor's name	Industry Betting
Solidarity	Ves Xo There is no mechanism in place	Amount N/A	Origin National association
TV rights	Sold nationally Yes Xes No USD 21,000,00	Sold internationally	Average club revenue USD 2,000,000
Competition of	organiser's revenue structure l	preakdown	99% 1%
			35 70 78
	TV rights Sponsorship & commercia		20% 20 %
		00%	

Administrative & payroll 🛛 😑 Logistics & support (e.g. travel subsidies, equipment, matchday organisation, etc.) 🔷 Other

Member association

0

Chilean Football Association

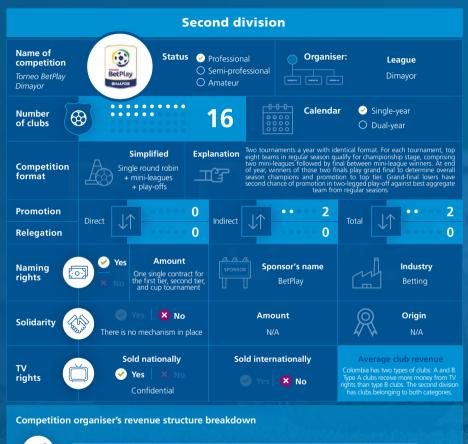


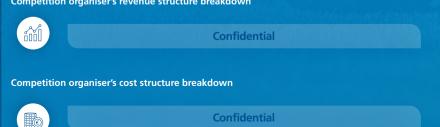
Abbreviation FIFA/Coca-Cola World Ranking

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FFCH

	Member association O Colombian Football Association	Abbreviation	FIFA/Coca-Cola World Ranking	COLOMBIA
CONMER		FCF	15	COLOIVIDIA





Name of Status O Professional Organiser: competition O Semi-professional Torneo Nacional O Amateur Interclubes Primera C Calendar O Single-year Number \bigotimes of clubs O Dual-year Simplified Explanation Competition Not applicable format Promotion Direct Total Indirect Relegation Sponsor's name Naming Amount Industry .0. rights Origin Amount 0 \sim Solidarity Sold nationally Sold internationally Average club revenue TV rights

Third division: will be relaunched in 2021, following an announcement made on 12 April 2021. Since no specific details have been confirmed, the fields for this tier have not been completed.

Competition organiser's revenue structure breakdown



Not applicable

Competition organiser's cost structure breakdown

Not applicable

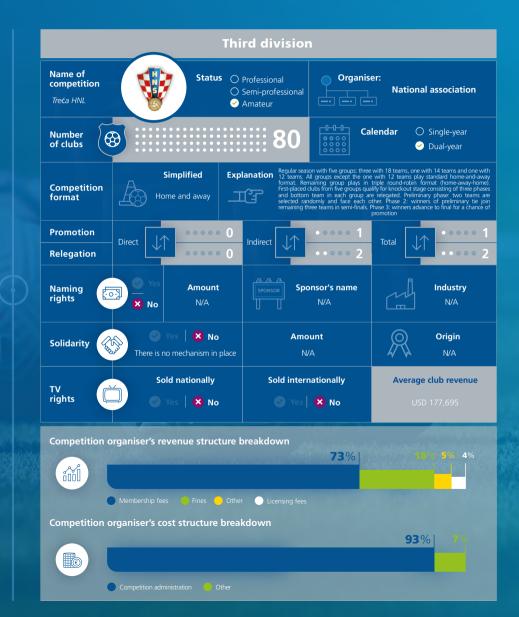
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Professional Football	3
	Name o compe
	Druge

3	۷ 🎯	······O······	association Football Fede	ration
	S	econd divisio	n	
Name of competition Druga HNL	Status	 Professional Semi-professional Amateur 	Organise	Nati
Number of clubs		18 🗟	Calenda	r ⊖s ⊘c
Competition format	Simplified Home and away	Explanation After re	egular season, top and bottom thre 1	team is pro e teams are hird tier
Promotion Relegation	Direct	1 Indirect	• • • • • 0	Total
Naming rights	Yes Amount X No N/A	SPONSOR Spo	onsor's name N/A	

Industry × No Origin Amount $\langle \rangle \otimes$ Solidarity There is no mechanism in place Sold internationally Sold nationally Average club revenue TV rights 🖌 Yes 🗙 No USD 23,569 Competition organiser's revenue structure breakdown

ŵ Membership fees 🔴 Fines 😑 Other 🛑 Licensing fees Competition organiser's cost structure breakdown Referees & match commissioners 😑 Other



Abbreviation FIFA/Coca-Cola World Ranking

1

3

. . .

National association

O Single-year

Dual-year

three teams are relegated to

top team is promoted to first division

FIFA COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS

CROATIA

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Profe: Footb	
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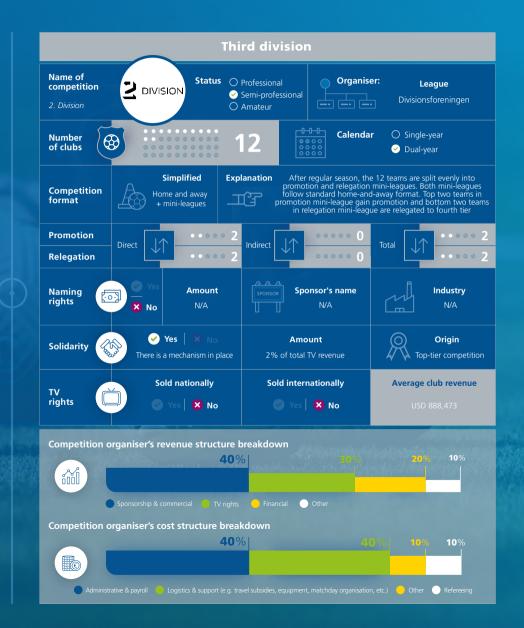


Naming rights		Yes X No	Amount N/A		Sponsor's name N/A		Industry N/A
Solidarity	Carlos and Carlos	✓ There is	Yes X No		. mount otal TV revenue	R 1	Origin op-tier competition
TV rights	Ŏ	_	old nationally Yes X No	Sold in	ternationally es X No		e club revenue 3,535,365

Competition organiser's revenue structure breakdown







DENMARK

Abbreviation FIFA/Coca-Cola World Ranking

2

League

Divisionsforeningen

O Single-year

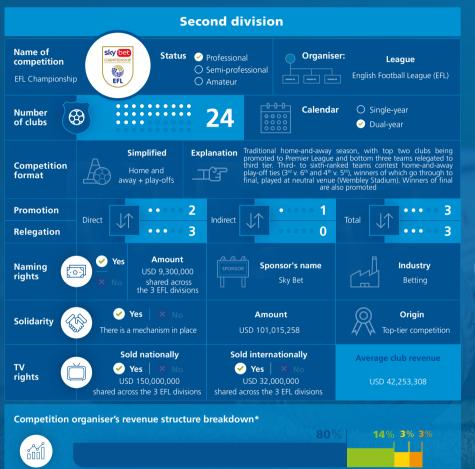
🕑 Dual-year

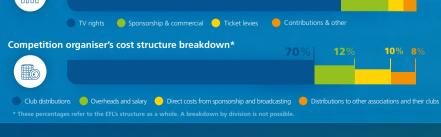
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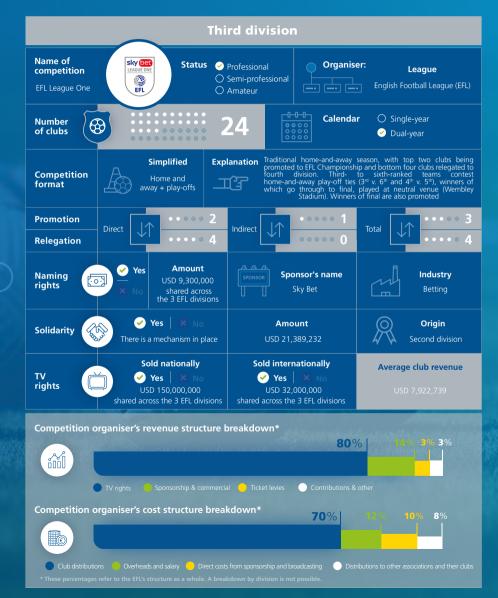
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Total

ENGLAND	Member association		FIFA/Coca-Cola World Ranking	ENGLAND
		The FA	4	ENGLAND

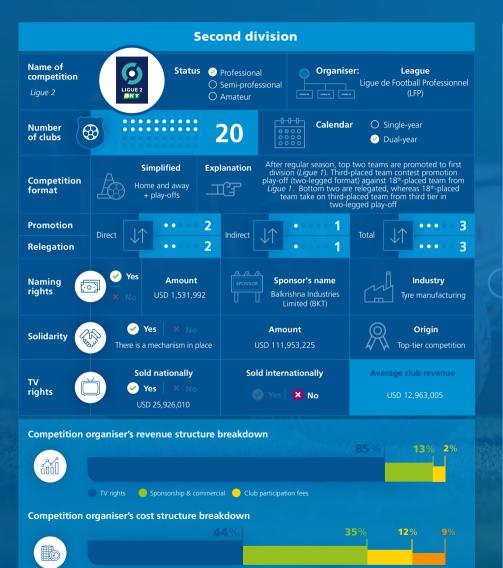




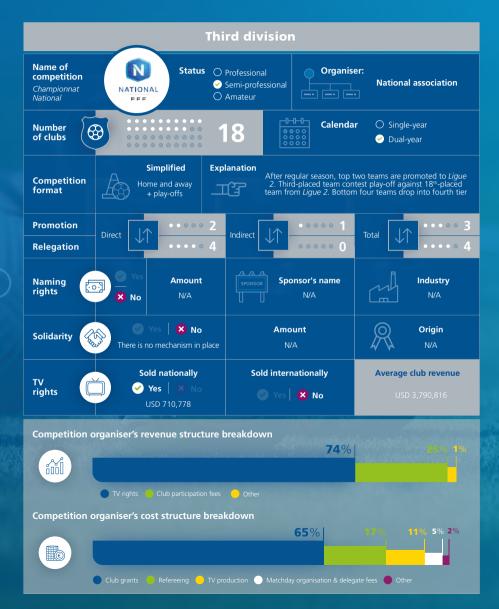


)	* * FRANCE	6	Member association O		FIFA/Coca-Cola World Ranking
	FRANCE		French Football Association	FFF	2



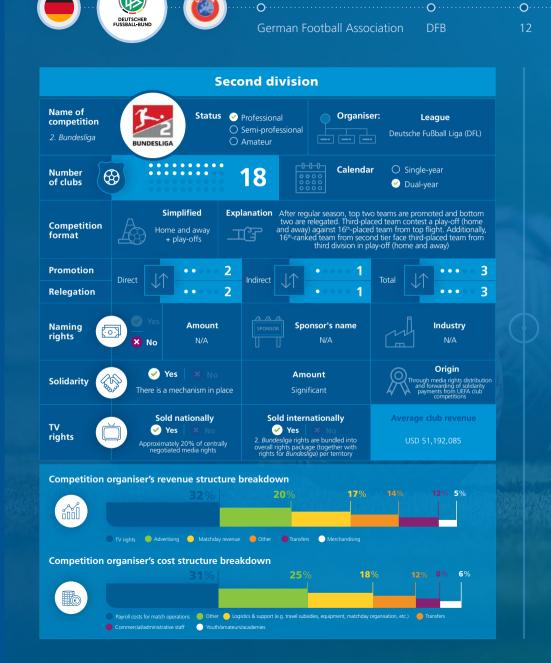


Administrative (share of personnel, buildings, etc.) 🛑 Refereeing 🦳 Taxes 🛑 Matchday organisation

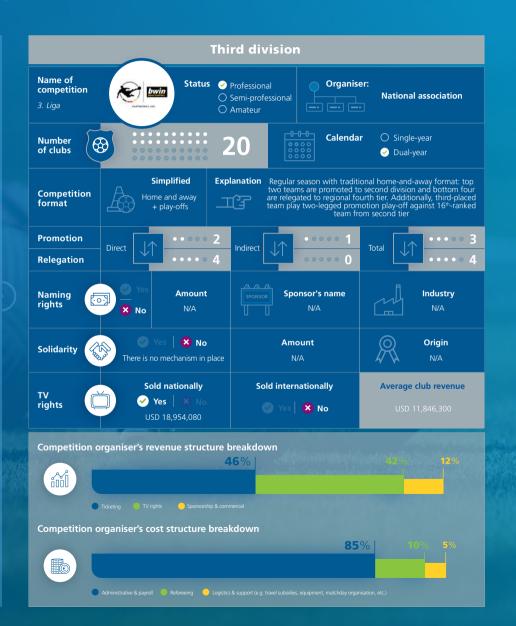


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Professional Football	



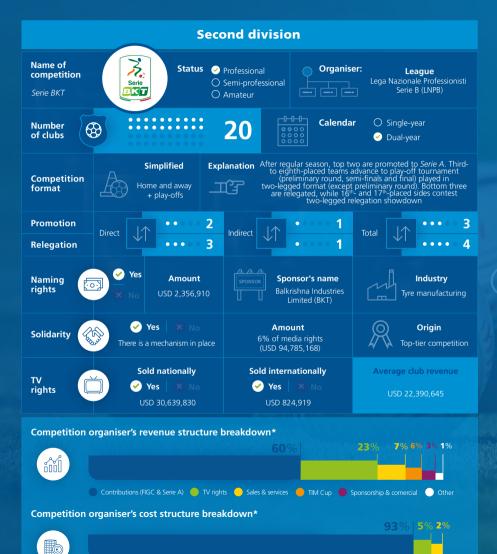
Member association



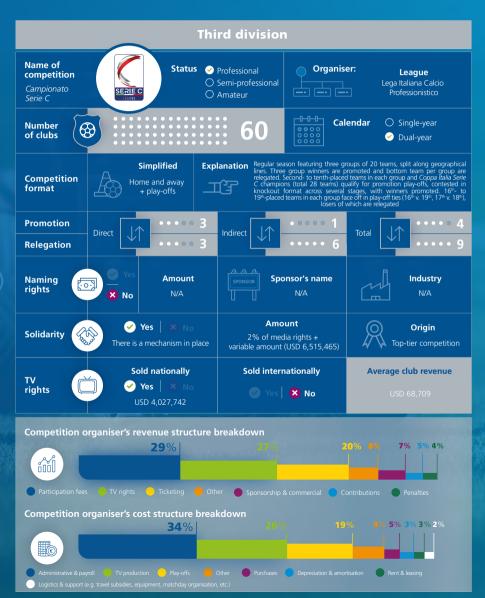
Abbreviation FIFA/Coca-Cola World Ranking

GERMANY

	Member association		FIFA/Coca-Cola World Ranking	LEGAPRO	Т
	Italian Football Association	FIGC	7		

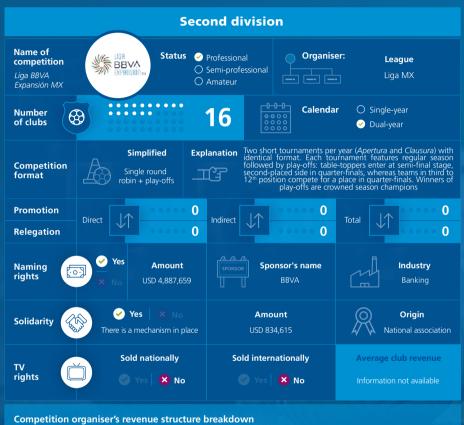


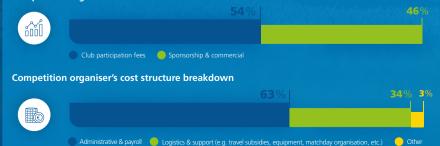
🔍 Club & other distributions (i.e. advisors, event producers, etc.) 🛛 🋑 Services 🛛 😑 Administrative <u>& payroll</u>

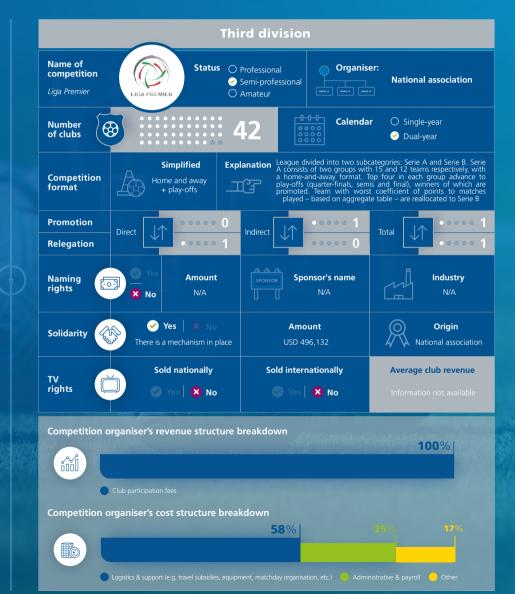


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		Member association		FIFA/Coca-Cola World Ranking	MEX
Concacaf	- Mexican Football Association	FMF	11		

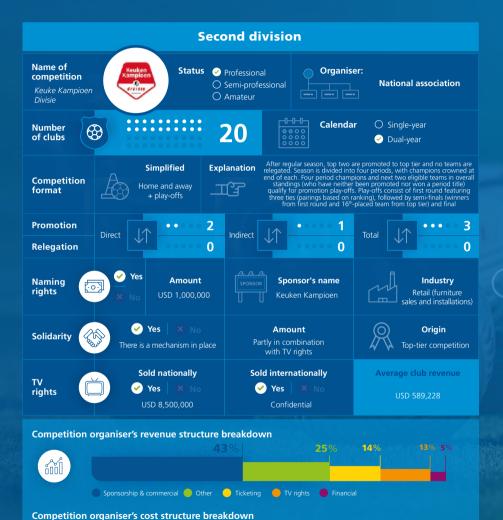




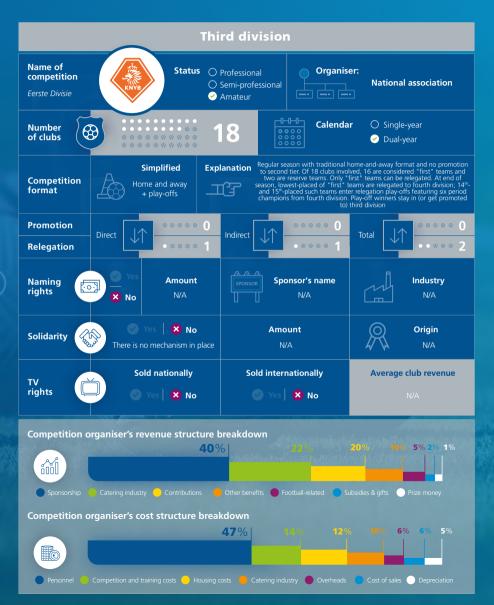


	Member association O Dutch Football Association	Abbreviation	FIFA/Coca-Cola World Ranking	NETHERLAND
KNVB	Dutch Football Association	KNVB	16	

10%



🔴 Other 🛛 🛑 Administrative & payroll 💦 Logistics & support (e.g. travel subsidies, equipment, matchday organisation, etc.)



35

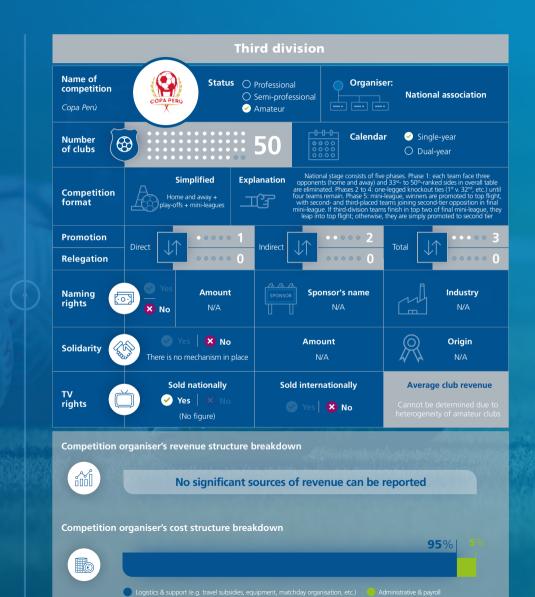
Professional Football	

Name of ormetition Lga 2 Number of clubs Simplified Home and away + play-offs Formation Direct Naming Oreganiser: Naming Oreganiser: Solidarity Oreganiser: Solidarity Oreganiser's revenue structure breakdown Virgints Oreganiser's revenue structure breakdown Solidarity Oreganiser's revenue structure breakdown		Sec	ond divisio	on		
Number of clubs Single-year Competition format Simplified block Explanation Home and away + play-offs Explanation Image was play of frait multi-league descende placed teams go into playou claring with the placed teams go into playou sare relegated. Second: out the placed teams go into playou claring with the placed teams go into playou show the count of the placed teams go into playou claring with the placed teams go into playou show the count of the placed teams go into playou the descende and the placed teams go into playou claring with the placed teams go into playou the descende and the descende teams go into playou NA Naming rights Solid antionally type Amount NA Amount NA Average club revenu USD 500,000 Virights Other Tricketing Output Toteling Competition organiser's cost structure breakdown	competition		Semi-professional		National a	association
Promotion Direct Indirect Indire			10 8		- , ,	
Relegation Direct Naming Image: Competition organiser's cost structure breakdown Naming Image: Competition organiser's cost structure breakdown Indirect Indirect </td <td>Competition format</td> <td>Home and away</td> <td></td> <td>iciudes second- and thi</td> <td>iru-piaceu teams m</td> <td>on inal phase of</td>	Competition format	Home and away		iciudes second- and thi	iru-piaceu teams m	on inal phase of
Naming rights Amount N/A Sponsor's name N/A Industry N/A Solidarity Image: Solid nationally There is no mechanism in place Amount N/A Image: Solid nationally N/A Image: Solid nationally N/A TV rights Sold nationally Image: Solid nationaly Image: Solid nationaly Image: Solid nationaly Image:		Direct	Indirect		Total	•••••
Solidarity There is no mechanism in place N/A N/A TV Sold nationally Sold internationally Average club revenue TV Yes NO USD 500,000 Competition organiser's revenue structure breakdown 88% 8% 4% TV rights Other Ticketing Competition organiser's cost structure breakdown 500 other Ticketing	Naming rights	Amount	SPONSOR Spo			
Image: Second	Solidarity				R	
TV rights Other Ticketing Competition organiser's cost structure breakdown		Yes 🙁 No			-	
TV rights Other Ticketing	Competition or	ganiser's revenue structure	breakdown			9 0/ 4 0/
Competition organiser's cost structure breakdown					00 70	
			akdown			
					% 10	5% 5%

Member association

0

Peruvian Football Association FPF

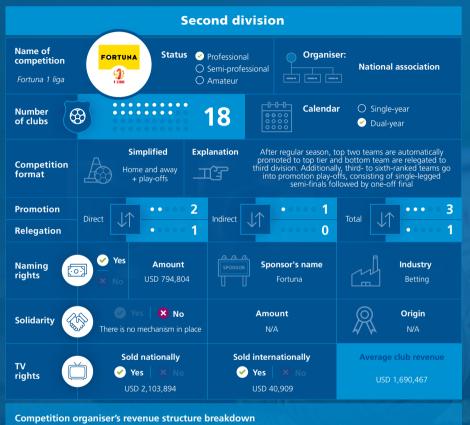


Abbreviation FIFA/Coca-Cola World Ranking

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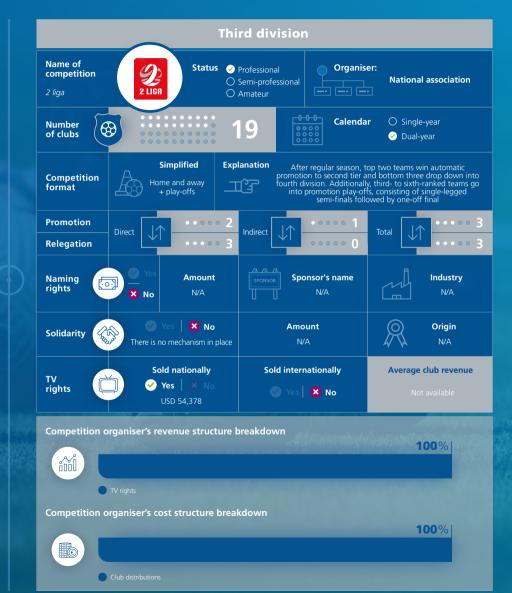
PERU

٢	Member association O Polish Football Association	Abbreviation	FIFA/Coca-Cola World Ranking	POLAN
PZPN	Polish Football Association	PZPN	21	IULAI



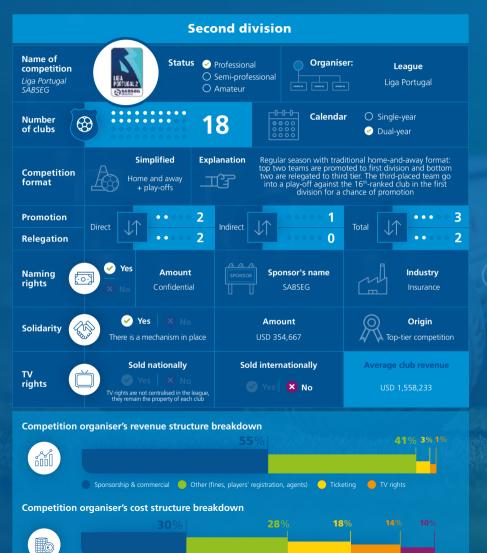




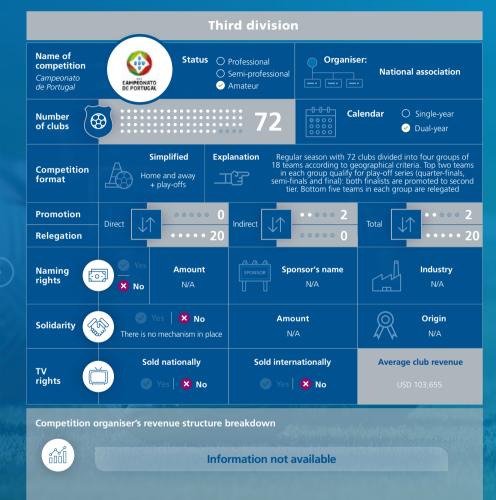


(1)		Member association	Abbreviation	FIFA/Coca-Cola World Ranking
		Portuguese Football Association	FPF	5





Administrative & payroll (structure, services, etc.)

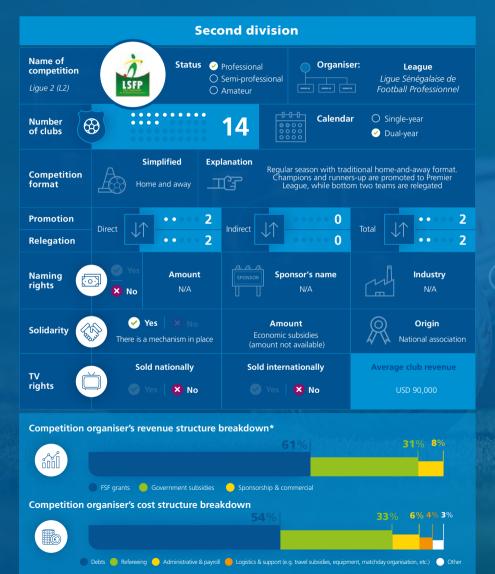


Competition organiser's cost structure breakdown

Information not available

	Member association		FIFA/Coca-Cola World Ranking
CAF	Senegalese Football	FSF	22
	Association		22

SENEGAL





Third division

No significant sources of revenue can be reported

Competition organiser's cost structure breakdown

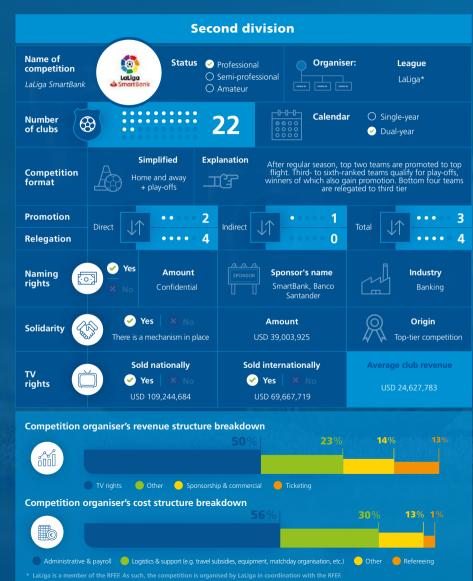


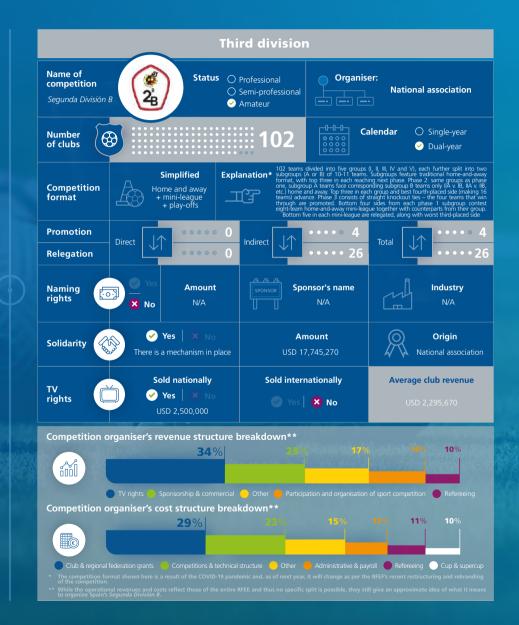
) 🧉)	Membe O Spanish I
		Secor	nd divisi

Member association	Abbre
· O · · · · · · · · · · · · · · · · · ·	• O · · · · ·
Spanish Football Association	RFEF

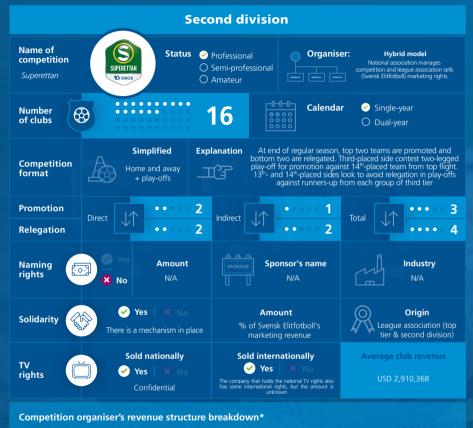
eviation	FIFA/Coca-Cola World Ranking
	···O·····
	6

SPAIN

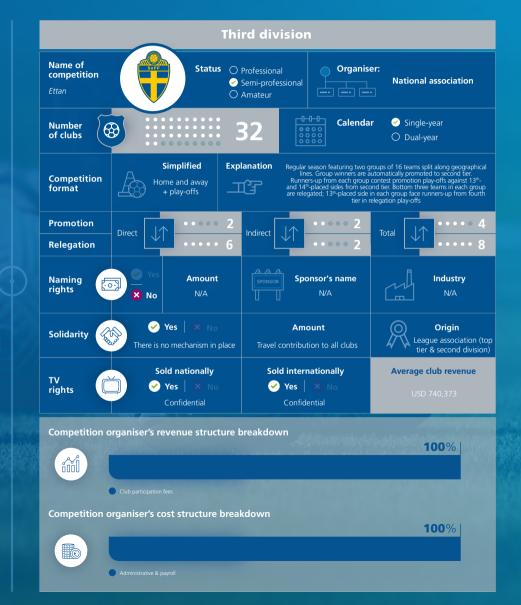




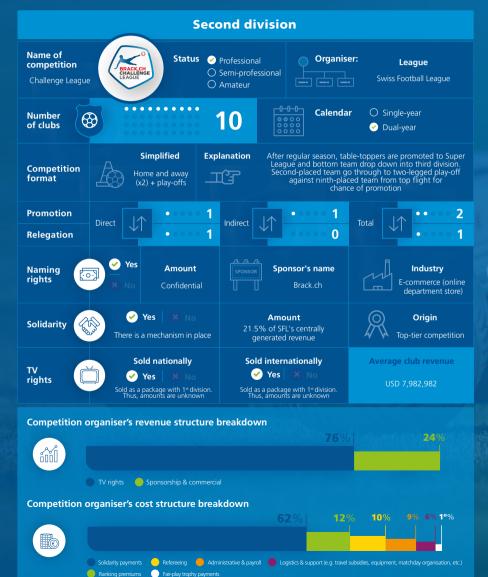
	Member association O Swedish Football Association	Abbreviation	FIFA/Coca-Cola World Ranking	SWEDEN
	Swedish Football Association	SVFF	18	JVVLDLIN

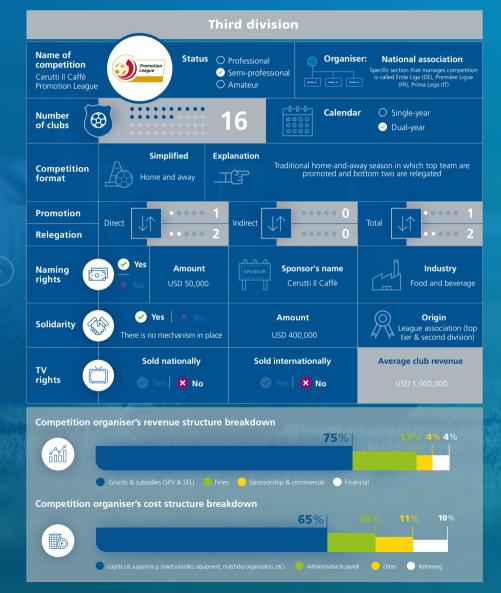






	Member association O	Abbreviation	FIFA/Coca-Cola World Ranking	SWITZERLAND
	Swiss Football Association	SFV ASF	13	





Professional Football
Ъ

		second divis
Name of competition Ukrainian First Lead (or <i>Persha Liha</i>)	gue Statu	 Semi-professional ○ Semi-profession ○ Amateur
Number of clubs		16
Competition format	Simplified Home and away	Explanation
Promotion	Direct	3 Indirect
Relegation		
Naming rights	Yes Amoun No N/A	t SPONSOR
Solidarity	Ves No	
TV rights	Sold nationally	Sold inf
Competition o	organiser's revenue struc	ture breakdown*
	Club registration fees	
Competition o	organiser's cost structure	breakdown*
	🕨 Administrative & payroll 🛛 🛑 Refere	eing 😑 Logistics & suppo

Member association	1
O	(
Ukrainian Association of	ι

Organiser:

Calendar

0

2

. .

Sponsor's name

Amount

Id internationally

🔀 No

League

Professional Football League

of Ukraine

. . .

Industry

Origin

Average club revenue

USD 10,000

. .

• 3

2

O Single-year

Dual-year

Regular season with traditional home-and-away format.

relegated to third tier

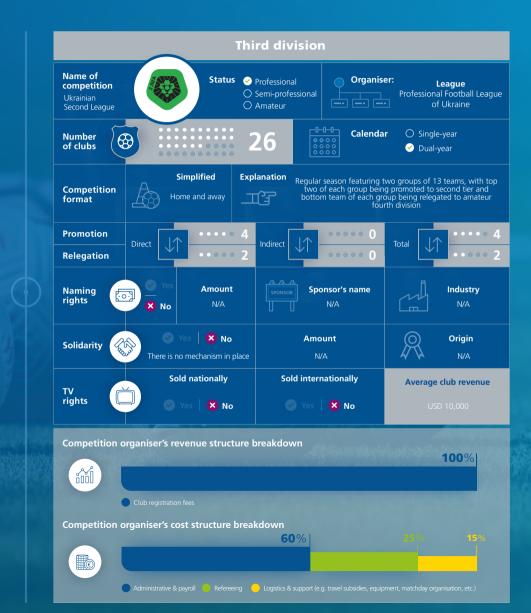
Top three rise into first division and bottom two are

Second division

ssional

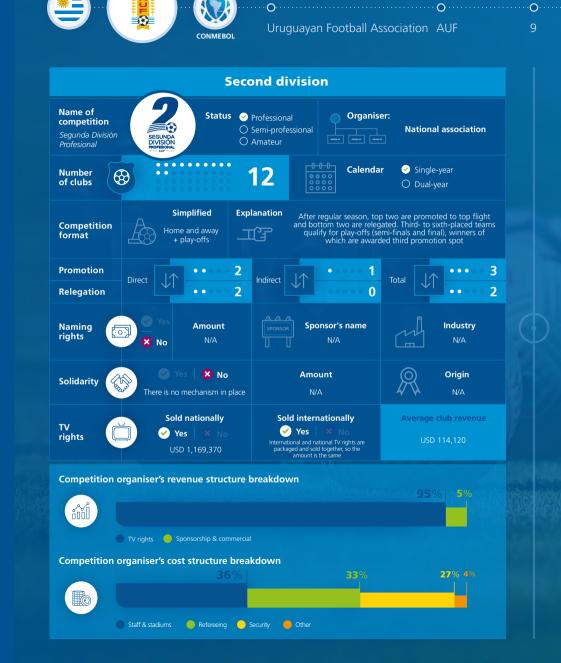


UKRAINE

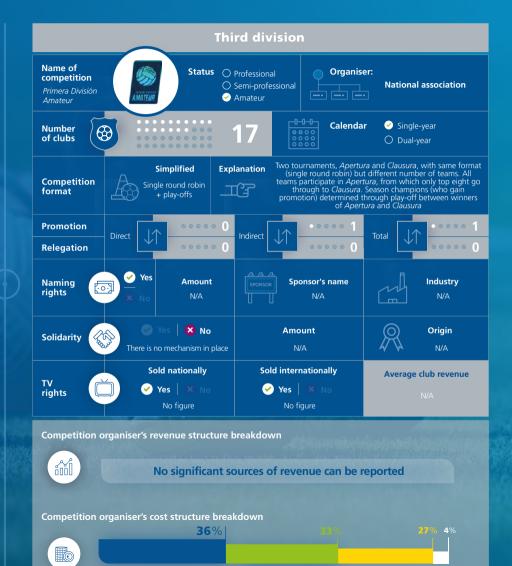


FIFA COMPARATIVE ANALYSIS OF SECOND AND THIRD DIVISIONS

Professional Football
—
•



Member association



Othe

Refereeing 💛 Security

Staff & stadiums

Abbreviation FIFA/Coca-Cola World Ranking

URUGUAY

Professional Football	

Professic Football			Concacaf
		\frown	Se
	Name of competition USL Championsh	ip	Status
	Number of clubs	8	
	Competition format	Home	plified E and away lay-offs -
	Promotion		
	Relegation	Direct	
SN	Naming rights	Yes No	Amount N/A
RD DIVISIO	Solidarity	Yes	echanism in plac
SECOND AND THIRD DIVISIONS	TV rights	📋 🕜 Yes	nationally hidential
SE			

USA





Member association

United States Soccer

Federation

cond division

Professional

O Amateur

35

Explanation

TT

n

Indirect

O Semi-professional

Organiser:

Calendar

Sponsor's name

Amount

Sold internationally

🖌 Yes 🛛 🐼 No

Confidential

League

United Soccer League (USL)

Industry

Origin

Average club revenue

Single-year

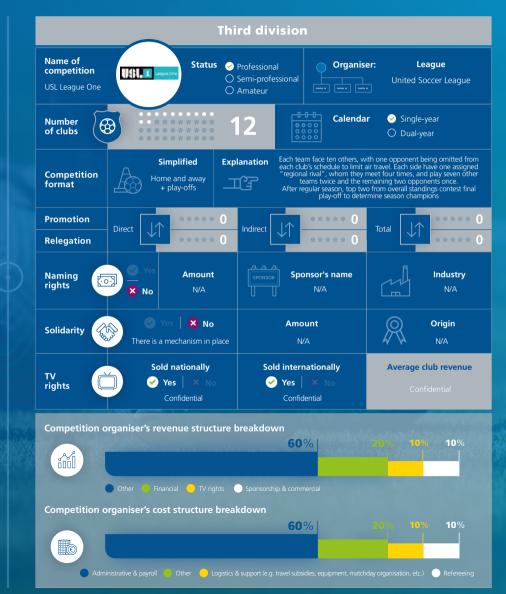
O Dual-year

Regular season split into conferences (East and West) with 17 and 18 teams respectively: top six go directly through to conference play-offs (quarter-finals, semis and final). Before quarter-finals,

"play-in round" is contested (7th v. 1th, 8th v. 9th), the winners of which also advance to play-offs. Winners of each conference final play each other for season title

Abbreviation	FIFA/Coca-Cola World Ranking
USSF	20

Ιςα



FIFA COMPARATIVE ANALYSIS OF 45

Football	
	Name of competition Segunda división

	Seco	ond division		
Name of competition Segunda división	EUTVE O	Professional Semi-professional Amateur	Organiser: Nation	onal association
Number of clubs		21		ingle-year ual-year
Competition format	Simplified Exp Home and away + play-offs	teams, with to teams qualifying winners from b	rnaments per year (Apern tt: regular season featuring p two from each group ai g for play-offs (quarter-finals oth tournaments are promo sed on aggregate points – a	nd best two third-placed s, semis and final). Play-off oted, bottom two teams —
Promotion Dire	ct 11	Indirect	••• 2 Total	1个 ••••• 2
Relegation	••••• 2		• • • 0	✓I ●●●●●● 2
Naming rights	Yes Amount X No USD 1,800,000	SPONSOR Kick Soco		Industry Cryptocurrency
Solidarity	Yes Xes No	Amount N/A	R	Origin N/A
TV rights	Sold nationally	Sold internation		age club revenue USD 90,000
Competition orgar	niser's revenue structure l	preakdown		
				100%
	nsorship & commercial			
Competition organ	iiser's cost structure brea			25% 5%

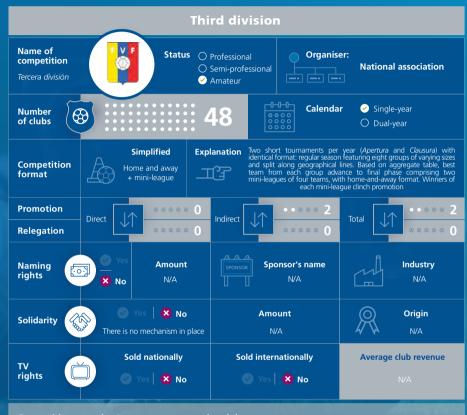
🔵 Refereeing 😑 Logistics & support (e.g. travel subsidies, equipment, matchday organisation, etc.) 🛛 📒 Administrative & payroll

Member association

Venezuelan Football

 \bigcirc

CONMEBOL



VENEZUELA

Competition organiser's revenue structure breakdown

No significant sources of revenue can be reported

Competition organiser's cost structure breakdown



Abbreviation FIFA/Coca-Cola World Ranking

0.....0.

FVF

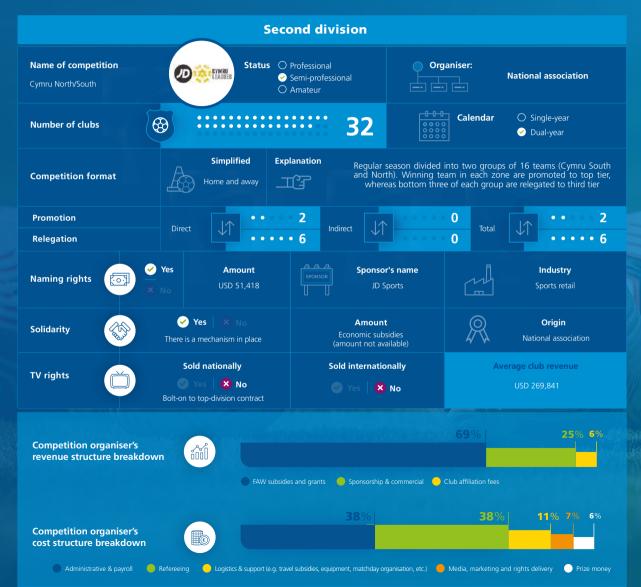
No significant sources of costs can be reported



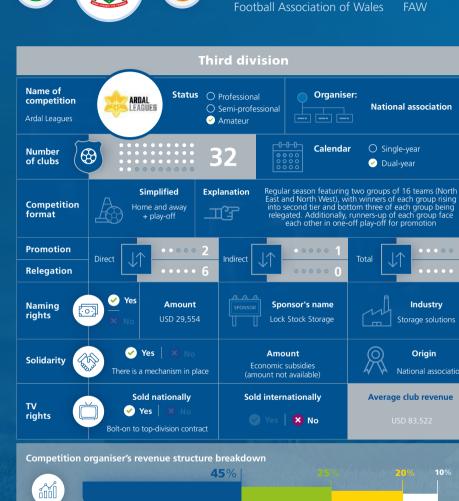


Member association		FIFA/Coca-Cola World Ranking
0	U	
Football Association of Wales	FAW	17

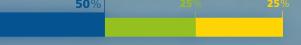
WALES



Professional Football

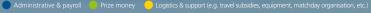


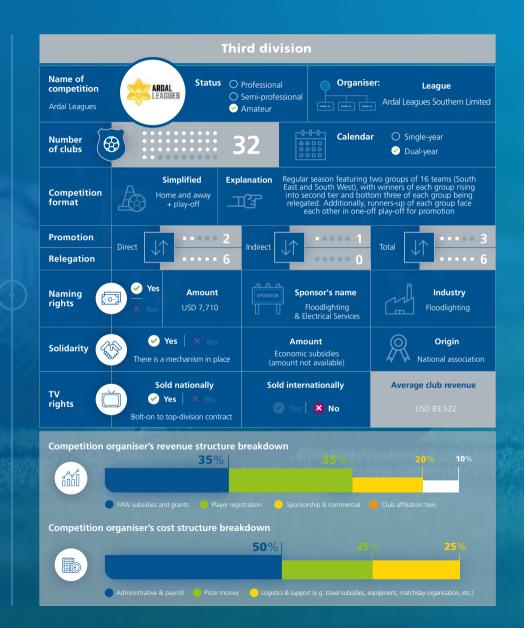
Sponsorship & commercial e Player registration FAW subsidies and grants e Club atfiliation fees Competition organiser's cost structure breakdown 50%



Member association

0





WALES

Abbreviation FIFA/Coca-Cola World Ranking

FAW

National association

•••• 3

Industry

Storage solutions

Origin

Average club revenue

National association

O Single-year

Dual-year

