



The Significance of Esports in MENA

Various Developments in The Middle East Region

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Abstract

In the last few years, esports has been a mind-blowing international revolution that has gained remarkable perception as a real professional sport. There are not enough wide-scope analyses regarding the effect of regional dynamics on the unique development of esports in the Middle East. By analyzing the significance of esports in the Middle Eastern countries of the UAE, Saudi Arabia, Egypt, and Qatar, this research aims to fill the gap in the literature, for instance, different industry stakeholders such as professional players, tournament organizers, government officials, and executives from esports organizations, were interviewed in a semi-structured format. A thematic analysis revealed the key themes relating to the factors that drive regional industry growth and its far-reaching social and economic consequences.

The findings indicate that the Middle East has experienced a dramatic growth in esports enthusiasm. This is primarily because the Internet is widely accessible, and most of the population is young. Nevertheless, the involvement of the government and the private sector has tremendously facilitated the growth of esports as professional sports in the region. The report studies the increasing power of esports events and programming for national branding efforts and its role in developing cross-cultural ties worldwide. The sector also contributes to the region's economic diversification by creating employment opportunities and promoting technology development. However, regardless of the infrastructure problem, insufficient skills and social discrimination remain. The study is of great interest to policymakers pursuing the goal of leading the Middle East as a prime esports destination for developing national and international culture.

Keywords

- Esports
- Gaming
- Electronic sports
- Middle East
- MENA
- GCC
- Youth
- population
- Demographics
- Economy
- Revenue
- Investment
- Sponsorship
- Infrastructure
- Internet
- Broadband
- 5G
- Technology
- Innovation
- Entrepreneurship
- Tournaments
- Competitions
- Culture
- Social inclusion
- Community
- Engagement
- Development
- Growth
- Trends
- Globalization
- Branding
- Entertainment

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1.0 Introduction

Socioeconomic shifts in the MENA in recent years prompt us to reconsider the significance of globalization, technology, and regional culture in the economic diversification of regional and local businesses (Al Rashidi et al., 2021). Traditional and modern beliefs are converging, changing social norms, and aligning consumer behavior. Among the tendencies, however, we should highlight the rapid development and growth of electronic sports (esports), these were viewed on the border of mainstream entertainment. The esports landscape has changed significantly, surpassing the traditional sports growth ratio with a wide fanbase and substantial financial rewards. Modern esports attract an increasingly diverse audience across different age groups, genders, and geographical locations (Cranmer et al., 2021). Notably, today's revamp concerns participants, professionals, and other key stakeholders who contribute to transforming the hobby into a well-organized business. With its growing popularity and player base, esports in MENA is expanding on a large scale. The Internet penetration, the young population, and the new digital culture are the forces behind the region's fast-developing media.

Cast into the MENA region, esports popularity closely mirrors the regional entertainment industry, driven by considerable digital platforms and real-world communities. Gaming kiosks and streaming platforms are integral to the region's culture, offering opportunities for socialization, competitiveness, and self-expression. The significance of esports in the Middle East region can be supported by constructing a gaming culture, highlighting its influence on content creation, establishing events, and outlining the importance of esports in the MENA region and its direct impact on economic growth, representing challenges and benefits for other sectors. Key stakeholders comprehend esports' significance in contributing to a nation's economy, accelerating innovations, and stimulating cultural exchange (Al Rashidi et al., 2021). Because of the magnitude of the establishment of this esports environment, we will need a very large-scale financial commitment to public services and the formation of appropriate infrastructure and legal frameworks.

1.1 Research background and significance

Sports engagement and culture integration have been modernized through numerous innovations, and the esports industry has grown. Digital technology's

breakthrough broke the borders between the virtual and physical worlds, forcing the appearance of new forms of competitiveness, social exchange, and mental content (Dwivedi et al., 2022). Esports, which includes competitive gaming conducted over several platforms and genres, has tapped into this trend by creating a unique, engaging, and interactive experience for both the audience and the players.

The MENA region is the same as the rest of the world regarding the esports movement because it is affected by regional dynamics and cultural diversity. The UAE, Saudi Arabia, Egypt, and Qatar have gradually emerged as prominent actors in the rapidly growing gaming space, which they use to drive innovation, build community, and establish their international prestigious status. The availability of up-to-date esports infrastructures and the birth of homegrown gaming communities are drastically changing people's image of digital games in this part of the world (Dwivedi et al., 2022). Therefore, the MENA region's esports should be considered, as they can change culture, national identity, and social progress. Because politics and organizations have realized that the digital sector has strategic implications, policymakers, investors, and stakeholders must learn how complex esports is. The connection of fashion with globalization, culture exchange, and technology should also be mentioned. This insight reveals both the dynamic qualities of modern society and the significance of esports for the economy and society.

Interviews were analyzed in thematic form and transcribed in full. The transcription is done over the coding of each line to see whether there are repeated themes and topics. The codes are examined by looking for trends and associations among the knowledge. This helped us extract recurring and prominent themes from the data. Besides, major quotations were included to establish the evidence and draw attention to the main thoughts.

1.2 Aims and objectives of the study

In light of this, the study has multiple related goals:

- 1 To assess the MENA region's gaming industry's employment potential, market size, and revenue production, focusing on key regional initiatives and various market developments.

- 2 Esports impact on Middle East region perceptions and images, using local game creators and esports organizations achievements as inspiration for national branding projects.
- 3 This study examines the international perception of the MENA gaming industry, including its potential effects on cultural representation, social image, and global branding, and compares it to other gaming hotspots.
- 4 This study triangulates data and ideas using a qualitative research strategy and many methods. Besides actual data analysis and comparative case studies, a complete literature review provides theoretical frameworks and basic knowledge. Game enthusiasts, government officials, and industry professionals were interviewed to gain firsthand knowledge and improve study results, contributing to the conclusion.

1.3 Limitation

This thesis has several limitations. First, it only examines the global and regional development of the esports industry and does not cover regional or local trends. Second, it may give a small idea of the entire industry. Finally, we focus on a specific subset of esports games organized into large-scale competitions, and the significance of the sector on the region's global image, and do not consider other types of games or competitions. Therefore, the study only focuses on the efforts of developers, regulators, and critical stakeholders and the products posited for the sector's regional prosperity and success.

1.4 Research questions

Research questions help narrow the research area, identify the problem, and ask more relevant questions. Importantly, these questions will focus on the topic's emerging ideas and maintain the direction of focus on the essential elements of the research without drifting away from the main topic to build up a solid conclusion and realistic implementation of the outcome. In line with the same idea, we will utilize a precise and scientific approach to investigate, build up essential discoveries, and gain solid knowledge within the field. The primary address addressed in this proposal is as follows:

"What is the significance of the esports industry in the Middle East region?"

To answer this question, we will delve into the topic more and construct a waterfall with a breakdown of the subsequent questions.,

- 1 How does the MENA esports industry compare to traditional sports in terms of economic impact?
- 2 How are the MENA esports industry's growth drivers shaping its development?
- 3 How are education and talent development helping the MENA esports ecosystem expand and survive?
- 4 How do global esports trends affect MENA, and how can they be capitalized on?
- 5 How would the MENA esports industry foster social inclusion and community engagement? What are its socio-cultural effects?
- 6 What role can the MENA esports sector play in altering regional and global perceptions?

1.5 Research methods

A qualitative research approach was chosen to gain a detailed understanding of the phenomenon. The study used literature, data analysis, and the comparative method. The literature data method was used to collect information about esports. Interpretation of data followed solid, codified procedures for analysis to enable the reader to understand how the analyst constructed the work; relevant interview(s) were conducted with a professional gamer, investor(s), and official delegates from the Middle East region. These interviews were conducted between January and March 2024 and aimed to understand the gaming climate in the Middle East region and share insights from participants and stakeholders. Interviews were conducted with pre-prepared questions.

The topic outlined the esports industry in the Middle East region, mainly how the United Arab Emirates, Kingdom of Saudi Arabia, Egypt, and Qatar endeavor to support and develop the industry to reach its full potential and drive its markets to step up and compete with its global giant peers. It was utilizing a significant regional focus on developing the esports industry.

2.0 Phenomena

As a home-based hobby on video game consoles, esports has conclusively evolved into a thriving industry. It boasts professional players, teams, and world-class venues that host international competitions with multimillion-dollar rewards. It has garnered significant corporate commitments available to millions of dedicated fans worldwide. Consequently, its resilience to the pandemic is magnificent; the outcomes remain indisputable despite its challenges. Throughout this period, individuals spent extended durations within their homes due to various restrictions, including quarantine periods and limitations on travel between cities or countries; individuals pursued different means to entertain themselves and maintain their social connections simultaneously. As a result, there has been a notable surge in the integration of digitalization into daily life, with digital games emerging as a significant means for people to pass the time. During this timeframe, online gaming has garnered considerable attention for its development within the digital platform realm.

In 2020, there was an increase in time spent at home by 11.7 percent due to the social distancing restriction introduced during the pandemic (Geysler, 2023), while in 2021, a new record of the watched live stream content reached over 1,460 billion minutes. Likewise, the number of streamers jumped from 3.6 million in 2019 to 8.5 million during the same period (Stuart, 2023). Esports has been utilized during the pandemic period as a social medium; at the same time, people started to change their perspective on gaming from being an entertainment hobby, which once suggested it contributes to personality issues like social isolation and impaired communication skills, to a profession with a multimillion USD prize pool (Skwarczek, 2021). The evolution of gaming enabled individuals to enjoy interactive and engaging gaming experiences and nurture a sense of connectivity, enabling them to stay seamlessly connected with their peers and friends. Additionally, concerns were raised about the physical toll of extended practice or viewing hours. However, esports has effectively altered this perception by representing adaptability and proving itself as an inclusive and multifaceted form of entertainment. Also, game regulators realized the significance of its lucrative potential, rapid growth, and popularity. Importantly, esports has gained international acceptance since the International Olympic Committee (IOC) announced that Singapore is set to host the

inaugural Olympic Esports Week (OEW) in June 2023. The OEW aims to foster the growth of esports within the Olympic Movement and establish connections with the competitive gaming community (Goh, 2023). Olympic Esports Week (OEW) 2023 is a dedicated event for esports, addressing the significance of virtual sports. This inaugural event, developed by the IOC in collaboration with Singapore's Ministry of Culture (IOC, 2023) and the International Electronic Sports Federation (IESF), labeled esports as the fastest-developing sport globally, with thousands of players and millions of fans around the globe. It is worth highlighting that the esports industry generated total revenue of USD 1.38 billion in 2022, with more than 921 million online streamed games (IESF, 2023).

The situation mirrored the phenomenon everywhere in the Middle East region (MENA). The pandemic lockdown prompted individuals to seek different and new sources of entertainment. Consequently, the social restrictions caused by the coronavirus not only led to an upsurge in individuals entering the gaming sector but also resulted in an increase in the average duration of gameplay online, including for live streamers (Held, 2022), the region underscores a promising presence in the esports realm, presenting a glorified future for the industry. With a sizable population of gamers and a new era of substantial investments, the MENA region stands out as a promising hub within the global esports ecosystem. The gaming industry in MENA underlines substantial growth compared to other gaming countries, and it has become more prevalent. Forecasting a USD 5 billion revenue by 2025, currently holding a value of USD 1.78 billion. This positions it as an emerging player in the global video games industry and an enabler in the mainstream economy (Srinivasan, 2022).

2.1 Gaming Industry Introduction

Esports means electronic gaming sports, it refers to the industry with a significant popularity and fan base of more than 500 million across the globe, all fans share the same interest in participating in various competitions as a hobby or following professional ones, where elite gamers are competing individually or forming different teams aiming for the grand prize of esports championship, nowadays the industry surpassed USD 1.5 billion over the year 2023, and based on a review by Forbes esports is the most lucrative platform on the planet (Maryville,

2022). Modern technological advances, changing customer preferences, and extensive investments from different stakeholders fueled the emerging MENA gaming industry's rapid growth (Kende, 2020). Some reports revealed that accessing esports through mobile gaming, consoles, personal computers, and other gaming platforms is becoming more popular and rising, indicating a regional trend toward embracing digital entertainment.

The Middle East region demonstrates the sizable potential for the esports industry, boasting a large fanbase and some significant investments. Picture it as a promising destination within the global esports ecosystem, highlighting its stakeholders's commitment to positioning the region as a future global hub for esports. These forward-looking initiatives seek to draw global audiences and create opportunities for local talent to thrive in the era of competitive gaming (Zawya, 2023). Highlighting the prevalence of gaming cafes across the region and their popularity as urban social hubs for gamers of all ages, these cafes offered a convenient and immersive gaming experience with high-end PCs and consoles and a wide selection of games. Conceptually evolving into gaming arenas on a larger scale across the region, these venues energized various government and private stakeholders to expand and invest more. These investments transformed some sites and cafes into larger gaming venues with regional and national tournaments. Post-COVID, the gaming business in MENA is expected to proliferate, generating USD 4 billion in 2023 (Al-Khamees et al., 2023).

Additionally, smartphone adoption and mobile gaming software have transformed gaming into a significant revenue stream. The region's young and digitally native population enjoy mobile games for leisure and socializing; for instance, Twitch, an "online streaming platform," became a cornerstone in the gaming industry by enabling a new revenue stream for gamers and, at the same time, engaging gaming followers with their preferred players. Twitch has become one of gamers' most significant sources of internet traffic (Hoppe, 2018). It is considered a game changer since it has transformed esports demand from local to global and generated a new edge for gaming players and fans to interact with other fans within a live environment. Also, fans can upload or stream their work from anywhere at any time with the least available resources, which is considered a cost-efficient platform (Morgan, 2021).

2.2 Developments

Figures around the industry are growing extensively since the esports market value surpassed USD 1 billion in 2021, with high total earnings for some gaming teams like Team Liquid, who hit USD 40 million in prize value. Also, sponsorship contracts around the industry generated USD 600 million in annual revenue, with more stakeholders entering the field. Media rights revenue grew to exceed USD 200 million (Howarth, 2023), and still, these figures are predicted to grow nearly every year, with expectations to reach 27.6 percent, around USD 11.94 billion by the year 2030 (Vantage et al., 2023).

The rapid growth in regional gaming markets can arguably be attributed to the increased attention paid by critical stakeholders, particularly some of the region's governments. With current investments in the technology sector, especially telecommunication and networking infrastructure, the Internet has become a significant player in growing and transforming the regional industry. It provided online users with faster internet connections and comprehensive network coverage, increasing the number of online gamers (Ar-Kheem, 2023). They have made gaming available everywhere in the region. Because more users sign up and online competition and multiplayer are simultaneously participating in the same forum or platform, internet connectivity has strengthened the gaming community in the region (Leonard et al., 2018).

The online game sites enabled people from different demographics and various ethnic communities to further interact by establishing local communities and togetherness. It offered an opportunity to compete at tournaments and events, contributing to the esports industry's expansion. Internet gaming in the region has facilitated more social inclusion and created engagement forums, adding multiplayer games that have become increasingly popular. With the increase in games, casual gamers are also expected to grow with these infrastructure developments. It seems the region is going through a geo-economic transformation as cloud gaming such as Amazon Luna and Xbox cloud gaming is hoping to grow 13.5 percent on average by 2027, while today hand tablets and smartphones contribute to 51 percent of the whole industry hardware sales in the region (Reporter, 2023) because smartphones are the number one prevailed devices for online contents both streams and online gaming (87.2 percent of gamers), and the highest average online played per week

(8.7 hours), while it is interesting to mention the regionally most accessible online games are PUBG, Call of Duty, and EA Sports FC (Niko Partners, 2024).

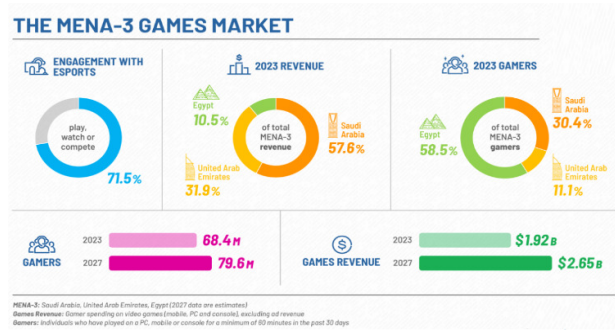


Figure 1- The MENA-3 Games Market (Niko Partners, 2024).

2.3 Strong income growth

Individuals living in Middle Eastern countries, particularly some Gulf countries like the UAE and Saudi Arabia, are enjoying the minimum to no income tax, resulting in higher disposable income (Bowen, 2024); these low tax policies enabled them to leverage high living standards and elevated growth in wages, which reflected positively on gaming revenues (Arezki et al., 2019). Whether it is leisure expenditures for enjoying gaming or spending on gaming products and services, this demand for gaming is on the rise.

The fact that equipment, programs, and in-game accessories have increased prices within the economy has provoked the growth of the gaming industry. Digital distribution platforms have also allowed Middle Eastern and North African gamers to access different gaming content quickly. This has ultimately increased revenues in the industry. Numerous games have been launched on various platforms, including PCs, consoles, and mobile phones, and they have drawn interest from across the region. Furthermore, the gaming industry has emerged as an essential part of the regional entertainment business, which attracts investments from key stakeholders within and abroad. This investment in the esports ecosystem has created a high-level gaming technology, structure, and content environment to improve and foster the gaming sector.

2.4 Youth Gaming Culture

The Middle East region generally has a young age structure; about 30 percent of the population is between the ages of 15 and 29. A group of young people has found itself among the first ones that came of age when digital technology was widely adopted, and this generation is the driving force of the gaming business in the area. A survey done in 2017 showed that the number of active gamers in the MENA region is expected to be more than 587 million. In addition, the survey also revealed that more than one-quarter of people in the age group of 15–29 were gamers (U.S. Department of State, 2018).

The degree of youth participation also emphasizes this demographic's considerable importance. Based on the surveys done by Nielsen in 2019, gaming is the most trendy leisure activity for those aged 16–24 in the Middle East. It turned out that 80 percent or more participants played intensive video or mobile games regularly. Since the technology of the digital era has been such an integral part of our current generation's lives, we have witnessed the creation of a connection between games and culture, thus a permanent integration into the tastes and habits of the youth of this generation as never before.

The increasing proportion of young people in Saudi Arabia exemplifies this trend. As indicated by a poll conducted by Deloitte in 2023, 46 percent of the people in Saudi Arabia, with an age group of 15–35 constituting 44 percent in totality, play games, as stated in the survey. As supported by Samsung's 2021 study, the weekly hours spent by the youth in KSA on smartphone use for gaming exceed 7 hours. Gulf Youth, known for their ardent interest in gaming, is a considerable consumer group from which local companies have recognized and profited.

Game producers have dealt with this problem by localizing materials through a filter of their Middle Eastern values and interests. Renowned games like FIFA by EA Sports have included officially authorized teams from the Saudi and Emirati leagues, and some versions are incorporating Arabic commentators. This group finds such characters beautiful (Aljomaih, 2022). Also, new businesses are popping up aimed at making games that strive to reflect and celebrate Islamic heritage and customs. This category of culturally important goods is becoming increasingly popular among the community through gaming.

On the other hand, esports constitute a significant, vital, and entertaining activity for the youth in the MENA region. The growing audience at both competitive gaming tournaments and qualifying competitions shows vividly how esports has developed into one of the most popular mainstream forms of entertainment. Platforms such as Twitch and Discord provide an online environment where young gamers from the area can watch gaming broadcasts and access esports community servers (Hoppe, 2018).

On the other hand, there are many countries in the Middle East where playing games invokes a negative image of an unproductive leisure activity that leads to social isolation. The truth is that participating in the world of esports provides young people the chance to be part of healthy competition and develop excellent transferable skills like collaboration, communication, and work ethic (AlJasser et al., 2020). Also, it creates an environment where people showcase themselves in the light of this generational culture created through shared gaming experiences.

Visualizing the social and cultural contributions of gaming to Middle Eastern youth will demonstrate its benefits in the future. The most significant gaming potential can be achieved by targeting grassroots esports development and community activities and promoting involvement. An attempt to offer the service of self-restraint as an in-person gathering with competitions inside educational institutions may help young people with their mental and emotional health and teach them valuable skills. Through the adoption of preventative policies, gaming will have an increased influence on a significant section of the population in the MENA region.

2.5 Innovation and entrepreneurship

In recent years, the UAE and Saudi Arabia have led the gaming industry in innovation and entrepreneurship, as stated (Adieme & Subramanian, 2020). These countries have fostered local gaming developments by establishing cultural festivals, esports contests, and financial incentives like hosting the Esports World Cup. They boosted economic growth and technological innovation.

The UAE and Saudi Arabia have sponsored indigenous game developers and innovation contests with large incentive schemes. These incentives complement event sponsorship, grants, subsidies, and investment options to support prospective business owners and established gaming firms in developing and commercializing

their gaming products. With their high incentive schemes, such initiatives foster originality and entrepreneurship in the gaming industry, leading to high-quality, global-appeal games. Technology and innovation are fundamental elements in the entrepreneur and esports sectors, so Saudi Arabia is taking advantage of the progression of these elements and fostering a more focused cybersports sector in chip manufacturing, artificial intelligence, and big data technologies.

Over the past few years, the UAE and Saudi Arabia have organized many gaming competitions and festivals to showcase their local talent and draw international attention to their rapidly growing gaming scenes. The Dubai Gaming Festival and Riyadh esports Tournaments showcase the region's gaming culture. These events have allowed game developers, players, and fans to network, compete, and celebrate the culture, as Adieme Subramanian (2020) reported.

The UAE and Saudi Arabia are fostering gaming innovation and entrepreneurship to boost economic growth and technical innovation. The gaming industry has a high potential to create more jobs, attract foreign investment, and position the Middle East and North Africa as competitive players on the global gaming market stage. The instant hosting of the Esports World Cup in Saudi Arabia is expected to contribute some 39,000 new jobs to the Saudi employment market. It will uplift the tourism market by attracting a new demographic segment of the gaming audience (Asif, Yusra, 2023).

Gaming innovation programs foster global engagement and cultural exchange. Several cultures influence local game creators and work with foreign partners, promoting globalization and cultural interchange. As centers for creative collaboration and cross-cultural discussion, the UAE and Saudi Arabia enrich the global gaming ecosystem with their unique perspectives and experiences.

2.6 Transformation into the Mainstream

Gaming and esports have undergone a sizable transformation from a hobby to a popular form of entertainment in MENA (Aksun, 2022). Technological advances, customer preferences, and societal attitudes toward interactive entertainment have all contributed to this trend. Gaming and esports have grown in popularity across age, gender, and social groups throughout the Middle East and North Africa. An activity long considered a specialized leisure activity attended and enjoyed by a

significant demographic group has become an essential entertainment source and engagement medium involving different ages and backgrounds, and it has become more acceptable as a legitimate leisure and social activity in families, communities, and schools.

Esports events and conferences draw thousands of people, and game content dominates social media and streaming sites. Celebrities, influencers, and companies involvement in gaming culture reinforce its mainstream status, especially since gaming and esports permeate popular culture in MENA, influencing fashion, music, art, and even traditional media (Aksun, 2022). Gaming and esports have mainstreamed, changing cultural norms as well as the MENA economy landscape with its diverse and passionate audience, gamers consumption went beyond content engagement and utilization, involving a new range of products and services, including different critical industries with 56 percent permanent jobs like fintech, healthcare, media, marketing, and advertisement (Deloitte, 2023). Gamers exhibit interests beyond mere content consumption, embracing various products and services. Continued regional public support and a passionate local consumer base can catalyze sustained success in the gaming and esports sector and diversity in the gaming industry revenue from game sales, esports events, advertising, merchandise, and sponsorships. Gaming has become profitable. This increase has boosted the region's economic diversification and development by creating jobs, entrepreneurial opportunities, and investment opportunities.

2.7 Culture Integration

Today, the Middle East region is transforming into an esports hub with exciting market potential poised to drive substantial expansion throughout the coming years. The area is anticipated to contribute 15 percent to the global gaming sector. In 2022, it boasted an estimated (377 million) players, closely rivaling Europe (386 million) and surpassing the American market (210 million) by a significant margin. Given the emerging talents from the region, many publishers are taking steps to localize their games in Arabic and organize competitions that present the area on the international esports stage. The different governments' initiatives, such as those of Saudi Arabia and the United Arab Emirates, are actively supportive and make substantial investments in developing their infrastructure (Newzoo, 2022).

During the past few years, gaming cafes, esports contests, and gaming media have become cultural staples in MENA (Borowy, 2012). These venues have become cultural hubs that promote community involvement, social interaction, and cultural exchange.

Games cafes are popular places for gamers of all ages and backgrounds to socialize, compete, and discuss their favorite games. These cafes offer gaming gear, software, and a lively environment where gamers can make friends, join local gaming communities, and socialize. Gaming cafes foster community and companionship. They give gamers a place to gather and share gaming experiences (Borowy, 2012). In contrast, esports competitions are becoming cultural events that draw enormous crowds and encourage community participation. These events let gamers compete for rewards, show off their skills, and meet other fans. These include small competitions and significant esports championships. Esports events spark excitement like regular sports competitions when fans cheer on their teams, and their events are inclusive, attract a broad audience, and further build community identity. Gaming websites, forums, social media channels, and streaming platforms help build this gaming culture and community participation. Gamers can interact with other enthusiasts worldwide, exchange their methods and ideas, and share industry news and gaming experiences on these platforms. Gaming media can promote esports events, gaming cafes, and other cultural ventures within and outside the gaming community. Every revenue source asserts that mobile gaming is the best approach to improving revenue. This observation coincides with the number of mobile apps used for entertainment, and the world is developing smartphones now.

The MENA gaming sector is characterized by a mix of cultural, socioeconomic, and legal pillars that make the place unique. Cultural tendencies and customer sensitivities may affect the kinds of games they prefer, which consist of MENA (Shaw et al., 2014). Such an approach would potentially result in regional game stories that depict different languages and cultures, which could serve as prototypes for other game designers.

3.0 Significance of the National Image and Global Brand

The MENA gaming sector's growth shapes every country's regional and international image. Gaming is like any entertainment medium that unites people

from different cultures and blends them. Esports allows Middle Eastern countries to illustrate their own culture, expose their history, and showcase their latest innovations by utilizing the platform. It is the modern version of the traditional sport, and since it has become more competitive and widespread across the globe, it attracts participants and audiences worldwide. Some countries and cities might benefit from this phenomenon and utilize it in a tourism context, prioritizing strategic planning for events to deliver their full potential of a global reach and promoting the region in a different and new form. The platform is full of opportunities and a gateway for investment returns, which is worth considering. Some surveys indicate that 30 percent of gamers watch esports streaming at least once per week, and the excitement around the games proliferates, which has helped spread esports tournaments (Deloitte, 2020). Sports contexts seamlessly mix MENA culture, history, and folklore to represent the region's rich traditions worldwide. For example, one of the famous and popular video games named "Assassin's Creed Origins" takes players to ancient Egypt and introduces participants to experience the old Egyptian civilization and what it means to live in old Egypt and discover more about its culture since the game's time goes back to ancient Egypt during the Ptolemaic Kingdom and Cleopatra epoch and the opposition of the Roman Republic (Gallagher & Saavedra, 2017). Another experience was Al-Qadim "The Genie's Curse" which is a famous arcade video game designed and introduced in the taste of Arabian Nights and borrowed from Arabian folklore. Both games are recommended for their authenticity and compelling stories.

MENA countries are known for their dynamic and cosmopolitan esports communities, and over a short period, the community managed to build a robust reputation for its significant gaming events in the global tournaments arena. Most of the regional events, such as UAE's Games Con. in the capital city of AbhDuabi and Saudi Arabia's Gamers without Borders tournament, draw international gamers and viewers, showing the region's capabilities and proven its potential to host top gaming events and engage with the global gaming community (Belkharchiche, 2021).

The Middle East and North Africa (MENA) countries started their journey by establishing an open and diverse esports culture and conducting various competitions (Dyer-Witthford & De Peuter, 2009). Popular ideas include esports leagues, community competitions, and gaming academies. These efforts encourage

gamers of all skill levels and backgrounds to participate and combine their efforts to build up the region's esports brand. This grassroots approach to esports growth is crucial for developing local talent and a sustainable gaming industry. The success of MENA gaming tournaments has been observed worldwide. International gaming companies, publishers, and sponsors are eager and ready to work with MENA partners to capitalize on the fast-growing sector. This relationship boosts the region's position as a critical player in the global gaming sector and provides additional resources and opportunities.

3.1 Branding Strategies

Regional stakeholders recognized the significance gains of the esports industry, so many cities across the region joined the race to host regional and international tournaments. Place branding is a decisive strategy to uplift the competitive advantage of a region, country, or city globally. Cities attempt to respond to competition demands with strategic plans for promoting their heritage, social values, equity, and culture and sometimes rely on future sustainability plans. Efforts are put in place to attract foreign investment, approach international tourism, and encourage local exports, and regional brands are significant factors in the success of these activities. However, what does it take to create, develop, and manage a place's brand and gain world recognition in a way that makes it globally appealing? Creating a city's or country's brand is a complex process. Still, it can be done with unified efforts and a clear plan with the involvement of different stakeholders and an understanding of the landscape's challenges and opportunities.

Sports is one essential context in creating city brand since it adds more weight to city own brand development and identity, as an example UAE's main cities (Dubai, and Abu Dhabi) used the sport context in building own city brand not only for hosting sport events, but to strength up its whole tourism division, so the country built its part of its global identity through hosting various sport events such as the Dubai Open tennis championships, and a Abu Dhabi Formula One Grand, and many other international competitions (UAE Government portal, 2020), another example within sports context is the immerse success of Qatar in hosting 2023 FIFA World Cup, as reports stated that Qatar is taking an advantage position and benefitting from hosting the World Cup in terms of excelling its return on investment and secure

a sustainable economic growth which contributed to the country's more extensive plan of economy transformation and accelerate its voyage in building a knowledge based economy and elevate the overall quality of life (PWC, 2023). These events added to the region's sports profile and helped the region rise in the global gaming scene.

Sports have been proposed as an efficient context to formulate a city's brand through sports teams, athletes, or hosting sports events. A place's branding combines the place, its facilities, and its people. It has to reflect the authenticity of the place, described by some literature as perceived expertise, place trustworthiness, and likeability (Knott & Hemmonsby, 2017).

Gaming helps brands in MENA countries boost their image. It engages international audiences, attracts investment, increases tourism, and develops talent. The UAE launched the Dubai Gaming Festival and Dubai Esports Arena to become a gaming and esports hotspot. The UAE may promote its cutting-edge gaming infrastructure and reputation as a vibrant technology, innovation, and entertainment hub at these events. Qatar promotes itself as a cultural and sporting destination through gaming. Qatar has established its esports federation and Quest Esports, the country's official industry expertise, since 2019. Quest Team provides a comprehensive platform of various services and products ranging from events, talent, and professional player management to educational programs for athlete training (Quest Esports, 2024). The esports National Team competes in international esports to foster youth and digital innovation. It is worth mentioning that the Qatari esports Team was developed within the Qatar Football Association and in association with the Qatar Olympic Committee. Gaming has become a powerful tool for portraying Middle Eastern and North African (MENA) countries as modern, technologically advanced, and culturally dynamic (Cole, 2014). The United Arab Emirates, Saudi Arabia, and Qatar are using gaming to attract global attention by organizing events like the Dubai Esports and Games Festival 2024 (DEF) while at the same time investing in cutting-edge gaming infrastructure. These projects boost tourism and investment, promote MENA countries's reputations as technology and creativity hubs, and encourage digital entertainment innovation across the region. Qatar's esports National Team, a collaboration between government, sports, and gaming organizations, has proven the region's sincere efforts and dedication to

fostering youth talent and digital innovation. Qatar's professional gaming team was created through teamwork. MENA countries are using gaming to boost their brand image and economic growth. This is done through intelligent partnerships and unique ideas.

The MENA region is taking advantage of the esports phenomenon by utilizing it in a tourism context. Some events are strategically prioritized to break through the potential of global reach since the platform is full of opportunities and is a gateway for investment returns worth considering. Below are the opportunities that countries might have to host some esports tournaments.

3.1.1 Large Demographic Fan-Base

The esports industry is evolving globally and attracts youth from different parts of the world with a unified interest in gaming. Young generations (millennials and Gen-Z) and medical age groups represent the largest audience. Spectators are traveling everywhere to follow and support their teams' participation and competition in a particular tournament, with events being held in large stadiums and dedicated venues, and millions of devoted fans are following these tournaments online. 2014, the League of Legends World Championship was held in South Korea in a football stadium that held the semi-final of the World Cup 2002, and around 40,000 spectators attended the event (Farah, n.d.), on August 20, 2023, Saudi Arabia hosted the Gamers8 Festival, which was considered one of the largest tournaments globally and the biggest in the region with a total prize pool of more than USD 34 million. The festival recorded 60 percent more viewership and 48 hours of air time than its previous year's version (Šimić, 2023). Right after the success of organizing such a significant event, the Kingdom announced the first Esports World Cup in the region.

3.1.2 Virtual Accessibility

The Internet revolution in the MENA region has contributed to the esports market's growth thanks to its affinity for video games. Statistically, more than 70 percent of Arabs have internet access. Countries like Bahrain and the UAE have internet penetration rates above 90 percent. The merging of digital contact with

smartphones's high adoption rate becomes one of the significant features that can facilitate gaming.

The wide-scale internet availability enables esports influence on the breaking of geographical boundaries likewise in traditional sports. Independent of their location, gamers can now easily enjoy competitive multiplayer games and online streaming platforms. Engaging in global collaborations and competitions has broadened the concept of esports beyond local horizons. PUBG and Fortnite, two regional gaming hits, gained significant popularity through online communities across several countries.

Esports broadcasts are also famous on streaming sites, enabling the competitions to be enjoyed by hordes of virtual audiences. MENA-based companies have attracted millions of regional viewers and followers to watch them on Twitch and YouTube gaming channels. Notably, micro-influencers interact with followers online in Arabic language by offering individualized mobile gaming reviews and ideas.

Cloud gaming's emergence may lead to even more accessibility enhancements. Platforms such as Microsoft and Google can stream high-quality games without worrying about hardware constraints, making a stream possible as long as there is a stable network. This gives rise to new opportunities for those living in remote areas and individuals who cannot afford a high-end gaming computer.

3.1.3 Engagement Content

The popularity of games is growing, and audiences from different cultures are engaged in the same game or the same content. These contents enable opportunities to attract new fans in other ways. It changes how fans connect or follow their favorite sports by interacting all together, as fans interact instantly by posting their highlights on social media platforms, unlike traditional sports fans just watching the games. Still, in esports, it is more like prompt interaction of highlights on social media (Seto, 2019), and this is the most significant change that esports introduced to the fans while watching their games. It enabled different platforms to connect with other fans worldwide, as people could be friends and share their feelings about making memorable moments. These interactions make fans engaged and connected to the games and each other. Also, the online platforms allow people to communicate via

chat rooms. “We believe that live interactive video with chat works for any live video; it is just a matter of figuring out the right format and recipe to bring it to that vertical.” Emmet Shear, CEO of Twitch.

Considering emerging regions like the Middle East, I believe some of the region’s big cities, like Dubai, Riyadh, Cairo, and Doha, are in an excellent position to utilize the platform for regional tourism ideas using esports as an access to the vast number of participants in the games (in-person and online followers), who are growing massively. There is a lucrative contiguous full of sponsors and investors looking for various profit sources, and the industry has a fruitful and promising future.

3.2 Involvement and support

Historically, it is known that Gulf countries rely on the oil and gas industries as the primary source of their economies. The region is rich in its natural resources, but that won't be the case shortly because the natural resources are scarce and limited. The global focus is shifting toward using clean and environmentally friendly energy sources, with immense pressure to reduce carbon footprints. The political leadership of the UAE has given more consideration to diversifying its economic resources and increasing its international foreign investments. The vision is to develop and invest in various sectors and growing industries to benefit economic prosperity and foreign investment growth (The United Arab Emirates Government Portal, 2020).

The institutionalization of sports sectors is one effective political act that the government can take to uplift its global image and enhance the country's reputation. Hosting sports events can change and reimage the country's international perception, as sports are always considered game changers, replicating successful cases in many cities like Barcelona, Cape Town, and Melbourne.

Understanding the complexity of the sports industry with its multiple requirements, the region's potential could grow to become a sports hotspot, and this has been witnessed in many governmental initiatives and investments in the sports context in general, such as building world-class sports facilities such as esports venues, car-racing tracks, tennis stadiums, golf courses, and training centers for

root-grass level and professional athletes. The region is now in a perfect position to establish its own nation's brand and compete with the big players in the industry.

3.2.1 Events and Culture Activities

Sports events and culture festivals are the most well-known means to enhance a nation's brand and make it more appealing globally, the government is striving to establish a competitive nation brand, as hosting sports events goes hand in hand with tourism promotion for the host city's culture, heritage, and social lifestyle. Because of its unique characteristics, the sport has its magic and always carries different meanings for participants, audiences, and stakeholders. It can be used as a platform for national unification and to establish a social construct, social inclusion, and civil integration in one place. Hosting successful sports events can build an authentic image and increase its reputation for content. The foundation of any thriving place's brand is to raise awareness of its culture, social values, and authenticity and create its own identity. It will become more competitive and attractive worldwide. Since a big part of government investments focus is going into building sports venues and elite facilities, there is a tourism appetite for leisure sports venue teams, and in most cases, the fans mainly are not visiting the venue because of the venue itself but because their favorite team is utilizing the venue and playing there, there are stadiums attached with VIP lounges to host leisure visitors who are looking for different exposure of visiting the facility of their favorite fans and feel it like home, but since Dubai as a destination is famous for its social diverse construct, and has its own unique culture with the sunny climate around the year, there is a scope of promoting for luxury esports centers where elite-athletes can be invited for training and preparations, suggest to use this a platform for increase city's visibility and enhance its images of hosting elite sports players, celebrities for more conferences, promotions, or technology and innovation events, which will increase audience confidence in the city alike.

3.2.2 Specialized Schools and Centers

Government investments focus is directed to building sport venues and elite facilities, where there is a tourism appetite for leisure sports venue based team, mostly fans are not visiting the venue because of the venue superiority, but because their favorite team is using the venue and playing there, some stadiums are attached

with VIP lounges to host leisure visitors who are looking for different exposure of visiting the facility of their favorite team like the case in traditional football stadiums i.e., Bayern Munich Allianz Arena, but since Dubai as a destination is famous for its social diverse construct, and has its own unique culture with sunny climate around the year, there is a scope of promoting a luxury esports venues and high-level training centers where elite-athletes can be invited, and the platform form will be an opportunity to showcase the city's heritage and reach culture increase, and will show the city globally as a home for elite esports players and venues, which will increase audience confidence in city alike.

On the other hand, we started to see some genuine efforts to build a robust esports ecosystem, as the city of Abu Dhabi (capital city of UAE) has approved its first esports specialized school, alongside student's studying curriculum, the school will present an opportunity for the students to start learning esports and explore gaming different platforms with some technical studies incorporate software topics like coding, 3D prototyping, and design and educational classes, The project is running in partnership with Lenovo Technologies Middle East, this collaboration will adapt the latest Fintech, like Augmented Reality VR and VAR technology to the classroom (Bhat, 2023), and this might be the start of a futuristic educational classroom driven by technology. It is an excellent opportunity for school students to explore new technology on a practical platform.

3.2.3 Regional Esports Hub

Esports are increasing on an international scale, and also in the Middle East, but not as fast as its global pace; esports has become a cultural mainstream, and hosting regional esports events can be an efficient strategy for Dubai's branding strategic plan, Dubai is not new to the gaming industry as in 2015 the city hosted the first mainstream, large-scale tournament in the region (ESL et al. invitational competition), with total prizes of USD 250,000. In October 2019, Dubai-based holding company W-Ventures announced that it would spend USD 50 million as an investment in the local esports sector and will develop the gaming ecosystem in the Middle East and North Africa to transform the map of the region (Murphy, 2019).

Dubai is getting ready for the games since the Dubai Media City office has established the cornerstone for the first dedicated esports stadium in the Middle

East, named Dubai X-Stadium. The authorities are looking to develop the project to become a digital cultural and economic hub in the region to attract game participants, spectators, and visitors from around the globe. As Mr. Al Malek, the group's CEO, added, "We are proud to take part in conceptualizing the Dubai X-Stadium, where we seek to attract and harness the creativity, talent, and innovation of young generations, which is largely in line with our strategic vision in TECOM Group." (Arabian Business, 2018).

The Middle East region annually hosts various regional, international, and local sports events. The critical success factors that will position MENA as a global competitive esports destination are tourism attractiveness, good event management, and the diversity of events hosted in the region. The city has a fast-growing economic sector, open policy trading regulations, a tourism retention mindset, and massive logistics capacity. These are the main pillars for MENA to preserve as a vital, high-ranked region in branding and building its glossy image, especially after hosting the FIFA World Cup in Qatar. The focus of the international professional footballer is to move to the Saudi Arabian football league and join the regional transformative era.

The regional government is keen on providing the necessary support for esports to achieve its more extensive vision of achieving a cohesive society, so we can see its efforts in lifestyle and wellbeing initiatives, facilities, and infrastructure, as well as hosting some of the elite regional and international events. Recently, the Dubai government has established the Ministry of Youth and Sports (MoYS) to create a complacent environment for youth to develop physical and mental abilities, practice their favorite activities, improve their wellbeing standards, and improve their creative skills. As a result, this will deepen national identity principles, instill loyalty, create a sense of belonging, and boost voluntary social work. MoYS has many responsibilities, such as ensuring the implementation of the government's standards and delivering the desired results, spreading the sports culture, and promoting the well-being concept as a way of life among the community to reduce illnesses and encourage physical fitness and mental health. On the other hand, the government represents the best talent at regional and international sports events. It takes tangible measures to promote and facilitate the participation of people with special needs and women in sports events (UAE et al., 2020).

4.0 Qualitative Analysis Methodology

4.1 Qualitative Research Approach

The research was done through a qualitative technique to understand the stakeholder views in their natural setting. A strategy that is meant to be exploratory and may provide new ideas and a rich depth of data that formal methods cannot achieve is made possible by qualitative research. Thus, a semi-structured interview design was adopted to balance flexibility and structure. Using a question guide for preparation makes it possible for the interviewers to lead the conversation while maintaining the comparability of the interviews.

Intentional sampling was used to obtain information-rich examples for the best possible study of viewpoints from the critical players impacting the local esports scene. The predetermined criteria were the basis for choosing the interview subjects according to their positions and roles in the organisations that are the main actors in the ecosystem. The attendees were the executives from the commercial sector, the government representatives, the esports players, and the tournament planners.

Thus, the data was collected via one-on-one virtual interviews carried out via video conference to ensure the best possible engagement, even with the distance. This customised plan aimed to make the participants feel at ease so they could express their thoughts. To ensure that all the data was saved for in-depth analysis, the interviews were audio recorded with the participant's permission, and the transcriptions were made verbatim. The anonymization of IDs and the secrecy of the responses were the tools that were used to prioritise ethics.

The interview data was thoroughly coded and sorted, and thematic analysis discovered the general themes. Repeated coding was employed in this inductive technique to extract the most popular concepts without imposing any prejudices. To illustrate the developing ideas, the direct quotations were removed. Ultimately, this methodological framework allowed for detailed analyses of the stakeholder views on a complicated and little-researched topic.

4.2 Participant Selection and Data Collection

A purposive sample method was used in accordance with the study objectives to specifically target the instances with a lot of information. The goal was to have a

conversation with the key people who might give a wide range of opinions on how the MENA region's esports market is changing. High-ranking executives and the founders of the organisations were first approached personally to be involved. They were instructed to suggest more people through a snowball sampling approach to increase the number of possible interview prospects.

Four in-depth interviews were done to keep in mind the practicality of the research and the number of replies. A professional player, an academy director, a government official, an event planner, and a leader in the telecom sector were the people who attended the meeting. They were from the younger, more competitive demographic and the more established organisational positions that influence policy and infrastructural support. The ages ranged from the early 20s to the late 30s, and male and female voices were heard.

Participants set up interviews according to their availability after they were recruited. Virtual interviews were the most feasible and secure way because the participants are located in different countries and are still afraid of the pandemic. With the participants' consent, all interviews were recorded and then fully transcribed for in-depth qualitative analysis. The participants' names and other identifying information have been deleted, and the references to the participants are made anonymously to protect their privacy.

4.3 Interview Questions

In the first interview, I spoke with the Esports Manager of Al Nasr Esports team, a privately owned UAE company focusing on FIFA tournaments. More than 300 participants from different Emirates, and different parts of the region participate in their online tournaments. Management expects a proliferation of esports clubs, which would subsequently become professionally managed entities, like conventional sports clubs, as the industry grows and develops.

He highly commended the National Federation for its initiatives in organizing qualifiers for international tournaments, which increased the reputation of UAE players worldwide. However, he suggested that they instead budget the requisite funds for club amateur leagues, child academies, or training programs, which may help private sector participation. This would help attract broad participation and identify new talents.

Al Nasr's primary competitive activity is organizing live-streaming FIFA tournaments on YouTube. Further, they also sometimes run live LAN finals at their gaming place in Dubai. According to the management, more comprehensive market penetration within the gaming circle cannot be achieved successfully unless FIFA is no longer the only game they provide. Other well-known games like Valorant, League of Legends, or CS:GO may also be added. Telecom companies and energy drink makers are among the top corporate sponsors; they provide equipment loans or take the tournament naming rights.

With the industry's development, he foresaw that club ecosystems would be structured differently. Companies will establish written contracts and revenue-sharing agreements with participants instead of relying on verbal agreements. As football teams are already setting up sections devoted to esports, partnerships might be created between esports clubs and regular football teams in the future. The continuation of private investment and intentional support by the federal government via industry-friendly initiatives are essential for further development.

Second interview: Pixoul Gaming, a mixed private-public gaming center operator in Dubai, Abu Dhabi, and Al Ain, with the job title of Digital Product Manager. Hundreds of gamers come to their monthly organized tournaments and several weekly multi-game qualifiers every month. On top of that, Pixoul aids governmental organizations in the planning and staging of championships at both regional and national levels.

The management thinks that once launched, the construction of their esports stadiums and high-school esports programs will undoubtedly lay the groundwork for a promising future. In the next five years, he forecasts the rise of specialized sports academies that are the equivalent of traditional athletic institutions but focus on training in game-specific skills, sports science, and sports coaching certifications. With the sector's development, talented young people can earn their living only as esports players, not depending on their hobby.

Furthermore, a strong partnership with technical companies that will become our long-term sponsor partners will be another vital factor. Using a combined approach that also leads towards realizing the national gaming plans and government vision, Pixoul looks to build links between industry and academia and strengthen them. On the other hand, financing the achievements and activities

geared towards grassroots engagement and youth development will require strong political will.

The third interview was with the Vice President of Corporate Excellence at STC Play, the largest telecoms company in Saudi Arabia. Their esports multimedia platforms and live game flow broadcasting have more than 500,000 active users. STC Play provides an online broadcasting service for the national and independent esports organizations of more than 15 partners.

Establishing college esports programs and casual player leisure leagues is the key strategic aim of their community involvement. STC teams up with neighborhood youth centers so that they can host esports seminars, in which gaming works as a vehicle to impart skills such as work-life balance, communication, collaboration, and others. Such activities aim to improve the branding of Saudi arts, encourage building a new sector in Saudi society, and bring about the comprehensive inclusion of its community.

Planning that STC social inclusions programmes revolve around hosting competitions and educational workshops to encourage women traditionally excluded from a male-dominated industry to participate. On the one hand, participation is rising. However, challenges of social stigma and a lack of facilities are not exist and teams only for women is feasible to support competitive scenes for women.

Added that some partnerships promote to boosting the status of women in gaming by providing them with more power, explaining the importance of structural improvements like changing parental attitudes, cultural sensitivity programs, and designating female-only areas in stations and colleges. Besides that, arrange mentorship programs, allowing professional female players, and female content makers to connect with business executives. if grass-root efforts and supporting programs continued to recruit more female groups locally with institutions involved, in the next five years, at least, there would be female pros competing in the international circuit.

The fourth interview was with the Saudi Esports Federation's event manager, and she highlighted, the organization focused on helping national esports teams and planning international exposure tours. There are still problems with the limited number of specialist facilities in the country, which can also affect service delivery.

She stays cheerful as she looks forward to long-term professionalization through well-organized programs connected to international certification boards and the growth of collegiate-level partnerships with foreign institutions shortly. Uniformity would prevail due to this, thus making it an easy task for domestic players to play on the global stage.

One of the principal tasks of the event manager of the Saudi Esports Federation is to foster the development of the national esports teams and their global reputation. They send their top-rated players abroad to take part in these sporting championships and also to gain ideas from differing competitive platforms all over the world. This particular experience would help them boost their level and finally attain the status of a global player. Discovering and nurturing young athletes within the country may be done by holding local competitions. However, they need more specialized facilities to appropriately organize sports competitions and other related games. The Federation is working with investors and the government to set up specialized esports facilities in large urban centers.

Concerning their policy work, they have set rules for managing qualifications and competitions at the national level. Player and team registration rules ensure equitability in standards and compliance with international norms. Moreover, they are looking forward to applying for ESL certification and standardizing their environment. This will, therefore, enhance the capability of their athletes and teams to compete on the global stage seamlessly in the future. They are looking into academic collaborations with international universities to bring esports programs to the university level. Their mission is to effectively secure Saudi Arabia as a top player in the Middle East esports industry through these legal policies and medium-to-long-term strategic considerations.

By 2030, every respondent anticipated maintaining the support and recognition of competitive gaming as a popular career path across the Middle Eastern region through specialized infrastructure. Nevertheless, it is deemed that countrywide community club-based grassroots engagements are some of the prerequisites for the country's socio-economic development.

4.4 Data Analysis

The most effective approach for the systematic search, evaluation, and summary of the patterns in the interview data was found to be thematic analysis. A first read-through of each transcript was necessary for this inductive approach to familiarise oneself with their scope and depth. After that, the initial codes were developed to incorporate the main ideas, viewpoints, and experiences the participants had to share on every aspect of the study's subject.

The draft open codes were the basis for creating the possible themes—repeated or noteworthy concepts across the data collection. The coded data extracts were repeatedly compared to these possible themes to see if they exhibited a consistent pattern. Some codes were merged under broad topics, while codes that didn't fit were discarded. The themes were enhanced through this iteration process to ensure they correctly reflected the wide range of the material.

Once the themes were developed entirely, they were analysed in detail through close reading to describe and identify them. The themes were linked, and the passages that best reflected each were chosen for quotation in the results. The themes' worthiness and ability to describe all the relevant parts of the raw transcripts were confirmed by the constant comparison with the coded data. During the whole analysis process, the researcher kept a reflective record to uncover any preconceived notions and ensure that the themes were truly based on the participants' views.

4.5 Findings from Interviews

The thematic analysis identified four main themes, which reflected the stakeholders' opinions on the local esports scene. The first subject, "Growth Enablers," showed how the participants related important enablers, like broad internet access, government regulations, and business investments, to popularity and economic benefits. "Internet infrastructure is the lifeblood of any esports ecosystem," one organiser said. The second subject, "Social Impact," talked about how esports could positively engage huge young audiences specially women, create inclusive communities, and challenge cultural preconceptions through exposure to other countries. A participant said: Through esports, people learn that we are all like any other country, enthusiastic about games and competition.

The participants stressed the innovation and energy from new enterprises, educational initiatives, and technology applications related to esports, and the phrase "Embracing Innovation" was born. According to an academy director, it fosters "a mindset of entrepreneurship and thinking outside the box." The lack of industry-standard education hinders the development of skilled labor, persistent social stigmas, and insufficient grassroots facilities that might affect the growth of the amateur competition base and spectators are among the remaining barriers. "We are still working on persuading some that esports is as worthy as traditional sports," a telecom executive said. These results, through the perspectives and roles of the players creating esports, give useful insights into what regional stakeholders regard as the major industry advancements and ongoing issues.

5.0 Esports Developments in MENA

Esports potential growth in the Middle East region is more comprehensive than its commercial or economic returns. Still, it intertwined with some other regional trends comprehending technological, social, and health facets that contribute to the market's robust growth and prosperity, considering the significant governmental interest and its tangible investments since sports play a pivotal role in ambitious national transformation strategies to diversify its economy streams away from oil and energy sectors, and many notable examples where the sovereign wealth funds in the Middle East actively align with governments enthusiasm to leverage sports as an internal and external economic diversification tool (McBurney, 2023). A notable instance is Saudi Arabia's Public Investment Fund (PIF), which acquired Newcastle's English football club in 2021 (Savage, 2023). Similarly, the Qatari government acquired the French football club Paris Saint-Germain in 2011, which is owned by Qatar Sports Investments (QSI), a subsidiary of the Qatar Investment Authority (QIA) (Alencar, 2023).

The Saudi Arabian esports sector has come a long way in development. The Federation for Saudi Esports was established in 2018 to supervise the industry and organize national tournaments. This has led to many amateur and college-level esports clubs and associations at Saudi schools and universities. Regarding the professional side of the Kingdom, the latter regularly organizes many international competitions annually. An annual event held in Riyadh, the Prince Faisal bin Fahd Esports Tournament is one of the world's biggest esports tournaments, with over

USD 1 million in prize money. In 2021, Saudi Arabia officially opened the doors to the King Abdullah Sports City arena in Jeddah, a modern and tech-driven structure custom-made for esports. The venue provides a state-of-the-art arena, training facilities, and a game innovation center. The inexorable urbanization of the 21st century has led to the emergence of sustainable urban planning as an essential tool in pursuing a safer, healthier, and environmentally responsible future.

The United Arab Emirates (UAE) is the region's undisputed leader in esports. The final of the World Electronic Sports Games was held in Abu Dhabi; awards amounting to USD 250,000 and above were given away. The DU Gaming Arena in Dubai is a sports venue where athletes train and compete. The city also held the annual Dubai Esports Festival, attended by 150,000 participants last year, competing to grab the USD 500,000 prize fund. The government of the UAE has created entities, including the Dubai Esports Association, which has the role of developing local expertise and global events and investments. Team Liquid and Galaxy Racer, two esports organizations, have headquarters in Dubai. Hence, the UAE is now the top esports city in the MENA region for professional esports activities and entrepreneurial opportunities in this sector.

5.1 Esports Club Business

The MENA region's distinctive esports clubs attract gamers of different backgrounds. Counting MENA esports groups would require substantial research and data collection. These clubs range from significant professional levels to smaller, community-oriented ones, and their purposes include casual gaming and professional competition. Esports clubs' organizational structure, competitive activities, and goals may help distinguish professional from recreational ones (Hong, 2023). Professional clubs prioritize high-stakes competitions, hard training, and talent development programs for elite players. Instead, gaming social clubs arrange local events, welcome players of all abilities, and encourage members to socialize with other gamers. MENA clubs invest heavily in esports at home and abroad. Some clubs strive to be the unquestioned leaders in their local country's gaming sector, while others compete globally and cooperate with powerful esports companies (García, 2004). This paradox reflects clubs' deliberate efforts to grow and become more prominent in a competitive climate.

Players' esports club affiliations make the MENA gaming industry active and competitive. To estimate the number of individuals active in these clubs, we must include professional esports players, casual gamers, and supporters who attend club events. Every club's recruitment and retention activities aim to attract top personnel and foster teamwork. Esports clubs use sponsorships and agreements to promote their brands, raise funds, and access resources. MENA esports teams work with IT, entertainment, consumer products, and telecom corporations. These agreements enable cross-promotion, product placements, and other experiential marketing strategies that target the gaming community and a wider audience while funding club operations.

5.2 Competitive Landscape

There are various esports events and gaming tournaments with excessive prize pools within the region. These events range from local competitions to global championships showcasing global talent, as reported by Seidner (2022). Participants on different levels can demonstrate their abilities, compete with peers, and meet other passionate fans at these events.

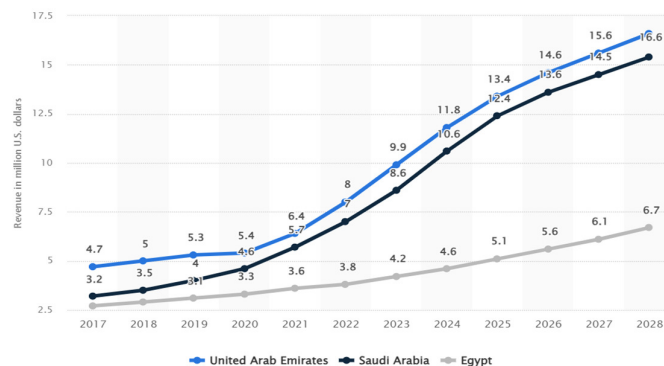


Figure 2: UAE lead the MENA esports market in 2021 with 6.44 million U.S. dollars in revenue, according to the latest data. According to Statista Market Outlook, e-sport revenue in the indicated nations would expand in the next years (statista, 2024)

Gamers and fans in MENA can join or watch live and online events every year. These regular gatherings can draw thousands of people in person and thousands more online. Esports competitions range from informal amateur contests to highly fierce professional championships; everyone has a spot to fit in. However, esports is dominated by a few game titles that draw players and fans. FIFA, League of Legends, Counter-Strike: Global Offensive, Dota 2, and Fortnite are featured in many regional esports tournaments, showing fans the range of competitive gaming experiences, and

the fast financial growth which created a new channel of revenue streams (Yuzyk & Seidner, 2022). Since the MENA esports scene continually changes, stakeholders must understand competitive dynamics to capitalize on its growth. By looking at the most popular series and events, competition frequency and intensity, and games played, stakeholders may learn a lot about the MENA esports ecosystem.

5.3 Corporate Partnerships

Esports organizations and entrepreneurs can benefit from corporate ties in MENA. They might include financial support, brand inclusion, product display, or event staging. MENA has many esports tournaments and teams sponsored by various companies. These include tech, consumer products, telecom, gaming peripherals, and multinational companies (Chow, 2022). Red Bull, Etisalat, STC, Razer, Logitech, and more traditional sports franchises are entering electronic sports. Esports organizations allow advertisers to reach a young, tech-savvy audience engaged in and interested in their brand. Online and offline spectators attend esports events, giving sponsors a diverse customer base. Businesses can also appear forward-thinking and trendy to younger generations by promoting esports teams or events (Chow, 2022).

Business collaborations give esports organizations attention, financing, and resources. Sponsorship partnerships assist teams, organizations, and event organizers in funding running costs, player salaries, travel, and prize pools. Relationships with well-known companies give esports organizations respectability, attracting a larger audience, viewers, and investors. MENA esports has several unique partnerships and collaborations. Gaming firms and traditional sports organizations have cross-industry alliances; telecom providers and esports platforms have strategic collaborations; and gaming gear makers and events co-brand (Ruta, 2022). These agreements show the growing interaction between companies and the breadth of MENA esports options.

5.4 Entertainment

MENA esports fans access content on live streaming platforms, social media, specialized websites, and traditional media. Esports fans love Twitch, YouTube, and Facebook Gaming for their real-time tournaments, matches, and gaming materials (Anderson, 2018). Reddit, Instagram, and Twitter allow fans to communicate with

their favorite teams, players, and communities while spreading esports news, highlights, and conversations. Supporters span ages, genders, and backgrounds. Esports attract teens, young adults, and seniors, with a disproportionate percentage of 18–34-year-olds. Esports fans are becoming gender-balanced as more women play (Tang et al., 2021).

The UAE embarked on its gaming journey ahead of its Gulf peers, pioneering the region's esports market with substantial investments and recognizing its vast potential. The country has strategically implemented different initiatives to attract gaming companies, capitalizing on its business-friendly environment; some 70 game developers and esports teams are now based in the UAE's capital city, Abu Dhabi (Gulf Business, 2023), and many of these international gaming developers, such as Ubisoft from France, have chosen to establish their regional headquarters in Abu Dhabi. The Chinese gaming giant Tencent has also set up its regional headquarters in Dubai.

Esports enthusiasts in MENA speak about the sport online, watch matches live, and read articles about it. Esports interest is rising across MENA, although numbers vary by region, game, and infrastructure. This includes gaming communities, esports news and updates, esports celebrities, and live streaming (Tang et al., 2021). MENA esports fan behavior has shown some intriguing trends. The rise of mobile esports attracts a diverse audience (Pissarev, 2023). The popularity of community-driven projects and grassroots esports events shows how esports culture has naturally spread into local communities. Influencers, content providers, and online networks have helped MENA esports fans connect more deeply.

5.5 Platforms and Ancillary Activities

For online video game tournaments in MENA, Twitch, YouTube Gaming, Facebook Gaming, Tamago, and Nimo TV are crucial. Millions of active users make Amazon-owned Twitch the leading live-streaming platform for esports events, competitions, and gaming content. Twitch averaged 1.4 million concurrent viewers during MENA esports peak hours in 2023. Google's YouTube gaming platform has grown with its rich content and easy integration with YouTube. YouTube Gaming has

gained 30 percent viewership in MENA in the past year, with 2 billion monthly gaming-related views (Hutchins et al., 2019).

MENA esports streaming's live streaming, VR, and AR improvements increase spectator experiences. Esports fans may get a 360-degree perspective of the action using virtual reality streaming. Augmented reality (AR) technology can add interactive elements, player profiles, and real-time statistics to live streams, engaging viewers in new ways. Also, live broadcasting and other activities enhance MENA esports events for participants and fans. Examples of such activities include

- Fans can buy branded clothes, accessories, and souvenirs from venue kiosks or online stores during esports events. These merchandise sales allow fans to support their favorite esports brands and boost event income. At major MENA esports competitions in 2023, merchandise sales comprised 20 percent of event revenue. The worldwide esports merchandise market is expected to reach USD 1.8 billion by 2025, growing 15 percent annually. This emphasizes the esports industry's rising merchandise sales revenue stream and fans' strong purchasing power.
- Esports betting has increased in popularity in MENA despite legal restrictions in some countries. Esports betting excites fans by letting them gamble on results and compete with other fans.
- Esports events produce highlight reels, player interviews, event summaries, and analysis videos. YouTubers, streamers, and journalists boost esports events' exposure and influence by creating engaging and instructional material.
- Sponsors use sponsorship activations and brand integrations to promote their products and services at eSports events. Sponsors can engage esports fans and customers via branded booths, product demos, interactive experiences, and on-screen ads.

Saudi Arabia, in particular, leads the way in the Middle East's esports landscape, capturing stakeholders' attention by establishing the most significant independent esports events during 2023. The kingdom hosted 12 esports competitions with an unparalleled USD 45 million prize pool (Zawya, 2023).

Furthermore, it reinforces its commitment to leadership in esports by establishing its esports federation in 2017 in the capital city of Riyadh. This

federation plays a pivotal role in nurturing elite gaming athletes, fostering the gaming community and industry in Saudi Arabia, and contributing to the Kingdom's 2030 strategy by diversifying its economic streams and altering its global reputation as a modern, fast-developing country.

6.0 Economic Significance

The rocketing growth of the esports sector globally in recent years confirms its mounting economic significance at the national and regional levels. Market studies indicate that in 2021, the number of esports fans worldwide will reach beyond 400 million, and by 2023, global revenues are predicted to exceed one billion dollars. Based on various industry statistics, the Middle Eastern esports business has experienced rapid growth in the past year and is estimated to be worth about 250 million dollars. It is a significant and quickly growing digital sports and entertainment business. However, it is much smaller than that of the core developed economies.

Not only does esports generate income for the industry, but it also generates income for other industries in the industry's supply chain, thereby creating a ripple effect. Media companies provide sustainable income for local content development and employment, and regional tournament organizers and teams permanently employ hundreds of full-time operational staff. Game gear and accessory manufacturers and online retail stores are one more beneficiary of this popularity among consumers.

On the other hand, the emergence of regional premier clubs and sponsorships of the top league by international brands make MENA a more attractive travel and cultural destination. The FIFA Global Series, an annual event attended by tens of millions at once, projects the host country's brand on a global scale free of charge. Because most Middle Eastern and African populations are young and have a large population of interconnected people, there is a nearly unlimited possibility for economic power. This is evident from the robust business centers and spillover effects in various industries owing to regional esports. As a result, the aggregate regional economy alone is estimated to add billions of dollars to the national gross domestic product annually through appropriate institutional support. This validates

competitive gaming as one of the key national strategic priorities, which has been experiencing strong growth in the region.

6.1 Influence on the Market

The esports industry has grown separately as a particular digital entertainment field, but it has also significantly affected existing and developing markets. Various additional businesses that serve esports and non-professionals have emerged or expanded as esports domestically, and businesses are shaped around it.

The PC hardware market has undergone one of the most drastic downturns. Top esports games require high configurations of CPUs, graphic cards, and accessories, thus creating an enormous market for them. Brands like Intel, AMD, and NVIDIA have actively supported domestic esports competitions so that they can demonstrate their new technology to the audience. The manufacturers of professional gaming laptops have also been designed to give the broadcasters and the manufacturers of mobile gamers what they want.

Furthermore, mobile game developers aim to create recreational esports categories by capitalizing on the hype of popular competitive gaming. Through reaching the fans' fan base of local esports heroes, games such as Mobile Legends have experienced rapid growth and have become models for other mobile MOBAs. Due to the emergence of esports culture, mobile gaming has become competitive.

One more aspect worth mentioning is the worldwide sale of licensed club products, coaching clothing, and jerseys, which has further connected the sports apparel sector. Collaborations like the one between Adidas and League of Legends can be valuable in terms of recurring income linked to live event views and retail stores. To achieve the same visibility as the MENA teams, local cultural fashion brands in the region have started to support the teams and athletes.

Among other modes of advertising items for performance enhancement, recuperation, and the lifestyle of professional gamers, the esports industry has seen the development of nutritional supplements and the involvement of different sectors like organizations, manufacturers, and sponsors. Together with electronics organizations, energy drink suppliers are the leading ones for regional-level sponsorship.

Broadcasting and content platforms have realized that, carried by esports, they can earn more through subscriptions. Significant events are the primary traffic source for endemic websites, such as Twitch, from the MENA region. YouTube Gaming attracts Arabic viewers via the larger broadcaster communities in that region.

Esports advance as one of the newfangled fundamental competitive entertainment products that promote the development of closely related sectors among elites and passionate fans worldwide is manifested by its wide societal impact. Competitive gaming is now a part of marketing that appeals to the media, consumer packaged goods, and technology sectors to stimulate demand.

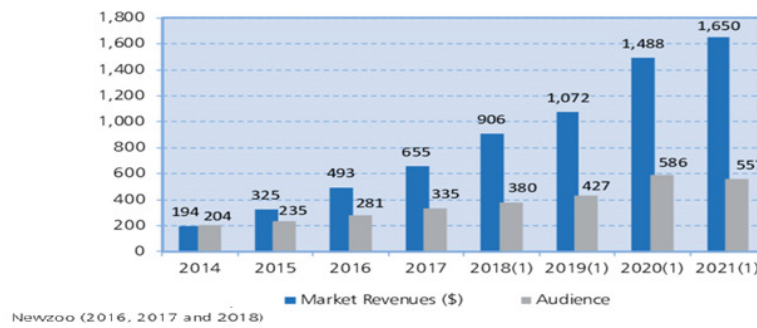


Figure 3: Esports revenue in MENA has grown steadily over the past decade, as shown in this graph. Each statistic point reflects annual esports revenue from sponsorships, advertising, ticket sales, and merchandising (Newzoo, 2021).

6.2 Growth Key Drivers

Youth Population

The favorable youth demographics have dramatically affected the growth and commercial capacity of esports in the Middle East and North Africa (MENA). Nowadays, more than 60 percent of the population in the area is under 30, and their favorite hobby is gaming. This massive online network of local sports fans passionately supports their local clubs and athletes and helps boost ticket sales, viewership, and sponsor interest. Younger demographics indicate that the business has a bright future ahead because audiences are still highly engaged, unlike other entertainment industries that compete for attention.

Enhanced Interconnectivity

The broad application of the high-speed internet has made it possible for fans from every corner of the Middle East to meet virtually. The pandemic itself caused an increase in the average monthly consumption rate to almost 30 percent. Improved connections cut down on location barriers by ensuring smooth surfing of online qualifying, wagering, and streaming. The future for cloud gaming looks extremely promising, and it has the potential to attract larger audiences to the competitive scene.

State-sponsored Projects

Gulf countries have been at the forefront of spearheading proactive national esports plans by putting their efforts into grassroots initiatives and facility development. Event programs like LOL's partnership with Saudi Arabia and the nation's Rise of Nations Festival inspire young people, attract investors, and highlight the state's strengths. Regulatory sandboxes and specialized zones facilitate companies aiming to commercialize specific genres.

Particularized Instruction

Establishing advanced research institutes, in-game majors, and divisions of esports at universities is a critical first step towards building specialized local talent pipelines. Graduation gives the region an advantage as the graduates can draw from their experiences and skills found in jobs and bring them back to the region. In addition, colleges cultivate a noncompetitive gaming scene by hosting on-campus networks and qualifying ladders.

Turning a profit

Entrepreneurship in esports increasingly looks like a practical startup method because business models are improving. High-net-worth individuals and corporations are now ready to buy units that might be worth millions. The players can form a union and negotiate a better deal with health benefits. Global industry standards and MENA region compliances are synchronized through international coaching and event operations certification standards. This interaction among the stakeholders attests to the multifaceted economic strength of esports in the Middle East, particularly given the favorable economic conditions that facilitate the growth

of competitive gaming as it evolves into an essential strategic industry and popular digital sport. Targeted actions must provide a solid basis for the sector and speed up the pace of change.

6.2.1 Demographics and social inclusion

Foremost is the region's youth population, and its large fan base will boost the sector's income; there are millions and millions of individuals attending esports events online and offline. Relevant products, ticket sales, and media rights make these events profitable. Demand for esports as an entertainment medium is rising, pushing income growth. This is due to the popularity of the gaming culture among the younger generation in the area, which has led to a surge in participation and a big appetite for competitive gaming tournaments. Esports participation has increased due to the prevalence of technical advances such as mobile gaming platforms and high-speed internet (Cranmer et al., 2021). The Intel Arabian Cup and PUBG Mobile Star Challenge attracted millions of online and offline spectators and gamers, and I believe this was the spark light for their publicity acceptance. These events generate income from ticket sales, merchandise, sponsorship contracts, and media rights. MENA fans flock to this annual competition, which features some game titles such as League of Legends and Counter-Strike: Global Offensive. Live and online ticket sales produce significant revenue for the organizers.

Within the region the average age of population might influence sport activities activation, Dubai has a population of more than 3.32 million, majority of the residents are foreign origins, and it is a male dominated population, and the highest age group is between 25 to 54 years old (GMI Blogger, 2021), also inclusion focus should make the sports sector in general more attractive for different segment of the population, Dubai has a regional record in social inclusion with promoting residents participation culture throughout many initiatives like supporting women participation with launching women esports tournaments, and dedicated women sports events such as the Sheikha Hind Women's Sport Tournament that was held in Dubai and participation was limited to women, and the Dubai Women's Run, with its growing participants of more than 6,000 woman runners annually, also government approaches mass participation events like Standard Chartered Dubai Marathon, founded in 2000 and has grown to become one of the most significant events on the global marathon Circuit with more than 25000 participants in 10km Road Race, and

3km Fun Run and the majority of its participants are non-professional athletes. Dubai Plan 2021 is to become a city of happiness with creative and empowered people, and the government reinforces the participation of individuals to maintain a healthy lifestyle, enabling them to play an active, productive, and innovative role in all aspects of society and the economy (Falcon and Associates commissioned Deloitte, 2015).

6.2.2 Technology Advancement

Technological advances have made esports more accessible in the Middle East and North Africa. High-speed internet, mobile gaming platforms, and streaming services allow fans to interact with esports content anytime. The accessibility of esports has increased audience and participation, which has reflected positively on advertising and sponsorship revenue for both events and teams. Technology has made esports more accessible, increasing audience involvement (Block & Haack, 2021). UAE and Saudi Arabia lead MENA internet penetration. The UAE had 99 percent internet penetration in 2021, while Saudi Arabia had 91 percent, according to Statista. Due to widespread high-speed internet, esports events are more accessible to broadcast on Twitch and YouTube Gaming. MENA esports competitions have gained popularity. The Intel Arabian Cup, one of the region's most significant esports events, drew over one million viewers in 2021. Players can play esports on their phones and tablets (Rowe, 2022). This accessibility strategy has improved MENA mobile esports contests and audience participation. The proliferation of streaming platforms has increased eSports advertising and sponsorship money. Brands sponsor and work with esports teams and events to reach the region's growing gaming fanbase. Samsung and Red Bull gave millions to the MENA PUBG Mobile Star challenge.

Notably, the rapid adoption of advanced technologies within the region fosters industry innovation, allowing them to capitalize on different opportunities and develop the industry's ecosystem. Mobile esports events and leagues aim to attract casual gamers and grow the ecosystem. AI-driven data analytics and insights can improve esports marketing and experience. You may discover how to tailor content and boost user engagement from player activity, engagement metrics, and viewer demographics. AI-powered matchmaking algorithms can improve games by creating a fair and competitive environment by pairing players with similar abilities.

In recent years, the Middle East has shown a growing interest in exploring blockchain applications for sports, with some countries already delving into niche tech-related areas like non-fungible tokens (NFTs) to enhance online fan engagement, where the focus shifted toward blockchain enablement platforms that leverage the technology for fans participation in engagement programs and decision-making processes to elevate fans experience and increase their involvement (Deloitte, 2023).

6.2.3 Infrastructure

Rapid MENA esports infrastructure growth has boosted income. Government and corporate investment in cutting-edge gaming venues, stadiums, and training facilities has strengthened the eSports ecosystem. The Dubai Esports Arena, a top city center facility, hosts tournaments and events that draw top players and promote the region's esports image. The Saudi Esports Federation (SEF) constructs esports stadiums and training centers for prospective players and promotes the economy through venue leases and sponsorships. Gaming cafes and lounges in MENA let gamers compete and connect, boosting commerce. MENA is a global leader in esports due to infrastructural improvements that boost events and revenue. Dubai has constructed a state-of-the-art esports infrastructure, including unique gaming-themed entertainment parks and facilitating year-round community use in hosting different regional and global events.

Dubai is expanding its network of esports clubs and is actively working on establishing new spaces shortly; the theme for these new venues revolves around creating mobile interiors that can be easily transported and installed in multiple locations, maximizing sports exposure to a broader audience base (EdgeME, 2023), and Saudi Arabia has revealed plans to build a regional esports hub, featuring a dedicated 500,000-square-meter center. The vision is to host over 25 competing teams simultaneously, with a capacity to welcome more than 10 million visitors annually. This initiative will contribute to Saudi Arabia's economic landscape, energizing the job market and generating approximately 40,000 jobs by the year 2030 (Alvin R. Cabral, 2023), adding that the development of these high-level esports facilities will have its social attractiveness augmented and attract residents participation and foreign attention to try, which will be reflected positively on the

interest in creating versatile sports facilities that serve multiple purposes in hosting major global events (Economy Middle East, 2023).

Dubai's sports activities calendar is busy around the year, offering interesting domestic events for residents or visitors' participation and other professional tournaments. In 2019, the Department of Culture and Tourism in Abu Dhabi received a world travel award, which was a tourism-related recognition named "World's Leading Sports Tourism Destination" for its serious efforts and sports expenditures that have been done and are still ongoing in the sport tourism sector. It was interesting that some big city names like Auckland, London, Seoul, and Tokyo were among the other contenders for the award, which reflects the capacity for the country to stage and host major sports events (March 2019).

6.2.4 Skilled Talents

Employment opportunities also increased due to the fast construction of esports infrastructure in the Middle East and North Africa. These investments deliver high-quality esports competitions and events and generate additional revenue from venue fees, sponsorships, and merchandise sales. This ongoing growth required supporting jobs in various industries to establish a robust esports ecosystem. Besides the construction work required in the infrastructure, expansion requires skilled game developers, event organizers, broadcasters, and marketers. This demand has made the region a productive place to create and advance jobs.

For the region to build up a robust ecosystem, there should be a deliberate consideration of talent acquisition and the development of workforce skills. Also, key stakeholders value the urgency of this factor for sustainable growth. Thus, investment in hiring and retaining the best talents within the region is a priority, as nurturing the new generations with the necessary knowledge will prepare competent individuals for further development and expansion. These steps assist in filling the skills gap and keep the region at the forefront of esports development and innovation; some programs are currently offered by universities, corporations, and government entities, thanks to their relationship. These initiatives promote creativity and entrepreneurship and give esports workers the knowledge and skills they need to succeed. For example, Qatar University and industry experts founded the Esports Academy to teach game design, management, and digital marketing. This program

gives students hands-on experience and practical skills under industry pros, preparing them for careers in the fast-growing esports business, as reported by Newham (2023).

Talent and skill development boost economic growth. It allows Middle Eastern and North African nations to capitalize on the booming esports sector. By cultivating bright, skilled, and knowledgeable individuals, the region can attract investment, foster innovation, and create a dynamic esports ecosystem that boosts the economy, education, and training. MENA has to accelerate the creation of a highly skilled workforce that can drive innovation and competition in the global esports ecosystem. This is done through education and training.

Saudi Arabia's Vision 2030 program is a national accelerated initiative focused on integrating and empowering women through diverse sports events and entertainment programs. These initiatives extend beyond sports and encompass various entertainment contexts, such as music concerts, fine art exhibitions, and cultural events. The focus is on reaching the youth demographic with a comprehensive inclusion plan, ensuring engagement for everyone (Vision 2030, 2023), while the Dubai Sports Council's Women's Sports Committee has been actively promoting female participation since 2006 (Dubaisc, 2023).

6.2.5 Stakeholders

The cumulative public and private sector investments in sports are propelled by the industry's optimistic outlook and recognition of the potential benefits derived from esports at time the MENA gaming market has rapidly become a focal point for global sports industry growth highlighted by public sector subsidies as Saudi Arabia's Savvy Games Group kingdom announced an investment of SAR 142 billion riyals in different partnerships with private companies aimed at developing the kingdom esports and entertainment sector which anticipated to create 39,000 jobs, and will contribute with adding more than SAR 50 billion to kingdom's GDP by 2030 (Reuters, 2023), later on, 2023 the neighbourhood country UAE has welcomed my—games to its capital city, Abu Dhabi. MyGames is a Dutch video game publisher and developer with over one billion registered users globally and a portfolio of over 80 popular video games (MY.Games, 2023). This strategic partnership will highlight the sector's significance and regulators' interest in facilitating and cooperating with

regional and local game developers; it will also contribute to the country's economic growth with numerous new jobs over the coming years. Also, the same partnership will play a pivotal educational role by offering internships for students, fresh graduates for enablement, and elevating their industrial knowledge (Mediaoffice Abu Dhabi, 2023).

UAE government invests in Dubai's central infrastructure like roads, airport upgrades, building up new hotels and pavilions for different exhibitions/ events visitors, connecting and growing its public transportation system like (taxi, business, motorsport facilities and venues investments are among Dubai's sports stakeholders agenda as some of these facilities are used for warm weather training or competition venues during the European winter season, and this is an area of potential considerable growth, that is why stakeholders managed to build indoor 10-15,000 capacity multi-purpose arena Hamdan sports complex, and another 5,000 seat arena being constructed at the Nad Al Sheba complex (Falcon and Associates commissioned Deloitte, 2015).

In Saudi Arabia, the situation mirrors that of the UAE, and to remain a big MENA potential player in 2023, the Saudi Esports Federation (SEF) has announced a new partnership with the British national body of esports, this collaboration will introduce some different activities, projects, cultural exchange programs, employment, and educational opportunities (Mcgowan, 2023). Also, the Saudi government has announced a strategic collaboration with the Japan Esports Union (JeSU) in the field of esports human resources and industry growth to unlock esports full potential and provide new opportunities for the MENA market; these initiatives of Saudi stakeholders have also extended to different esports multinational stakeholders in various industries to diversify its contribution and deliver Saudi Arabia's 2030 strategy to become an esports and gaming global hub (Xu, 2023).

6.3 Growth Opportunity

Esports are growing in popularity, yet MENA offers many untapped niche and segment markets. In esports, women could benefit from inclusive approaches and gender gap-closing programs. To create a more inclusive esports environment, leagues should cater to female players, sponsor tournaments for them, and help them become professionals. Funding educational and grassroots esports is another

untapped market growth opportunity. Esports groups in schools, financial aid for top players, and training programs for aspiring professionals can help cultivate potential and future professionals. By encouraging amateur competitions, everyone can help the esports industry succeed.

The growing esports ecosystem in the Middle East and North Africa has created job opportunities and economic diversification. Esports, game development, content creation, and event planning companies are hiring talented personnel to meet rising demand. This infusion of qualified workers and financial investments boosts economic growth and innovation across many industries, boosting regional wealth. The MENA esports ecosystem has created many jobs and diversified the economy. Content production platforms and esports events have raised demand for streaming, broadcasting, event management, and marketing specialists. ESI Media in Saudi Arabia, which organizes esports events and produces gaming content, has helped gamers find jobs (Mogielnicki, 2021).

There are other gains aside from monetary returns. There are employment opportunities as many individuals are indirectly involved in the sector, like production developers, marketing companies, venue and facility operations, and events management teams, these jobs are directly and indirectly connected to the ecosystem of the industry and play a pivotal role in unlocking esports regional potential. Also esports educational institutions that started teaching esports in a more structured curriculum, which involves a new segment of stakeholders. These educational entities are offering programs to provide individuals with an opportunity within the esports industry without being gamers or participating, but they will be involved as a stakeholder or employee.

It is essential to mention the sports tourism in the region. In contrast, MENA might be an esports hub in the future coupled with being a sports destination, where sports individuals will attend from all over the world to experience sports in all of their forms in the region, while sports tourism is one of the fastest growing sectors on the global tourism map. In today's modern world, traveling to a different country for the sake of participating in or attending sports events has become more worthy and trendy.

Enhancing or changing a perception about one destination is important. Sports events offer an opportunity to build up a good reputation, as many countries are

hosting sports events with an understanding of their opportunities and challenges as well. Still, everyone looks for development opportunities to attract foreign investments, and sports events are ideal platforms to promote and uplift MENA's region as an esports destination.

7.0 Challenges and Opportunities

The esports field in the Middle East and North Africa (MENA) area has seen a massive development in recent years, attributed to factors like young communities being actively involved, comprehensive internet coverage, government support initiatives, and significant corporate investments. However, there are still some impediments that can limit the growth and development of the industry. One of the biggest challenges is the lack of specialized equipment and facilities meant for this kind of activity (Allal-Chérif et al., 2024). Access to advanced training grounds, esports arenas, and places for competitive play and community development is still limited in most markets in this area. This hinders the growth of local esports talent and the development of a flourishing local esports community. Another acknowledged problem is the social perception of gaming and esports as a practical career or admissible occupation. In countries where society and cultures are more conservative than others, we must make extra efforts to educate the citizens and change their minds to regard eSports as equal to traditional sports.

Similarly, the industry necessitates building regulatory structures, as the regulations concerned with streaming, sponsorship, and cross-border competition among local teams are still being formulated. These inconsistencies among markets can especially cause problems for cross-country organizations and contests. The shortage of readily accessed vocational education programs also holds back the development of specialized coaching skills and expertise, eventually affecting the ability to raise professional standards and promote self-reliance within the local esports talent pool.

Conversely, these issues provide many opportunities if solved together through the collaboration of the company's stakeholders and with the support of government policies. The increasing involvement of consumers and sponsors for the grand events and a continuous league attract private sector funding for the specialized training facilities and esports complexes that offer solutions to the

infrastructural problems. Making the vocational education programs and the certification boards both at the regional and worldwide levels can help grow coaching talent from primary to advanced levels in the future. By incorporating cultural awareness programs that highlight the true character of esports as a sport and its usefulness in bringing socio-economic growth to society, we will manage to change overlooked perceptions and eventually increase society's acceptance of esports, and women participation, the esports event organizers and franchises will participate in councils and regulatory bodies to ensure that they follow regulations while the new industry sector is regulated (Wong & Meng-Lewis, 2023). This enables framework improvements whereby the development of the industry is fostered while consumer interests are protected and local markets remain appealing to foreign investment as the industry evolves. By acknowledging and resolving these impediments in the region through collaborative efforts among stakeholders, the Middle East and Africa can lay the stable groundwork for further prosperity.

8.0 Future Directions

In the future, various stakeholders expressed diverse strategic initiatives that might speed up the advent of the esports business in the MENA region in the coming years. Adopting bottom-up development initiatives involving youth and disempowered groups is a must to increase both public participation and local potential. Spending further money on the same local teams, training programs, and community facilities will increase the number of talented individuals. Academic-industrial collaborations present various opportunities for long-term benefits (Olsson & Bernhard, 2020). The establishment of recognized esports degree programs and research centers, as well as the facilitation of practical learning opportunities like internships and startup incubation, will foster the cultivation of graduates who are ready for careers and the creation of new ideas and developments. With the progress of the business, the focus will shift to upgrading the regional qualifying paths so that the top local players and teams are smoothly integrated for participation in the circuits and big international championships. This develops a global competitive edge for the regional companies in the region over the long run. Stepping towards organizing national professional leagues through the franchising system of the standard domestic championships may appear promising from the commercialization point of view and in terms of a league's stability in the long run.

Efficient public-private partnerships that are strategic and key to maximizing resources will also accelerate the process. Partnerships (joint ventures) can be a grand alliance to build and expand infrastructure for esports, such as training facilities, community centers, and stadiums (Zhou, 2024). Educating local communities, families, and school administrations about esports' social and cultural benefits is essential to eliminating myths and creating an atmosphere that will attract women. Implementing esports as part of community outreach initiatives can efficiently develop new life skills, leadership qualities, and experience in the job market for professional e-sport players and young people, thus enhancing the industry's effectiveness in society. Through top-tier international tournaments organized by reputable organizers and the cities hosting these events, we can boost the profile of esports at a national and international level and in the cities that host these events. Having an official regulatory authority comprising all stakeholders might be the answer to developing equitable frameworks and rules for streamlining the sector and sponsorship issues.

9.0 Conclusion

This research disclosed that the esports business in the MENA region is experiencing an ever-growing boom, mainly due to factors like demography, technological progression, and government assistance. This area is cementing its reputation as a world-class place with the best venues and ideas. esports clubs are increasing in the centers of major urban areas, including the range of skills from casual players to the most competitive. The national federations are setting up the national leagues and international tournaments. Popular genres include shooters, fighting, and sports, which is no surprise. Streaming platforms such as Facebook Gaming, YouTube, and Twitch have a powerful position in the industry while growing in areas including sponsorships, merchandising, and fantasy gaming. The esports market has created lots of social and economic benefits alongside this through job creation, skill development, and intercultural exchange. Continual support is the primary factor that will make it possible to reach the final goals.

The MENA esports industry has experienced tremendous growth in recent times, mainly due to the active involvement of the youth population. These governmental initiatives provide support, corporate investments, and enhanced

competition infrastructure. However, several issues remain, including prejudice among members of society, a lack of adequate infrastructure and skilled trainers, and the need for better regulatory frameworks. Through stakeholder engagement, the difficulties can be resolved so that these possibilities can be uncovered and the sector can be pushed to the next level. The cumulative efforts to build the community, strengthen partnerships with local universities, and promote regional patronage internationally will be essential. Suppose all stakeholders, including the governmental sector, continuously play their part. In that case, esports has the potential to become a thriving culture and an economically significant contribution that can reinforce the competitiveness of the countries in the Middle East and North African region. To guarantee a bright future, development must be done in the spirit of cooperation to overcome all kinds of obstacles and bring the community's utmost capabilities to fruition.

The esports sector has made a massive economic impact on the MENA region. The industry offers many new specialized career opportunities, especially in game development, event planning, team management, and marketing. Moreover, the esports economy has generated many secondary jobs that produce goods and services. Figures indicate that the sector can make a yearly contribution of more than 4 billion dollars to the GDP of the whole region. The rise in revenues is mostly explained by the sales of games, the microtransactions, the sponsorships, and the media rights. It profoundly assisted in the diversification of economies that were heavily dependent on oil and gas. Countries are channeling resources toward the growth of esports as a means to draw tourists and foreign capital. A thriving community sector can be considered a stepping stone to selling the area's knowledge and skills to the rest of the world on the international market.

Esports has provided speedy development of internet infrastructure in the MENA region. Improved broadband and 5G networks are key for competitive online gaming and streaming. This has been a positive force in other fields as well. The esports field pioneered cloud gaming, internet platforms, and broadcast technology. The development of games brought improvements in the game engines, virtual reality and augmented reality apps, and complex multiplayer options. These companies have expanded into adjacent industries such as hardware, payments, and

data analytics. Governments are aware of esports' ability to drive technological growth and participate in transforming their economies.

Esports brings more inclusivity at a social level. It has brought together the teenagers of the area, youth males and females, and many of whom are from different backgrounds, via competitive local multiplayer scenes and communities. Online games help create cross-border friendships. Even though more efforts are urgent to move more women into business, including the advertisement of female influencers, the implementation of training programs, and the resolution of cultural obstacles, both on grassroots and professional levels, they are also very necessary. Online video games, including esports, increase social interaction and are a significant factor in a growing digital society, and probably this constructs the futuristic context of our favorite sports.

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