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THE MIDDLE EAST SPORT ECOSYSTEM: INVESTMENT, INNOVATION AND TRANSFORMATION

2026 White Report

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Introduction

The Middle East's sports industry continues its remarkable transformation, solidifying its position as one of the most dynamic and strategically significant markets in the global sports ecosystem. Over the past year, countries across the region have accelerated their investments in sports infrastructure, major events, and talent development, reinforcing sports as a pillar of national identity, economic diversification, and international visibility. While this transformation spans multiple disciplines and sectors, football has increasingly emerged as the primary catalyst of commercial growth, institutional development, and global positioning across the region's sports industry.

A defining moment in this latest phase is FIFA World Cup 2034 being awarded to Saudi Arabia, a development that has rapidly shaped the trajectory of sports investment and international engagement across the Gulf and beyond. Football is increasingly acting as a strategic engine for economic diversification, driving investments in infrastructure, tourism, media, entertainment, and private sector participation. Saudi Arabia, Qatar, and the United Arab Emirates have leveraged football as a platform for international visibility, soft power, and ecosystem development through domestic league expansion, global partnerships, and talent acquisition strategies, while other countries in the region are exploring how similar development models can be adapted across different sports according to their own competitive strengths. The World Cup assignment has further intensified commitments to stadium construction, hospitality, tourism infrastructure, and brand partnerships, elevating the region's role in global sport. Accordingly, while this report analyses the broader evolution of the Middle Eastern sports ecosystem, particular attention is dedicated to football as the leading driver of investment and transformation in the region.

The investment of SURJ Sport in DAZN MENA in February, the first-ever staging of the EuroLeague Final Four in Abu Dhabi in May, the Esports World Cup in Riyadh in summer: these are only few of the milestones reached in 2025 in the region. This underscores how the Middle East is converging on new sports, new formats, and new global partnerships beyond traditional event types.

Building on years of research and engagement, the Sport and Entertainment Knowledge Center at SDA Bocconi School of Management has continued to deepen its understanding of this evolving landscape. Through initiatives in executive education, advisory projects, and research collaborations – particularly in Qatar, Saudi Arabia, and the United Arab Emirates – the Center has observed first-hand how sports investments are shaping new opportunities for growth and innovation across the region.

The Middle East Sports Investment Forum (MESIF) remains at the core of this dialogue, fostering connections among key stakeholders, such as government institutions, investors, sports federations and academic partners, to promote knowledge exchange and strategic collaboration. MESIF serves as both a reflection of the region's ambitions and a catalyst for its continued progress, helping to align investments with sustainable social and economic outcomes.

The growing network of alumni, experts, and faculty involved in MESIF has created a vibrant platform for innovation and leadership in international sports management. The region's large-scale investments are not solely financial; they embody a broader vision of social development, nation-branding and diplomatic engagement, leveraging sports to enhance quality of life, global integration and cultural exchange.

SDA Bocconi's expertise allows it to interpret these transformations through the lens of human capital, analyzing how education, management skills and leadership development can sustain the sector's long-term success. This updated edition of the White Report integrates new insights from interviews, MESIF 2025 events, and research across multiple Middle Eastern markets. Its purpose is to offer readers a credible and up-to-date source of knowledge to understand the forces driving this new phase of growth, one that is reshaping not only the region, but also the global future of sport.

Since the landmark moment of the FIFA World Cup Qatar 2022, the momentum has not slowed. On the contrary, it has inspired new approaches to event organization, investment strategies and cross-border collaboration. The challenge, and opportunity, now lies in turning this momentum into sustainable impact.

As a leading School of Management, SDA Bocconi remains committed to bridging sport and human capital, equipping a new generation of leaders to guide the ongoing evolution of the sports sector in the Middle East and beyond.

Prof. Dino Ruta

*Director, Sport & Entertainment Knowledge Center, SDA Bocconi School of Management
Rector's Delegate for the Olympic Movement, Bocconi University*

The MESIF Purpose

Dear Readers,

Welcome to the Middle East Sports Investment Forum (MESIF) White Report 2026, a flagship publication that embodies our mission to advance the future of sports investment in the Middle East. This report is a critical extension of the work we do at MESIF, reflecting our commitment to creating meaningful dialogues and fostering partnerships that can transform the regional sports landscape.

At MESIF, we don't just host events – we curate global gatherings that attract senior decision-makers from around the world, all united in their focus on sports in the Middle East. Our events are designed to provide comprehensive insights into the evolving opportunities, challenges, and trends within the region's sports sector. Each forum is a unique opportunity for leaders, investors, and professionals to engage with key topics that matter to our industry, from the rise of esports and the increasing influence of female sports leadership to the sustainability and legacy of major sports investments.

This White Report represents an essential part of our broader vision. Edited by the prestigious SDA Bocconi School of Management's Sports & Entertainment Knowledge Center, it provides in-depth analysis and actionable insights into the themes shaping Middle Eastern sports investment. Our collaboration with SDA Bocconi allows us to deliver not only a local perspective but also an academic rigor and global relevance about economic and human capital implications in the region. Through the White Report, MESIF extends the knowledge and conversations from our events into a resource that can inform strategic decisions in the sector.

This publication is particularly significant at a time when sports investment in the Middle East is gaining unprecedented momentum. With visionary national agendas such as Saudi Arabia's Vision 2030, Oman Vision 2040, Qatar's Vision 2030 and the UAE's Year of the Fiftieth, the region is accelerating its role on the global sports stage, investing in world-class facilities, hosting monumental events, and promoting sports participation across all levels of society. These ambitions are propelling the region toward its goal of becoming a sports and entertainment hub, recognized worldwide for its impact and innovation.

The White Report, therefore, is not merely an analysis; it's a tool for action. It reflects MESIF's commitment to supporting the industry with the knowledge needed to shape the future. We hope this report will inspire further investment, forge new partnerships, and support impactful initiatives that will leave a lasting legacy in the Middle East. Thank you for joining us on this journey, and we look forward to the exciting developments this report will help drive.

Maximilian Lejman

Director & Co-Founder, Middle East Sports Investment Forum

Middle East and the Investments in Sports

Over the last years, the Middle East has firmly positioned itself as one of the leading global hubs for international sports, evolving from an emerging market into a consolidated powerhouse of event hosting. Across the region, from Qatar and Saudi Arabia to the United Arab Emirates, Oman and Bahrain, hundreds of high-profile competitions have taken place, attracting millions of spectators, global media coverage, and substantial investment. This remarkable expansion reflects not only a growing appetite for international visibility, but also a strategic alignment between sport, national branding, and economic diversification.

Today, the Middle Eastern sporting calendar encompasses an unprecedented range of disciplines. The region annually stages world-class motorsport events in Abu Dhabi, Jeddah, Bahrain, and Lusail; major championships in athletics, swimming, boxing, and judo in Doha, Riyadh, and Dubai; the ATP 250 tournament in Doha; international padel tournaments such as Ooredoo Qatar Major Premier Padel 2025; and multi-sport gatherings such as the GCC Games, Islamic Solidarity Games, and Arab Women Sports Tournament. Professional tennis, golf, basketball, equestrian competitions, and an increasingly global eSports scene further enrich this diverse ecosystem, positioning the region as a year-round destination for elite and emerging sports alike.

The next decade promises to reinforce this trajectory. Upcoming events such as the 2034 FIFA World Cup in Saudi Arabia, the 2029 Asian Winter Games in NEOM, and new editions of the Formula 1 Grand Prix, UFC Championships, and Golf World Tours will consolidate the Middle East's reputation as a host of global excellence. These projects are sustained by cutting-edge infrastructure and a collaborative investment model that brings together governments, sovereign wealth funds, and private stakeholders. Facilities such as Lusail Stadium, King Abdullah Sports City, and Dubai's Coca-Cola Arena exemplify a new generation of sustainable, technology-driven venues designed to deliver both excellent performance and valuable legacy.

Beyond their economic and geopolitical significance, these developments are reshaping the region's social fabric. Initiatives to promote youth participation, women's inclusion, and talent development are expanding rapidly, supported by national federations and regional partnerships. As a result, sport is increasingly viewed not only as an industry, but as a cultural and educational driver to enhance national identity, wellbeing, and social cohesion.

According to recent industry projections, the Middle East's sports market (defined as the overall economic ecosystem generated by the sports industry) is expected to grow by 8.7% annually through 2027, more than twice the global average. Event-related tourism, sponsorship, media rights, urban development are benefitting from this sustained motion, creating a multi-layered ecosystem that blends entertainment, innovation, and diplomacy.

As the Middle East continues to host, innovate, and invest at an unprecedented scale, it is redefining the global geography of sport. Combining long-term planning, world-class execution, and regional cooperation, the coming years will mark not just continuity but consolidation of its role as a permanent cornerstone of the international sports industry.

Description of Key Countries through major sport events and key milestones

Kingdom of Saudi Arabia

Key Figures

GDP 1,270 billion of U.S. dollars

Population 36.01 million of people

Territorial Extension 2,149,690 KM²

Since the launch of Vision 2030, Saudi Arabia has embarked on a comprehensive transformation aimed at reducing its dependence on oil and fostering growth across sectors such as tourism, entertainment, logistics, and sports. This diversification has been driven by strong public investment, a stable financial outlook, and the rise of new industries that are reshaping the country's economic base. Within this framework, sports have become a central pillar of national development. It's not only an engine of non-oil GDP growth, projected to triple by 2030, but also a tool to promote health, employment, and global engagement.

After years of state-led expansion under Vision 2030, Saudi Arabia's sports sector has built solid foundations in participation, talent development, and international visibility. The Saudi Pro League stands as its flagship achievement, strengthened by major investments and the arrival of world-class players. In 2025, however, the focus has shifted toward privatization, a new phase aimed at attracting private capital, improving governance, and ensuring the league's long-term sustainability.

Historically, all Saudi Pro League clubs were state-owned, with the Ministry of Sport covering wages, facilities, and operations. In 2023, the Kingdom launched a gradual privatization process under Vision 2030 to make the league more sustainable, competitive, and appealing to investors. The plan unfolds in two phases: the first transferred many clubs to state-linked entities such as the Public Investment Fund (PIF), Aramco, and NEOM; the second, now underway, aims to open ownership to private and foreign investors. A key milestone came in mid-2025, when three clubs (Al-Ansar, Al-Kholood, and Al-Zulfi) were sold to private groups, with Al-Kholood becoming the first Saudi top-flight team entirely owned by an international firm, the U.S.-based Harburg Group.

This development marks a turning point for Saudi football, signaling a transition from government-financed expansion to market-driven growth. For investors, the league offers clear advantages: clubs remain undervalued compared to European or MLS teams despite growing global exposure, regulations are designed to encourage investment, and the rise of multi-club ownership creates pathways for talent exchange and strategic partnerships. Yet challenges persist.

*“I think moving forward and looking at the changes that are going to happen in the Kingdom of Saudi Arabia, we can see that we as a government, we do not want to build for the government ownership only. We want to build the sector more to be owned and that by the private sector.” (Eng. Abdulrahman Justaniah, former Deputy Minister of Strategic Planning & Investment, Ministry of Sport, Kingdom of Saudi Arabia)**

While the League has made significant progress, detailed financial data on club operations, sponsorship agreements, and player contracts remains largely undisclosed. This limited level of financial transparency makes it more difficult for investors to accurately assess asset valuations, revenue sustainability, and long-term profitability.

In addition, although the Saudi riyal is pegged to the U.S. dollar, foreign investors may still face administrative complexity and procedural delays related to cross-border capital movements, currency conversion, and profit repatriation. For example, international investors involved in club ownership or commercial partnerships may encounter lengthy approval processes when transferring dividends or revenues abroad.

Together, these factors highlight the structural challenges that still separate Saudi football from more mature sports markets and that will need to be addressed for the privatization process to unlock its full potential. The success of this new model will ultimately determine whether Saudi football can effectively balance private-sector efficiency with broader national ambitions in the lead-up to the 2034 FIFA World Cup.

Qatar

Key Figures

GDP 222.12 billion of U.S. dollars

Population 3.11 million of people

Territorial Extension 11,490 KM²

In 2008 Qatar launched its Vision 2030 program, pursuing a long-term development strategy built around human, social, economic, and environmental pillars. Since then, two multi-year programs have been completed and significant milestones have been achieved, nearly doubling the nation's GDP. The 67% increase in the non-oil sector's contribution to this figure clearly reflects the country's repositioning towards dynamic branding and a diversified economy.

Sport has become one of the most powerful instruments in achieving this goal. The successful delivery of the FIFA World Cup 2022 not only attracted millions of visitors but also elevated Qatar's global standing as a reliable and innovative host. The event's legacy continues to generate tangible outcomes: in April 2023, Qatar was officially awarded the hosting rights for the FIBA Basketball World Cup 2027, becoming the first Middle Eastern nation to organize the tournament. This achievement further consolidates the country's

reputation as a trusted destination for top-tier international competitions and underscores the long-term impact of its investment in sports infrastructure.

Building on this momentum, 2025 brought further developments confirming the nation's ongoing commitment to growth through sport. The Qatar Olympic Committee (QOC) has entered discussions with the International Olympic Committee (IOC) to submit a bid for the 2036 Olympic Games. Indonesia, Turkey, India, and Chile have expressed similar intentions, yet Qatar is widely regarded as one of the strongest contenders. This perception stems from the country's proven record in hosting large-scale events and its comprehensive infrastructure readiness. As noted by Sheikh Joaan bin Hamad Al-Thani, President of the QOC, 95% of the facilities required for the Olympics are already in place, while the remaining developments are integrated into the national planning framework.

Qatar is also broadening its sporting portfolio beyond mainstream disciplines. It has secured hosting rights for the 2029 Men's Volleyball World Championships, the next five editions of the T100 Triathlon, and the World Rugby Nations Championship 2028 finals, supported by an £80 million title sponsorship from Qatar Airways. Furthermore, the country is reportedly in talks with FIFA to host the 2029 Club World Cup. In parallel, Saudi Arabia's Sports Minister, Prince Abdulaziz bin Turki Al-Faisal, recently announced the possibility of a joint bid with Qatar and the United Arab Emirates to host the 2035 Rugby World Cup. A project that, if realized, would mark a milestone for the Middle East's growing ability to stage multi-nation regional events, a model increasingly favored by international federations.

*“After the World Cup, we created a lot of company specialized in facility management. We have a lot of companies specialized in tech management. We create jobs for people, we encourage the foreign companies to come to Qatar and invest and to open a new branch. This is linked to the economy of the country, even though when we selected the location of the stadium, we selected in the neighborhood area, this help to develop the area, the neighborhood roads, utilities, parks, all these, help the economy for the country.” (Eng. Abdulrahman Abdullah Al-Malki, Director of Assets and Projects, Ministry of Sports and Youth, Qatar)**

Oman

Key Figures

GDP 105.19 billion of U.S. dollars

Population 5.5 million of people

Territorial Extension 309,500 KM²

Over the past few years, Oman has experienced sustained and resilient economic growth, with real GDP expanding by an average of 4.5% since the launch of Oman Vision 2040. The country is well on track toward the Vision's 5% target. What sets this roadmap apart is its human-centered approach: Education, Learning, Scientific Research, Wellbeing and Social

Protection rank among the top national priorities, reflecting the belief that human development is the foundation of long-term prosperity.

Within this framework, sport plays a pivotal role as a tool to enhance health, social cohesion, and productivity, as well as a strategic driver for diversification and soft power. The Ministry of Culture, Sports and Youth has expanded initiatives to increase participation, improve infrastructure, and promote inclusion across the country.

Although Oman's sports industry does not yet follow a fully structured national roadmap like in some neighboring Gulf states, the nation holds significant potential. The country is decisively moving towards professionalizing its sports sector, transitioning from a volunteer-based model to a more structured and specialized system. The Ministry of Culture, Sports and Youth has established formal committees and frameworks to support high-performance sports development, athlete classification, and continued education for athletes, coaches, and sports managers.

Thanks to its favorable climate, varied geography, and strong hospitality sector Oman is a natural hub for sports tourism, which has become a key growth driver generating US\$16.9 million in 2024 (up 30% from the previous year). Flagship events such as Ironman Muscat 70.3 (US\$5.2 million), the Himam Trail Run Race (US\$3.6 million), and the Red Bull Car Park Drift World Final (US\$2.6 million) highlight the high returns of individual events. The Muscat Marathon grew from 135 runners in 2012 to 13,000 participants from 60 countries in 2025, boosting hotel occupancy by 18% and doubling tourism revenues since 2019.

Among Oman's achievements, cricket represents both a sporting and diplomatic milestone. The Sultanate's co-hosting of the ICC Men's T20 World Cup 2021 exposed Oman to 167 million viewers, generating 112 billion viewing minutes and media value worth tens of millions. Two international-standard venues in Al-Amerat and grassroots programs engaging 700+ children aged 8-12 have created a clear pathway from youth participation to elite performance. Beyond the field, cricket reinforces Oman's soft power, fostering ties with South Asian communities and strengthening the country's regional profile.

On the infrastructure front, the Integrated Sports City in Musannah marks a major step toward international-grade facilities and public-private investment models. Meanwhile, Oman Sail has transformed Al-Mussanah Marina into a "Category A" High-Performance Centre, hosting top-tier events such as the Youth Sailing World Championships (2021) and the RS Venture Connect World Championships (2022)—the first para-sailing world event ever held in Oman.

Looking ahead, Oman is expanding into eSports, leveraging its youthful demographics (61.5% under 30) and 95% smartphone penetration to enter the fast-growing digital sports economy.

Finally, Oman Basketball Association's partnership with FIBA Plus further reflects a growing focus on international collaboration, governance, and talent development, laying the groundwork for a more professional and competitive sports ecosystem.

*"Nothing will flourish or will happen or will have a proper economic model if it's not for the three, the Golden Triangle: the government, private sector strategic partners and the people. If they all work together and harmonize together you will have the Golden Triangle." (Nader Al Rawahy, Operation Excellence Lead, Oman Vision 2040)**

Bahrain

Key Figures 2025

GDP 47.39 billion of U.S. dollars

Population 1.62 million of people

Territorial Extension 788 Km²

Similarly to other countries in the Middle East, Bahrain enjoys a demographic boom with increasing life expectancy, a median age of 33.4 and its population raising in numbers by around 2.3% yearly. In this context, the monarchy launched its Economic Vision 2030 in October 2008 in order to coordinate and accelerate country's growth. Since then Bahrain GDP almost doubled.

Even though Bahrain Vision 2030 only briefly mention sport, it is increasingly positioned as a tool for economic diversification, particularly to reduce the country's long-standing dependence on the oil and gas sector. Indeed, the country is investing in infrastructures such as the new sport city in Sakhir that will act as a regional hub for sports tourism and a center of sports excellence for the youth. The Economic Development Board announced a funding of \$268 million in two tranches for this project, that will include a state-of-the-art sports stadium with a capacity of 50,000 spectators, a significant improvement from the maximum 24,000 capacity of the Bahrain National Stadium. The complex will include commercial areas, hotels and athletics tracks.

Another pivotal sport infrastructure in Bahrain is the Bahrain International Circuit, also located in Sakhir, which host the Formula 1 Gulf Air Bahrain Grand Prix and which was the very first international level circuit hosting Formula 1 in the middle east, opening its doors in 2004 and paving the way for other similar initiatives in Qatar, Saudi Arabia, and United Arab Emirates. In addition, facilities such as Shaikh Khalifa Sports City, the Royal Golf Club, and the Rashid Equestrian & Horseracing Club promote sports that are embedded in Bahrain's culture, historically in the case of horseracing, and more recently through international influence in the case of golf. Being Bahrain an island aquatic sports represent an important driver of tourism in the region, from jet ski to snorkeling, passing through the revisited

tradition of pearl diving and more agonistic initiatives such as High Diving World Cup hosted in 2024.

*“Of course, you need the infrastructure. You can have the best vision, you can have the best planning, but without the actual sporting centres, you cannot actually accomplish your goals” (H.E. Faris Al Kooheji, Secretary General, Bahrain Olympic Committee)**

Sport activities in the country are coordinated and fostered by the General Sports Authority, established in 2021 by King Hamad bin Isa Al Khalifa through the Supreme Council for Youth and Sports, which acts similarly to a ministry of sports entity. Prince Sheikh Khalid bin Hamad Al Khalifa is the chairman of the board of both the GSA and the council, as well as the Bahrain Olympic Committee, ensuring coordination in the sport vision of the various related entities in the country. Through these institutions, Bahrain successfully bid for and secured the hosting rights of the 4th Asian Youth Games (AYG) 2025.

The event is set to gather over 4,000 young athletes representing 45 Asian nations, competing across 26 sports and 232 medal events, making it the largest edition in the history of the Games. The AYG will serve not only as a celebration of youth and athleticism but also as a platform to showcase Bahrain’s growing capability to host large-scale international events and to strengthen its position within the Asian sports movement.

UAE

Key Figures

GDP 569.1 billion of U.S. dollars

Population 11.08 million of people

Territorial Extension 71,024 KM²

The monarchy of United Arab Emirates, which reunites under its government a federation of seven emirates, has aligned with other Middle East countries drafting and publish a long-term vision for the nation. In particular, the UAE 2031 and UAE Centennial 2071 serve as core foundations for several other field specific visions such as Abu Dhabi Economic Vision 2030, Environment Vision 2030, Dubai Industrial Strategy 2030 and many more. The aim is to ensure a sustainable and accelerated trajectory for the UAE’s ongoing growth, both economically, with GDP expanding by roughly 4% annually since the post-COVID period, and demographically, with the population rising by around 3% per year and a median age of 31.6.

In this setting in which reducing dependence on the oil and gas sector is a primary goal, not only the UAE Centennial Plan 2071 places strong emphasis on advancing the quality of sports, acknowledging its importance in building communities and developing young generations, but a National Sport Strategy 2031 itself has been drafted and emanated. This vision promotes objectives such as attracting international sports events, developing sports

infrastructure, and enhancing community participation, as well as some specific targets such as the adoption of an active lifestyle by more than 71% of the population, qualification in the Olympic games by more than 30 UAE athletes, and a sports sector contribution to the non-oil GDP by 0.5%.

In line with this strategy significant investments have been made in providing state-of-the-art sport facilities in the region. A pivotal example of this is the Yas Marina Circuit, home of the Etihad Airways Abu Dhabi Grand Prix by Formula 1, that represents not only one of the most innovative racetracks in the world but is connected to the Yas Island Ferrari World, the world's first Ferrari-branded theme park and one of the largest indoor parks globally. This attraction, together with world-class concerts, NBA Abu Dhabi games, Disney on ICE and much more led 38 million tourists to Yas Island in 2024. Other instances of top-tier facilities include Dubai Sport City, a residential district centered on sport venues for grassroots activities, and Hamdan Sports Complex, a multi-purpose indoor sport arena.

Through those investments United Arab Emirates attracted and hosted several international events on top of those previously mentioned. Indeed, the International Cricket Stadium in Dubai was home to the 2025 Asia Cup Cricket, a popular sport in the country, while Meydan Racecourse annually holds the Dubai World Cup Horse Racing. In 2024 the FIFA Beach Soccer was staged in UAE in continuation with the Beach Soccer Intercontinental Cup played every November in Dubai. Other significant sporting events in the region include the Dubai Rugby Sevens and the Cycling UAE Tour. Aside from international events, the UAE Sports for all federation was created to foster grassroots sports and thus enhancing community participation.

Key Sport Topics

Football Impacts in Middle East

The FIFA Effect: Global Tournaments, Regional Transformation

One of the most significant achievements of Middle Eastern investments in sports has been the establishment of trust with international stakeholders and governing bodies. FIFA's decision to award multiple hosting rights to the region stands as a prime example of this growing confidence. Building on that trust, numerous FIFA-led projects have been developed and implemented across various levels in the Middle East, generating an impact that we can define as the FIFA effect.

The primary FIFA effect is represented by the global tournaments held and planned in the region, capable of fostering the area international perception and diversified economic growth. Qatar 2022 FIFA world cup has been a primary instance of this, as the International Monetary Fund estimating a contribution to the national GDP by the event spillovers of about 1%, with world-cup related revenue assessed between \$1,575 and \$2,412 million. Interestingly, these spillovers have not been restrained in the country borders but have impacted a great part of the middle east region with UAE world cup related revenues between \$113 and \$435 million.

This momentum is not fading. FIFA has already entrusted the Middle East with further global events, such as the Arab Cup 2025 in Qatar and the FIFA World Cup 2034 in Saudi Arabia, confirming the region's growing centrality in the global football landscape.

*“We have a very clear and important milestone in our sights: the FIFA World Cup 2034. This event represents a powerful launchpad for the leisure economy. However, to truly succeed, we must plan beyond the event itself and keep in mind five golden principles. We must plan for legacy, not just for the stadium, avoiding the pitfall of overdelivering: scale must always meet actual use. We need to think long-term, programming for ten years before and after the event, not just for the one month it takes place. We should aim to activate daily, not only on special occasions. And finally, success also depends on what happens off the pitch, in how we engage, include, and uphold rights beyond the game itself” (Ivan Shapochkin, Principal, Oliver Wyman)**

Beyond hosting rights, Middle Eastern influence is also expanding into the strategic and financial dimensions of international sport. In June 2025, FIFA and the Saudi-based Public Investment Fund (PIF) announced a global partnership for the FIFA Club World Cup 2025 in the United States. The agreement, part of FIFA's commercial program, designates PIF as a main partner of the tournament, marking a new chapter in the region's involvement in global football governance and investment.

Similarly, in January 2024, Aramco, one of the world's largest integrated energy and chemicals companies, became a Major Worldwide Partner of FIFA under an agreement running through 2027. The partnership covers multiple flagship tournaments including the FIFA World Cup 2026 and the FIFA Women's World Cup 2027, and grants Aramco exclusive rights in the energy category. The collaboration is centered on shared values of innovation, community development, and social impact, aligning with FIFA's mission to make football truly global. Through this partnership, Aramco and FIFA aim to develop social initiatives worldwide, while also exploring technological applications to enhance event delivery and fan engagement.

Aside from projects of international standing it is worth noting the FIFA effect and impact at grassroots levels. In 2016 under Gianni Infantino presidency the FIFA Forward program was launched promoting global football development assisting the six football confederations including the Asian Football Confederation (AFC) in which the Middle East takes part. Two years later a FIFA regional development office was opened in Dubai, serving nineteen member associations in the region. Through the regional development offices, including the one in Middle East, FIFA has been able to promote and administer more than 1,350 tailor-made projects with over \$2.5 billion in funding. For Instance, Oman's hosting and staging of numerous sport competitions over the years was creating a financial burden, thus FIFA forward through its regional development office designed an Oman Football Association technical center and accommodation project and awarded a fund of \$3.19 million to build it, creating a venue for technical assistance and seminars, generating savings of more than \$1.5 million per annum. Several other infrastructure investments have been carried out in middle east through the FIFA forward program, such as the renewal of the UAE Football Association's technical center in Dubai.

Another impactful FIFA project at grassroots level is the FIFA football for schools' program, in collaboration with UNESCO, which supports social transformation through sport participation and football development in schools and education programs. Football for schools involves the provision by FIFA of an online learning tool, equipment and funding of \$50,000 to each member associations. The program has been widely deployed in the AFC countries, including Kuwait, Bahrain and Oman, in line with the community growing principle common to most of the long-term vision of the middle east countries.

Women's Football: A Growing Opportunity in the Middle East

As with many other economic and social aspects, the trajectory of women's football in the Middle East is similar across many countries in the region. During the last decade the long-term visions emanated in the territory fostered women's football development through two elements: the institutional establishment of professional level teams and leagues, frequently including the women national team, and the promotion of sport participation at grassroots level, endorsing communities and taking advantage of the hosted global tournaments legacy.

A pivotal example of this process is given by Saudi Arabia. After the launch of Saudi Vision 2030 the Kingdom created the institutional and physical infrastructure necessary to foster women's football in few years. In 2019 the SAFF women's football department was created, and a year later the women's national team was established, with the senior and youth teams following shortly after. In 2020 the first women's Community Football League was launched, promoting the practice and contributing to the establishment of the SAFF Women's Premier League and First Division League in 2022. In 2021 the first girls regional training center was inaugurated in Riyadh and two years later the SAFF women's premier league secured a global broadcasting with DAZN and a first title partnership with Lay's, representing some of the first steps towards a globally competitive women's football ecosystem. Thanks to these innovations key milestones were achieved between 2021 and 2023, increasing the number of registered women players in Saudi from 374 to more than 1,100, the number of coaches from 11 to 1,067 and involving more than 70,000 players in schools league.

Another important factor recognized by many countries in the area, including Saudi Arabia and Oman, is the one of inspiring role models capable of becoming symbols and motivating young girls to pursue their sporting dreams. This is done not only by professional athletes obtaining wins and success but even by female coaches who not only mentor players on the pitch but build commitment and passion for the game in young generations. That's one of the reasons why Saudi Arabia decided to invest in training and development programs, including more than 50 SAFF coaching courses helping to develop more than a thousand coaches, and in turn enabling the impressive growth of 46% year to year in participation to Girls' Schools League between 2022 and 2024.

Other countries in the region are taking actions in order to pursue the same trajectory, moving from the various nations' long-term visions. For instance, organizations and academies in Qatar are observing a behavioral change part of the 2022 World Cup with more women approaching football. Aya Kassem, a former professional player for the

Lebanese national team and head of the female program at PSG Academy in Doha, declared there has been an 80% increase in female registration at the academy. Meanwhile, the United Arab Emirates established the Women's Football Committee (WFC) in 2009 to elevate women's football in the region to international standards. In line with this goal, the UAE launched a FIFA-approved strategic plan to advance women's football in 2023 and has introduced national women's leagues at both youth and adult levels over the past decade.

Beyond the growing participation of women in sports practice, a significant trend emerging in recent years is their increasing involvement in leadership and decision-making roles within the sports industry. Across the Middle East, governments and sports federations have introduced structural reforms and policy mandates to ensure women's representation on federation boards and in executive committees, a development that was almost unheard of a decade ago. This shift reflects a broader cultural and economic transformation, where women are not only participating as athletes but are shaping strategies, governance, and investment decisions at the highest levels of sport. As a result, women are playing a central role in redefining the region's sports ecosystem, bringing new perspectives to management, community engagement, and sustainable growth.

*"I think there has been a huge shift in both mindset and public policy when it comes to women in general. Across sports and entertainment, especially among young women in Saudi Arabia and the United Arab Emirates, we've seen major changes in approach: from structural reforms to government policies that now require sport federation boards to include women, something that had never happened before. We've also witnessed women gaining the right to own their own companies, and in Saudi Arabia, even to buy their own clubs. It's an incredible transformation, the growth of women's participation in sports and entertainment across the region is truly flourishing." (Dr. Najat Benchiba-Savenius, CEO, Gazelle Advisory Group)**

Elevating National Teams: The Road to Global Competitiveness

National competitiveness in football refers to a country's ability to build a sustainable ecosystem in the sport. One that nurtures domestic talent, maintains strong national teams, supports vibrant local leagues, and projects international influence. In the Middle East, this pursuit is closely aligned with broader national objectives: sport serves not only as a platform for performance, but also as a catalyst for economic diversification, social development, and soft power projection. While these strategic dimensions have been examined in earlier chapters, this section focuses on how football systems across the region are translating such ambitions into tangible forms of competitive strength.

Recent performance indicators provide a useful overview of this progress. According to the latest FIFA World Rankings, Qatar currently stands at 52nd place, Saudi Arabia at 58th, the United Arab Emirates at 67th, Oman at 79th, and Bahrain at 90th. These rankings illustrate an emerging competitive hierarchy within the Gulf region, while also reflecting the diverse stages of development among its national football systems.

A shared area of focus across the region remains the international exposure of local players. Data from the CIES Football Observatory indicate that, at present, none of these nations

feature among the world's top 100 associations in terms of players competing abroad, a pattern that underscores the domestic orientation of their leagues. For comparison, Japan provides an instructive case study of how long-term talent development can translate into both international presence and sustained on-field results. Between 2020 and 2025, the number of Japanese players active abroad increased by 97%, coinciding with consistent World Cup participation and one of the highest FIFA rankings in Asia. This trajectory highlights how structured youth systems and global integration can reinforce national competitiveness, offering valuable lessons for other regions.

Despite these structural differences, recent years have brought visible progress across the Gulf. Qatar has captured two consecutive AFC Asian Cup titles and qualified for the 2026 FIFA World Cup. Saudi Arabia has achieved success at multiple levels, including victory in the 2022 AFC U-23 Asian Cup and qualification for the 2026 World Cup. The UAE reached the final playoff stage for qualification, while Bahrain secured the Gulf Cup title. Collectively, these outcomes suggest positive momentum and a rising standard of performance across the region.

Each country, however, follows a distinct development pathway. In Qatar, the model is centralized around the Aspire Academy, established in 2004, which integrates elite facilities, sports science, education, and international partnerships. The Academy's mission "to develop champions in sport and life" positions it as one of the region's leading youth development institutions. The framework benefits from local league policies that ensure opportunities for domestic players, fostering a clear progression from academy to national representation.

In contrast, Saudi Arabia's strategy emphasizes international collaboration. Through initiatives such as the MAHD Academy and partnerships with foreign clubs and systems, Saudi programs seek to expose young athletes to global best practices. The domestic league's attraction of international stars also serves to elevate the competitive standard and visibility of national football. In parallel, countries such as the UAE, Oman, and Bahrain have made steady advances in youth development, infrastructure, and participation programs. The UAE has combined academy growth with naturalization policies for selected players, while Oman and Bahrain have focused on upgrading training facilities and broadening access to sport at community level.

A complementary element of this evolution has been the strategic attraction of international players and coaches of recognized caliber. This approach, most prominently seen in the Saudi Pro League, but also in Qatar's Stars League and the UAE Pro League, aims not only to enhance the commercial appeal and global visibility of domestic competitions, but also to accelerate the transfer of knowledge and professional standards to local talent. The arrival of internationally experienced professionals (both players and technical staff) has contributed to raising the tactical level of domestic leagues, modernizing training methodologies, and creating a higher-performance environment in which emerging local players can develop. While still in its formative phase, this model reflects a deliberate effort to balance global attraction with local development, ensuring that international expertise translates into lasting capacity building within national football ecosystems.

Certain structural aspects continue to require attention, particularly in relation to governance practices and the long-term sustainability of sport systems. As in many developing football ecosystems, further progress in areas such as financial transparency and the diversification of funding mechanisms would contribute to reinforce institutional resilience and operational continuity. While recent achievements on the field demonstrate significant advancement, the consolidation of these results within stable, self-sustaining frameworks represents a natural stage in the region's ongoing evolution.

Overall, football across the Gulf region continues to advance through consistent investment, infrastructure development, and international cooperation. The consolidation of competitiveness will likely be shaped by each nation's capacity to strengthen governance structures, broaden stakeholder participation, and ensure that sport remains closely aligned with broader economic and social development objectives.

Economies around Sport

Sport as a Driver of Tourism and Destination Branding

As we have extensively discussed in the previous chapters, sport in the Middle East has become a strategic tool for economic diversification, tourist-portfolio expansion, job creation and global influence. In fact, although exact figures vary, the PwC report on GCC suggests that the region currently accounts for around 5-7% of global sports tourism expenditure.

To give a clear definition to the concept, sport tourism refers to travel which involves either active participation in sport or observation of sport, generally in connection with commercial or non-commercial events of a competitive nature. In a useful framework put forward by Oliver Wyman, sports tourism can be segmented into four distinct types: active participation, event-based, training and rehabilitation, and heritage. For the active type, travelers take part in sporting activity themselves; in event-based tourism they attend or visit major competitions; training and rehab tourism refers to trips centered on training camps, high-performance centers or sports rehabilitation; and heritage sports tourism comprises visits to historic sporting venues, museums or sport-related cultural sites.

Turning to the Middle East context, countries such as Qatar and Saudi Arabia are particularly oriented towards event-based sports tourism. Their focus is on hosting major international tournaments (2022 and 2034 Football World Cups for example), leveraging those for destination branding and global visibility. Meanwhile, UAE and Oman are making strong pushes in active participation tourism.

*“Sports gave us the platform to unlock the experience in which the international visitors can enjoy our region. If we go and look, we take the example of Qatar World Cup, it was the first time that the world comes to the Middle East. It was a platform for everyone in the world to come and enjoy the qualities that our region can provide”
(Abdulaziz Al Baqous, Senior Director of Public, International Relations and Protocol, Saudi Olympic & Paralympic Committee)**

Oman, thanks to its favorable geography, climate and hospitality infrastructure provides an instructive case-study: the country positions human development (education, wellbeing, social protection) at the core of its strategy. Within this roadmap, sport is explicitly seen as a lever for health, social cohesion, productivity and diversification. As the sports tourism segment there grows (for example flagship events like Ironman Muscat 70.3, Himam Trail Run, the Muscat Marathon) the results illustrate the high-return nature of well-targeted events, including increased hotel occupancy and doubled tourism revenues since 2019.

The UAE, on the other hand, has built a sports tourism model that blends major international events with growing active participation. Iconic events such as the Abu Dhabi F1 Grand Prix and the Dubai Tennis Championships attract global audiences, while initiatives like the Dubai Fitness Challenge (drawing over 2.2 million participants in 2023) highlight strong demand for wellness and active tourism. The country also leads in innovation, with developments like the world's largest wave pool and a growing footprint in UFC and combat sports. Supported by world-class venues and outdoor infrastructure, the UAE continues to lead the region in tourism arrivals, experience diversity and infrastructure utilization, showing how a hybrid approach between event-hosting and lifestyle sports can sustain growth throughout the year.

Age-based trends in sports tourism show that younger travelers (18–34 years) dominate in emerging markets, making many sports tourists relatively young and digitally savvy. Therefore, there is an increasing attention toward fan engagement, *sportainment* and e-sports. This means that beyond the physical travel and stadium visit, destinations are creating immersive experiences, digital extensions, and community engagement designed to convert one-time visitors into repeat travelers and brand ambassadors.

*“Our sports sector has rapidly evolved becoming a core pillar of alula reality and long-term strategy with the vision to become a globally recognized sporting destination that contributes meaningfully to alula development to the national sports strategy, By designing world class sport offerings that inspire both Residents and visitors.” (Ziad Alsuhaibani, Chief Sports Officer, Royal Commission for AlUla)**

Stadium and Equipment Manufacturing

As Middle East countries focus on fostering the sport sector in line with their long-term visions more and more inputs are required to make this possible, beginning with facilities and equipment. In particular, hosting international events such as Qatar 2022 or Saudi Arabia 2034 FIFA World Cup accelerate the development of such goods, and thus boost the demand for their suppliers, with the Kingdom already constructing three new stadiums and planning eight more to be completed in the next few years.

In the realm of sports infrastructure development across the region, a consistent pattern has emerged in the organization of supply chains. Projects are frequently delivered through joint ventures that pair an international contractor with a local partner, supported by an international project management consultancy. This model was clearly exemplified during the preparations for the 2022 FIFA World Cup in Qatar. For instance, the Lusail Stadium was built by a joint venture between China Railway Construction Corporation and the local

HBK, under the project management of the U.S.-based firm Turner International. Similarly, the Indian company Larsen & Toubro partnered with Qatar's Al-Balagh Trading & Contracting to deliver the Al-Rayyan Stadium, with project management provided by the American firm AECOM.

Comparable arrangements are now taking shape in Saudi Arabia as the country gears up for the 2034 World Cup. The Mohammed bin Salman Stadium in Qiddiya has been awarded to a joint venture between the Spanish firm FCC and the local company Nesma & Partners, while the Aramco Stadium will be built by the Belgian contractor Besix in collaboration with the Saudi firm Albawani, with project management by the Spanish group Ayesa. The design of these venues is often entrusted to internationally renowned firms, such as the British company Populous, which within the FIFA 2034 World Cup is responsible for the designs of the Prince Mohammed bin Salman Stadium, King Salman Stadium, and Aramco Stadium. Many other stadiums and world-class facilities in the region follow the same contracting scheme, even beyond football involving other sports such as cricket. The emergence of similar supply chain dynamics highlights the interconnection of the Middle East with the world, both the Asian and Western one, and thus the capacity of the region to develop world class facilities without renouncing to a local companies' role, fostering job creation in the territory and the creation of a human capital legacy too.

*"I think the cherry on top was the announcements of Saudi Arabia hosting the World Cup 2034, but we had a a very a very heavy Pipeline of upcoming events, Plus our own Olympics, the Saudi Games and The other international Events we are hosting, so this is also an invitation for construction companies, the tech companies and the real estate developers as well as everything That will come around The developments of the heavy infrastructure For the World Cup 2034." (Basim K. Ibrahim, Sport Sector Director, Ministry of Investment, KSA)**

Interestingly, a similar pattern can be observed in the equipment required by similar facilities and in the services connected to the events they host. A pivotal example lies in the field of technology: elite stadiums in the Middle East are increasingly becoming *digital stadiums*, equipped with advanced systems spanning multiple domains—from security and match analysis to smart cooling technologies designed to counter the region's climate. Looking back at Qatar 2022 we can once again find the cooperation of local and international players. The Aspire Foundation, based in Qatar, operated the Aspire Command and Control Center—a cloud-based operational hub managing eight tournament venues. Meanwhile, global companies such as Microsoft, Rostec, and FIFA played key roles through partnerships focused on unified stadium platforms, security, and match analytics. Although it is difficult to precisely quantify the impact of the region's sports investments on equipment at the grassroots level, it is reasonable to assume that the growing participation in sports across the Middle East will further stimulate the sportswear and sporting goods industries.

Digital Frontiers and Fan Engagement

Esports

The global Esports industry is experiencing consistent growth over recent years, reaching around \$4.3 billion revenue in 2024 and projecting its growth to more than \$5.9 billion revenue in 2029. In this context, Middle Eastern countries seeking to diversify their economies in line with long-term national visions have found a promising opportunity in the esports industry. Moreover, being a recently established industry the esports landscape lacks internationally recognized governing bodies or reference institutions, offering Middle East countries the chance to assume a key role on what will most certainly become, if it's not already, a global stage, enhancing the international perception of the region.

This occurs primarily at two levels within the esports sector: game development and competition organization. Game development often occurs through direct ownership of, or partnerships with, established video game studios. A notable example is Saudi Arabia, which has expanded its presence in the gaming industry through both investment and acquisition. The kingdom's Public Investment Fund (PIF) holds minority stakes in major companies such as Activision Blizzard, Electronic Arts, and Nintendo. In addition, Saudi Arabia founded Savvy Games Group in Riyadh, employing around 3,500 people, and, through the Misk Foundation, acquired nearly all of SNK Corporation, a renowned Japanese game publisher. Similarly, the United Arab Emirates launched Ubisoft Abu Dhabi in 2011, a regional development hub that went on to release titles such as *CSI: Hidden Crimes* and *Growtopia*, building a community of over 30 million registered players.

The competition organization is carried out through event organizers and worldclass facilities often backed by the country itself. Instances of this are the Esports Middle East (ESME) and Middle East Esports based in UAE, and most importantly the Esports World Cup Foundation, backed by PIF and headquartered in Saudi Arabia. The Esports World Cup Foundation holds annually since 2024 the Esport World Cup, a seven-week esports competition which in 2025 featured more than 2,000 players and a prize pool of \$70 Million. The event is fostered by the elite location at Qiddiya City's Gaming & Esports District, a futuristic complex covering 183,100 m² of land, comprising esports arenas and facilities as well as regional gaming headquarters. Despite the absence of a supranational governing body, the Esports World Cup is widely regarded as one of the pinnacles of professional gaming, thanks to its unparalleled prize pool, elite player participation, and state-of-the-art infrastructure, positioning Saudi Arabia as the organizer and host of what is internationally perceived as a prestigious global hub of a sector that is rapidly and consistently growing. Other countries in the region are taking steps in the same direction with the UAE launching the Dubai Program for Gaming 2033 and Qatar establishing the Qatar eSport Federation (QESF) in 2021.

Smart Stadiums

Stadiums equipped with advanced technologies are redefining the sports infrastructure landscape, functioning not only as venues for athletic competition but as versatile centers for events and digital engagement. These environments integrate enhanced connectivity,

real-time data systems, and multifunctional design to meet the evolving expectations of fans and stakeholders.

We suggest to refer to the technical Supplement to MESIF London 2025 (Paul, Burton & Ekbia, 2025) to further explore how technology now represents a strategic dimension of the sports ecosystem, transforming venues into “platforms of experience” where innovation, data, and engagement converge to create long-term competitive advantage.

The digital stadium sector is expanding at a remarkable rate: according to a recent PwC report, its annual growth is projected to reach 20.6% globally between 2025 and 2037. Notable examples outside the Middle East include Tottenham Hotspur Stadium (London), SoFi Stadium (Los Angeles), and Levi’s Stadium (San Francisco), all of which exemplify integrated digital ticketing, real-time personalized content, and seamless fan engagement.

A particularly forward-looking example within the region was presented by H.E. Faris Al Kooheji, Secretary General of the Bahrain Olympic Committee, during the MESIF Panel – London 2025. Bahrain is advancing plans for the Bahrain International Sports City, a major development designed by Populous Architects, the same firm behind several of the world’s leading smart venues, including Tottenham Hotspur Stadium itself. This project represents a significant milestone in Bahrain’s broader strategy to position itself as a regional hub for innovation in sports infrastructure, integrating sustainability, education, and elite performance into a unified ecosystem.

The expectations for stadium functionality have evolved significantly. Venues are now designed as year-round community hubs, hosting concerts, esports, business conferences, and hospitality events. As a result, fan experience is at the forefront of stadium innovation: a truly smart stadium offers fans seamless ticketing, smart transportation, and engagement platforms spanning pre-event, in-event, and post-event phases. Features such as mobile-based seat selection, augmented reality replays, and in-seat food delivery illustrate the immersive experiences now available.

In the Middle East, the region’s young and tech-savvy population drives the adoption of these innovations at an accelerated pace. Clubs and operators leverage fan data captured throughout the stadium journey, enabling the personalization of offers, content, and rewards, thus enhancing both loyalty and commercial outcomes. For example, interactive apps allow fans to vote for MVPs, access exclusive player content, or participate in gamified experiences during matches.

Additionally, advanced systems such as crowd analytics and predictive maintenance powered by AI optimize operations, reduce costs, and enhance safety. Data-driven insights also allow clubs to tailor experiences to individual preferences, deepening emotional engagement and driving higher spending on merchandise, food, and premium services.

The Middle East is increasingly recognized not as a follower but as a global innovator in smart stadium development. Saudi Arabia, the UAE, and Qatar have invested heavily in

digital infrastructure under ambitious national visions such as Vision 2030 and the UAE National Sports Strategy. A distinctive example of regional innovation is the deployment of AI-driven air conditioning systems, enabling sustainable climate management in venues exposed to extreme heat. The Al Thumama Stadium in Qatar, for instance, is among the world's most advanced facilities in AI-based environmental control.

Despite these advancements, smart stadiums face several challenges. Data privacy and cybersecurity are increasingly critical, as large volumes of personal data are collected through ticketing, apps, and sensors. Ensuring robust protection requires end-to-end encryption, multi-factor authentication, and AI-driven threat detection. Operational risks also persist, with potential system failures or hardware dependencies affecting service continuity. Consequently, disaster recovery frameworks and automated failover systems are becoming standard practice to safeguard reliability and user trust.

In summary, Middle Eastern smart stadiums exemplify the intersection of sport, technology, and strategy. By coupling advanced infrastructure with data-driven innovation, as theorized by Paul, Burton & Ekbia (2025), regional stakeholders are not only elevating fan experience but also reshaping global benchmarks for stadium management, sustainability, and digital engagement, while remaining attentive to resilience, privacy, and operational continuity.

“The very important opportunity that we are looking at today is also talking about the smart stadiums and the smart facilities. Also, we're inviting all tech companies to join this, whether they have a new product or a new innovation you want to implement or provide, for Saudis, this is one of the key key investment areas that we're attracting.”
(Basim K. Ibrahim, Sport Sector Director, Ministry of Investment, KSA)*

Data, Analytics, and Performance Technology

Data, analytics, and performance technology have become foundational pillars in the transformation of the sports sector across the Middle East, especially within the Gulf states, rather than peripheral components of their national vision strategies. Their integration is directly supported by government mandates and significant investments under broader economic diversification agendas. For example, the sports analytics market in Saudi Arabia alone is projected to reach \$328 million by 2032, with an estimated CAGR of 53% between 2025 and 2032. This exponential growth underscores how data-driven approaches are considered central to the region's efforts in elevating competitive standards, maximizing talent development, and optimizing event logistics.

Data and analytics are no longer auxiliary tools but “strategic infrastructures” shaping governance, innovation, and global positioning in contemporary sport systems (see Paul, Burton & Ekbia, 2025. Technical Supplement to MESIF London 2025).

The pivotal role of data was a recurring theme at the Middle East Sports Investment Forum (MESIF) 2025 in London, where speakers highlighted a surge in analytics adoption for talent identification, injury prevention, performance analysis, and the orchestration of complex sporting events. They emphasized that the quality and integration of performance

technology will ultimately determine the effectiveness and global competitiveness of Middle Eastern sporting organizations.

This relentless push for technological advancement has produced an ecosystem in the Middle East where innovation, collaboration, and talent development are powerfully intertwined. At the center is the Eyeball Model, a video and AI-driven scouting platform that connects thousands of clubs, federations, and scouts across the region, making international youth scouting accessible like never before. By analyzing over 1,000 matches a week from 33 countries, Eyeball ensures that every promising player can be seen, evaluated, and developed based on rich, objective data, building transparent pathways from grassroots to elite levels.

This spirit of integrated progress is reflected in landmark partnerships such as the \$3.3 billion alliance between Saudi Arabia's Alpha Jossor Investments and the UK's Blockchain Sports Ecosystem. This ambitious project combines analytics, AI, and blockchain infrastructure to create a state-of-the-art sports hub, including digital athlete IDs for seamless talent management and secure athlete records, spanning over 16 countries.

The same approach is evident in other leading initiatives, such as the MAHD Sports Academy's AI Scout application. By digitizing youth football tryouts and leveraging machine learning for player assessment, MAHD enables unprecedented access to data-rich, objective evaluation from grassroots to elite levels. Moreover, the Saudi Pro League's expanded partnership with Stats Perform, integrating OptaAI and Opta Vision, equips clubs with advanced analytics on performance, fitness, and recruitment, ensuring that decision-making is data-driven and internationally benchmarked. The Grintafy platform closes the loop by offering a connected ecosystem where athletes, federations, and clubs use on-field video and analytics reports to discover, develop, and promote talent with transparency and speed.

Together, these projects and platforms are harmonizing the region's approach to football development, bridging local ambition and international best practices, while opening new avenues for commercial engagement and global leadership in sport technology. This comprehensive transformation demonstrates how the Middle East is not merely adopting technology but strategically embedding it into the very architecture of its sports ecosystems, turning data into a structural driver of sustainable competitiveness (see Paul, Burton & Ekbia, 2025. Technical Supplement to MESIF London 2025).

*“One aspect, I wouldn't call it underdeveloped, but it's very important and everybody needs to work on it and seeing it in the sporting ecosystem: data, having the proper data helps you engage with your fans, helps you generate new revenue streams and ensure that your fans are always on, always engaged.” (Wael Fayez, Chief Commercial Officer, Saudi Pro League)**

Conclusions and Strategic Recommendations

This year's report confirms the Middle East's ascent as a global hub for sport, investment, and innovation. The region is no longer defined merely by its ability to host international events, but it is actively shaping a sustainable, data-driven, and institutionally mature sport ecosystem. Across the Gulf, countries are deploying sport as both an economic accelerator and a vehicle of soft power, embedding it in long-term visions such as Saudi Arabia's Vision 2030, Oman Vision 2040, the UAE's "We the UAE 2031," and Qatar Vision 2030.

Saudi Arabia continues to stand at the center of this transformation. Building on the success of Vision 2030, the Kingdom is advancing through a new phase of privatization and governance reform, signaling a shift from state-backed expansion to market-led sustainability. The sale of some Saudi Pro League clubs to private and foreign investors in 2025 marks a milestone for the region, highlighting a maturing sport economy.

Qatar, after the legacy of the 2022 World Cup, has repositioned itself as a long-term event management and infrastructure benchmark, working for other relevant international events such as FIBA Basketball World Cup 2027 and 2029 Men's Volleyball World Championships, and also now exploring the possibility of hosting the 2036 Olympic Games and expanding into multi-sport disciplines. Meanwhile, Oman, Bahrain, and the UAE are consolidating complementary roles: Oman through sports tourism and community participation, Bahrain through sport-city infrastructure, and the UAE through its advanced National Sports Strategy 2031, which integrates health, innovation, and participation goals.

Football remains the cornerstone of visibility and integration. However, the level of football maturity and international competitiveness differs significantly across Middle Eastern countries. Saudi Arabia, Qatar, and the UAE have already positioned football as a central pillar of their international sport strategy through professional league development, global partnerships, and major event hosting. Other countries, such as Oman and Bahrain, while continuing to strengthen their football ecosystems, may achieve greater long-term differentiation by investing more decisively in complementary sports segments (including sports tourism, motorsport, combat sports, endurance events, or community-based participation models) while applying similar governance, infrastructure, and commercialization frameworks adapted to their national strengths and market opportunities. The Saudi Pro League, Qatar Stars League, and UAE Pro League are not only entertainment platforms but economic laboratories for privatization, sponsorship, and international collaboration. The rise of women's football, led by Saudi Arabia's Women's Premier League and national development programs, illustrates how inclusion and gender equity are becoming central to regional sport policy.

Equally transformative is the region's leadership in technology, data, and esports. Initiatives such as Saudi Arabia's Esports World Cup, the UAE's Gaming 2033 Program, and smart-stadium development projects demonstrate how sport innovation aligns with national digital and diversification agendas. Yet, this digital acceleration demands new managerial and ethical capabilities to safeguard data privacy, ensure interoperability, and measure the societal return on technology investment.

Ultimately, the region's investment in sport is about more than events, it is about creating lasting social, institutional, and knowledge legacies. Programs such as the Saudi Sports for All Federation, Qatar's Generation Amazing, and Oman's participation initiatives show how sport contributes to youth empowerment, education, and health, strengthening the human foundation of economic progress.

Based on an integrated assessment of the region's sport policies, infrastructures, and innovation trajectories, the report advances a comprehensive set of recommendations reflecting the roles of key stakeholders in sustaining future growth.

1. A Regional Strategy and Governance to Coordinate Investments

Governments should consolidate their role as strategic orchestrators, focusing on governance frameworks, ESG integration, and cross-sector collaboration rather than direct ownership. Establishing clear financial regulations, talent pathways, and gender-inclusion strategies will ensure measurable returns. A regional governance platform or Middle East Sports Council could harmonize standards and coordinate multi-nation hosting models.

2. Sport Institutions Co-Developing and Working Together with Middle East Countries

International federations and leagues should treat the Middle East not merely as a host region but as a co-developer of global sport systems. Encouraging knowledge transfer, co-created tournaments, and youth and women's competitions will embed sustainable impact. Mega-events like the 2034 FIFA World Cup or a potential 2036 Olympic bid must leave a managerial and social legacy, strengthening local expertise and institutional capacity.

3. International Investors as Knowledge Gateway for Capacity Building

Privatization offers unprecedented entry points for global investors, but long-term value creation requires governance transparency and ecosystem thinking. Investors should not only bring capital but also managerial know-how, contributing to capacity building, youth academies, and sport-tech ventures. Blended finance models and sovereign-private partnerships can further balance commercial and developmental objectives.

4. Consolidate Ecosystems for Value Creation

Tech firms, data companies, and start-ups represent the new frontier of sport value creation. Developing regional sport innovation hubs, connecting universities, federations, and incubators, can position the Middle East as a global test bench for AI, performance analytics, and smart-stadium management. Robust cybersecurity and data ethics frameworks are essential for long-term trust.

5. Education and Research Institutions Supporting Sport Strategy

Universities, sport academies, and research centers – both national and international – must continue to act as knowledge catalysts, generating evidence-based insights and executive training programs. Academic partnerships can support governments in policy design and provide the managerial competences necessary for the professionalization of the sector.

6. Sports Embedded in Daily Life of Communities

Sports fans and local communities play a crucial role in supporting the long-term development of the sports ecosystem in the GCC. Their participation in grassroots initiatives, school and youth sport, and community programmes strengthens the social base of sport and helps transform major investments into broader cultural and economic impact. By contributing to volunteer networks, embracing inclusive practices, and supporting local clubs and academies, communities help ensure that sport remains embedded in daily life and continues to grow in a sustainable, locally grounded way.

7. More Media Narratives Elevating the Role of Middle East Sports in The International Landscape

Global media, as well as regional broadcasters with international reach such as beIN, play a decisive role in shaping how Middle Eastern sport is perceived worldwide. Their coverage influences global audiences, strengthens the visibility of regional competitions, and supports the international positioning of national leagues and major events. High-quality reporting, documentary storytelling, and analytical content can further elevate the narrative surrounding the region's sporting transformation.

Final Remarks

To engage effectively with the evolving Middle Eastern sport ecosystem, stakeholders must go beyond transactional engagement toward strategic collaboration and mutual learning. The region's investments are not a temporary phenomenon, but represent a coherent vision of economic diversification, innovation, and social progress. Sustaining this momentum will require a shared commitment across all actors in the ecosystem: governments, clubs, private investors, media, communities, and educational institutions. Each must contribute to a model of sustainable development in which long-term planning, transparent governance, and collective responsibility reinforce one another.

As the Middle East transitions from investment to institution, from visibility to governance, and from ambition to maturity, its sport sector offers a distinctive managerial case study in nation-building through strategic vision, data, and diplomacy. The next phase of growth will depend on the region's ability to articulate a clear future vision, make strategic and evidence-based investment choices, strengthen collaboration mechanisms among stakeholders, and develop the skills and competencies required to support a sophisticated, innovation-driven sport economy. Research, education, and international dialogue will remain essential in sustaining this transformation and ensuring that the Middle East's leadership in global sport continues to shape not only markets, but ideas, management models, and the future of sport itself.

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*All quotations included in this White Report were extracted from sessions, panels, and public discussions held during the MESIF London 2025. The views expressed are solely those of the respective speakers and do not necessarily reflect the views of the authors or affiliated institutions.

Authors

Dino Ruta is a Professor of Practice in Leadership, Sports & Events Business at SDA Bocconi School of Management. He engages in research and training to support decision-making processes that link human capital, strategy, and innovation, with a focus on sports and entertainment contexts. In 2023 he has been appointed as Università Bocconi Rector's Delegate for the Olympic Movement. In 2013, he founded the Sport & Entertainment Knowledge Center, a research and training center at SDA Bocconi. He also serves as the Academic Director of the Executive Master in Business of Events (EMBE) in collaboration with the Milano Cortina 2026 Foundation and the Scientific Director of the FIFA Master (International Master in Humanities, Management, and Law of Sports). Since 2015, he has been an Affiliate Professor of International Sports Management at Columbia University in New York, USA, and since 2018, an Affiliate Professor at the Josoor Institute in Doha, Qatar. He is the Director of the "Management dello Sport" program and the "Management del Calcio" program in collaboration with the Technical Sector of the Italian Football Federation (FIGC). From 2024, he is the coordinator of the Milano Cortina 2026 Impacts and Legacy project. Dino has worked on innovative projects in the sports and events world, supporting initiatives such as the managerial career of Javier Zanetti, athletes as brands for the National Basketball Players Association in the USA, career transition for football players for UEFA, development trajectories for women's football for FIFPro, impact measurement for the Giro d'Italia, integrated development of sports in the Trento Province, human capital development strategies for the Supreme Committee for Delivery and Legacy Qatar 2022, organizational criteria expert for UEFA licensing for FIGC, and board member of the Vero Volley Consortium. He is often called upon to interview sports personalities and Olympic medalists on Leadership and Sports Management topics, including Agassi, Buffon, Cordoba, Fontana, Phelps, Djordjevic, Leonardo, Massaro, Scola, Zanetti, and Webber. He developed a test that measures athletes' winning mindset, believing in the Olympic values of excellence, friendship, and respect as a model for sustainable behavior in professional contexts.

Chiara Bigotto is a Fellow in Event Organization and Sport Management and she carries out her activities at the Sport and Entertainment Knowledge Center of SDA Bocconi. She is a PhD candidate in Physical Exercise and Sport Sciences at Università Cattolica del Sacro Cuore and Università Statale di Milano. Chiara serves as Coordinator of the Executive Master in Business of Events (EMBE) with the academic collaboration of Fondazione Milano Cortina 2026. She also played the role of Coordinator of the Diploma Programs in Sports Management and Major Events Management in partnership with Josoor Institute in Doha (Qatar) and she collaborates to the ideation and management of the initiatives and events of the Topic Sport of the Bocconi Alumni Association (BAC). Her research activities are mainly focused on major events management (sports and entertainment), career development and the concept of sport as a tool for psychophysical well-being and social inclusion. Chiara has participated in several training and research projects, collaborating with professional athletes and important stakeholders in the global sports ecosystem, such as FIBA, UEFA, FIGC, NBPA, Ryder Cup 2023. Chiara earned the Master of Science in Economics and Management in Arts, Culture, Media and Entertainment from Università Bocconi in 2016. She was Event Manager at Consorzio Vero Volley from 2017 to 2020.