LET'S RESEARCH THE FUTURE





SPORT AND ENTERTAINMENT KNOWLEDGE CENTER

SPORT INVESTMENTS IN THE MIDDLE EAST

2024 White Report



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Introduction

The Middle East's sports sector is undergoing an unprecedented transformation, emerging as a focal point for global investment and attention. As countries in the region strive to diversify their economies beyond oil and promote a culture of health, sports, and entertainment, sports have become a strategic avenue for development.

Over the years, the Sport and Entertainment Knowledge Center at SDA Bocconi has developed an in-depth knowledge of the international sports ecosystem and the Middle East, working on human capital development programs in Qatar and other significant projects across the region.

The Middle East Sports Investment Forum (MESIF) has positioned itself at the heart of this transformation, acting as a hub for strategic dialogue and collaboration among Middle Eastern nations. By bringing together key stakeholders—government leaders, investors, sports organizations, and industry experts—MESIF aims to shape the future of sports investments, leveraging the potential of sports to drive economic diversification, social development, and global engagement.

The Knowledge Center has been able to create important connections, which can also be defined as "bridges", between alumni, experts and faculty to generate an innovation platform for international sports. The large investments that the Middle Eastern countries are making in sport have a social purpose to develop the identity and quality of life of citizens, and at the same time a diplomatic dimension to expand the scope for tourism and international events in the region.

SDA Bocconi has the expertise to read these social and economic changes through a human capital lens, and recognizes the need for new knowledge. This report has been developed using interviews and speeches delivered at MESIF events in 2024, as well as additional researched publications. The aim of the report is to provide a reliable and credible source of knowledge to guide readers interested in these themes - and these geographical areas - to find out how to contribute to this unique and complex evolution made of opportunities and challenges.

Since the FIFA World Cup Qatar 2022 the world of sport has changed, and so has the perception of the contribution that the Arab world can play in the development of the global sports ecosystem. It is the time to conceive new ways of organizing sport events and the impacts they may generate on people and countries. The role of a School of Management like SDA Bocconi is to close the gap between Sport and Human Capital, contributing with research and education to develop new leaders that can further develop the success and impact of the sector.

Prof. Dino Ruta Director, Sport & Entertainment Knowledge Center SDA Bocconi School of Management







The MESIF Purpose

Welcome to the Middle East Sports Investment Forum (MESIF) White Report 2024, 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. Produced in partnership with the prestigious SDA Bocconi School of Management's Sports & Entertainment Knowledge Centre, 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 that enhance the depth and value of our findings. 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.



DIRECTOR & CO-FOUNDER, MIDDLE EAST SPORTS INVESTMENT FORUM.



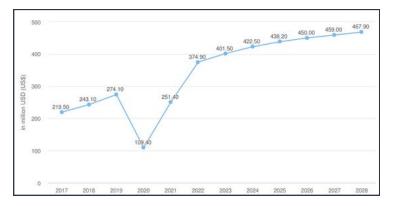
ALEKSANDER GEORGIEV, MBA. DIRECTOR & CO-FOUNDER, MIDDLE EAST SPORTS INVESTMENT FORUM.



Middle East and the Investments in Sports

The Middle East, a new Global Destination for Major Sport Events

In recent years, the Middle East (ME) has rapidly transformed into one of the world's foremost centers for major sports events, establishing itself as a global destination for athletes, fans, and sports organizations alike. The growth of the sector is highlighted by some significant data: the sports market in Qatar is projected to reach an estimated value of \$3.7 billion by 2025, while Saudi Arabia aims to create 100,000 jobs within the sports industry and ensure the sector contributes 3% of the nation's GDP by 2030, sports events ticketing revenues in GCC will grow constantly in the next years (see table below, source: Statista).



The successful hosting of the FIFA World Cup 2022 in Qatar marked a historic milestone, showcasing the region's capacity to deliver amazing. KSA FIFA World Cup 2034 confirms the Kingdom's ambition to cement its status as a pivotal player in global sports. The ME is home to cutting-edge sporting facilities designed for elite performance while emphasizing sustainability and technological advancements.

Qatar's Lusail Stadium, which hosted the FIFA World Cup final, is a model of eco-friendly design featuring solar panels and energy-efficient systems to reduce its carbon footprint. Similarly, Saudi Arabia's Sports Investment Plan has allocated over \$2 billion to world-class infrastructure like the King Abdullah Sports City, which uses advanced cooling technologies.

Beyond football, the region increasingly hosts prestigious international competitions, fostering a growing sports culture, enhancing the region's reputation as a sports hub. Also the presence of Middle Eastern athletes in global competitions, like Mutaz Barshim, Qatar's Olympic gold medalist in high jump, and Tareg Hamedi, Saudi Arabia's Olympic silver medalist in karate, highlights the region's growing influence. Their successes inspire a new generation of athletes and reflect the region's commitment to talent development. This trend is further reinforced by women's participation in the Olympics, with Oman's first female athletes competing in 2008 and Qatar and Saudi Arabia sending women athletes to the 2012 London Olympics.

All these investments, however, also brought the Middle East to the center of numerous controversies and disputes. These concerned the health and safety of workers, the role of women in society and certain forms of business misconduct aimed at acquiring rights and organizing competitions. Such criticism can be considered a natural consequence of the sports' popularity and its sociological implications. It is inevitable that international events are able to catalyze tangible resources, such as money and infrastructure, and intangible ones, such as changes and new policies.

As the sports sector in the Middle East continues to develop, governments are leveraging their geographic advantages and world-class facilities to set benchmarks in sustainability and technology, with a focus on creating lasting legacies, attracting sponsors, media, and fans worldwide.





Description of the Key Countries through major sport events and key milestones

Qatar



Sources: International Monetary Fund; Economic Observatory of Italian Ministry of Foreign Affairs and International Cooperation. The data is in relation to the year 2023.



FIFA World Cup 2022 Doha, Qatar

The socio-economic development of Qatar in recent years can be described as an economic boom, which is evidenced by a 20% increase in GDP over the past five years and a 28% rise in exports from 2019 to 2024. This growth has been driven by the country's vast energy resources, a stable political approach, and a strategic commitment to economic diversification. Central to this transformation is the Qatar National Vision 2030, which seeks to reduce the country's reliance on natural gas by expanding into other sectors. Through targeted investments and forward-thinking policies, Qatar is reshaping its economy, positioning itself as a leader in both regional and global markets.

One of the key sectors in which Qatar has heavily invested in recent years is sports. This strategic focus has not only contributed to the country's economic diversification but has also elevated Qatar's status on the global stage. By hosting major international events and developing world-class sports infrastructure, Qatar is positioning itself as a leading hub for sports and athletic excellence.

Qatar's sports sector has experienced remarkable growth, especially following the successful hosting of the 2022 FIFA World Cup, which has significantly boosted the country's sports market. This market is projected to reach an estimated value of \$3.7 billion by 2025. The growth of Qatar's sports sector has been driven by several significant milestones that continue to propel the country to extraordinary heights in the realm of sports. As we delve into these key achievements, it's essential to recognize how they have shaped Qatar's position as an emerging leader in the global sports landscape.





1. Hosting of Major International Events



World Aquatics Championships 2024

The event took place in Doha, showcasing elite talent in swimming, diving, and water polo.



Formula One Qatar Grand Prix in 2021, 2023, 2024

There was no race in 2022, however, as the country focused instead on hosting the FIFA World Cup.



MotoGP Grand Prix of Qatar since 2004

In 2008, the first-ever nighttime Grand Prix took place, made possible by the construction of a permanent lighting system.



AFC Asian Cup Qatar 2023 (The event took place in January 2024)

The tournament showcased the country's commitment to sports and its capability to host major international events, and the victory reinforced Qatar's status as a dominant force in Asian football.







FIFA World Cup 2022

Qatar successfully hosted the FIFA World Cup, a flagship event that brought the country into the global spotlight. This marked a turning point for sports in Qatar and the region, showcasing the nation's capabilities in organizing world-class events.



IAAF World Athletics Championships 2019 This event attracted elite athletes from around the world.



ANOC World Beach Games 2019

The event was the inaugural edition of the international beach and water multi-sport event organized by the Association of the National Olympic Committees (ANOC).



48th Artistic Gymnastics World Championships 2018

This prestigious event was significant as it marked the first time the championships were held in the Middle East.







Men's Handball World Championship 2015

The event featured 24 teams and was notable for its high level of competition, with France ultimately winning the championship by defeating Qatar in the final match.



Asian Games 2006

Qatar became the first Middle Eastern country to host the Asian Games, laying the groundwork for its commitment to sports development.





2. World Class Facilities

- Aspire Zone: Qatar developed the Aspire Zone, one of the most advanced sports training facilities in the world. It includes Aspire Academy, Aspetar (a specialized orthopedic and sports medicine hospital), and international-level stadiums used by athletes globally for training.
- Aspire Academy: established in 2004, this academy offers elite training programs for young athletes and has become a center of excellence for sports development not only in Qatar but also on a global scale.
- **Sport Accelerator:** this dedicated area within Aspire Zone is aimed at enhancing Qatar's position as a global sports business hub by fostering new opportunities for the private sector, attracting international investment, and supporting the growth of Qatari entrepreneurs.
- **Qatar SportsTech:** a joint venture initiated by the Qatar Development Bank and supported by various state authorities. The accelerator program provides participating start-ups with access to Qatar's comprehensive sports and entrepreneurial ecosystem. Through this initiative, high-potential candidates are identified, encouraged to apply, and receive intensive mentorship in Aspire Zone, the vibrant center of sports in Qatar.



3. Significant Sporting Achievements

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- Olympics results: at the London 2012
 Olympics, Qatar celebrated its first Olympic silver medal, won by Mutaz Barshim in the high jump.
 Barshim added another silver at the Rio 2016
 Olympics. The Tokyo 2020 Summer Olympics marked a historic milestone for Qatar, as the nation won three medals for the first time: golds for Fares Ibrahim in weightlifting and Mutaz
 Barshim in high jump, along with a bronze for the beach volleyball team of Cherif Younousse and Ahmed Tijan. This achievement has positioned Qatar as the leading Arab country at the Tokyo Olympics.
- Qatar National Football Team: the team won the AFC Asian Cup in both 2019 and 2023, marking two historic consecutive triumphs that showcased the rising level of football in the nation.



4. Partnerships and International Collaborations

- Paris Saint-Germain (PSG): the acquisition of the majority stake in PSG by Qatar Sports Investments, an entity controlled by the Government of Qatar, has enhanced Qatar's image in European and global football, acting as a catalyst for further investments in the sports sector.
- **K.A.S. Eupen**: in 2012 the Belgian Club was purchased by the Aspire Zone Foundation, with the primary goal of using it as a launching pad into European football for its academy graduates from Africa, South America and Asia.
- **Collaboration with UEFA:** Visit Qatar served as the official tourism partner of UEFA EURO 2024 and will continue in this role for UEFA EURO 2028. Additionally, Qatar Airways, the national airline, will be an official partner of UEFA until 2030, showcasing its commitment to enhancing the fan experience worldwide.
- **Partnership with AFC:** a similar partnership, akin to the one with UEFA, has been established between Qatar Airways and the AFC, which will run until 2029.

5. Securing Hosting Rights for Future Tournaments

- FIA World Endurance Championship from 2024 to 2029: Taking place at the Lusail International Circuit, this championship will set the stage for future international motorsport events in the country.
- FIBA Basketball World Cup 2027: Qatar secured the rights to host the FIBA Basketball World Cup, making it the first MENA country to organise this event.
- Asian Games 2030: Doha 2030 has been confirmed as the host city for this prestigious event, marking it as a national priority. Qatar's commitment to the Asian Games leverages its vast hosting experience and state-of-the-art infrastructure.



6. Investments in Infrastructure

- Al Bayt Stadium & Lusail Stadium: Built for the 2022 World Cup, these stadiums symbolize Qatar's strong commitment to developing sustainable and innovative sports infrastructure.
- **3-2-1 Qatar Olympic and Sports Museum:** It is one of the most innovative sports museums in the world, highlighting the evolution of various sports disciplines and showcasing Qatar's passion for sports.

7. Sustainability and Legacy

- **Qatar National Vision 2030:** Sports are at the core of Qatar's national vision to promote sustainable development, improve quality of life, and position the country as a global leader in the sports sector.
- Generation Amazing: a social development initiative launched by Qatar as part of the FIFA World Cup 2022™ legacy program.

8. Promotion of Women in Sports

- Participation in the London 2012 Olympics: Qatari female athletes participated in the Olympics for the first time, marking a milestone in the country's women's sports movement.
- Development of Women's Football: Qatar is increasingly investing resources in promoting women's football, establishing leagues and development programs for young female athletes. According to Aya Kassem, head of the female program at PSG Academy in Doha, there has been an 80% increase in female registration in the football academy since Qatar hosted the World Cup in 2022.



"Qatar's growth as a global hub for tourism and sports reflects a great commitment to offering world-class experiences that are deeply rooted in the country's heritage. Through remarkable investments in sports and entertainment, we continue to create a dynamic destination where visitors can enjoy state-of-the-art facilities, cultural richness, and warm hospitality. Major events like the FIFA World Cup 2022 have already drawn millions to experience Qatar and the region, and with an expanding portfolio of events and attractions, Qatar is inviting the world to discover the diverse treasures of the Middle East. By blending sports, entertainment and culture with an enduring spirit of hospitality, Qatar is redefining what it means to be a global sports leader and premier travel destination."



APHRODITE MOSCHOUDI DIRECTOR OF PLANNING AND QUALITY, QATAR TOURSIM



Qatar National Vision 2030

The Qatar National Vision 2030 is a strategic initiative launched in 2008 aimed at promoting economic diversification and sustainable growth in Qatar. The program's goal is to transform the nation into an advanced state by 2030, focusing on four fundamental pillars:

Human Development: this pillar seeks to cultivate a society capable of contributing to its prosperity.
 Social Development: the aim is to foster a community with high moral standards and a collaborative approach to progress.

3. **Economic Development**: this focuses on creating a diverse and competitive economy that meets both current and future needs.

4. **Environmental Development**: this ensures that economic and social advancement aligns with environmental conservation.



Recently, Qatar presented its Third National Development Strategy 2024-2030, marking the final phase of this initiative. This strategy places a particular emphasis on enhancing competitiveness, strengthening innovation, and ensuring the long-term sustainability of the Qatari economy, with a target growth rate of 4% per year for the GDP.

The Qatar National Vision 2030 encompasses a comprehensive sustainable development plan that integrates sports as one of the 14 key sectors contributing to the country's growth. The development of Qatar through sport essentially serves two key functions: nation-building and nation-branding.

Nation-building in Qatar involves fostering social cohesion, national identity, and civic pride among its citizens. Through strategic investments in sports infrastructure, youth development programs, and community engagement initiatives, Qatar aims to unify its population, strengthen social bonds, and instill a shared sense of purpose in the country's progress. This effort is exemplified by initiatives like Qatar National Sport Day, which brings citizens together through a wide range of sports activities organized by government bodies and private companies, promoting health and well-being nationwide. Further examples include the Schools Olympics Program, a multisport competition for Qatari students aged 5 to 18, and the Active Lifestyle Project, which educates the public on the importance of physical activity. The Active Qatar campaign, for instance, encourages small lifestyle changes, such as opting for stairs instead of elevators, embedding the values of health and unity within society from a young age.

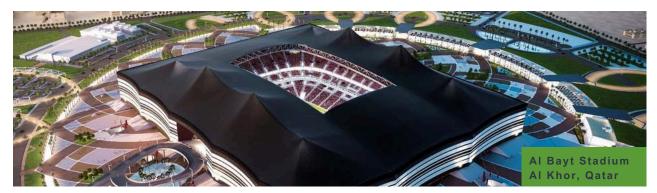
Nation-branding, on the other hand, involves projecting a positive image of Qatar to the global community. By hosting major international sporting events and nurturing world-class athletes, Qatar aims to enhance its reputation on the world stage, positioning itself as a modern, dynamic, and forward-thinking nation. The Aspire Academy for Sport Excellence exemplifies this strategy by cultivating athletic talent and preparing young Qatari athletes to compete internationally.

Additionally, the Talent Identification and Testing Program (TITP), a mass screening of Qatari male and female 6th grade students, identifies individuals with sporting potential who are offered full Aspire Academy scholarships.





Significant investments, such as the \$20 billion dedicated to new sports facilities, underscore Qatar's ambition to be recognized as a global sports hub. These funds were allocated towards building state-of-theart stadiums, including the iconic Lusail Stadium and **AI Bayt Stadium**, as well as expanding the Aspire Zone, home to the world's largest indoor sports facility. Moreover, numerous multipurpose venues, training centers, and public sports spaces were developed to meet international standards. These efforts culminated in Qatar's successful hosting of the FIFA World Cup 2022, marking the first time the event was held in the Middle East. This not only elevated Qatar's global reputation but also solidified its position as a premier destination for major international sporting events. Additionally, efforts to include marginalized communities, such as the work of the Qatar Women Sport Committee, help project Qatar as an inclusive and progressive nation, advancing its international image.



This dual approach highlights how sport is not only a tool for internal development but also a powerful instrument for shaping Qatar's global identity. Through its focus on both nation-building and nation-branding, Qatar positions itself as a leader in the region, attracting international investment, tourism, and diplomatic opportunities while reinforcing social cohesion and national pride.



ENG. FAHAD EBRAHIM JUMA MUHANNA DIRECTOR OF STRATEGY AND SUSTAINABILITY, QATAR OLYMPIC COMMITTEE

"Qatar is proud to be the first MENA nation to host the FIBA Basketball World Cup in 2027, marking yet another milestone in our journey to establish Qatar as a global sports hub. Guided by Qatar National Vision 2030, we've invested in world-class infrastructure, sustainable practices, and cutting-edge technology to create unforgettable, eco-friendly sports experiences. From the excitement of the FIFA World Cup 2022 to the Aspire Zone's advanced facilities and the upcoming Asian Games 2030, we're setting new benchmarks in global sports. With our sports sector projected to reach \$3.7 billion by 2025, Qatar is paving the way for growth and investment across the Middle East. We're excited to share our journey, collaborate with regional partners, and build a legacy of innovation and excellence for future young generations to enjoy and expand."





Kingdom of Saudi Arabia



Sources: International Monetary Fund; Economic Observatory of Italian Ministry of Foreign Affairs and International Cooperation. The data is in relation to the year 2023.

The growth of Saudi Arabia in recent years is evident in the improvement of key economic indicators. Between 2019 and 2023, the country's population grew by 9.7%, accompanied by notable economic advancements, including a 26.5% increase in nominal GDP and a 22.5% rise in exports over the same period. This overall expansion demonstrates that Saudi Arabia's economic progress has kept pace with its population growth, driving improvements in wealth, employment, and global trade—key pillars of the Saudi National Vision 2030 plan.

As a key component of its economic diversification strategy, the sports industry in Saudi Arabia has shown remarkable potential. The Ministry of Investment for Saudi Arabia (MISA) has created the National Sports Investment Plan to position sports investment as a key part of Saudi Arabia's broader investment strategy. The plan aims to attract and regulate both local and international investors to help achieve the Kingdom's ambitions for the sports sector. The country is off to a strong start, and with ongoing momentum, the Kingdom aims for the sector to contribute 1,5% growth to GDP, equating to approximately \$16.5 billion annually. The growth and investment appeal of the sector undoubtedly rely on Saudi Arabia's proven ability to achieve significant milestones in recent years. The growth and investment appeal of the sector undoubtedly rely on Saudi Arabia's proven ability to achieve significant milestones in recent years.







1. Hosting of Major International Events



Formula 1 Saudi Arabian Grand Prix Launched in 2021 in Jeddah, with a significant attendance of 143,000 in 2023.



Dakar Rally Held since 2020, attracting global attention to the rally raid sector.



Saudi Cup

Established in 2020, it is currently the world's richest horse race, with a prize pool of \$20 million.



FIBA Asian Cup 2025 Qualifiers A one-year tournament started on February 2024.







Riyadh Season Cup (Football)

A special match between the stars of local clubs and Paris Saint-Germain in January 2023, drawing international attention.



Liv Golf event

Every year since 2022, one of the LIV Golf events takes place in Riyadh. For the 2025 edition, it will be held from February 6 to 8.



Esports World Cup 2024

A premier multi-genre esports competition will be held annually in Saudi Arabia starting in 2024, taking place in July and August at a state-of-the-art venue in Riyadh Boulevard City





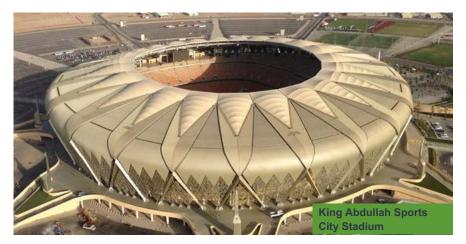
2. World Class Facilities

- King Abdullah Sports City Stadium: an elegant, sustainable, and versatile complex that combines the traditional Islamic architecture with innovative design.
- Qiddiya City's Gaming & Esports District: it will become the worldwide hub for gaming and esports, with cutting-edge esports arenas, team facilities, bootcamps, and regional offices for some of the largest gaming companies in the world. It will also provide an immersive environment where visitors and residents can play, work, and live within creatively themed spaces.
- State-of-the-art stadiums for FIFA World Cup 2034: the bidding proposal includes 15 stadiums across 5 host cities, comprising 4 existing stadiums, 3 under construction, and 8 planned new builds.



"As Saudi Arabia gears up its sports infrastructure for the FIFA World Cup 2034 after the highest evaluated successful bid in history, it is crucial to plan for optimum and financially sustainable stadiums through undertaking the appropriate feasibility studies of the new and the existing stadiums and the surrounding communities, exploring private financing routes and setting-up long term performance-based operation and management concessions with qualified operators, incentivized by revenue sharing models where applicable. The most successful stadiums around the world are multi-purpose sports and entertainment venues, with a vibrant calendar of events, and are integrated as local community hubs for social, cultural, community and commercial activities

AHMED ABAS DIRECTOR, MENA SPORTS PRACTICE



around the year."

3. Significant Sporting Achievements



Tareg Hamedi Olympic Silver Medal Saudi Arabia won its first Olympic medal at the Tokyo 2020 Games.



AFC U23 Asian Cup Victory: The national U23 team secured the championship, showcasing the country's emerging football talent.







Al-Hilal FC Club World Cup

Finished in 2nd place in 2022, marking a historic achievement for Saudi club football.



Issa Ghazwani

Won the gold medal in the 800 meters at the Asian Games, further highlighting Saudi athletic prowess.



Social Media Impressions

Achieved 1.7 billion impressions on sports events in 2020, indicating a growing global interest.

4. Partnerships amd International Collaborations



WWE Events

Saudi Arabia has hosted WWE events such as Crown Jewel and Super ShowDown since 2018, attracting major stars and international audiences.



International Handball Federation (IHF) Super Globe Hosted since 2019, promoting handball on a global scale.





Middle East Sports Investment Forum SDA Bocconi, School of Management, Sport and Entertainment Knowledge Center 2024 White Report



Football club

 Since 2021, Newcastle United has been owned by Saudi Arabia's Public Investment Fund (PIF). In 2022 Liverpool FC International Academy has opened its first youth program in Saudi Arabia.



Partnership deals with other company

Puregym, Portas, F4, Saudi Motorsport Company, GL events, LEEJAM, BAC, DBS, IRC Soccer ACADEMYKSA, Sela.

5. Securing Hosting Rights for Future Tournaments



AFC Asian Cup 2027



Asian Winter Games 2029



FIFA World Cup 2034





6. Enhancing the Domestic Sports Scene

- **Saudi Pro League:** gained international relevance with the arrival of stars like Cristiano Ronaldo, Karim Benzema, Kante, Fabinho, Neymar, and more.
- **Diriyah E-Prix:** hosted since 2018, part of the Kingdom's commitment to sustainability through electric racing.
- Jeddah International Tennis Tournament: a new event aimed at bringing professional tennis to the Kingdom.
- Saudi International (Golf): part of the European Tour and Asian Tour, attracting top international golfers since 2019.
- World Heavyweight Boxing Championship: hosted in 2019, marking the Kingdom's entry into major boxing events.

7. Promotion of Women in Sports

- Saudi female athletes participated for the first time in the 2012 Olympic Games.
- Sports programs for girls were introduced in schools in 2017, leading to over 330,000 registered female athletes.
- Female participation in sports has increased by 149% since 2019, with notable athletes like Yasmeen Al Dabbagh and Tahani Al Qahtani gaining recognition.
- Launched a women's football Premier League in 2022 and sent its first women's tennis team to an international tournament in Sri Lanka in 2023.



8. Sports participation

- The percentage of the population aged 15 and over who engaged in more than 150 minutes of physical activity increased from 13% in 2015 to 40% in 2022.
- The percentage of the population aged 5 and over who engaged in more than 30 minutes of physical activity increased from 13% in 2015 to 48% in 2022.

9. Sports Governance and Investment

- The Ministry of Sport has allocated a budget of SAR 2.6 bn to accelerate the process of development of Saudi sporting federations.
- Cross-Investment Opportunities for the Sports Industry within the GIGA Projects of the Public Investment Fund's (PIF) Vision 2030.



10. Sustainability and Legacy

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- **Saudi National Vision 2030**: a strategic framework aimed at diversifying the economy and transforming the Kingdom into a global hub in which Sports play a pivotal role.
- • Saudi Sports for All Federation: an initiative aimed at promoting physical activity and sports participation across all age groups, fostering a healthier and more active society in line with Vision 2030.
- Leaders Development Institute (LDI): A premier sports education institute designed to develop and enhance the skills of sports professionals, managers, and leaders in Saudi Arabia.



BASIM K. IBRAHIM SPORTS INVESTMENT DIRECTOR, MINISTRY OF INVESTMENT, KSA

"Saudi Arabia's Vision 2030 has set a bold and comprehensive pathway that positions sports as a key driver for societal engagement and economic diversification. The emphasis on fostering participation, talent development, and achieving global sporting excellence underpins our strategic direction. As we look towards hosting the FIFA World Cup 2034 and beyond, our investment in infrastructure, innovation, and strategic partnerships will ensure that Saudi Arabia not only meets but surpasses these ambitious milestones. The collaborative efforts outlined in the Sport Investment Strategy—developed by the Ministry of Investment, Ministry of Sport, and Portas—demonstrate our commitment to creating a sustainable and world-leading sports ecosystem."

Saudi National Vision 2030

Launched in 2016, Saudi Arabia's Vision 2030 is an ambitious plan aimed at reducing the Kingdom's dependence on oil by diversifying the economy through the development of strategic sectors such as tourism, technology, healthcare, and entertainment. Among the main goals of the plan are to increase the contribution of the non-oil sector to GDP from 16% to 50%, create 1.6 million new jobs, and raise female workforce participation to 30%.

As part of this broader vision, the sports sector plays a crucial role in shaping an active and healthy society, while also aiming to achieve international recognition.

Saudi Arabia's vision for the sports sector is to build a dynamic system that not only encourages widespread participation in sports and physical activity but also fosters pathways for talent development and promotes elite performance at the highest levels. These three pillars – mass participation, talent development, and elite performance – form the foundation of the Sport Investment Strategy, developed by the Ministry of Investment, Ministry of sport, and Portas, guiding the Kingdom's approach to establishing itself as a global leader in sports.

Building on these pillars, Vision 2030 has set six ambitious targets for 2030 that will significantly shape the future of Saudi sports:

- 1. Expanding the sports sector's contribution to the non-oil GDP to reach 3%;
- 2. Creating 100,000 jobs within the sports industry;
- 3. Achieving a physical activity rate of 40% for the population aged 5 and above;
- 4. Ranking in the top 5 for medal wins at the 2030 Asian Games;
- 5. Ranking in the top 25 for medal wins at the 2032 Olympic Games;
- 6. Increasing private sector contribution to the sports sector to 30%.





To support these ambitious goals, the Saudi Sports Investment Plan and the Ministry of Sports (MoS) have launched a portfolio of key investment initiatives that are transforming the sector. These include the Sector Privatization Program, which aims to unlock state-owned sports assets and foster private sector investment, the Investment in Workforce Capacity & Capability program, focusing on upskilling professionals within the sports industry, and the Entrepreneurship Program, which encourages new ventures in the sports sector.

The Digitalization of Sports Services is another key pillar, aiming to modernize and streamline access to sports-related services through technology. In addition, the Sponsorship Program is enhancing opportunities for brands and businesses to engage with the sports market, while the National Sports Facility Platform is centralizing the management and utilization of sports infrastructure. To further accelerate growth, the Regulatory Modernization and Commercial Licensing programs are being implemented to create a more business-friendly environment, removing barriers and enhancing the efficiency of operations within the sports industry.

The Kingdom's sports federations have also devised their own strategies, each focused on elevating their respective sports to a new level of excellence. For example, the Saudi Esports Federation (SEF) has implemented a series of strategic initiatives aimed at positioning Saudi Arabia as a global hub for esports. These include attracting global developers and publishing powerhouses, building innovative esports arenas, cafés, and gaming-related venues, offering practical gaming-related academic curriculums, and establishing Saudi Arabia as the world hub for esports events.



The Saudi Arabian Football Federation (SAFF) is also focused on elevating the nation's football standing. Its selected strategies include increasing the breadth of football competitors, enhancing stakeholder coordination, implementing data analytics, and activating partnerships in sports technology. Additionally, SAFF aims to partner with leading sports management institutions to develop workforce pathways and position Saudi Arabia as a global hub for football knowledge and innovation.

The Saudi Sports Investment Plan aligns with these ambitious goals, mobilizing over \$2 billion in investments to develop world-class sports infrastructure, such as "King Abdullah Sports City" and the renovation of existing facilities to host international events. In 2023, Riyadh was selected to host the '2029 Asian Winter Games', a major event that solidifies the Kingdom's position as a global sports center.

Women's inclusion in sports is also a key priority, with the establishment of new women's teams, dedicated infrastructure, and the organization of national and international competitions, such as the "Aramco Saudi Ladies International" golf tournament.





Middle East Sports Investment Forum SDA Bocconi, School of Management, Sport and Entertainment Knowledge Center 2024 White Report

Oman



108,81 Billion of U.S. dollars 5,17 Million of People

309.500 Km^2

Sources: International Monetary Fund; Economic Observatory of Italian Ministry of Foreign Affairs and International Cooperation. **The data is in relation to the year 2023.**

Oman has experienced significant socio-economic growth in recent years, with its GDP increasing by 22% from 2019 to 2024. During the same period, the total export volume rose by 57%, measured in billions of euros. Oman's Vision 2040 focuses on establishing a developed, diversified, and sustainable national economy while ensuring the fair distribution of development benefits and protecting natural resources. Strategic investments in sectors such as tourism, infrastructure, and sports have been crucial to this diversification. These investments aim to create long-term opportunities in sports for both men and women, ensuring inclusivity and sustainability.

While other countries position themselves with mega events such as FIFA World Cup and the Formula One Grand Prix, Oman has taken a typically strategic approach to regional sports development. The country is leveraging its economic growth to foster national identity, promote community engagement, and enhance its international reputation through sports events that resonate with its unique culture, geography, and history.

Key projects, such as Oman Sail's international achievements, the comprehensive high-altitude training center at the Oman Mountain Destination, and the planned Quiksilver resort amidst the stunning scenery of the South, illustrate how Oman is strategically using sports to enhance its economy. These initiatives aim to attract global visitors while reinforcing the nation's identity and promoting local development.

As Oman continues to capitalize on its unique geography and rich cultural heritage, it is poised to become a regional leader in eco-conscious tourism, offering visitors an authentic and thoughtfully crafted experience.







1. Hosting of Major International Events



2024 Men's FIH Olympic Qualifiers

It was the final stage of the qualification for the men's field hockey event at the 2024 Summer Olympics.



2024 IGFA International Fishing Tournament



2024 ACC Men's Premier Cup Serving as the final stage of qualification for the 2025 Asia Cup Tournament for Cricket.



2022 World Athletics Race Walking Team Championships The 29th edition of the global team racewalking competition organized by World Athletics.



2019 Oman Open, part of the 2019 ITTF Challenge Series An international table tennis event held in Muscat.





Middle East Sports Investment Forum SDA Bocconi, School of Management, Sport and Entertainment Knowledge Center 2024 White Report



IronMan 70.3 Oman

Since 2019 The competition has attracted athletes from all over the world. In 2024, the number of participants exceeded 750.



2018 Asia Hockey Championship Trophy A prestigious tournament featuring the six best national team in Asia.



2017 Formula Kite World Championships.

A five-day competition to crown the IKA hosted by Oman Sail at Al Mouj Muscat.



2012 Beach Handball World Championship A twelve-team tournament in both men's and women's beach handball, held in Muscat.



2010 Asian Beach Games A multi-sport event bringing together over 40 nations, hosted in Muscat.







Tour of Oman

An international road cycling race attracting world-class cyclists since 2010.



19th Arabian Gulf Cup in 2009 A milestone as the first edition of the Gulf Cup to be broadcast in HD.

2. World Class Facilities

- High Altitude Training Centers: Oman is home to several high-altitude training centres located in its mountainous regions, with peaks reaching up to 3,400 meters. In February 2024, Oman announced its new Omani Mountain Destination, which features a highaltitude sports training center located on Jabal al Akhdar. Master-planned by AtkinsRéalis in consultation with local communities, this facility will be one of the world's highest high-altitude training centers, situated at 2,400 meters
- Southern Hub for Water Sports in Duqm: Duqm, situated on the southern coast of Oman, is renowned for sports tourism, particularly kiteboarding, windsurfing, sports fishing, and diving. The region offers ideal conditions for water sports and is known for world record catches, including the Long Tail Tuna and Giant Trevally (GT), attracting enthusiasts from around the globe.
- **Masirah Island**: close to Duqm, Masirah Island is a prime location for eco-friendly tourism and board sports. The island, a key turtle breeding area, ensures that tourism development aligns with environmental conservation, balancing nature with sporting activities.







3. Significant Sport Achievement

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SPORT AND ENTERTAINMENT

- •Musab bin Mohammed Al Hadi and Waleed bin Issa Al Kindi won the silver medal in the 49er event at the 2023 Asian Games in China. This achievement marks the first silver medal in Oman's history at the Asian Games.
- Omar Abdullah Al Ghailani earned a silver medal and set a new Asian record at the 2024 CMAS 8th World Championship in Free diving Depth.
- Ibrahim Al Salatni won a silver medal in the Dynamic Apnea category at the 2024 AIDA Freediving World Championship, achieving a distance of 252 meters in four minutes.

4. Heritage and Sport Initiatives

- Oman Sail: Established in 2008 with the support of His Majesty, Oman Sail aims to revive Oman's rich maritime heritage, promote the nation globally through sailing, and create long term opportunities for Omani youth. Through participation in international sailing competitions and regattas, Oman Sail has enhanced the country's global visibility, while providing invaluable career opportunities for young Omanis. Its training programs in leadership, teamwork, and sailing have made it a cornerstone of Oman's broader cultural and sporting strategy, contributing significantly to nation branding.
- **Traditional Omani Dhow Racing,** featuring traditional wooden sailing vessels, dhow racing is a cultural event that showcases Oman's maritime history. It not only preserves a centuries-old tradition but also strengthens national identity, making it a key part of the country's sports and heritage initiatives.



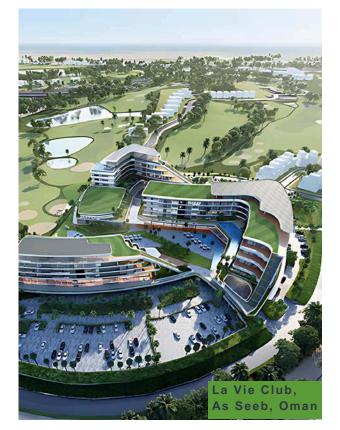


5. Renovation of Sport Facilities

SDA**Bocconi**

SPORT AND ENTERTAINMENT

- Sultan Qaboos Sport Complex: The recent renovations of the Sultan Qaboos Sports
 Complex have upgraded the stadium to meet international standards, enabling Oman to host high-profile matches and international tournaments. The upgrades included the main stadium, women's sports center, office buildings, and men's gym facilities, enhancing the overall quality and functionality of the complex.
- La Vie Club: Formerly known as Muscat Hills Golf & Country Club. The newly renamed La Vie Club has undergone significant renovations as part of the first phase of a resort development. The development is led by Oman Real Estate Investment Services LLC (ORIS), part of Oman International Development and Investment Company SAOG (ominvest), reflecting the country's focus on world-class sports facilities as part of its diversification strategy



6. Promotion of Women in Sport

- First Omani Female Participation in the 2008 Beijing Olympic Games thanks to Buthaina Al-Yaqoubi.
- Women's Sports Complex, the establishment of this dedicated facility for women in Muscat represents a significant investment in promoting female athletic participation. The complex is designed to nurture local talent and encourage greater female involvement in sports.
- GCC Women's Sports Hackathon in March 2024, organized by the Oman Olympic Committee and the Oman Women's Sports and Gender Equality Committee, this event brought together participants to develop innovative models for promoting women's sports in the GCC. Oman's teams presented initiatives to form a volunteer team for women's sports events and proposed the creation of a GCC Women's Center for Sports Investment, designed to support community sports initiatives across the region.

7. Sustainability and Legacy

- In 2022, Oman Sail won the gold award for "Best Sports Event Organizer in the Middle East" and the silver award for "Best Sports Event" at the Middle East Sports Industry Awards.
- In 2023, Oman Sail's "SailFree" program for people with disabilities, supported by BP Oman and the Oman Paralympic Committee, received the gold award for "Best Social Responsibility Initiative."







MARK ALEXANDER CHIEF EXECUTIVE OFFICER OF LIVING.LAB

"Oman's new Omani Mountain Destination on Jabal al Akhdar represents a visionary commitment to both environmental stewardship, sports and wellness center community development. At 2,400 meters, this world-leading highaltitude training center not only provides an exceptional setting for athletes to reach peak physical and mental performance but also champions sustainability and inclusivity. The integration of renewable energy, extensive pedestrian and cycle spaces, and opportunities for local ownership mark Omani leadership in development."

Oman Vision 2040

Launched in 2021, Oman Vision 2040 outlines a roadmap for the country's sustainable and diversified growth over the coming decades. The vision is structured around four key pillars that aim to transform Oman into a thriving nation, balancing modernization with the preservation of its cultural and environmental heritage:

- 1. A Society of Creative Individuals: Oman envisions a society where individuals are proud of their identity, innovative, and globally competitive.
- 2. **Responsible State Agencies**: the vision emphasizes the need for comprehensive governance, effective oversight, a swift justice system, and efficient performance from state agencies.
- 3. **A Competitive Economy**: Oman aims to build a productive and diversified economy, driven by innovation and private sector involvement.
- 4. **An Environment with Sustainable Components**: environmental sustainability is central to Oman Vision 2040. The plan aims to safeguard the country's ecosystems, balancing economic development with the preservation of natural resources.

In addition to its economic and environmental goals, the vision also recognizes the pivotal role of sports and tourism in fostering national unity, community well-being, and economic diversification. Oman's diverse landscapes and exceptional conditions position it as a prime destination for sports enthusiasts and international events. Oman aims to attract \$51 billion in tourism investment by 2040, in addition to the \$7.8 billion it secured between 2021 and 2023. To improve the diversity and quality of its tourism offerings, Oman is adopting a "cluster" approach that provides a variety of unique experiences within easy reach. The country believes this strategy will double the contribution of tourism to its GDP, increasing it to 5% by 2030 and further to 10% by 2040.







In response to the growing interest in the country's natural attractions, Oman has launched various initiatives to develop sports infrastructure. Of particular note is the Sports City Development, a large-scale project currently in Stage 4 of planning, situated north of Muscat. This mixed-use development is set to become a cornerstone of Oman's sports infrastructure, encompassing state-of-the-art stadiums, training facilities, residential areas, and retail spaces. By creating a dedicated environment for sports, this project aims to enhance local participation in athletic activities, attract international events, and stimulate economic growth through tourism and sports-related ventures. The Sports City will not only elevate Oman's profile in the global sports community but also serve as a catalyst for community engagement, fostering a culture of health and fitness among its citizens.



NADER NASSER HAMOOD AL RAWAHY MARKETING AND INVESTMENT EXPERT AT THE MINISTRY OF CULTURE SPORTS AND YOUTH, OMAN VISION 2040

Jordan



"The sports and related tourism sector present a vast opportunity for Oman due to two key factors: the country's unique geography and significant investments in tourism infrastructure. Oman's diverse landscapes—comprising beaches, mountains, deserts, wadis, and monsoon cloud forests—serve as a foundation for its future growth. Furthermore, Oman's cultural, sporting, and MICE (Meetings, Incentives, Conferences, and Exhibitions) events play a crucial role in attracting foreign direct investment, enhancing Omani soft power, and drawing affluent tourists from both local and international markets."

118,54 Billion of U.S. dollars 11,34 Million of People 88.794 Km^2

Sources: International Monetary Fund; Economic Observatory of Italian Ministry of Foreign Affairs and International Cooperation. The data is in relation to the year 2023.

Sport Development and Women's Football as a Symbol of Progress

Jordan has established itself as a politically stable and economically resilient nation in the Middle East. Over the past five years, the country's GDP has grown by 17.2%, driven by efforts to diversify its economy, focusing on sectors such as tourism, services, and technology.

Strategically located at the heart of the Middle East, Jordan is gradually increasing its presence in the regional sports landscape. While it does not have the same level of investment or infrastructure as countries like Qatar or Saudi Arabia, Jordan has made significant strides in various sports.





The government and local institutions are working to promote sports as a key part of national development, placing special emphasis on youth engagement and women's inclusion.

The Jordan women's national football team has risen to prominence as one of the strongest teams in the Arab world. It has won the West Asian Football Federation (WAFF) Women's Championship six times (2005, 2007, 2014, 2019, 2022, 2024), cementing its position as a regional powerhouse. Jordan has also led the way in promoting women's football in the Middle East by hosting the 2016 FIFA Under17 Women's World Cup, a milestone event that showcased the country's commitment to advancing women's sports on a global stage.

Despite these achievements, Jordan still faces significant challenges in developing its sports sector. While the success of the women's national team is commendable, the country's sports infrastructure remains underdeveloped, particularly for women's sports. Many facilities require modernization, and further investment is needed to bring them up to international standards.

The road ahead for Jordanian sports development is long, particularly in terms of improving infrastructure and enhancing fan engagement. Yet, with its growing economy, strategic vision, and dedication to fostering sports among all demographics, Jordan has the potential to become a leader in promoting both men's and women's sports in the region.



STEPHANIE ALNABER BOARD MEMBER & HEAD OF THE WOMEN'S COMMITTEE, JORDAN FOOTBALL ASSOCIATION

"Jordan's economic growth and strategic location position it as a rising force in the Middle East, with sports playing a key role in its development. Women's football has emerged as a powerful symbol of progress, showcasing the country's dedication to advancing women's sports and fostering inclusion. While challenges like underdeveloped infrastructure and limited fan engagement remain, Jordan's commitment to growth and innovation positions it as a leader in promoting gender equality and regional collaboration through sports."

Egypt



393,83 Billion of U.S. dollars

105,2 Million of People



995.450 Km^2

Sources: International Monetary Fund; Economic Observatory of Italian Ministry of Foreign Affairs and International Cooperation. The data is in relation to the year 2023.



A Historical Sporting Nation with Global Ambitions

Egypt, the most populous Arab country with over 109 million people, has long been a cultural and political leader in the Middle East and Africa. Despite facing economic challenges, Egypt's GDP in 2023 approximately \$314.58 billion, supported by its strategic location and diversified economy. In the realm of sports, Egypt holds a prestigious position, particularly in football and individual sports like squash.

Football is the dominant sport in Egypt, with the national team boasting a record seven African Cup of Nations (AFCON) titles, making it the most successful team on the continent. Clubs such as Al Ahly and Zamalek have passionate fan bases and are considered among the top teams in African football. Additionally, Egyptian football has gained global recognition thanks to the success of Mohamed Salah, a world-class player who has become an international star, putting Egyptian football on the global stage.

Beyond football, squash is another sport where Egypt has excelled, producing world champions such as Ramy Ashour and Nour El Sherbini. Egypt's dominance in squash has been unparalleled, with both men's and women's players consistently ranking among the world's best. This success has positioned Egypt as a global leader in a sport that, while niche, has brought the country considerable international recognition.

In terms of infrastructure, Egypt has invested heavily in hosting major sporting events, such as the 2019 African Cup of Nations and the 2021 World Men's Handball Championship, which have helped modernize stadiums and other sports facilities. However, fan engagement remains a challenge. While clubs like Al Ahly and Zamalek enjoy widespread support, security concerns and logistical issues at stadiums have dampened fan attendance in recent years. A lot of work is needed to ensure safe and engaging experiences for fans across all sports.

Attracting new investors is crucial for Egypt's sports development, as the country has significant untapped potential. The government recognizes that enhancing investment in sports infrastructure, facilities, and community programs is vital to driving growth and sustainability in the sector. Increased investment could not only improve the quality of sports facilities but also help foster grassroots initiatives and promote sports at all levels, including women's sports. Despite the challenges, the future looks promising for Egypt; with the right focus on investment and development, the country has the potential to further solidify its status as a leader in the African and Arab sports landscape.



Key Sports Topics

Football Evolution in the Middle East Region

FIFA World Cup Qatar 2022

The FIFA World Cup Qatar 2022 marked a historic milestone, being the first World Cup hosted in the Middle East and the first to take place in winter, accommodating the region's extreme summer climate. However, these unique aspects are overshadowed by the profound impact the event had on the country, not just during the tournament but in the years that followed. From the outset, Qatar's mission was clear: to celebrate football while fostering intercultural understanding and creating opportunities. The tournament was designed to advance Qatar's long-term goals for sustainability and establish a lasting legacy for the nation, the Middle East, Asia, and the world.

Several elements made the FIFA World Cup 2022 truly distinctive. It was the most compact World Cup since 1930, with all stadiums located within a 75-kilometer radius and the closest venues just 5 kilometers apart. This unique layout allowed fans and players to attend multiple matches in a single day without long-distance travel, reducing the event's carbon footprint and enhancing the overall experience. This compactness reflected Qatar's commitment to sustainability, reinforced by innovative projects like Stadium 974 — constructed from 974 repurposed shipping containers and modular steel. The stadium was designed to be fully dismantled and repurposed after the tournament, emphasizing environmental responsibility.



Qatar's hospitality was another defining feature, epitomized by the International Consular Services Centre, which provided support to fans and visitors from around the world. Over one million international visitors attended the event, while stadiums saw more than 3.4 million spectators throughout the tournament. Al Bidda Park in Doha alone welcomed more than 1.8 million fans, who enjoyed live broadcasts and vibrant entertainment at the FIFA Fan Festival.

The global visibility of the event was also remarkable. An estimated 5 billion people engaged with the World Cup across various platforms. Social media played a pivotal role in this outreach, with 93.6 million





posts shared, resulting in 5.95 billion social engagements and a reach of 262 billion. The final match attracted 1.5 billion viewers worldwide, showcasing the tournament's unparalleled ability to unite people and inspire a shared passion for football on a massive scale.

Qatar's focus on leaving a lasting legacy was further reinforced by the implementation of several key projects, each with measurable success:

- 1. **Generation Amazing Foundation**: This football-for-development program is driving social change globally, with operations in over 75 countries. To date, it has reached 1 million beneficiaries, trained 2,200 coaches and teachers, and built 45 football pitches and community clubs worldwide. Additionally, it has organized seven Youth Festivals.
- 2. **Challenge 22**: Launched in 2015, this regional innovation program has been supporting startups across the Middle East, encouraging innovation and entrepreneurial spirit. More than 1,400 applications have been submitted, and the program has awarded \$1.85 million in grants to successful innovators.
- 3. **Josoor Institute**: Established to train future leaders in the sports and entertainment sectors, the Josoor Institute has engaged 5,400 delegates from 98 countries, with more than 300 prominent speakers delivering over 40 courses. It has connected 18 MENA countries and collaborated with leading global education partners.
- 4. **Worker's Welfare**: This program set new standards for labour rights and safety, achieving 438.6 million working hours during the construction phase, with 30,000 workers at peak periods. The accident/incident frequency rate was an impressively low 0.02.
- 5. **Volunteering Programme**: Over 20,000 skilled, multilingual, and motivated volunteers from 150 countries participated, selected from more than 400,000 applications. This program ensured the seamless operation of the event and left a lasting positive impression on the participants.
- 6. **Community Engagement**: This project involved local communities in intercultural exchange, offering workshops, events, and initiatives that fostered greater understanding between locals and visitors. The engagement program succeeded in strengthening social ties, building goodwill, and leaving a meaningful cultural legacy.

To conclude, the FIFA World Cup 2022 not only set new standards for innovation and sustainability but also succeeded in leaving a profound legacy that will continue to shape the social, cultural, and economic landscape of Qatar and the region for years to come. Through its wide-reaching initiatives, Qatar has demonstrated that major sporting events can serve as powerful catalysts for positive, long-lasting change, solidifying the nation's role as a leader in global sports development.

Saudi Arabia FIFA World Cup 2034 Bid

Saudi Arabia's bid to host the FIFA World Cup 2034 represents a significant milestone in the nation's ambition to elevate its status in the global sports arena, particularly in football. This initiative is not only a reflection of the Kingdom's commitment to enhancing its sports infrastructure but also a pivotal component of its broader Vision 2030 strategy.

The aspiration for the FIFA World Cup 2034, unites Saudi Arabia, its citizens, and the global football community, as encapsulated by the bid's slogan: "Growing. Together.". The slogan contains three key messages that summarize the growth process of Saudi Arabia leading to its candidacy:



- **Growing People Together**: the process of social transformation started a few years ago in Saudi Arabia, involving younger generations. This ongoing social transformation in Saudi Arabia is illustrated by several key figures: 63% of the population is aged under 30, over 70,000 girls are actively playing football in the Schools League, there has been a 149% increase in women's participation in sports since 2015, and, in 2023, there were 834,000 volunteers, a significant rise from just 23,000 in 2015.
- Growing Football Together: this reflects the Saudis' deep-rooted and ever-increasing passion for football, a sport that has been a vital part of their culture for generations. Supporting this enthusiasm, Saudi Arabia has formed over 100 active football partnerships with other FIFA member associations. The Saudi Pro League (SPL) currently features more than 150 international players from over 50 different nationalities. Additionally, there has been a 50% increase in the number of coaches from 2021 to 2023, and 80% of Saudis consider themselves fans of football.
- Growing Connections Together: during the FIFA World Cup 2034, there will be a remarkable convergence of teams and fans, uniting in one place like never before. To highlight this potential, here are some compelling statistics: Saudi Arabia could be the first single country to host a 48-team tournament. Additionally, 60% of the world's population is located within 8 hours of the Kingdom. In 2023, Saudi Arabia welcomed over 27 million international tourists, ranking first in global growth. These statistics underscore the Kingdom's strategic position and potential as a host nation for major international sports events.



Saudi Arabia has presented a comprehensive plan for the FIFA World Cup 2034 that features state-of-theart stadiums designed for optimal functionality, comfort, and visitor experience. These world-class venues will be strategically located throughout the country and will meet all local and international standards, with sustainability as a guiding principle. The stadium will be located in 5 different cities: Riyadh, Jeddah, Al Khobar, Abha, and Neom. In addition to the stadiums, the plan includes 134 training sites that will provide essential support for players, teams, and referees, ensuring their comfort and accessibility during the tournament.

The bid to host the FIFA World Cup 2034 has been designed in alignment with Saudi Arabia's long-term strategy for the development of domestic football. In terms of legacy, the goal is clear: to promote football for everyone—men and women, boys and girls alike. The aim is to increase the number of players, coaches, and spectators involved in the sport.

However, the football legacy is not the only aspect to consider. In fact, we also have:

- Job Creation: the Saudi Arabia FIFA World Cup 2034 bid presents significant economic opportunities for both local and international businesses. In addition to the benefits directly associated with the tournament, there will be growth in sectors such as hospitality, food and beverage, tourism, and infrastructure. Moreover, the tournament will create additional opportunities for volunteers.
- **Community Growth**: the Saudi Arabia FIFA World Cup 2034 will serve as a platform for promoting shared values, fostering community cohesion, and driving development.



- Human Rights: throughout the development of its bid, Saudi Arabia has embraced a human rights approach in alignment with FIFA requirements, drawing on expertise from within the Kingdom and beyond. In line with the objectives of Vision 2030, the Kingdom is committed to managing risks and maximizing positive social impact throughout the tournament. This commitment ensures that the event adheres to Saudi Arabia's human rights obligations, cultural values, and traditions. This approach yields several positive outcomes, including improved labor rights, anti-discrimination measures, enhanced accessibility, safeguarding, and security.
- **Sustainability**: in collaboration with host cities, the Saudi Arabia FIFA World Cup 2034 aims to minimize environmental impacts associated with preparing for and hosting the tournament. This includes addressing issues related to transportation, accommodation, stadiums, infrastructure, waste management, and energy consumption. The Kingdom is committed to implementing sustainable practices to ensure a responsible and eco-friendly event.

Saudi Pro League vs Qatar Stars League Strategies

In recent years, the Saudi Pro League (SPL) and the Qatar Stars League (QSL) have implemented aggressive and innovative strategies to elevate their domestic football leagues to international prominence. Both leagues have pursued a multi-pronged approach that includes significant investments in star players, infrastructure development, and strategic partnerships, aimed at enhancing the competitive appeal of their leagues and aligning with broader national goals.

One of the key strategies in the SPL has been its focus on attracting top-tier international talent. Following the landmark signing of Cristiano Ronaldo by Al-Nassr in 2023, the SPL has continued to bring in world-renowned players, such as Karim Benzema, Sadio Mané, and Neymar Jr., reflecting the Kingdom's ambitions to

transform its football league into one of the top leagues globally. These high-profile signings not only elevate the quality of the league but also significantly boost its global visibility.



In addition to player signings, the SPL is investing heavily in infrastructure development. Several new stateof-the-art stadiums are being constructed or renovated, such as the King Abdullah Sports City Stadium in Jeddah and the Prince Mohammed bin Fahd Stadium in Dammam, both of which are designed to meet international standards for hosting top-level competitions. Furthermore, there is a focus on building





advanced training facilities for clubs, including the new facilities for Al-Nassr and Al-Hilal, equipped with cutting-edge technology for player performance analysis, sports science, and medical rehabilitation. These investments are aimed at not only improving the quality of the game but also attracting international events and teams for training camps and pre-season tours.

Moreover, the SPL has focused on expanding its digital presence and broadcasting rights, making its matches accessible to a broader global audience, and increasing its revenue streams through media and sponsorship deals. The league has secured partnerships with major international broadcasters such as DAZN in Austria, Belgium, Canada, Germany and the UK, Canal+ in France, and Sport TV in Portugal, which have helped bring SPL matches to a global audience.

On the other hand, the QSL has adopted a slightly different but equally ambitious approach. While Qatar also signs high-profile players, the QSL places significant emphasis on youth development and long-term sustainability. A cornerstone of this strategy is the Aspire Academy, one of the world's leading sports academies based in Doha, which is dedicated to identifying and developing young Qatari talents. The academy offers elite training facilities, world-class coaching, and a holistic development program aimed at nurturing future stars of both the domestic league and the national team. Aspire has been instrumental in providing a steady pipeline of young players who have contributed to the QSL's overall growth and success, as well as the Qatari national team's historic victories at the 2019 and 2023 AFC Asian Cups.



The QSL has also fostered partnerships with leading European clubs, such as Paris Saint-Germain, to enhance the league's expertise in coaching, management, and player development. These initiatives align with Qatar's broader sports vision, culminating in the successful hosting of the 2022 FIFA World Cup, which further solidified Qatar's place in global football.

Both the SPL and QSL are keenly aware that the success of their respective leagues depends not only on attracting star power but also on developing sustainable, competitive leagues with solid grassroots foundations. Their strategies aim to balance the short-term benefits of star players with long-term investments in youth academies and coaching education. By doing so, they aspire to create a lasting legacy for football in the region, positioning their leagues as premier destinations for both players and fans worldwide.



Saudi Pro League Clubs' Privatization Strategy

The Saudi Sports Clubs Investment and Privatization Project, launched on June 5, 2023, by Crown Prince and Prime Minister Mohammed bin Salman, represents a cornerstone of Saudi Vision 2030, aimed at transforming the Kingdom's sports sector into a thriving, globally recognized industry. Historically, sports clubs in Saudi Arabia were state-owned and managed by the Ministry of Sport, which provided financial support under the Sports Club Support Strategy. The privatization initiative marks a pivotal shift, introducing private sector involvement to enhance operational efficiency, financial sustainability, and global competitiveness. The project's ambitious economic goals include raising the value of the Saudi Pro League to over SAR 8 billion (approximately \$2.13 billion), significantly boosting club revenues, fan engagement, and international appeal.

The initiative unfolds in two distinct phases, each aligned with the Kingdom's broader vision of economic diversification and societal development. The first phase, launched in 2023, was divided into two key tracks. The first track facilitated investments from leading corporations and developmental entities, resulting in the transfer of ownership for specific clubs. Notably, Al-Hilal, Al-Nassr, Al-Ittihad, and Al-Ahli were acquired by the Public Investment Fund (PIF), underscoring the strategic importance of these flagship clubs. Additionally, Qadsiyah Club transitioned to Saudi Aramco, Diriyah Club to the Diriyah Gate Development Authority, AlUla Club to the Royal Commission for AlUla, and the Falcons Club to NEOM Company. This approach has successfully integrated corporate expertise and resources into club management, driving professional development and improved governance.

The second track of the first phase focused on privatizing publicly owned clubs, a process initiated in late 2023. This track sought to create a sustainable sports ecosystem by enabling private sector participation in the kingdom's broader sports development agenda. By fostering investments in infrastructure, talent identification, and fan experience enhancement, this track aims to elevate the quality of domestic and international competitions, while building stronger connections with global sports markets.

Building upon the success of the initial phase, the second phase was approved by the Council of Ministers on July 2, 2024. This phase expanded the scope of the project by privatizing 14 additional clubs across various divisions—professional, First, Second, Third, and Fourth. The clubs involved in this phase include Al-Zulfi, Al-Nahda, Al-Okhdood, Al-Ansar, Al-Orouba, Al-Kholoud, Al-Shoalah, Hajer, Al-Najmah, Al-Riyadh, Al-Rawdhah, Jeddah, Al-Taraji, and Al-Sahel. Selection criteria emphasized financial preparation, administrative efficiency, and infrastructure capabilities, ensuring the transition promotes long-term growth.

The impact of the initiative is already evident. The Saudi Professional League Association has recorded significant revenue growth, targeting an annual total of SAR 1.8 billion (approximately \$479 million). Moreover, the introduction of dedicated home stadiums for clubs such as AI-Fateh, AI-Ettifaq, AI-Taawoun, AI-Shabab, and AI-Hilal during the 2023–24 season underscores the Kingdom's commitment to infrastructure enhancement and fan-centric developments. These achievements align with the project's dual purpose of fostering national pride and reinforcing Saudi Arabia's reputation as a global hub for sports.

By integrating corporate investment and public-private partnerships, the Saudi Sports Clubs Investment and Privatization Project not only supports the Kingdom's aspirations to host major international events but also accelerates economic diversification. Through strategic governance and targeted investments, the initiative leverages sports as a transformative force for cultural, social, and economic development, positioning Saudi Arabia as a leader in the global sports arena.





Esports

In recent years, the Middle East has witnessed a significant transformation in fan engagement, driven by digital technologies that reshape how audiences interact with sports. With a young, tech-savvy population and high internet penetration rates — 98.3% of the population across Saudi Arabia, Qatar, and Oman uses the internet — the region is ideally positioned to capitalize on the rapid growth of digital platforms and gaming. Esports, in particular, has emerged as a dynamic sector, offering new opportunities for fans to connect with their favorite games, players, and teams. This shift reflects a broader trend of integrating entertainment, sports, and technology, fostering an ecosystem where fans are not merely spectators but active participants in a global gaming community.



Recognizing this potential, governments and private sectors in Saudi Arabia, Qatar, and Oman are heavily investing in esports infrastructure, hosting major tournaments, and collaborating with global gaming companies. This focus on esports transcends mere entertainment; it serves as a vehicle for technological advancement, economic growth, and enhanced international visibility.

For Saudi Arabia, esports has emerged as a significant part of the country's cultural and entertainment landscape, reflecting its commitment to diversifying its economy and enhancing its global influence in the gaming sector. The Kingdom has invested heavily in the gaming industry, with a goal of becoming the global hub for gaming and esports by 2030. The National Development Fund has significantly increased its financial commitment to the sector, ballooning from approximately \$81 million in 2022 to \$294.3 million by 2023.







The ultimate goal is to transform the gaming and esports sector into a substantial contributor to the Kingdom's economy, with plans to generate \$13.3 billion for GDP, creating over 39,000 new jobs across various fields, including development, publishing, and infrastructure. Saudi Arabia aims to rank among the top three nations for the number of professional esports players. The country's rapidly growing gaming market, which reached \$1 billion in 2023 and is projected to soar to \$2.67 billion by 2026, positions it as a formidable player in the global gaming and esports arena.

One of the flagship initiatives is the Saudi Arabian Federation for Electronic and Intellectual Sports (SAFEIS), established to regulate and promote esports in the country. SAFEIS aims to develop a robust esports ecosystem, focusing on organizing tournaments, establishing partnerships, and fostering local talent.

Saudi Arabia, a country where two-thirds of the population are gaming enthusiasts, has made headlines by hosting prominent esports events, including the Esports World Cup, which took place in Riyadh in August 2024. The inaugural tournament attracted the world's elite esports players and club, and over 2,6 million visitors to the Kingdom, creating a platform for a global celebration of esports as a global sport. In this edition, the individual game prize pool and club championship reached an impressive \$60 million. The tournament featured 22 competitions in 21 different games, including League of Legends, Counter-Strike, Dota 2, Mobile Legends: Bang Bang, PUBG Mobile, Honor of Kings, Apex Legends, Rainbow Six Siege, and more, ensuring a thrilling experience for both competitors and spectators alike. The event was watched by over 500 million viewers worldwide, and a recorded 250 million hours watched, while generating unprecedented coverage in local, regional and international media.

Additionally, Saudi Arabia is home to Qiddiya City, an ambitious project with the goal of establishing the world's premier gaming and esports destination, a critical component of Saudi Arabia's National Gaming and Esports Strategy. Built to reflect the interests of gamers, the Qiddya City Gaming & amp; Esports District will cover 500,000 square meters of gaming space, housing cutting-edge esports venues that aim to attract up to 10 million visits a year. These facilities will provide the lowest latency technology infrastructure in the world, and will host Esports Bootcamp pre-competition training centers, as well as sports science performance labs and high-end tech incubators to spur gaming innovation.

Another significant achievement for Saudi Arabia is the ambitious projects called NEOM, which aims to create a futuristic city designed to integrate cutting-edge technology and innovative industries. Spanning 26,500 square kilometers in the northwest of the country, NEOM is envisioned as a hub for various sectors, including technology, sustainability, and entertainment. The project emphasizes creating smart urban environments equipped with advanced infrastructure that fosters innovation and creativity.

Within this context, NEOM intends to position itself as a leading global destination for the gaming and esports industry, with facilities and resources that support both local and international competitions and game studios. The development plans include state-of-the-art arenas, training facilities, and creative spaces that attract top talent and organizations in the gaming sector. By leveraging its commitment to technology and gaming, NEOM seeks to host major international esports competitions, solidifying Saudi Arabia's status as a leading player in the global gaming landscape.

Qatar has also been at the forefront of the esports world, launching several key initiatives. One of the most prominent is Ooredoo Nation – Gamers' Land, a brand developed in collaboration with Quest, the largest esports company in Qatar. This initiative aims to unite the global gaming community by fostering creativity,





innovation, and development while transcending physical borders. Additionally, Qatar's expanding Gaming Value Chain highlights partnerships with global giants such as Sony, Nintendo, Xbox, Ubisoft, and Google Play, covering the entire gaming ecosystem, from game development to distribution and cloud platforms.

Further boosting its esports profile, Qatar partnered with Paris Saint-Germain (PSG) through Quest Esports, rebranding as PSG Quest. This collaboration made its debut at The International 2023, one of the most prestigious Dota 2 tournaments.

In recent years, Qatar has established itself as a premier destination for esports tournaments and events, hosting groundbreaking competitions like the first metaverse EA Sports FIFA 2022 tournament in the MENA region, where the top 12 EA Sports FIFA22 players competed alongside four regional players who qualified through Ooredoo Nation – Gamers' Land online qualifiers. Moreover, in 2024, Qatar launched a Dota 2 league featuring a \$2.6 million prize pool.

While Oman has not yet reached the level of investment and development seen in Qatar and Saudi Arabia, the country is beginning to make strides in the esports sector, recognizing its potential for technological innovation and youth engagement.

The establishment of the Omani Committee for Games and Electronic Sports marks an important step in this direction. The committee's mission is to spread cultural awareness of esports within Omani society, organize events and tournaments across the Sultanate, and form national teams to represent Oman in global, continental, and regional championships. Additionally, the committee aims to equip players with the necessary skills and awareness for the positive practice of esports.

The vision of the Omani Committee for Games and Electronic Sports is to enhance the skills of Omani players, enabling them to compete on both global and regional stages, while raising Oman's profile in international forums and tournaments. Though the esports scene in Oman is still developing, it is a key part of the country's broader efforts to diversify its economy and foster new opportunities for its younger population within Oman Vision 2040.



HANS JAGNOW DIRECTOR - TEAM & PLAYER RELATIONS / SPECIAL PROJECTS, ESPORTS WORLD CUP FOUNDATION

"With the inaugural Esports World Cup hosted 2024 in Riyadh, the esports industry frog-leaped to become one of the biggest sports worldwide. The event hosted 21 of the most popular video games for eight weeks. 500 million people tuned in to watch players from the world's best esports clubs compete for a life-changing \$60M prize pool. This event not only united different games under one competitive umbrella - it also brought together multiple key stakeholders , creating unity on the joint quest to crown the first World Cup Club Champion. Sponsors like stc, SONY, Qiddya, JAMEEL and Pepsi believed in the vision, and partners like CNN, Eurosport, Twitch and YouTube distributed to audiences worldwide. The unprecedented unity, driven by the Kingdom's vision, further established esports as the new global sport that resonates with an entire generation that grew up playing video games. EWC returns to Riyadh in summer 2025."



Social Legacies

Generation Amazing

The Generation Amazing Foundation (GA), a legacy project stemming from the FIFA World Cup Qatar 2022TM, has been instrumental in using Sports Mega Events (SMEs) to promote social change, capacity building, and human development. SMEs hosted by emerging economies, particularly in the Global South, offer a unique platform to advance domestic and international policy agendas, leaving legacies that extend well beyond the events themselves. GA has demonstrated how these gatherings can be leveraged to address global challenges such as social injustice, access to education, and human rights through strategic collaborations and targeted initiatives. Over the past 14 years, GA has positively impacted more than 1 million young people across 75 countries.

GA's approach focuses on adapting programs to the specific requirements of local communities. Its grassroots initiatives, developed in collaboration with organizations such as Esperance in Rwanda, ASA and Fund life in the Philippines, FC Rurka Kalan, Right to Play (RTP), and the Oscar Foundation in South Asia, JHCO and GFP in Jordan, as well as various other partnerships across the Global South, demonstrate how bottom-up, community-driven programs can catalyze positive change. A significant aspect of GA's strategy is promoting Global South agency, exemplified by the Generation Amazing Community Club (GACC) model. This model works with community stakeholders to create infrastructures that are purpose-built to act as safe spaces for sports and social entrepreneurship. Within its projects, the foundation has successfully trained over 2,200 coaches and teachers globally and has facilitated the construction of over 40 football pitches and community clubs around the world. Additionally, GA has organized seven Youth Festivals to further promote development through sport.

Building on its grassroots initiatives, GA also extends its impact through collaborations with global organizations, such as the UNHCR, WHO, and the International Federation of Red Cross and Red Crescent Societies (IFRC). Highlighting GA's interdisciplinary approach, these collaborations ensure that SME legacies align with global agendas while also addressing immediate community needs. Effective monitoring and evaluation methods provide concrete evidence of social impact.

GA's legacy is defined by its emphasis on inclusivity, which involves actively integrating marginalized communities to prevent tokenism. Authentic community engagement is key to GA's mission, allowing adolescents to explore development possibilities both locally and through higher education.

Looking ahead, GA advocates for institutional change, reconfiguring power dynamics in Sports for Development and Peace (SDP). In collaboration with Saudi Arabia, GA aims to extend the legacy of the FIFA World Cup Qatar 2022TM to the FIFA World Cup 2034TM. Through its three-year partnership with the Saudi Sports for All Federation (SFA), GA seeks to co-develop programs that foster youth empowerment, inclusivity, and regional leadership development, in alignment with Vision 2030. This partnership is expected to influence 32 neighborhood clubs across 23 cities, preparing a cohort of youth advocates and training up to 80 coaches to carry the legacy forward across the Middle East. The renaissance of development highlighted by GA showcases the Middle East's pivotal role in reshaping global sports for development.







EXECUTIVE DIRECTOR, GENERATION AMAZING

"At Generation Amazing Foundation, we believe that Sports Mega Events provide a unique opportunity to catalyze social change and empower local communities. Our focus on grassroots initiatives enables us to adapt our programs to the specific needs of diverse populations, creating safe spaces for sports and fostering social entrepreneurship. Through partnerships with organizations across the Global South, we have successfully implemented community-driven projects that promote inclusivity and youth development. We recognize the power of collaboration and the importance of engaging marginalized voices to ensure authentic impact. As the Middle East becomes the center of the Sporting world for the next decade, particularly with the FIFA World Cup KSA 2034, our commitment remains steadfast: to leverage the power of sport to drive meaningful change, cement the Middle East as a best practice leader, and build a sustainable legacy for generations to come. Together, we can transform challenges into opportunities and inspire a new generation of leaders through sport."

Saudi Sports for All Federation

The Saudi Sports for All Federation (SFA) plays a pivotal role in promoting physical activity and community engagement across the Kingdom of Saudi Arabia. As part of Vision 2030. The Saudi Sports for All Federation (SFA) aims to increase levels of physical activity participation, fostering healthier lifestyles, focusing on education and mindset, community engagement and volunteering, fitness and well-being, campaigns and awareness. Since the federation's inception, the two concepts of well-being and movement, were interconnected, incorporated, and injected in our plans and ways of working. We live in an era where we think now, more than ever, is a critical time to embrace the power of leading an active and healthy lifestyle.

To support its mission, the Saudi Sports for All Federation (SFA) has launched several impactful initiatives and programs:

- The opening of the Sports for All Dome in Dammam City has created a community hub for families and friends, enabling them to engage in various sports. This facility attracted over 71,000 participants in 2023, underscoring its social significance.
- The Marathon Series showcases notable success, beginning with the AI Khobar Half Marathon in 2021, which hosted over 1,700 participants. Subsequent events included the Riyadh Marathon in 2022 with 10,000 participants representing over 100 nationalities, the Jeddah Half Marathon with 3,000 participants, and the Riyadh Marathon in 2023 with 15,000 participants from 120+ nationalities, and around 20,000 participants in Riyadh Marathon 2024, anticipation builds for the 2025 event, expecting over 40,000 participants.
- With the support of the Ministry of Sport, Ministry of Education, and Quality of Life Program, SFA has
 implemented year-round programs for the youth through Neighborhood Clubs, which saw more than
 45,000 memberships—55% male and 45% female—across 45 clubs in Saudi Arabia. These clubs offer
 over 10 different activities, including tennis, basketball, football, and yoga, along with seasonal events
 such as summer camps across 20+ cities.



• The National Cricket Championship, in partnership with the Saudi Arabian Cricket Federation, engaged approximately 25,000 participants, aiming to enhance community fitness levels and attract new players to the sport. Additionally, the SFA launched the "Move Your World" campaign in multiple phases to inspire regular physical activity, addressing various motivators and barriers related to exercise.

The Saudi Sports for All Federation (SFA) employs a data-driven approach to decision-making, focusing on data collection, insights, and research to enhance outreach and customize offerings through continuous reporting and refinement.

- SFA's grassroots initiatives are aligned with expert recommendations, allowing the federation to tailor programs to specific demographics based on age, gender, and region. A national survey on physical activity informs these strategies, revealing that 73% of the Saudi population is willing to be active, with youth demonstrating the highest potential for increased participation.
- In addition to launching "Move Your World" campaign in multiple phases to inspire individuals to engage in regular physical activity, promoting physical activity participation everywhere, indoors and outdoors, taking into account motivators or barriers such as weather conditions or seasonality.
- Understanding community behaviours related to sports participation is essential. SFA seeks to identify
 what motivates individuals to engage in physical activity. Illustrated in Figure 1 below, key motivations
 include health-related issues, which is the top trigger across the Saudi population, highlighting the
 importance of health awareness, and improved appearance, as many individuals are motivated by a
 desire to enhance their physical appearance.

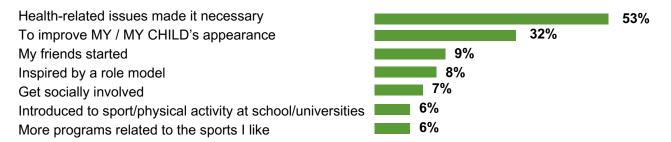


Figure 1: SFA National Survey - Motivators for Physical Activity

 Building strong partnerships is crucial for SFA's success. Collaborations with local communities and global institutions help tailor programs to meet specific needs. A recent three-year agreement between SFA and the Generation Amazing Foundation aims to enhance education and development in schools, sports clubs, and communities, co-developing joint programs that benefit students and local populations.

The Saudi Sports for All Federation is dedicated to providing opportunities for everyone in the Kingdom to engage in sports, regardless of background or ability. By tailoring initiatives to the unique needs of each region, leveraging data-driven strategies, and fostering partnerships, SFA aims to build a vibrant sports culture within Saudi Arabia.



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"At Saudi Sports for All Federation, we aim to support Vision 2030 by empowering communities to embrace healthier, more active lifestyles. We strive to make sports participation accessible across the Kingdom, prioritizing inclusivity by creating opportunities for women, youth, and individuals of all abilities to engage in physical activity. With each initiative, we work to cultivate a culture of health and community that aligns with our nation's vision of a vibrant society. Guided by data and partnerships, we adapt our programs to meet the needs of every region, fostering a legacy of well-being and fitness that will benefit Saudi Arabia for generations. By engaging local stakeholders and leveraging innovative approaches, we ensure that our efforts resonate within communities, inspiring individuals to take charge of their health and encouraging a collective movement toward a more active lifestyle. Together, we are building a healthier future for our nation, one step at a time."



SHAIMA SALEH AL-HUSSEINI MANAGING DIRECTOR, SAUDI SPORTS FOR ALL FEDERATION

Youth Academies and Social Impact of Sport

In the Middle East, youth academies are increasingly recognized as vital instruments for driving social change and fostering sustainable development through sports. These academies are not merely training grounds for aspiring athletes; they are transformative spaces that empower young people from diverse backgrounds, cultivating essential life skills while promoting values of inclusivity and community engagement. As the region experiences rapid socio-economic changes, these institutions play a crucial role in harnessing the potential of youth, channeling their energy and ambition towards positive outcomes.

One notable example is the Aspire Academy in Qatar, which has become a model for excellence in sports education and training. Established in 2004, Aspire Academy occupies a sprawling 2.5 square kilometers, housing an array of world-class facilities that contribute to the holistic development of young athletes. This includes two five-star hotels, ensuring that athletes and visitors enjoy premium accommodation, and a shopping mall that provides leisure and convenience. The academy is also surrounded by an 88-hectare park, offering ample space for outdoor activities and community engagement.

Furthermore, Aspire Academy features a dedicated ladies' club equipped with three multipurpose halls and a ladies' sports hall, promoting female participation in sports and providing them with the resources to thrive. The Aspetar Sports Medicine Hospital, known for its specialized care for athletes, is a vital part of this complex, ensuring that students receive top-notch medical support and rehabilitation when needed. Additionally, a mosque on-site caters to the spiritual needs of the community.

One of the standout features of Aspire Academy is the world's largest indoor sports complex, which boasts a seating capacity of 15,500 and includes 13 separate multi-sport halls. This facility allows for various training programs and events, supporting the development of athletes across multiple disciplines. The academy is also home to eight outdoor FIFA-starred football pitches, providing young footballers with high-quality training grounds. A key figure associated with Aspire Academy is Mutaz Barshim, the Olympic gold medalist in high jump, who honed his skills within its walls. His remarkable success, highlighted by his gold medal win at the Tokyo 2020 Olympics, exemplifies the academy's effectiveness in nurturing elite talent.





By fostering an environment where young athletes can excel, Aspire Academy plays a significant role in shaping not only skilled competitors but also well-rounded individuals who can contribute positively to society. This comprehensive approach to athlete development is crucial in a region that is increasingly recognizing the importance of sports in promoting health, wellness, and social cohesion.

While Aspire Academy represents a benchmark for youth development in Qatar, Saudi Arabia is following a parallel path with the emergence of the MAHD Sports Academy, which was launched in 2020 as part of the government's Vision 2030 initiative. This transition reflects a growing commitment from the Saudi government to support local sports initiatives and promote youth development within a broader strategic vision.

The MAHD Sports Academy aims to cultivate local talent through comprehensive training programs and educational support, bridging the gap between grassroots sports and professional opportunities. Since its inception, the academy has seen impressive participation, with 289.752 individuals involved in events and surveys. Furthermore, 635 talents have been nominated to join the academy, demonstrating its reach and influence in identifying potential athletes.

The academy emphasizes a holistic approach to athlete development, focusing not only on athletic performance but also on academic achievement and personal growth. With 368 academic talents identified, the MAHD Sports Academy ensures that young athletes receive a well-rounded education alongside their sports training. The academy has organized 17 camps, tournaments, and matches, further fostering competitive spirit among participants, while hosting 2 major tournaments and achieving a remarkable 44 medals across various competitions.



With state-of-the-art facilities and a curriculum designed to nurture young talent, the academy serves as a pivotal institution in Saudi Arabia's sports landscape. By fostering a structured environment for young athletes, the MAHD Sports Academy exemplifies the government's commitment to investing in sports infrastructure and creating pathways for future success.

Conversely, the approach taken by other youth academies, such as Al-Nassr Academy, Juventus Academy Saudi Arabia, and Liverpool Academy Saudi Arabia, reflects a growing trend of private involvement and international partnerships. These academies serve as vital connections between local talent and globally recognized football brands, bringing high-quality coaching methodologies to the Kingdom while promoting a culture of excellence in sports.





Another noteworthy institution is the Elite Sports Academy, based in Riyadh. This academy offers comprehensive training programs across various sports, not limited to football. By focusing on individual skill development and tactical awareness, Elite Sports Academy provides young athletes with a well-rounded approach to sports education. The academy emphasizes the importance of structured environments and high-quality coaching, significantly contributing to Saudi Arabia's youth sports landscape and promoting physical activity and teamwork across multiple disciplines.

These academies are just a few examples of how Saudi Arabia is investing in sports infrastructure to create pathways for young athletes. Through a combination of local initiatives, government support, and international partnerships, the Kingdom is actively working to foster talent while promoting social values aligned with its national development objectives.

While Qatar and Saudi Arabia have made significant strides in youth development through initiatives like Aspire Academy and MAHD Sports Academy, Oman is also making efforts to foster young talent in sports, albeit at a more foundational stage. Youth academies in Oman are emerging as key players in promoting sports education, focusing on nurturing local talent and instilling values of discipline and teamwork.

In line with these efforts, the Oman Olympic Committee launched the Oman Olympic Academy in 2018 as part of its "Sports for Development" program. The academy was established with four key objectives: to develop and qualify human competencies within sports organizations, provide a platform for scientific research, adopt constructive initiatives and ideas to serve the sports community, and support Olympic education programs in schools, universities, and colleges.

These initiatives aim to create a more structured and sustainable sports environment, contributing to both athletic excellence and broader educational goals.



Oman is also seeing the rise of private academies, some born from international collaborations, such as the Juventus Academy Oman, which operates in association with Mosaic Sports LLC. Alongside these international partnerships, homegrown initiatives like the Alpha Sports Academy are also contributing to the development of youth talent, further strengthening the country's sports landscape by offering structured programs that foster physical and mental growth.

These academies, both international and local, play an essential role in shaping the future of Omani sports by providing young athletes with the tools and opportunities to excel. As Oman continues to invest in its sports infrastructure, these initiatives will be crucial in driving the nation's long-term Vision 2040 for youth development and athletic achievement.





Conclusion and Recommendations

This report explored the growing prominence of the region as a global destination for major sporting events, with a focus on key initiatives in **Qatar, Saudi Arabia (KSA), and Oman**. These nations are making significant strides in hosting landmark events that capture global attention and align with their ambitious national visions. Qatar's hosting of the 2022 FIFA World Cup was a defining moment, demonstrating the country's ability to deliver world-class events. Similarly, Saudi Arabia, through Vision 2030 and the Saudi Sports Investment Plan, is advancing its bid for the 2034 World Cup, reinforcing the Kingdom's long-term commitment to becoming a global sports leader. Meanwhile, Oman is working to create a unified sports identity through projects like Oman Sports City, aligning with Oman Vision 2040 and positioning sports as a key element of national unity and regional cooperation.

Football remains a central passion across the region, with leagues like the Saudi Pro League and Qatar Stars League playing pivotal roles in attracting investment and enhancing the Middle East's profile. The legacy of Qatar's World Cup and Saudi Arabia's 2034 aspirations underscore football's significance in elevating regional influence and prestige. Notably, Saudi Arabia's strategy to privatize its football clubs offers a unique opportunity to connect international investors with local communities and ecosystems.

Esports is emerging as a critical driver of the region's sports transformation. Rapidly gaining popularity, it engages younger audiences and aligns with broader digitalization goals, positioning the Middle East as a significant player in the future of sports entertainment.

Beyond hosting major events, the focus on creating long-term social legacies remains a priority. Programs like the Saudi Sports for All Federation and Generation Amazing highlight a commitment to leveraging sports for social impact. By fostering youth engagement and community participation, these initiatives ensure that the benefits of sports investments extend beyond stadiums to society at large.

Having examined many of the key projects and regional strategies that define sports in the Middle East, the report offers recommendations from multiple perspectives and stakeholder approaches.

Middle Eastern Governments:

Governments in the region are using sports as a platform for international diplomacy, visibility, and innovation. However, it is essential to cultivate a sporting culture within communities, encouraging participation from young people, families, and fans who fill stadiums and arenas.

Major Event Rights Holders:

Federations, leagues, and clubs view the Middle East as a vital source of revenue, with many events already taking place in Qatar and Saudi Arabia. However, developing domestic competitions with international appeal is crucial for sustainability. Attracting star players alone is insufficient; a strategic focus on creating intra-regional competitions, like the FIFA Arab Cup, can inspire similar club-level tournaments across various sports.





Suppliers:

Suppliers see Middle Eastern sports events as lucrative opportunities, ranging from constructing facilities to developing new sports IPs. However, navigating cross-cultural differences requires transparency, local partnerships, and relationship-building with both locals and expatriates.

International Investors:

Privatization projects, such as those in the Saudi Pro League, invite international investors for expertise and financial contributions. These projects emphasize creating an open ecosystem for mutual investment flows. For companies aiming to expand in the Middle East, investing in sports can serve as a strategic gateway to align with broader economic goals.

Sports Fans:

The Middle East offers unique cultural experiences alongside cutting-edge infrastructure. Its world-class airports and airlines make travel convenient, yet there is potential to increase fan-tourism. Tourism agencies like Visit Qatar and Visit Saudi aim to attract visitors beyond events, enhancing cultural exchange.

International Media and Opinion Leaders:

Media and opinion leaders must recognize sports as a catalyst for change in the Arab world. While constructive criticism is essential, it should be diplomatic, acknowledging the transformative potential of these initiatives.

Conclusion:

To successfully engage with Middle Eastern sports projects, stakeholders must gain a deep understanding of the region's culture. This requires genuine interest, on-the-ground presence, and meaningful collaboration. The Middle East's investment in sports is not just a response to global trends but a vital component of its broader vision for economic growth, social cohesion, and international influence. As the region continues to position itself at the forefront of global sports, research and education initiatives, such as those by MESIF and SDA Bocconi, will remain crucial in driving these transformative developments, shaping the future of sports on the world.





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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.





MESIF - The Sports Investment Roadshow 2025



EVENT: MESIF - RIYADH LOCATION: MISA HQ, RIYADH FORMAT: PANEL SESSIONS & NETWORKING DELEGATES: 100 DATE: 7TH JANUARY 2025

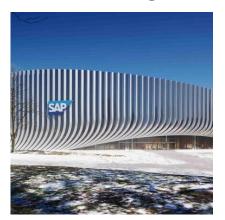


وزارة الاستثمار Ministry of Investment



EVENT: MESIF - LONDON FLAGSHIP EVENT LOCATION: TOTTENHAM HOTSPUR STADIUM FORMAT: VIP NETWORKING, CONFERENCE & EXPO DELEGATES: 350-400 DATE: 7TH & 8TH MAY 2025





EVENT: MESIF - MUNICH VIP WORKSHOP LOCATION: SAP GARDEN, INDOOR ARENA FORMAT: VIP WORKSHOP DELEGATES: 100-150 DATE: JUNE 2025



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