

# NATIONAL GAMING & ESPORTS

استراتيجية  
قطاع الألعاب والرياضات الإلكترونية



**BECOME**  
THE CENTER OF THE GAME

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THE CENTER OF THE GAME

# What is the National Gaming & Esports Strategy? Value Proposition

The National Gaming and Esports Strategy is a comprehensive investment to develop the entire gaming and esports value chain.

**It is driven by  
the passion of gamers**

Everyone is invited to play, in a strategy that fosters new career and business opportunities and will make Saudi Arabia the center of the game by 2030.

# What is Saudi Arabia doing through this strategy?



Inviting Everyone to play



levelling up the sector



Unlocking exciting career opportunities



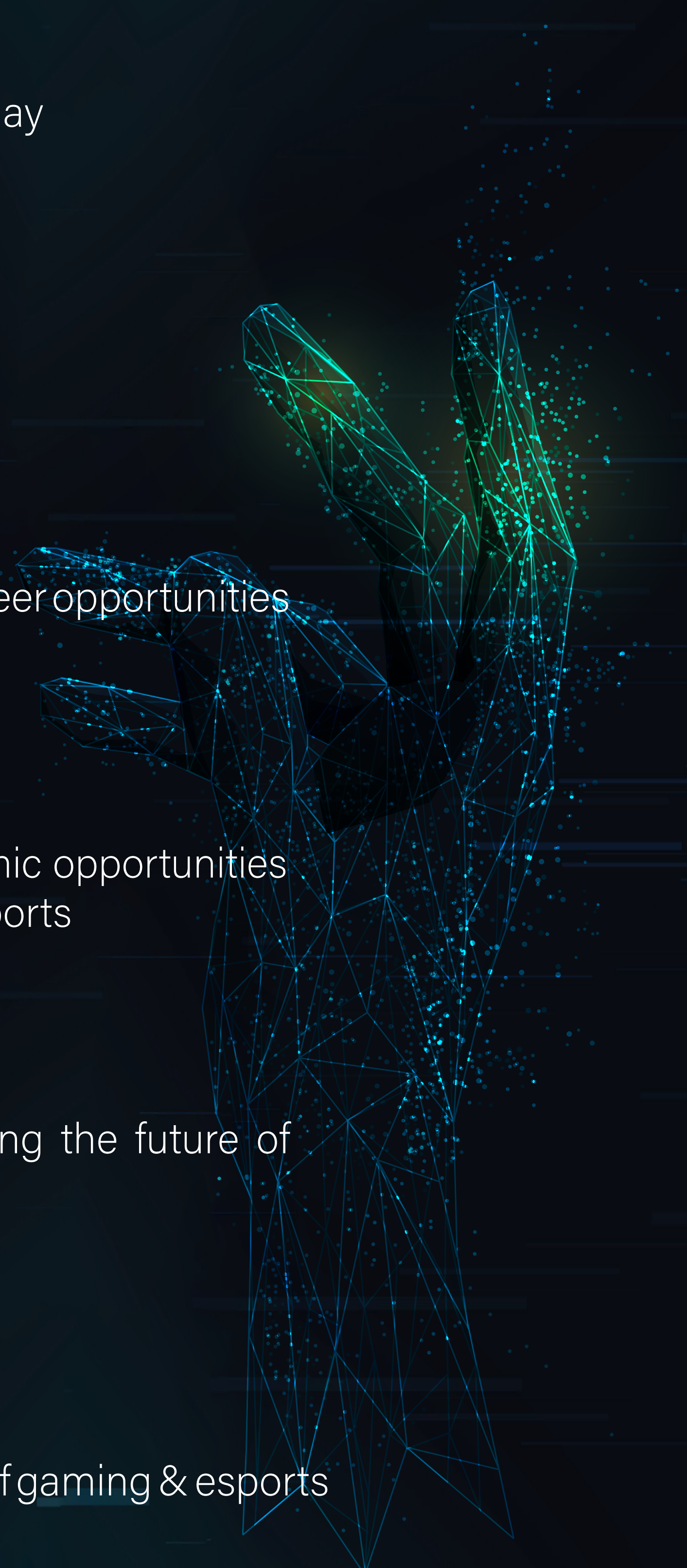
Create diverse economic opportunities  
through gaming & esports



Saudi Arabia is shaping the future of  
the sector



Become a global hub of gaming & esports



BECOME  
THE CENTER OF THE GAME

## Vision Statement

أن نصبح

# مركز اللعبة

BECOME THE CENTER OF THE GAME



# What areas of the value chain does the strategy cover?

**The strategy identifies eight**



different & complementary areas

that make up the value chain and twenty-six (26) strategic plays making up 86 initiatives that will be executed by 20 different entities

## value chain elements

# 4

Initiatives



### Tech development & hardware

#### Aspirations

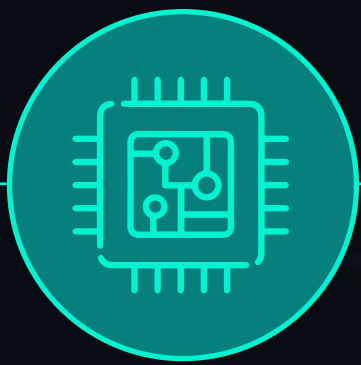
Achieve technological leapfrog by becoming the world testbed for Game-tech innovation

#### Strategic Plays- (How will we achieve the ambitions)

- Play a role in the Cloud / edge Gaming sector
- Lead the immersive sport-related & immersive gaming market
- Become a lab & testbed for forward-looking gaming-related innovation

# 13

Initiatives



### Game production

#### Aspirations

Create an Eden for game developers & produce legendary titles

#### Strategic Plays- (How will we achieve the ambitions) -

- Attract, localize and develop global AAA developers and publishing powerhouses
- Develop the games production start-up ecosystem for (mobile) indie games and local IP
- Foster production of games promoting Saudi and Arabic culture

# 14

Initiatives



### Esports

#### Aspirations

We aim to make KSA the pinnacle of esports and host legendary tournaments that unlock the true potential of esports

#### Strategic Plays- (How will we achieve the ambitions)

- Become the World hub for esports events, organizing the biggest events in the world
- Create, facilitate and export esports event IP
- Develop grassroots ecosystem to pave the way for local talents and enable them to become Legends
- Take a bigger role in the international esports federations to ensure KSA seat at the table

## value chain elements

# 10

Initiatives



### Consumption-driven adjacencies

#### Aspirations

Develop an innovative and attractive way of consuming games, infused with regional themes, aesthetics, and stories for Saudis and global visitors

#### Strategic Plays- (How will we achieve the ambitions)

- Bring global and local gaming community together through venues and events
- Become the streaming center of the Arab-speaking world
- Acquire, develop and Infuse gaming IP into all aspects of pop culture
- Create a blended reality experience for Saudis & international visitors

# 6

Initiatives



### Funding and financial support

#### Aspirations

Best-in-class enablers in funding and financial support

#### Strategic Plays- (How will we achieve the ambitions)

- Offer public incentives to attract global companies and build-up local entities
- Provide financial support for Gaming & esports ecosystem

# 10

Initiatives



### Technical & physical infrastructure

#### Aspirations

Best-in-class enablers in technical & physical infrastructure

#### Strategic Plays- (How will we achieve the ambitions)

- Provide ultra-low latency, connectivity and regional servers
- Build innovative esports arenas, cafes and adjacent gaming-related venues
- Provide production facilities for gaming & esports companies

# 16

Initiatives



## Regulation and Governance

### Aspirations

Best-in-class enablers in regulation and Governance

### Strategic Plays- (How will we achieve the ambitions)

- Offer an enabling regulatory framework for Gaming & esports
- Facilitate localization of Gaming & esports stakeholders and talents migration
- Ensure clear ownership & coordination for the different public players

# 13

Initiatives



## Education and Talent attractio

### Aspirations

Best-in-class enablers in education and Talent attraction

### Strategic Plays- (How will we achieve the ambitions)

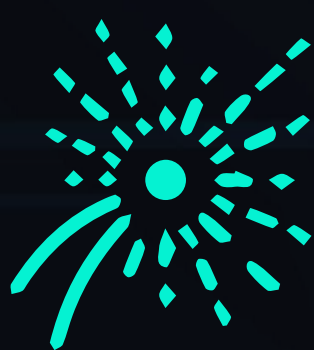
- Provide practical gaming-related academic curriculums
- Partner with global gaming institutes
- Support esports academies
- Build up research centers of excellence



The strategy effectiveness overall will be judged by

**4**

performance indicators (KPIs) with a goal for each KPI  
These are :



Become #1 event host by organizing and hosting the most viewed esports events in the world



**250**

gaming companies in Saudi Arabia

4

1

## Goals & KPIs

3

2



Be in the Top

**3**

for # of Esports athletes per capita



**+30**

games by KSA based studios reach Top 300 during the next 10 years starting 2021

## Facts & Figures

1

The sector will unlock economic contribution of more than 50 Bn SAR by 2030

2

We are investing in our citizens and gamers with the aim to create over 39,000 jobs in development, publishing, infrastructure and other professions by 2030

3

23.5m+ gaming enthusiasts (67% of the population)

4

42% female participation in gaming

5

18% female participation in esports

6

90% internet penetration in Saudi Arabia

7

The average gamer in Saudi provides above average ARPU

8

5 World champions hailing for Saudi Arabia

## Facts & Figures

9

Currently, the total prize pool of international and local tournaments exceeds SAR 100m

10

33+ areas of investment within the gaming and esports sector

11

Creation of SAVVY ( 129 Bn SAR ) & merging ESL& FACEIT into the largest tournament organizer in esports history

12

PIF acquisition of \$1bn stake in Embracer gaming group

13

SEF has leading roles in international federations to support the growth and regulation of esports (IeSF, GEF, AESF, AEF)

14

Gamers8 welcoming 500 international elite athletes coming to Saudi Arabia

15

MCIT scaling up local incubators/accelerators and fostering development of indie games

16

We are home to the regional servers for Activision Blizzard through their partnership with stc

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