

# Sports industry outlook

Insights and opportunities  
for the Middle East





# Foreword

The Middle East's sports industry is in an exciting, transformative phase, reshaping the regional and global sporting landscape. From Qatar's successful hosting of the Men's 2022 FIFA World Cup to Saudi Arabia's selection as host of the 2034 tournament, the region continues to make bold strides in establishing itself as a premier destination for major sporting events.

This outlook report explores how the Middle East's sports sector is evolving across seven key pillars, from government initiatives and private investment to emerging opportunities in women's sports and technological innovation. Our analysis reveals a sports ecosystem that is rapidly maturing, driven by strategic national visions, substantial infrastructure development and innovative approaches to fan engagement.

The region's sports market is projected to grow at an impressive rate of 8.7% over the next three to five years, outpacing the global average of 7.3%.<sup>1</sup> This growth will be fuelled by significant investments in premium sports properties and infrastructure, alongside ambitious initiatives to increase grassroots participation and develop local talent.

Looking ahead, the region's sports sector faces both opportunities and challenges as it balances commercial growth with sustainable development. Through this report, we aim to provide stakeholders with strategic insights into the trends, challenges and opportunities shaping the future of sports in the region.



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1

State of the  
sports industry



## Market overview and strategic development

As part of their national agenda to achieve economic diversification, countries in the Middle East have increased their investments in the sports sector that has led to a rapidly maturing sports ecosystem. There is a growing emphasis on diversifying sporting offerings, embedding sustainable development practices and leveraging technology to enhance global competitiveness. The sector is already a US \$600 billion industry in the Middle East and it is set to grow by 8.7 % by 2026.<sup>2</sup>

Saudi Arabia's Vision 2030, for example, reflects the region's ambition to position sports as a key driver of economic and social growth, with expected growth from \$8 billion to \$22.4 billion by 2030.<sup>3</sup> This trajectory is supported by comprehensive development across traditional and emerging sports domains, supported by grassroots and elite-level programmes.

## Infrastructure and technology

The region's commitment to sports development is evident in its substantial infrastructure investments. **Saudi Arabia** is preparing for the 2034 FIFA World Cup with plans to develop a total of 15 environmentally friendly stadiums. Of these, 11 will be newly built and 4 renovated across major cities including Riyadh, Jeddah, and other key locations, as part of its wider development initiatives.<sup>4</sup> **Qatar** continues to leverage its post-World Cup momentum through strategically bidding for, and hosting, major sporting events such as the FIFA Arab Cup in 2025, 2029, 2033, FIFA U17 World Cup in 2025 through 2029 and the Web Summit for 2024 through 2028.<sup>5</sup> The **UAE** is creating the region's first indoor velodrome and the world's largest wave pool.<sup>6</sup>

These projects prioritise renewable energy, water conservation and smart technologies, setting new standards for sustainable sports development and underpinning the region's capacity to host world-class events and attract international audiences.

The region increasingly embraces digital innovation in sports, with investments in smart stadium technology, fan engagement platforms, and Esports infrastructure. Saudi Arabia's National Gaming and Esports Sector Strategy aims to develop the entire gaming and Esports value chain, create 39,000 jobs, and contribute US\$13.3 billion to the Kingdom's GDP by 2030.<sup>7</sup>

The integration of digital technologies extends beyond Esports, enhancing traditional sports experiences from match-day activities to year-round fan engagement. This reflects the region's intent to leverage technology as a cornerstone of its sports development strategy.



## Global sporting hub

Formula 1's expansion in the Middle East demonstrates the region's growing prominence in global sports. The Bahrain Grand Prix has been held 20 times and the Abu Dhabi Grand Prix 15 times, with Saudi Arabia and Qatar also successfully establishing their own races. Additionally, combat sports have gained traction, with the UAE hosting over five UFC events since 2021 and Saudi Arabia hosting more than seven major boxing events. This diversification helps attract international audiences and positions the region as a year-round sporting destination.

## PwC perspective

These foundational efforts, from infrastructure development to strategic diversification, not only position the Middle East as a global sports hub but also create fertile ground for innovative technologies and transformative investments. This sets the stage for the critical role governments play in shaping this growth.

**The sports industry in the Middle East is transforming, boosting economic growth through strategic investments in infrastructure, commercial optimisation and capacity-building. The region is becoming a leading sports powerhouse by focusing on participation and hosting major global events.**

**Mushtaq Al Waeli,**  
Senior Executive Advisor, PwC Middle East





## Timeline of major sport events held in the Middle east

2018

**Formula E** 

2018-Ongoing

**Formula 1 Grand Prix\*** 

2018-Ongoing

2020

**FIFA Club World Cup** 
**Dakar Rally 2020** 

2022

**LIV Golf Invitational Series 2022** 
**FIFA World Cup 2022** 

2024

**World Aquatics Championships 2024** 
**Esports World Cup** 

2024-Ongoing

2025

**WTA Finals 2025** 
**ISG (Islamic Solidarity Games) in 2025** 

2034

**Asian Games 2034** 
**FIFA World Cup 2034** 

2030

**Asian Games 2030** 

2029

**Asian Winter Games 2029** 

2027

**AFC Asian Cup 2027** 
**FIBA World Cup 2027** 
**Olympic Esports Games 2027** 

2026

**AIMAG (Asian Indoor and Martial Arts Games) in 2026** 

\* Bahrain GP running since 2004





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Government in sports



## Strategic vision and policy framework

PwC's Global Sports Survey 2024 reveals that only 25 % of respondents globally believe their government's sports development strategy is well thought-out. However, the Middle East stands apart with a comprehensive approach that sets new standards for public sector involvement in sports. National transformation programmes, such as Saudi Arabia's Vision 2030 and the UAE's Vision 2031, and Qatar's National Vision 2030, position sport as central to economic diversification and social development. Other governments in the region are also taking an increasingly sophisticated approach to sports development, aligning initiatives with broader national transformation strategies, reinforcing the strategic importance of the sector.

## Public health, infrastructure and social development

Across the region, governments are turning to sports as a way to improve public health and social cohesion. In Saudi Arabia, efforts include expanding sports education, with projects such as a new Olympic village in Riyadh and the establishment of the Mahd Sports Academy.<sup>8</sup> These initiatives extend beyond elite sports development to promote grassroots participation and community well-being, with a particular focus on youth engagement and health outcomes.

## The scale of government-led infrastructure investment is transforming the regional sports landscape.

Qatar's ongoing post-World Cup facility development.

15 environmentally friendly stadiums across Saudi Arabia.

Comprehensive training and development centres.



The UAE's pioneering sports facilities, including the region's first indoor velodrome.

Dubai's 10-year sports strategy, aligned with the D33 agenda, aims to host 3,000 events and 1,000 training camps.

Oman's Musannah Integrated Sports City project, designed to host regional and international sporting events.

These investments highlight a commitment to sustainability and smart technology integration, setting new benchmarks for sports infrastructure development.



## Public-private partnerships and event strategy

As the sports sector matures, governments increasingly focus on creating frameworks that encourage private sector participation. For example, Saudi Arabia's National Privatization Center (NPC) is accelerating the privatisation of 14 football clubs.<sup>9</sup> Meanwhile, similar regional initiatives aim to enhance governance, improve financial reporting, and reduce reliance on government funding. Government support has been crucial in securing and delivering major international events. Qatar's successful hosting of the 2022 FIFA World Cup and Saudi Arabia's selection for the 2034 tournament demonstrates the region's capability. This success is built on strong government commitment to infrastructure development, security, and comprehensive event delivery frameworks.

## Future role evolution

In the region, the relationship between government and sports is evolving, with indicators suggesting a gradual shift towards a more regulatory and strategic role as private sector investment increases. However, governments remain committed to maintaining their enabling role in sports development while fostering sustainable growth through policy frameworks and standards.

## PwC perspective

As government initiatives lay the groundwork for public health, infrastructure, and event hosting, they also pave the way for private sector collaboration and significant investment opportunities, which will be explored next.

**Governments play a pivotal role in sports development, aligning with national strategies to drive social development, youth engagement, and health outcomes. When government backs such initiatives, private investment is more likely to follow which will amplify and expand potential.**

**Fauaz Labadi,**

Partner, Global Relationship Partner for Sport in KSA,  
PwC Middle East



An abstract geometric design on a black background. It features several thick yellow lines: a curved line at the top left, a diagonal line crossing the center, and two parallel diagonal lines in the lower right. Thin white lines intersect these yellow lines. In the bottom left, there are concentric circles: a small dark grey circle, a medium grey circle, and a large thin white circle.

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Sports investment



## Strategic investment and growth

The region's position in global sports investment has strengthened significantly. Sovereign wealth funds, including Middle Eastern funds, now lead 24 % of global sports investments.<sup>10</sup> This reflects the region's strategic approach to diversifying economies while establishing itself as a global sports hub. Premium sports assets remain particularly attractive, with 68 % of global survey respondents expecting this focus to continue.

Major investments are reshaping the sporting landscape. The Public Investment Fund's (PIF) acquisition of a 75 % stake in four top Saudi Pro League clubs – Al Hilal, Al Nassr, Al Ittihad and Al Ahli<sup>11</sup>. These investments extend beyond ownership, including significant spending on player recruitment, infrastructure, and commercial development.

The Saudi sports market is undergoing a transformative phase, with ambitious growth plans set for 2030.<sup>12</sup> Achieving these goals will require a significant increase in private sector participation, emphasising the need for substantial new investments and commercial innovation. The focus on private sector engagement represents a fundamental shift in the region's sports investment strategy.

Notable strategic partnerships include SURJ Investments' recent major investment into sports streaming platform DAZN, also the partnership with Professional Fighters League (PFL) to launch PFL MENA, demonstrating the region's ability to create new sports properties and develop an authentic broadcast platform for them.<sup>13</sup> Similarly, Qatar Sports Investments' (QSI) \$200 million investment in Monumental Sports, which owns clubs and arenas in the US, reflects a growing focus on international portfolio.<sup>14</sup>

## Commercial innovation

The region is pioneering new commercial models, particularly in emerging sports sectors. Qatar's investments in Formula 1, the UAE's development of combat sports, and Saudi Arabia's Esports initiatives demonstrate the breadth of commercial opportunities being pursued.



## PwC perspective

These investments create a robust financial and operational foundation for the sports industry, enabling innovative technologies like GenAI to further revolutionise sports management, fan engagement and performance analytics.

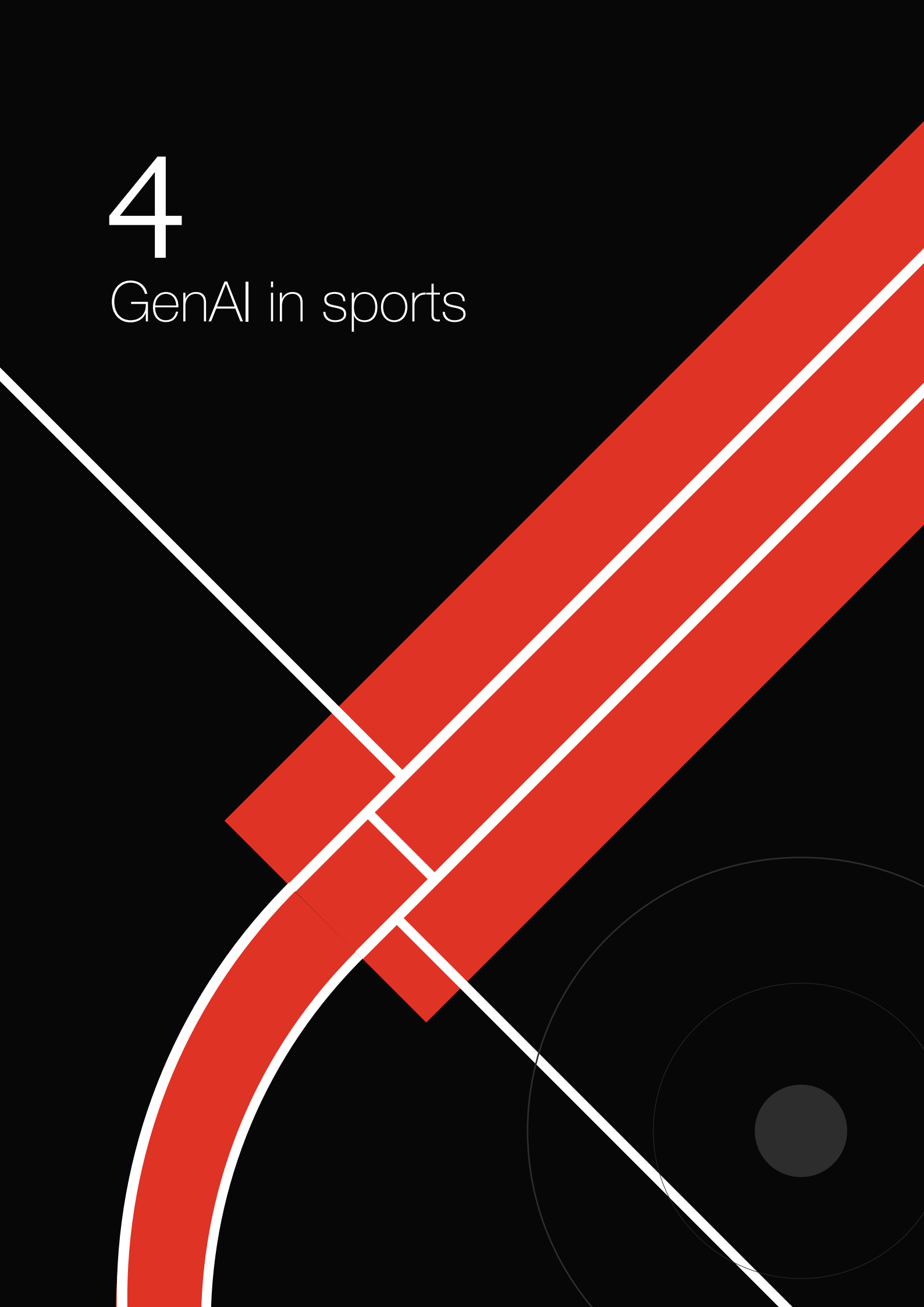
**Strategic sports investments and privatisation across the Middle East are strengthening governance, attracting investment and positioning the region as a sustainable, globally competitive sports hub.**

**Imad Matar,**  
Partner, Transaction Services Leader,  
PwC Middle East



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GenAI in sports





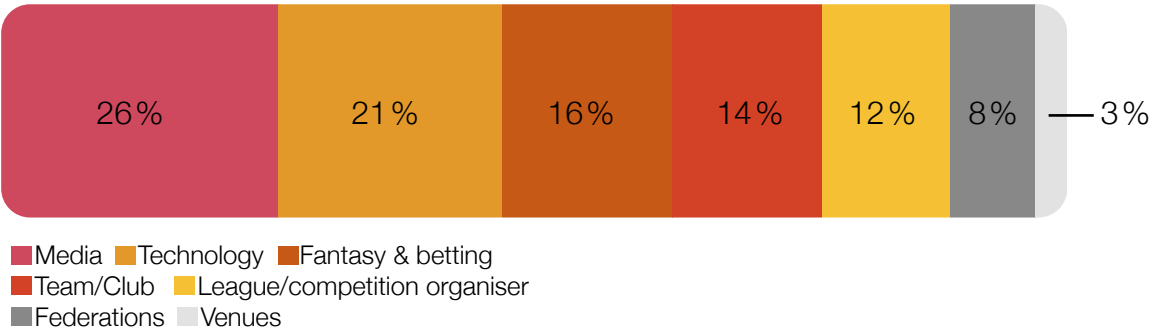


Adoption trends and applications

The Middle East's sports sector is approaching GenAI with measured optimism, though adoption patterns vary significantly across different segments of the industry. Findings from PwC's Global Sports Survey 2024 reveal a notable divide worldwide: while 70 % of technology companies are actively developing GenAI strategies, traditional sports organisations are taking a more cautious approach.<sup>15</sup> This disparity highlights both the transformative potential and the implementation challenges of GenAI in sports.

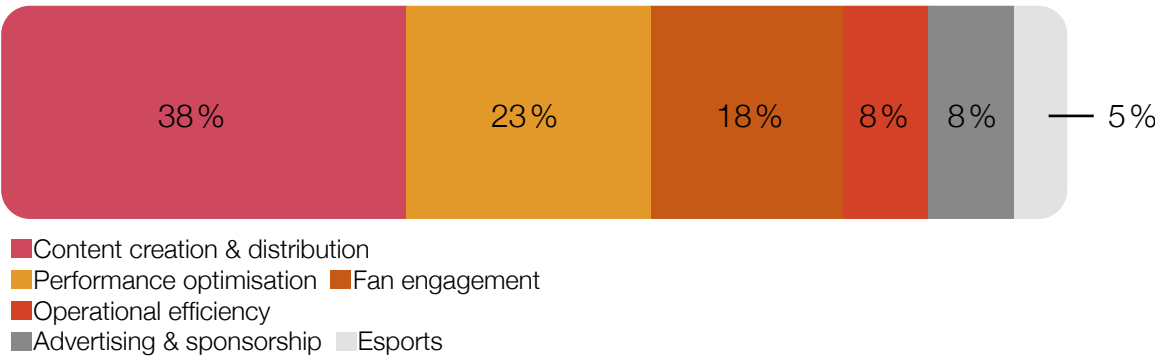
Organisations which stand to benefit most from GenAI

Percentage of respondents



Most important use case for GenAI in Sports

Percentage of respondents



Content creation and distribution emerge as the leading applications for GenAI, with 38 % of PwC's Global Sports Survey 2024 respondents identifying these as key areas. Sports media and technology companies are leveraging GenAI to create content more efficiently, unlock new commercial opportunities, and develop innovative fan engagement models. These applications range from automated highlight reels to personalised content delivery across multiple platforms, reshaping how fans interact with sports.

The integration of GenAI into performance analytics represents a significant opportunity for sports organisations. By combining diverse datasets - from medical history and training loads to match performance and nutrition data - organisations can generate richer insights for athlete recruitment, development and high-performance programmes. This data-driven approach will be particularly valuable in the region's emerging sports academies and training facilities.



## Implementation challenges

Despite the potential benefits, significant barriers to adoption persist. The global survey data indicates that 59 % of sports organisations lack a GenAI strategy, while 16 % do not currently see it as relevant to their business. The primary challenges include:

**Shifting operations away from established working methods**

**Securing sufficient funding for GenAI initiatives**

**Managing organisational culture change**

**Accessing required technical capabilities**

**Aligning stakeholders on GenAI opportunities**

The Middle East's strong technology infrastructure and digital-first approach to sports development create unique opportunities for GenAI adoption. The region's investment in smart venues, digital fan experiences and data analytics capabilities all provide a strong foundation for GenAI integration. This is particularly evident in Esports and gaming, where AI-driven technologies enhance user experiences and operational efficiency.

5 %

13 %

14 %

14 %

19 %

## Future development framework

Success in GenAI adoption requires a balanced approach combining technological innovation with practical implementation. Organisations are increasingly focusing on creating value realisation frameworks that align use cases with appropriate tools and solutions while maintaining responsible AI practices. This structured approach helps ensure sustainable adoption and measurable impact across the sports sector.

## PwC perspective

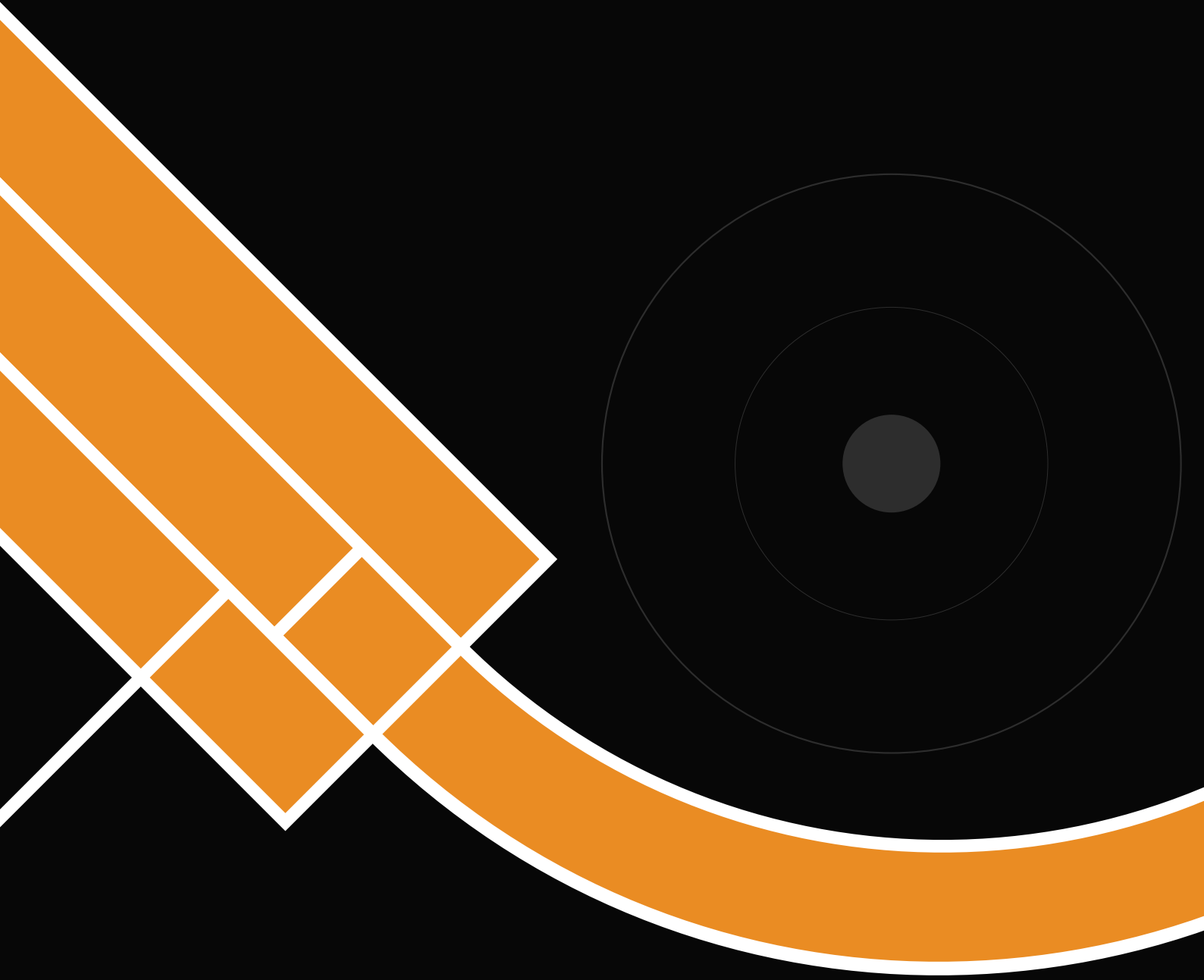
As the region adopts cutting-edge technologies, these advancements resonate with a digitally savvy sports consumer base, shaping a new era of engagement and interaction.

**In the Middle East, Gen AI isn't just enhancing sports; it's redefining fan engagement, optimising athlete performance and showcasing how technology can amplify national visions like Saudi Vision 2030 and Qatar Digital Agenda 2030.**

**Faisal Al-Urfali,**

Senior Manager, Sports Consulting, PwC Middle East





# 5 The sports consumer



## A young demographic

With more than 50 % of the population of Gulf Cooperation Council (GCC) countries aged under 25, today's youth are actively reshaping the region's sports landscape. While football maintains its position as the dominant sport, young consumers are increasingly exploring a range of interests, including padel, Esports, golf, basketball, and MMA. In Saudi Arabia, the transformation is particularly noteworthy, with nearly 1,000 Esports players having turned gaming into full-time careers<sup>16</sup>, positioning the Kingdom as a global gaming hub.

## Digital innovation fuels fan engagement

The Middle Eastern sports consumer is highly digitally engaged, with over-the-top (OTT) services like Shahid VIP and TOD revolutionising how fans consume sports content. Innovations from companies like the Qatar-based SponixTech (immersive replays) and KSA-based Fanera (fan experience platforms) underscore the region's leadership in digital sports transformation.

Social media is a key driver of fan engagement, with platforms like TikTok, Instagram, and X (formerly Twitter) playing a central role. Penetration rates in the Middle East highlight the widespread use of social platforms, with the

UAE at 115 %<sup>17</sup>, Saudi Arabia at 96.2 %<sup>18</sup> and Qatar at 96.8 %<sup>19</sup>. These platforms have become key channels for engaging audiences. TikTok, in particular, has become a focal point for football enthusiasts, as demonstrated by the Saudi Pro League's (SPL) collaboration with the platform. This partnership includes the launch of a dedicated SPL Exclusive Hub<sup>20</sup>, providing fans with a central space for exclusive content such as behind-the-scenes footage, player interviews, and match highlights. The initiative also involves collaborations with top TikTok creators, offering unique perspectives and interactive storytelling that bring fans closer to their favorite teams and players.

With over 2.5 million followers and 44.2 million likes, the Saudi Pro League's TikTok presence gives the example of how social media can enhance fan interaction and expand the league's global reach.

## Keen on fitness and wellness trends

The fitness and wellness culture in the GCC is experiencing significant growth, with increased participation in both recreational and professional sports. As of December 2024, 58.5 % of individuals aged 18 and above in Saudi Arabia engage in at least 150 minutes of physical activity per week.<sup>21</sup> This is exemplified by the 2024 Riyadh Marathon doubling of participants to 20,000.<sup>22</sup> Similarly, the UAE's Sports Sector Strategy 2032 reflects a strong commitment to enhancing both community and competitive sports. It aims to boost overall sports participation rates by 65 % and train 20 Olympic-level athletes.<sup>23</sup>



## Interested in sports events and tourism

Live sports attendance in the GCC has surged, driven by its growing reputation as a host for major international tournaments and local leagues, influx of international stars and enhanced fan experiences. For instance, Cristiano Ronaldo's arrival at Al Nassr football club has boosted average home-game stadium attendance from 8,121 in 2021/2022 season to 17,638 in the 2022/2023 season.<sup>24</sup> Investments in digital ticketing and improved fan amenities resulted in enhanced matchday experiences, supporting the growth in live attendance.

Sports tourism remains a vital growth driver. Qatar's Men's FIFA World Cup 2022 attracted over 1 million visitors, generating an estimated \$2.3 to \$4.1 billion in tourism spending and broadcasting revenue, contributing between \$1.6 and \$2.4 billion to Qatar's GDP.<sup>25</sup> This success has created a positive impact boosting the tourism and hospitality sectors across the region by up to 30%.<sup>26</sup>

## PwC perspective

With a young and tech-savvy demographic driving engagement, the region's consumer base is reshaping the sports landscape. This shift is fostering greater inclusivity and diversification, while creating unprecedented momentum in women's sports, as detailed in the next section.

**The sports industry in the GCC should further cater for family consumers, to serve a diverse fanbase, leverage the commercial opportunities and support the growth of sports tourism.**

**Guy Parsonage,**

Partner, Chief Experience Officer, PwC Middle East

**Sport businesses should aim to maximise visits by creating a rich events ecosystem with diverse spending opportunities - doing so will allow them to build direct, long lasting communication channels with their consumers, enabling them to tailor their offering towards optimal experiences and commercial offerings for their different demographic categories.**

**Nicolas Mayer,**

Partner, Middle East Tourism, Sports & Entertainment Leader, PwC Middle East



An abstract geometric design on a black background. It features several vertical lines of varying heights and colors (yellow, grey, and red). A large orange circle is positioned at the bottom left, and a red circle is at the top right. A grey line forms a rectangular frame at the bottom, with a semi-circle on top and a small circle inside. The text '6 Women's sports' is written in white, with the number '6' being significantly larger than the words.

# 6 Women's sports



## Growth and investment

Women's sports in the Middle East are witnessing unprecedented growth, with 85 % of sports executives forecasting double-digit revenue growth over the next three to five years.<sup>27</sup> This optimistic outlook reflects fundamental shifts in both institutional support and societal attitudes. The sector's development is particularly notable in football, where professional leagues and grassroots programmes are expanding rapidly across the region, creating new commercial opportunities and pathways for female athletes.

Infrastructure development has been crucial to this growth, with more than 500 women's sports centres now established across Saudi Arabia alone. The integration of sports into girls' school curricula represents a fundamental shift, with over 700,000 girls now participating in school football leagues.<sup>28</sup> Since 2021, the Kingdom has seen remarkable growth metrics: professional female players have increased by 195 %, the number of clubs has grown by 56 %, and women's national teams have expanded by 300 %.<sup>29</sup>

Sports teams in Dubai are also witnessing a growing interest from young girls eager to participate in rugby and football, a trend attributed to the influence of inspirational female athletes. Coaches have also reported increased engagement from teenage girls, driven by improved access to sports complexes, skilled coaches, dedicated girls-only teams and the expansion of competitive leagues and clubs across the emirate. The ED7 event has seen participation in netball and rugby grow by 23 % and 21 % respectively, since 2022.<sup>30</sup>

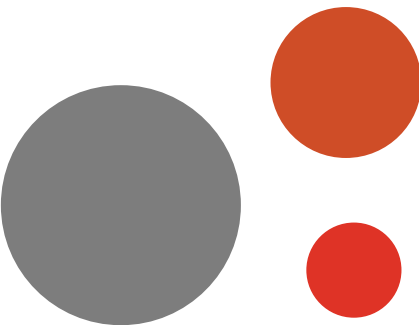
## Professional development and achievements

Since its inception in 2020, the Saudi Women's Football League has experienced significant growth.

Initially, the league featured over **600 players** participating in a **9-a-side** community competition.

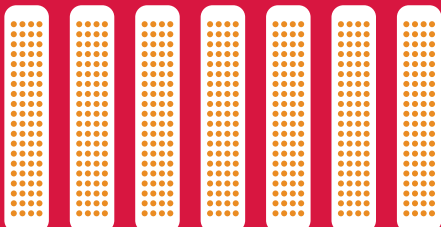
As of the **2025–2024 season**, the league has evolved into the Saudi Women's Premier League, comprising **10 teams** with more than **200 registered players**, including over 50 international players from 20 countries.<sup>31</sup>

Additionally, the Saudi Arabian Football Federation's (SAFF) inclusion of **three female referees** - out of the 27 FIFA-certified Saudi officials for 2024<sup>32</sup> - represents a milestone for professional development.



### In the UAE,

women's sports achievements have been equally impressive, with female athletes securing **335 medals across 70 championships during the 23-2022 season**.<sup>33</sup>





Qatar has also made notable progress in women's football and volleyball. The Qatar Women's Football League, established in 2012, features six teams and remains the country's main women's football competition. In volleyball, Qatar Foundation (QF) has introduced initiatives like the "Creating Pathways Program", focusing on empowering women and girls through sports.<sup>34</sup> QF has also collaborated with the International Volleyball Federation (FIVB) to host events such as the West Asian Volleyball Association (WAVA) U20 Women's Beach Volleyball Championship.<sup>35</sup>

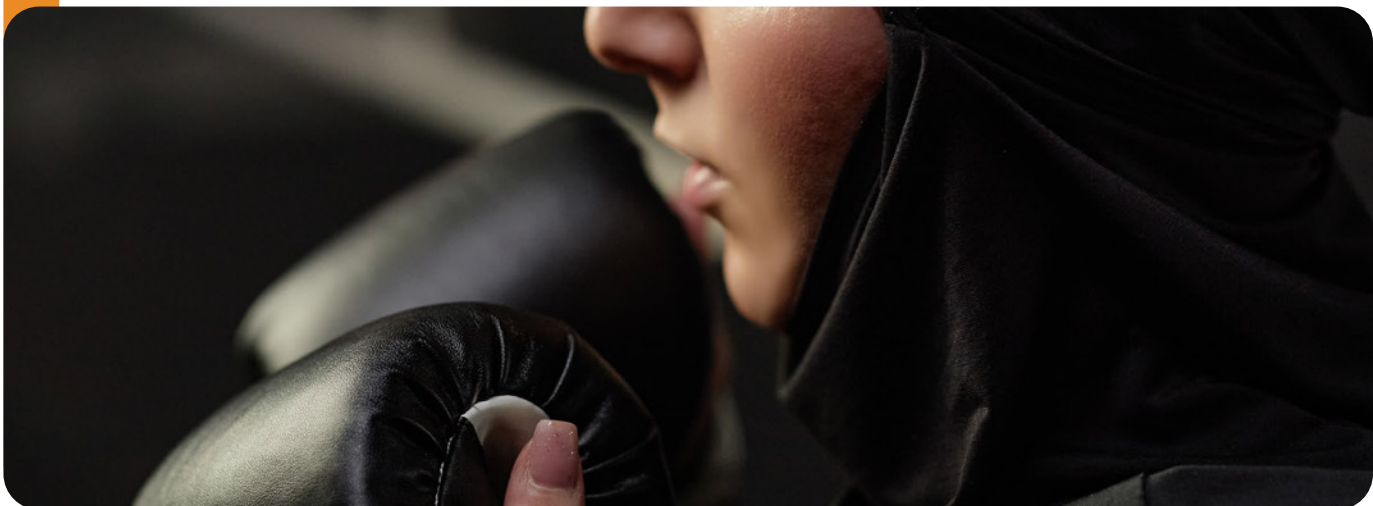
Furthermore, the Arab Women Sports Tournament (AWST) 2024 in Sharjah – with its powerful slogan "Our Courts, Her Story" – exemplifies the region's commitment to advancing women's sports. The tournament has evolved from a GCC-focused event to become the largest women's sporting event in the Arab world, providing crucial competitive opportunities and visibility for female athletes across multiple disciplines including basketball, archery and athletics. Similarly, Qatar Foundation's initiatives, including transforming Education City Stadium into a women-focused sports venue, highlight ongoing efforts to foster inclusivity.

### **Media coverage and visibility**

Despite women making up approximately 40 % of all sports participants, only 15 % of media coverage is dedicated to women's sports. While this marks an improvement from 4 % in 2018,<sup>36</sup> driven by the growth of streaming services and social media platforms, further progress is needed. There should be a focus on ensuring consistent and holistic coverage, encompassing not just games but also highlight reels and supplementary content to build sustained audience engagement.

### **Future opportunities**

The potential for women's sports in the Middle East extends beyond participation metrics. There are significant opportunities in areas such as sponsorship, media rights, and fan engagement. The women's sports market is increasingly seen as catalytic, capable of driving progress across other sectors while reshaping perceptions of women's capabilities and leadership potential.







## PwC perspective

This growth in women's sports not only demonstrates the region's progress in inclusivity but also contributes to a more diversified and dynamic sporting landscape, which is critical as the Middle East looks ahead to hosting transformative global events.

**Empowering women is essential in business, education, and sport. Advancing women's participation in sport breaks down barriers, drives progress in other sectors, and reshapes perceptions. It fosters equality, unlocks growth, and promotes leadership, creating an inclusive society where talent is recognised regardless of gender.**

**Mona AbouHana,**  
Partner, PwC' Chief People Officer - EMEA and Middle East



**Lower media coverage for women's sports is a global issue that is at last beginning to improve. We absolutely know there is a significant and growing audience for women's sport, but to accelerate this in the region, it's crucial that it is presented with high production values, across multiple platforms that suit viewing habits.**

**Peter Daire,**

Senior Executive Advisor, PwC Middle East

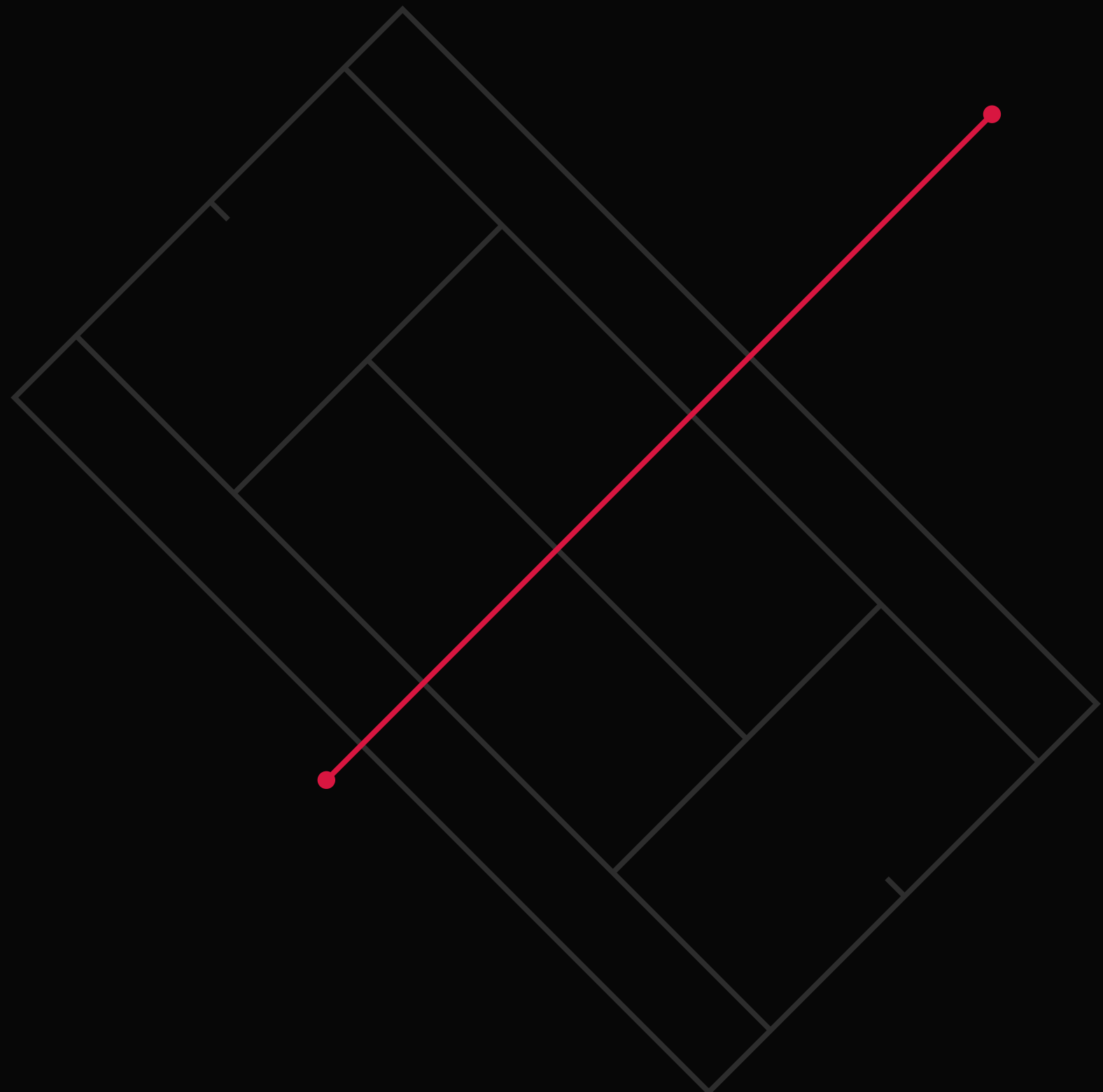
**The advancement of women's sports in the Middle East represents a transformative step that transcends regional boundaries, signaling the region's commitment to equality and empowerment. As global momentum builds toward greater equity, the Middle East is steadily translating ambition into tangible achievements on the podium.**

**Ahmed M. ElAzab,**

Director, Consulting, PwC Middle East



# 7 Future of major events in the Middle East





## Transformative journey

The Middle East's emergence as a premier destination for major sporting events marks a fundamental shift in the global sports landscape. The December 2024 confirmation of Saudi Arabia as host of the Men's 2034 FIFA World Cup represents the latest milestone in this journey. This progression from aspiration to execution demonstrates the region's growing capability and influence in global sports, reinforcing its position as a year-round destination for international sporting events.

## Capability building

The focus increasingly extends beyond event hosting to developing sustainable sports ecosystems. The region is making substantial investments in local workforce development, creating comprehensive training programmes for technical expertise and event management. These initiatives are complemented by extensive knowledge transfer partnerships with international sports organisations, ensuring that major events leave a lasting legacy of enhanced local capabilities. The development of sports administration skills and volunteer programmes further strengthens the foundation for future event delivery.

## Commercial innovation

New commercial models are emerging to support major event delivery. While 85 % of respondents to [PwC's Global Sports Survey 2024](#) expect a shift towards co-hosting models globally, Middle Eastern nations often pursue independent hosting opportunities, backed by substantial financial resources and infrastructure development. This approach allows for greater control over event delivery and maximises the economic and social benefits for host nations.







## PwC perspective

The region's vision for the future of major events is built on the combined strength of its infrastructure, government support, private investment, technological innovation, consumer engagement, and inclusivity. These interconnected pillars ensure the Middle East remains at the forefront of the global sporting stage.

### **Focus on enhancing visitor experiences through sector collaboration.**

Philippe Najjar, Partner, PwC Middle East

### **Strengthen skills transfer and capacity building to ensure sustainable growth and competitive positioning.**

Mushtaq Al Waeli, Senior Executive Advisor, PwC Middle East

### **Saudi Arabia's hosting of major events aligns with Vision 2030's goals of promoting sports, healthy living and youth engagement.**

Danny Karam, Partner, PwC Middle East



## Lasting impact

The Middle East's approach to hosting major sports events is focused on creating lasting impact across multiple dimensions. Sustainability has become a key priority, with efforts such as building carbon-neutral stadiums and adopting renewable energy in event venues. Modern stadium designs are now incorporating AI and IoT technologies to optimise resource usage in real time, cutting operational costs, energy consumption, and environmental impact.

For example, digital lighting systems adjust brightness based on crowd presence, while HVAC systems automatically scale back in less occupied areas, reducing carbon emissions. These AI-driven systems can achieve energy savings of up to 40%, making them essential in lowering the carbon footprint of sports venues.<sup>37</sup>

Qatar's Gulf Organisation for Research and Development (GORD) has been a key player in this shift, serving as the sustainability partner for the FIFA World Cup Qatar 2022<sup>38</sup> and leading the Qatar Chapter of the Association of Energy Engineers. GORD's Global Sustainability Assessment System (GSAS) has become the Gulf region's fastest-growing green building rating system, promoting ecologically responsible projects and services.

Despite these advances, challenges persist, such as managing the environmental impact of large-scale construction and addressing water conservation during events. These issues require careful planning to ensure growth doesn't come at the expense of long-term environmental goals.

Collaborations between governments, private companies, and non-profit organisations are helping tackle these challenges. Initiatives like The Middle East Sports Investment Forum (MESIF), in collaboration with the SDA Bocconi School of Management, have produced the Sports Investments in the Middle East 2024 White Report, focusing on sustainability and legacy in sports projects.<sup>39</sup>

Beyond sustainability, these events are driving social and economic development. Community programs ensure that benefits extend to local populations, while improvements in tourism infrastructure continue to draw global attention to the region.

As Professor Dino Ruta, Director of SDA Bocconi's Sport & Entertainment Knowledge Center, states, "The Middle East's investments in sports go beyond events; they aim to build identities, enhance quality of life, and foster international collaboration."<sup>40</sup>



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