



The Role of Digital in Realising Middle East Sports Ambitions

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01

The Role of Digital in Realising Middle East Sports Ambitions

A New Vision

In the 1930s, shortly before work on the first digital computer began, the discovery of vast oil reserves in the Middle East dramatically changed the fortunes of the Gulf nations. The nascent regional industry exploded into life after the 1970s oil embargo, creating a surge in revenues that funded large scale state development and infrastructure projects and fostered a new era of financial and cultural independence.

Nearly 100 years on and the picture has changed. Oil reserves are diminishing and, against a backdrop of climate change and rapid technological advancement, so too is the demand for fossil fuels. Youthful Middle Eastern populations are craving societal change and we live in a world of AI and advanced mobile technologies.

In their efforts to modernise their societies, diversify economies away from a reliance on hydrocarbons and improve the lifestyles of their citizens, Middle Eastern nations such as Saudi Arabia, UAE and Qatar have all established national development strategies – or Vision plans - which all hold sporting objectives as central strategic tenets.

Although each nation's plan is different, there are shared strategic goals that range from the development of elite sport and promoting health and wellbeing through mass participation to the investment in sporting infrastructure and hosting of major sports events.

Whether stated as a strategic aim, or implied as the vital mechanism for achieving others, the investment into digital innovation is seen as crucial to the fulfilment of each nation's sports goals. Gulf states have already begun implementing digital transformation initiatives but with timeframes stretching to 2030 and beyond, there is still a lot more to be done.

In this look at ***The Role of Digital in Realising Middle East Sports Ambitions***, we analyse the regional sports strategies and showcase how technology is being used to fulfil them by the region's main protagonists – Saudi Arabia, United Arab Emirates (UAE) & Qatar. Then, tapping into our extensive experience in implementing digital platforms for sports rights holders, we look at where the opportunities lie for technology to make further gains. We will look at how AI and other innovative tech could accelerate the fulfilment of national strategies and establish Middle Eastern nations as global leaders in sport.

02

Supporting regional development plans

National Sports Strategies

CORE OBJECTIVES

At the core of each national vision for Saudi, UAE and Qatar are three objectives:

- To improve the quality of life for their citizens
- To diversify their economies
- To enhance their global presence

In terms of sport, and the role it can play in achieving these aims, each nation's vision or national sports strategy outlines a series of strategic pillars which serve to create a framework for all state, federation and private sector implementation.

SAUDI VISION 2030

Saudi Arabia's Vision 2030 plan puts the emphasis on investment – both domestically and internationally – in building a thriving sports economy and establishing a position of sporting influence on the global stage. The plan sets out the following strategic aims for sport:

- To create a healthier, more active society that is more engaged in sports and athletic activities. The goal is to raise the percentage of people exercising at least once a week from 13% to 40% by 2030. The integration of sports into education is also viewed as key to helping develop students' characters, talents and wellbeing.
- To invest in state-of-the-art sports facilities that promote participation, to support athletic development and facilitate the hosting of international events which create tourism, economic growth and global awareness.
- To identify and develop elite sports talent within the country that can propel Saudi to both regional and global success in targeted professional sports.
- To improve the domestic sporting product by focusing on governance and the professionalisation of sports management in order to help attract elite talent and investment.
- To invest in the hosting of major sporting events that position Saudi as a global sports hub.

From data analysis tools to smart venue technology, digital innovations are viewed as the primary enabler in fulfilling Saudi's different sporting aims. State-backed entities have invested heavily both in securing the services of international experts but also in funding Saudi's own burgeoning sports tech ecosystem - especially around Esports, where Saudi sees a real opportunity to dominate the global landscape.

UAE VISION 2031

UAE has a national sports strategy as part of its Vision 2031 plan. This serves as a national directive for individual emirates like Dubai and Abu Dhabi, who have their own Sports Councils that operate semi-autonomously to achieve their own emirate's vision, but still in line with the framework of overarching national sports policy.

There are a number of shared strategic pillars with Saudi such as promoting participation, investing in the sporting infrastructure and developing elite talent. There is also a strong focus on social impact, community initiatives and promoting opportunities for women and youth in sport.

Digital innovation is at the heart of their ambitions with a drive to use the latest technology to improve governance, participation and the identification and development of talent. At an individual Emirates level, there are localised initiatives around sustainability, inclusion and social responsibility.

QATAR NATIONAL VISION 2030

Qatar's sports strategy is built around four core objectives:

- The growth of the Qatari sports economy
- Encouraging and facilitating participation
- The creation of sustainable sports facilities
- The development of elite talent

A lot of their community and infrastructure initiatives are underpinned by the investment and development that went into hosting the FIFA World Cup in 2022. This momentous occasion – the first time a World Cup or Olympics was hosted in the Middle East – was a catalyst for sports investment and there have been numerous legacies both in terms of the infrastructure and the digital platforms brought in for the tournament.

Qatar has also put a significant focus on innovation at their world renowned Aspire Academy, where the sports science team use the latest technology to better monitor, understand and improve sports performance.

SHARED STRATEGIC PILLARS



**Health, Fitness and Mass
Participation**



**Sports venues,
infrastructure & events**



**Elite performance & Talent
Development**



**Improving governance &
professionalism in domestic
sport**

For each of these shared pillars, Saudi Arabia, UAE & Qatar have already implemented, or are in the process of implementing, innovative apps, websites and other digital platforms to achieve their strategic aims. Let's look at some of the use cases across the different pillars:

03

How technology is making a difference

Health, Fitness & Mass Participation

SAUDI ARABIA

The Saudi Sports for All Federation (SFA) is the primary body responsible for the development of community sports in Saudi Arabia and is tasked with achieving Vision 2030 targets around raising physical activity levels across the Kingdom. In 2020, SFA launched its own app to serve as a digital hub for all health initiatives and community groups, as well as wellness content & event information

The app also features interactive elements such as tracker data integration, with over 20 billion steps tracked by users via the app to date, plus challenges and a rewards programme. Planned features include further gamification options, event ticketing and volunteer management.

UAE

The Abu Dhabi 360 App was launched in late 2022, by the Abu Dhabi Sports Council in partnership with leading global sports agency CSM, to enable all Abu Dhabi citizens to “achieve physical, social, and mental wellness through a personal, attainable journey”. The app offers personalised workout programmes, healthy recipes, mental wellness techniques and movement tracking.

Dubai is looking to follow suit and last year announced a memorandum of understanding with international fitness technology experts YoHealth, to build a dedicated mobile app for those practising sports and physical activities in Dubai. The app will be targeted to all ages and nationalities of Dubai’s community, providing the information and motivation for residents to achieve a healthier and more energetic lifestyle. It will also bring AI-powered sports and wellness programmes to schools, empowering the younger generation to get fit and active.

QATAR

In the build up to the 2022 World Cup, Qatar’s Ministry of Public Health, in collaboration with FIFA and The World Health Organization (WHO) released Gen Move, a mobile app that gamified physical activity in order to encourage participation. Aimed at 8–15-year-olds, the app combined AI with movement tracking to provide vigorous games that required physical interaction.

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How technology is making a difference

Sports Venues, Infrastructure & Events

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MIDDLE EAST

The Middle East has established itself as a premier venue for sports events with state-of-the-art facilities that host elite football, tennis, golf, boxing, motor racing and other sports events. The rights holders and venues all leverage digital ticketing to improve distribution, convenience and reduce ticket fraud. For example, the Saudi Pro League and Qatar Stars Leagues both work with digital ticketing partners ([WeBook](#) and [Ticketmaster](#) respectively).

The array of world class facilities that have been built – or that are under construction – across the Middle East all leverage the latest in smart venue technology to improve fan experience – let's look at how this is being done across Qatar, Saudi & the UAE:

QATAR

The responsibility of hosting the 2022 FIFA World Cup understandably served as a huge catalyst for the expansion of Qatar's sports venue infrastructure, with innovation at the core of their plans. Eight new stadiums were built or renovated for the tournament, and of these, seven featured [revolutionary cooling technology](#) designed to combat the heat for World Cup fans but also to ensure their legacy by enabling sporting events to be held all-year-round.

AI featured heavily in how stadia operations were managed, with platforms that allowed organisers to [predict crowd flow and use this intel to prevent overcrowding](#), enhance safety, shorten queues and improve fans access to amenities.

SAUDI ARABIA

Saudi will follow in the footsteps of Qatar as the next gulf nation to host the FIFA World Cup in 2024. The gulf state is building 11 new stadiums for the competition that will utilise the latest in digital innovation, AI and the internet of things (IoT) through mobile apps and digital signage to create a truly immersive, interactive and personalised experience for fans. The stadiums will incorporate the same cooling technology as seen in Qatar, but they will also be able to utilise advancements in Wifi connectivity, LED screens, seamless ticketing and AR/VR to maximise fan experience and the opportunity for sponsors.

Saudi Arabia is also developing a number of sustainable sports facilities as part of its Vision 2030, such as Sports Boulevard and facilities at the new Neom super city, that integrate green technologies like solar power, advanced water management, and smart building systems to reduce energy consumption and carbon emissions.

UAE

Although operating without the incentive of a World Cup, the UAE has been proactive in building smart venues that utilise different hardware and software to enhance venue capabilities.

At Dubai Sports City, home to a range of world-class venues for sports such as cricket, football and tennis, cloud-based solutions have been implemented to improve venue management, to facilitate online bookings and transactions. AI-driven crowd management tools have also been employed during high-profile events.

Zayed Sports City in Abu Dhabi, introduced AI-booking optimization technology leading to a 40% reduction in venue downtime and increased revenues through automated pricing strategies.

In Sharjah, they have implemented IoT-powered venue alerts which remove the possibility of facilities issues going undetected and enable proactive maintenance and better energy efficiency, which reduced repair and operational costs.

05



How technology is making a difference

Elite Performance & Talent Development

SAUDI ARABIA

In 2021, Saudi Arabia's Public Investment Fund (PIF) founded the Saudi Company for Artificial Intelligence (SCAI) to drive the adoption of AI and emerging tech across the Kingdom. In early 2024, SCAI turned their attention to sport with the launch of SportNative, an AI-powered solution made up of three separate platforms covering performance analysis scouting and in-venue experience, that "integrates data from various sources into a centralized platform, enabling its users in the sports sector to make informed decisions efficiently and effectively."

UAE

Earlier this year, the UAE unveiled its own AI-powered platform aimed at accelerating the nation's sporting success. Developed in partnership with the Ministry of Sport and the UAE National Olympic Committee, Sportifai, provides a comprehensive digital ecosystem for both elite and emerging athletes, with tools dedicated to talent identification, performance analysis, and data governance.

QATAR

The Aspire Academy in Qatar has created two different digital platforms designed to aid development of their football players.

Building on the foundations set by the Qatar Football Analytics Dashboard – an initiative they developed in partnership with the Qatar Football Association (QFA) - The Qatar Player App "empowers players with instant access to match statistics, performance analysis, and wellness updates, enhancing their training and preparation."

Launched in 2024, their Advanced Football Performance Platform combines data from across Qatar's football ecosystem, including the QFA, Qatar Stars League (QSL) and Aspire's own programmes in real-time to provide a holistic view of player performance. The platform can also be used to enhance preparations by analysing opponents' players and tactics.

TEC Take

Data drives decisions on and off the pitch and so it is crucial to have the ability to consolidate different data feeds into a single view that allows you to understand all facets of a player's performance and their relationship with their club. Working with a leading Premier League club, TEC built an intelligence platform that combined performance data with contractual information, giving a 360 overview of player-related financial obligations and enabling the club to efficiently manage all aspects of player's contracts, including the myriad of performance-related clauses involved.

The platform also provided intel player scouting and acquisition, allowing the club to model scenarios around financial profiles and the potential impact on the overall wage bill. The intelligence platform is so successful it has been used by over 40 football clubs worldwide.

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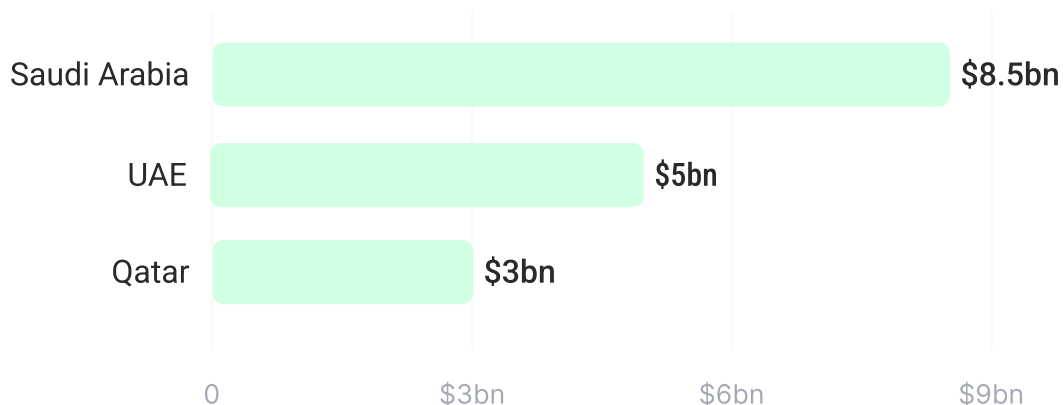
How technology is making a difference

Improving Governance & Professionalism in Domestic Sport

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MIDDLE EAST

Current sports market valuations



SAUDI ARABIA

Saudi's sports industry is underpinned by the growth of their domestic football competition, the Saudi Pro League. The flood of investment made to improve the league has not just been focused on players, however. The league has also collaborated with leading global technology partners like [Globant](#), [Stats Perform](#) and [OneFootball](#) to improve competition management, data analysis and content distribution, ensuring the league is better managed, better informed and more widely covered.

Saudi has also prioritised the hosting of electric vehicle racing with the likes of Formula E which uses its digital platforms to host features like predictor games and a Live Race Centre which combines live timing, interactive track maps and driver tracking with highlights and behind the scenes content.

Esports is a big part of Saudi's sports industry with the country hosting the annual Exports World Cup (EWC). Recognising the opportunity to engage a huge global audience, EWC have leveraged the cloud technology of their partner [Amazon Web Services](#) to enhance the viewing experience by delivering AI-powered live match insights and enabling automated, personalised highlights. The tournament also uses its digital channels to empower media, by offering an online media lobby with access to imagery, news and videos to enhance global media coverage.

TEC Take

Immediacy is a minimum expectation within the modern sports experience, with fans demanding to know what happens as it happens. With big tournaments featuring multiple competitors this means knowing not just individual scores, but how each fluctuation impacts their position in the competition. TEC has first-hand experience of this having successfully integrated a real-time scoring engine into The Open's website and app to ensure accurate and timely information for fans worldwide.

The role of the media in ensuring fans, rights holders and sponsors get the coverage they want can not be overstated. Digital platforms are now an important component in ensuring media have the content they need, when and where they need it. TEC understands the importance and intricacies of facilitating global media coverage having designed and built a virtual media centre for The R&A to use at The Open Championship.

UAE

In addition to serving elite performance, the UAE's Sportifai platform is designed to support data-driven decision-making within its sports federations, facilitating smarter governance and greater efficiency by reducing the administrative burden on officials.

The UAE government have recognised the economic potential of Esports and gaming and have supported tech-centred initiatives such as the [DMCC Gaming Centre](#), the [Dubai Esports & Games Festival](#) and the [Abu Dhabi Esports Island](#) aimed at accelerating the growth of the industry across the Emirates.

QATAR

Recognising the importance of technology to the growth of their sports industry, Qatar created The Qatar SportsTech (QST) Accelerator in order to identify and support start-ups focused on areas such as AI, wearables, fan engagement, data analytics and smart stadium solutions. By supporting both local and international start-ups, QST not only fosters the growth of Qatari businesses, it seeks to embed Qatar in the broader global sports tech industry. QST alumni include [Sponix Tech](#) and [Golee](#).

Esports is also a key focus for Qatar, with the Qatar E-sports Federation driving the growth industry through tournaments, international partnerships and talent development.

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The Role of Digital in Realising Middle East Sports Ambitions

Can Digital do More?

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As we have shown, technology is already instrumental in the efforts of Saudi, UAE and Qatar to fulfil their sporting ambitions, but to what extent could it be used to do more? To what extent could digital platforms and mobile technologies further accelerate the realisation of their different strategic sports pillars?

HEALTH, FITNESS & MASS PARTICIPATION

Greater data integration to provide more complete, personalised service. Apps like SFA and Abu Dhabi 360 already connect personal information and preferences with motion tracking data but by integrating data feeds from other related organisations like schools and medical facilities, these health apps could create a more comprehensive picture of each members' wellbeing and provide more personalised content.

Greater functionality to boost community building. The same apps do incorporate some community elements, but there is an opportunity to make them more of a central hub for community sports initiatives like local football teams or running clubs, allowing them to log scores and share event content. The data collected could then be fed back into the app and each individual's personal profile.

TEC Take

By expanding the functionality of these health focused platforms, there is an opportunity for the nations to create more reasons for use and with it, greater adoption from their people.

By making the apps more of a community sports hub, with more content and perhaps combining more rewards / promotions from community sponsors they could serve as sports membership platforms that are used by citizens more often.

From working with major sports rights holders like The R&A and European Athletics, we are experienced in designing digital membership platforms that combine features like exclusive content, event access and rewards programmes and have seen first-hand the impact on user adoption such additions can have.

SPORTS VENUES, INFRASTRUCTURE & EVENTS

Leverage innovation to improve experience. In terms of smart sports venues, many of the benefits are tied to future innovations. Developments with digital ticketing and smart venue technologies have shown the way, in terms of how access and in-venue experience can be improved, but they have also signposted that further improvements can be made. For example, as facial recognition, AI and sensor technology improve, more venues will be able to deliver the seamless access and retail opportunities that we are starting to see in some US sports arenas.

Centralise event processes. From an organisational perspective, benefits could be derived from centralising logistical processes such as accreditation and volunteering at a national level instead of just by venue or event. Apps could be created to manage event support and better allocate resources.

TEC Take

Venues and event organisers could also explore how they can co-ordinate and meet the needs of the different stakeholder groups attending, creating a seamless event experience for key attendees from the moment they receive their ticket to the moment they return home.

TEC built a bespoke stakeholder management app to do just this for a leading global sport tournament. The app enabled the organising federation to manage all aspects of their VIPs attendance from ticketing and accommodation, to and transport and venue access, all in one easy to access, branded portal.

ELITE PERFORMANCE & TALENT DEVELOPMENT

Greater data integration and sharing. We've seen how sports bodies across the three nations have sought to build centralised data platforms to enhance their ability to identify and improve the talent at their disposal, by using AI to process huge volumes of data feeds around athlete performance. This is undoubtedly the right approach and, with the right consensus and privacy protocols in place, further gains could be made in maximising athlete potential by integrating data feeds from clubs, federations and even individual training programmes and sharing findings across sports to understand where gains in performance and injury recovery are being made.

IMPROVING GOVERNANCE & PROFESSIONALISM IN DOMESTIC SPORT

AI efficiencies. The same digital platforms built to improve federations' understanding of their athletes' performance are also being used to power greater administrative efficiencies and improve the professionalisation of sport across the Middle East. From resource management to revenue generation, there are a range of AI-powered platforms that could be employed to make sports bodies more efficient in their efforts to grow the industry.

Embrace collaboration. Domestic leagues like the SPL and the QSL have chosen to partner with leading global technology and media businesses to modernise areas such as competition management and content distribution. By continuing this collaborative approach, both with technology providers and international leagues & federations, the leagues could work with innovators in fields such as AI, broadcasting, membership and merchandising, in order to create more personalised, immersive experiences that modern fans crave opening up new markets and new revenue opportunities.

Invest in innovation. Initiatives like the QST Accelerator exist to promote the role of domestic technology businesses in achieving regional sports objectives and digital platforms, similar to [Stryde](#) and [Connectd](#), could be built to showcase the innovative potential across the Gulf and connect start-ups with potential investors.

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The Role of Digital in Realising Middle East Sports Ambitions

Digital is The Catalyst For Sport Success

Across Saudi Arabia, the UAE and Qatar efforts to use sport as a vehicle for social and economic change are rightly rooted in technology, with digital platforms serving as the connective tissue between strategy and outcomes.

Ministries, governing bodies and private organisations have employed the latest innovations to encourage activity and healthy living, to build smart sports venues, to enhance talent development and to improve governance and professionalisation.

Things are moving in the right direction but there is more that can be done. By focusing on areas such as greater data integration, the use of AI and investment in innovation these three Middle Eastern nations will accelerate their strategic efforts and position themselves better to succeed.

Collaboration is also important – both between the different sporting bodies within each nation and with international experts – to ensure that the very best practice is adhered to.

Another important consideration is interoperability – with five years or more left on the timeframes for each nation's plan, there will undoubtedly be new technologies launched that will improve their strategic efforts. As platforms develop and functionality improves, the ability of systems to talk to each other and for parts to be able to be seamlessly swapped in/out without having to rebuild entire digital architectures is key.

The pace of change is fast but so has been the rise of the Middle East as an emerging sporting powerhouse. With innovation to the fore, it would take a brave person to bet against each nation achieving their specific sporting goals and cementing the region's reputation as a global leader both in sport and technology.

Whatever your digital challenge, we are
happy to discuss how we can help

Thank you

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