

## Analyzing Development of eSport in Pakistan with a Political Economy Approach

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### Abstract:

This paper discusses the emergence of eSports in Pakistan as a case of political economy, the way cultural attitudes relate to changing government policies. Instead of considering these aspects individual or constant we emphasize the ways these aspects impact one another through a time-based process that is complex and tends to be quite cyclic. The study outlines some of those defining points where cultural opposition and the inactivity of policy have mutually supported one another, stalling the expansion of the eSports industry. The study illuminates the question of how and when change is possible, by analyzing historical patterns and systemic barriers. The results can provide stakeholders with useful information when trying to promote the digital gaming ecosystem in Pakistan, as timing, coordination, and context-specific interventions are important. The work is part of a larger picture on how the relations of social norms and state structures in developing countries can influence the formation of emergent industries.

**Keywords:** eSport, Pakistan, Political Economy, Policy, Gaming Industry

### Introduction

The world of eSport not only has entertainment value for the consumers but also offers research opportunities for psycholinguistics and consumer behaviors. Therefore, it can be assertive that engagement in eSport impacts the consumption behavior, and therefore eSport has the potential to affect actions by consumers (Abbasi et al., 2020; Coon et al., 2023). Further, the rebuilding of identity and mental health of the eSport professional players and especially the players coming from the individual's region that is China, underscores the need to address the challenges and the vulnerabilities of playing eSport professional, especially to the young people (Zhao & Zhu, 2020; Chung et al., 2022). This corresponds with the general understanding of eSport as the process of sportification, which impacts results related to health, both physical and mental, social aspects, diversity, and inclusion (Cunningham et al., 2018). For Pakistanis, gaming industry is slowly becoming an exciting area of entertainment. Initially niche sport, eSport, also known as competitive video gaming, is one of the fastest growing industries in recent years (Qadri, 2022). The eSport industry is not only fascinating the imagination of millions but also is changing the concept of entertainment and professions. With a revenue supply exceeding \$200 million in 2023 (Hanif, 2023), Pakistan eSport industry is the emerging area of investments. This surge can be assessed from the fact that more than eight hundred teams have enrolled in various Gamer Pakistan (an eSport network) tournaments alone, while over four hundred eSport teams have exclusively registered for competitive games such as PubG, Call of Duty, DOTA 2, Free Fire, Tekken, FIFA, Valorant, and CSGO (Henderson, 2023).

The worldwide gaming business is seeing significant growth and is projected to be valued at over \$180 billion by 2022. The increase is fueled by the surging popularity of mobile gaming, the emergence of eSport, and the advancements in technologies like virtual reality (VR) and augmented reality (AR). Pakistan is well positioned to take advantage of this expansion. The nation has a large and youthful populace that shows an increasing inclination for gaming. Based on a recent study, it was found that 62% of individuals from Pakistan engage in video gaming, with the typical gamer dedicating an average of 6 hours per week to playing. The growth in Pakistan's eSport sector is the product of a synergistic effect of the stimulus factors (Jawwad, 2023). While taking part at the world stage, Pakistanis have often showed their undaunted strength in titles like Dota 2 and Tekken. Whether it is the case of Syed Sumail Hassan, an 18-year-old Dota 2 wizard who has collected numerous high-level victories with international teams, or Arslan Ash, a Tekken legend who has earned his fame and fortune thanks to numerous championship titles, these names have become synonymous with Pakistani eSport success (Esports Insider, 2023; Haq, 2023). Through their triumphs, the best of Pakistani gamers ceases to be solely an object of adoration but also a source of strong motivation for up-and-coming players all over the country, thus creating an active and competitive internal market. On the one hand, Pakistani eSport industry is prospering on its own but an essential serious factor pushing its growth is a recent milestone in the political economy of the country. In a crucial decision taken in 2021, the Pakistani government has provided eSport with a legal recognition as a legitimate game category (Houston, 2021). This crucial step implies great significance for the development of the industry in general. The focus of study has not been on the Pakistani eSport industry till now and therefore there is scarcity of literature. Some of the challenges that needed to be addressed as highlighted by the study include, there is scarcity of data and equally, there is scarcity of governmental support. Currently, the extent and opportunities of the Pakistani eSport market are not well-studied, and further research is needed to show its potential.

The review of the existing literature on social practices points to the fact that consumption practices include eSport (Seo & Jung, 2016). The reasons for eSport consumption are still not well researched in relation to other types of consuming processes, especially in countries where cultural values of traditional sports are very popular (Santos et al., 2021). Nevertheless, more research must be conducted to increase knowledge about the factors influencing eSport consumption based on positives in economic performance and youth popularity.

### ***Global eSport***

eSport has quickly expanded and become a worldwide movement because of the development of internet gaming capabilities (Wahyudi, 2024). Compared to traditional sports which in the past have usually needed more time to spread internationally, eSport have already become an international business and show perfect examples of what born global companies are (Lin et al., 2023). Some of the globalized body, namely Major League Gaming (MLG) and International ESport Federation (IeSF) have played a crucial role in setting standards and co-creating internationalization across countries (Seo & Jung, 2016). eSport are rapidly growing and developing; thus, there is an increased emphasis on cultural differences within the teams stressing multicultural awareness and cooperation (Lin et al., 2023). Thus, the worldwide spread, business relevance, and continuous development of eSport led to the emergence of new markets and potential growth (Hayday et al., 2020; Leonard et al., 2023). Currently, eSport is a multi-billion-dollar sector (Hayday et al., 2020). Technology growth in the industry has resulted in grassroots local markets that have given a glimpse into newer innovations on the management of media (McCauley et al., 2020). Besides, there is an acceptance of eSport as a real sport with a massive global following (Mondal, 2024). Despite the growth over time, the sustainable development of eSport requires the successful management of its governance and stakeholder relationships and continuous examination of governance and stakeholders within the eSport industry (Peng et al., 2020). As eSport events

foster across the globe, it is quite relevant to discuss risk matters and design measures for the health promotion of eSport competitions (Kamaruddin & Afiqah, 2023). Moreover, work on preventing risky conditions for individuals taking part in eSport, spectators, and fans as well as for those who stake on the outcomes along with a united system of regulating eSport should be continued with the primary focus on open and equal opportunities for all members (Czakó et al., 2023).

### ***Political Economy of Sport and eSport***

The political economic context is aimed at the regulation and organization of the sports and eSport markets. eSport is among the most promising industries worldwide, being already regarded as an important research and policy field because of the industry's specific nature and the requirement to recognize it as a sport. There are international eSport bodies like the International eSport Federation that are instrumental in setting up laws and also the framing of the rules for putting eSport on the right legal pedestal to be recognized as professional sports (Palanichamy et al., 2020). Such an institutional framework is important for the further development of fair competitors and widely popular eSport across the world. Most importantly, the opinion of the public and rulings of the countries run the key aspect of the eSport credential as the official sport. Opinion transformation is an essential activity due to the need to reverse negative feelings about games and eSport for policymaking to foster the eSport industry development. However, the general public's interest in eSport as a special sport influences its development and official recognition as a legitimate sport (Cui, 2023). Through changing such beliefs, and gaining public support, eSport can then establish its place within the sports industry and get the appropriate legislation support (Czakó et al., 2023). The popularity, extensive publicity and social acceptance is a crucial factor that eSport associations pursue, where attempts in countries such as Germany are seen to form supporting structures and to campaign for social recognition of eSport (Heidenreich et al., 2022). These initiatives are crucial for the formation of eSport' legitimacy in public, governmental, and athletics circles. This legitimacy and acceptance are counterarguments that hinder recognition, making eSport a regular sporting activity as the process continues. Appreciating eSport and comparing it with traditional sports raises some questions on the degree of similarities and differences between the two industries. eSport are regulated in leagues, tournaments, and teams backed by commercial organizations though they do not have the same institutional structure as conventional physical sports (Pereira et al., 2019). It is about these differences between eSport and traditional sports that can help policymakers and other stakeholders in the sports economy to know how the eSport landscape fits in the bigger picture. eSport is a modern sports movement defined by observers and critics about its cultural and economic concerns. Besides economic factors, cultural aspects also are still the defining characteristic of eSport and the rewriting of the concept of athleticism in the context of the digital world (Li, 2024). Therefore, by studying culture, economy, and sports as the factors that contribute to competitive gaming's transformation and effect on traditional sports, more information is to be gained by scholars and researchers in this area. Some debates have occurred in the earlier period about the relationship between sports and eSport as well as the possibility of substitution between both because of the occurrence of COVID 19. Even though both activities present some features that overlap with each other, the competition and audiences are different in many ways (Pu et al., 2021). Analysis of the interaction between sport and eSport in the context of a world crisis reveals the factors affecting these industries in critical conditions. Based on economic aspects, which are closely associated with profit-making, the direction of eSport differs from mainstream sports where financial return is not the principal value (Windholz, 2020). This profit-oriented model impacts on eSport governance and regulation, and therefore, there is the need to have corresponding policies that will meet the eSport sectoral requirements. Therefore, such economies are of significance as they can guide the formation of right policies that may lead to sustained development of eSport, riders' welfare as well as fair competition.

### ***eSport in Pakistani Context***

The number of gamers in Pakistan is estimated to be 36.8 million (16% of the population) in 2022 and this is predicted to rise to 50.9 million gamers (20.6% of the population) by 2026. Video game industry revenue in Pakistan is projected to reach US\$208.70 million in 2022 and show an annual growth rate of 2.17% from 2022-26 resulting in an estimated annual revenue of US\$227.40 million by 2026 (Intenta Digital, 2023). In 2022, the average amount spent by each person in Pakistan will be US\$5.67. This is less than many other global markets. However, Pakistan is a mobile-first market for games. In 2022, mobile games are expected to bring in US\$171.30 million, while web games will bring in US\$21.34 million and download games will bring in US\$16.13 million (Qadri, Gamers of the future: Does Esports have a future in Pakistan?, 2021). The video game industry in Pakistan is growing; nonetheless, the growth is complex due to some regulatory policies, its economy, and population's perception of gaming (Kemp et al., 2020). eSport have also become more professional with players spending many hours practicing and playing, which is an indication that more and more people are treating eSport as a career (Giakoni-Ramírez et al., 2021). This move has also increased the calling of offering real sports medical support within video gaming competitions that are often regarded as virtual sports.

### **Hypotheses**

The author has devised the following hypotheses for this research to know the status of eSporting activities through the response of the players, organizers or those who are engaged in playing as well as managing the events concerning eSport.

- H<sub>1</sub>. The Pakistani government offers enough policy and financial support to encourage the development of eSport.
- H<sub>2</sub>. The market of eSport can become one of the prominent sources of income in Pakistan.
- H<sub>3</sub>. eSport is considered as a serious profession in Pakistan most population.
- H<sub>4</sub>. Current infrastructure like internet speed, gaming arenas, sponsorships are sufficient to host professional eSport in Pakistan.
- H<sub>5</sub>. Society gives more attention to traditional sport than eSport in Pakistan.

### **Methodology**

#### ***Research Design***

The study employed a. embedded design of mixed-methods approach, combining both qualitative and quantitative data to provide a comprehensive understanding of the development of eSport in Pakistan. The qualitative aspect of the study involved closed-ended surveys with key stakeholders, including eSport players, coaches, organizers etc. The quantitative aspect involved analyzing secondary data sources, such as industry reports, government documents, and academic literature.

#### ***Data Collection Methods***

Primary data was collected through closed-ended surveys and previous data published semi-concerning stakeholders, focusing on their perceptions, and opinions regarding the development of eSport in Pakistan. Secondary data sources included academic literature, industry reports, government documents, and news articles. These sources were critically evaluated for their relevance, reliability, and credibility. A total of thirty-three respondents were questioned through purposive sampling about their association with eSport. Demographic enquiry of these respondents is noted in table 1.

Table 1. Construction of Questionnaire

| Question  | Variable           | Hypothesis     | Measurement   |
|---|--------------------|----------------|---------------|
| The Pakistani government offers enough policy and financial support to encourage the development of eSport. | Government Support | H <sub>1</sub> | 5-point Scale |

|   |                             |                |               |
|---|-----------------------------|----------------|---------------|
| The market of eSport can become one of the prominent sources of income in Pakistan.   | Economic Viability          | H <sub>2</sub> | 5-point Scale |
| eSport is considered as a serious profession in Pakistan most population.   | Public Perception           | H <sub>3</sub> | 5-point Scale |
| Current infrastructure like internet speed, gaming arenas, sponsorships are sufficient to host professional eSport in Pakistan. | Infrastructure & Investment | H <sub>4</sub> | 5-point Scale |
| Society gives more attention to traditional sport than eSport in Pakistan.  | Cultural Acceptance         | H <sub>5</sub> | 5-point Scale |

### ***Source Selection Criteria***

The selection of primary and secondary sources was based on their relevance to the study's objectives, the quality of the information provided, and the credibility of the authors. Academic literature was sourced from peer-reviewed journals, books, and conference proceedings. Industry reports and government documents were selected based on their reputation and the organizations that produce them. News articles were chosen for their timeliness and relevance to the study's focus.

### ***Analytical Framework***

The study employed a political economy analysis framework to understand the development of eSport in Pakistan. This framework considered the interplay between political, economic, social, and cultural factors that shape the industry's growth and challenges. The analysis focused on how these factors influence the development of eSport, the opportunities and constraints faced by stakeholders, and the potential for future growth. To process quantitative data, SPSS framework was used to fetch results using statistical Chi-squared tests using the contingency coefficient to statistically calculate the association of players or organizers.

This study used triangulation for combining multiple data sources and methods that helped validate the findings and provide a more comprehensive understanding of the development of eSport in Pakistan. By employing a rigorous methodology and aligning with a political economy analysis framework, this study aimed to provide valuable insights into the development of eSport in Pakistan and contributed to the broader understanding of the political, economic, and social factors that shape the industry's growth.

### **Results**

The cross tabulation results (table 2) present the comparison of the organizers and players' perception regarding whether the Pakistani government provides sufficient policies and funds to foster the growth of eSport. Hence, Pearson Chi-Square stands at 7.612 and the degree of freedom at 4 while the asymptotic significance (p value) stands at 0.107 which is greater than the 0.05 conventional standard. This means that the role of the respondent being an organizer or/and a player does not influence their perception of government support as determined by the two models. The likelihood ratio test (value = 9.209) is also almost close to significant level with p-value of 0.056. Chi-square test results are also valid with contingency coefficient value equal to 0.433 and a significance of 0.107. This shows a moderate relationship between the variables although the correlation is not quite significant statistically. Nevertheless, there is not a considerable difference in responses by organizers and players, which does not allow speaking about a significant correlation between the role in eSport and attitudes toward the government support. In general, more negative perception is apparent as far as the government support is concerned, especially if one must rely on the players' response where a considerable portion of them strongly dissented to the statement. The respondents' roles in eSport, in detail, the organizers and the players have been cross tabulated with their perception on the potential of eSport market as a prominent source of income in Pakistan. The Pearson Chi-Square value is 3.569 with 4 degrees of freedom Test of Likelihood Ratio: Continuity Correction = 4.150 with 4 degrees of freedom and the asymptotic significance (p-value) of 0.374 which is greater than 0.05. This means that there is no association between

the position of the respondents whether they are organizers or players and their attitudes towards the market prospects of eSport. The likelihood ratio test (value = 3.531) also is not significant, with  $p = 0.473$ , indicating no significant relationship. The contingency coefficient value is 0.312, the significance level is 0.467, hence there is very low relationship between the two variables and the relationship is not significant. The findings also suggest that the involvement of the respondents either as organizers or players does not affect the prominence of eSport as an income booster. However, there is a slight inclination towards agreement, especially from the players' side, but there are cross-discipline differences and possibly some level of ambiguity about the economic feasibility of eSport in Pakistan. These results imply that future research should examine variables related to perceptions, including experience, contact with the industry, or availability of resources. The result reveals how respondents' roles, organizer or player, influenced their answers to the question regarding whether eSport is considered a serious profession by most Pakistan's population. The Pearson Chi-Square value equals to 6.927 with 4 degrees of freedom and the asymptotic significance (p-value) equals to 0.140 which is greater than 0.05. This means that the respondents' position does not affect their perception of eSport as a serious profession in Pakistan in terms of P value less than 0.05. The likelihood ratio test (value = 8.944) gives  $p\text{-value} = 0.063$  which is slightly closer to the significance level but still not significant. The contingency coefficient value is 0.417, the significance value is 0.140, therefore, the findings reveal moderate association, but the relationship is not significant. The responses also indicate that both the organizers and players have a rather ambiguous opinion about the fact whether the eSport is considered a serious job by the public. While the organizers are closer to neutral-negative and skeptical, the players are divided into those who strongly agree and those who strongly disagree. Even though the data analyzed provided evidence for the existence of differences in the opinions of the respondents, the lack of statistically significant differences in the responses received suggests that it is impossible to definitively link these differences to the respondents' roles in eSport.

The result focuses on the respondents' activity during the event (organizers versus players) and their opinion on the adequacy of the current infrastructure (Internet speed, gaming arenas, sponsorships) to host professional eSport in Pakistan. The test gives a Pearson Chi-Square value of 8.152 and the degrees of freedom equals 4. The asymptotic significance of the observed = 0.086 which is slightly above the significance level of 0.05 but reasonably close to suggest that there is a trend worth analyzing. The likelihood ratio test value is 9.820, the p value is equal to 0.044 which is less than 0.05, hence it can be concluded that there is a statistically significant relationship between the two variables, roles and perceptions. The contingency coefficient value is 0.445 and the significance is 0.086, which shows a moderate relationship between variables but due to low significance we can't be very sure about the results. This again raises an important concern about the difference between organizers and players in terms of their perceptions concerning the adequacy of infrastructures. A similarly high percentage of the organizers feel that the current infrastructure is insufficient. The responses are divided into two extremes: 39 per cent of the players somewhat or strongly agree with the statement that there is enough infrastructure to support the game, while 27 per cent strongly disagree. This trend raises the possibility that the evaluations of infrastructure sufficiency may depend on the type of interaction with eSport. The crosstabulation focuses on the respondents' roles, that is whether they are organizers or players in eSport and their perception of whether society pays more attention to traditional sports as compared to eSport in Pakistan. The Pearson Chi-Square value is 3.553 with 4 degrees of freedom and the significance 0.470 is greater than the 0.05 level. This means there is no correlation between the roles of the respondents and the perceived variables. The likelihood ratio test value is 5.193 and p-value is 0.268 which again confirms that there is no statistically significant relationship between the study variables. The contingency coefficient is equal to 0.312 and the significance is equal to 0.470 that means we have a weak relationship between the variables used in the study and it is not significant at all. Many organizers and players

confirmed with the statement that society gives more importance to traditional sports than eSport in Pakistan. There are few exceptions and some even negative remarks and few neutrals, but the overall impression is coherent with the role. The average of chi-square test also reveals that there are no significant differences of opinion between the respondents on this because of their roles as organizers or players. This is a clear indication of the society bias towards traditional sports which is an implication of the growth and recognition of eSport in Pakistan. For it is this cultural perception that could be a key for changing the general perception and viewing eSport as a worthy and valuable competition.

Table 2. Chi-Square Tests Results

|                  | Pearson Chi-Square Value | df | Asymptotic Significance (2-sided) |
|------------------|--------------------------|----|-----------------------------------|
| H <sub>1</sub>   | 7.612 <sup>a</sup>       | 4  | .107                              |
| H <sub>2</sub>   | 3.569 <sup>a</sup>       | 4  | .467                              |
| H <sub>3</sub>   | 6.927 <sup>a</sup>       | 4  | .140                              |
| H <sub>4</sub>   | 8.152 <sup>a</sup>       | 4  | .086                              |
| H <sub>5</sub>   | 3.553 <sup>a</sup>       | 4  | .470                              |
| N of Valid Cases | 33                       |    |                                   |

## Discussion

### *Pakistan's Regulations and Government Policies concerning eSport*

Accreditation serves as the main tool to eradicate all recognition and financial problems while a rise in sponsorships increases professionals and gives gamers a chance to appear and grow (Hanif, 2023). In Pakistan, the informal status of competitive gaming in the beginning prevented the requirement of facilities like specialized training centers as well as dedicated eSport arenas (Akhtar, 2024). This lack of clear policies led to anxieties among sponsors, investors, and tournament organizers which was not favorable for the sponsors, investors, and tournament organizers. Besides that, unstable legislation covering taxation and licensing supported the maze of bureaucracy that drove away potential investors by fear of interest loss (Ali et al., 2023). In terms of events that are primarily targeted on Pakistanis, Pakistan has a limited choice. Pakistan has yet to host a sizable number of eSport tournaments (Esports Insider, 2023) that might be considered as global level events. A lack of government support and local sponsorships often dissuade gaming aficionados from pursuing eSport as a career (Haq, 2023). In January 2021, the Pakistan Sports Board and Pakistan Science Foundation signed a Memorandum of Understanding (MoU) acknowledging eSport as an official sport. This announcement was made by Fawad Chaudhry, the former Federal Minister for Science and Technology in Pakistan (Houston, 2021; Esports Insider, 2023; The Herald, 2021; Pakistan Sports Board, 2021). In 2021, the Government of Pakistan adopted eSport by launching a program called 'E-PAK', which featured an official competitive gaming event. The inaugural event organized by the venture was the Free Fire Pakistan League, a competitive series dedicated to the game Free Fire (Esports Insider, 2023). ESport Academy Pakistan (EAP) is at the forefront of the ESport movement in Pakistan. It offers a comprehensive platform for gamers, with highly regarded coaches and eSport leagues, to train and develop the future generation of eSport champions in the region (National Expansion Plan, 2019). But the information on how EAP managed to create an impact on its method of managing and organizing events or offering training facilities is not known. Beyond signing memorandums, Pakistan moved further on official levels with a slower pace. There is low interest in officially organizing or investing in the events. On the policy level, the revised draft of National Sports Policy 2005 (revised draft of Pakistan Sports Policy 2001) did not even mention eSport (Ministry of Culture, Sports, and Youth Affairs, 2005). Later, the National Sports Policy (NSP) was revised in 2021 which “acknowledges the need to support previously neglected areas, including women’s sports, special and Paralympic sports, winter sports, ESport and local/traditional sports” (Ali et al., 2023). Later, Punjab, the biggest province of Pakistan, in official release of the Punjab Sports Policy 2020, defined

eSport as “a form of sports where the primary aspects of the sport are facilitated by electronic systems; the input of players and teams as well as the output of the eSport system are mediated by human-computer interfaces” (Youth Affairs and Sports Department, 2020). But, beyond definition, the Punjab Sports Policy 2020 sheds no light on eSport policies, activities, or events.

### ***Economic Impact***

Pakistan has a substantial youth demographic, as over 64% of the total population of almost 207 million individuals is under the age of thirty (Esports Insider, 2023). A total of 392 Pakistani eSport players have collectively earned \$6,455,418.79 USD in prize money by taking part in 417 tournaments. Dota 2 had the greatest prize pool of \$4,661,548.59 USD, accounting for 72.21% of the total profits by Pakistani players (Esports Earnings, 2023). Syed ‘Sumail’ Hassan and Arslan ‘Arslan Ash’ Siddique, both professional gamers, have achieved world champion status in their respective games, Dota 2 and Tekken. Arslan Ash achieved the prestigious title of being a four-time EVO champion in Tekken, solidifying his position as the unrivalled top player in the world of Tekken (Esports Insider, 2023). Sumail Hassan has the title of being the top-earning Pakistani player, having accumulated a total of \$4,012,889.31 USD in prize money just from participating in Dota 2 competitions (Esports Earnings, 2023). He became the youngest gamer and earned more than \$1million (Jamal, 2021). Moreover, the top hundred video gaming YouTube channels in Pakistan, a list supported by subscribers, maintain over thirty million subscribers (Speakrj, 2023) and the number keeps on growing. According to the data provided by Statista in 2022, the expected total revenue in the Games market for 2022 was estimated to be US\$30.23 million. The predicted market volume was projected to reach US\$49.15m by 2027, with an annual growth rate (CAGR 2022-2027) of 9.66%, while the predicted income from in-app purchases (IAP) in the Games sector was expected to reach US\$15.99 million in 2022. The predicted revenue for paid apps in the Games sector was estimated to be US\$5.39 million in 2022 and the Games market was expected to generate advertising revenue of US\$8.85 million. The Games market reached a total of 1,092.00 million downloads in 2022. The expected average income per download was projected to be US\$0.03 (Statista, 2022). Muhammad Zohaib Khan, Chairman of the Pakistan Software Houses Association (P@SHA), forecasted that the gaming industry's earnings will surpass \$200 million by 2023, experiencing a yearly growth rate of 9.77% from 2023 to 2027 (Hanif, 2023). eSport is a lucrative sector worth billions of dollars, and Pakistan is steadily progressing in terms of cultivating a talented pool of players across many games that offer substantial prize money (Qadri, 2022).

### ***Partnerships and Collaborations***

In 2021, the Pakistani government initiated its first effort to assist and enable young gamers to enter the gaming sector, which is valued at over one billion dollars. The ministry of information and broadcasting in Pakistan has entered into an agreement with Singapore's Garena and Bigo businesses. This partnership aims to set up a thriving eSport ecosystem in Pakistan, which has a population of 220 million, with a considerable number of young individuals (Jamal, 2021). Soon after, the Pakistani government adopted eSport by launching the 'E-PAK' program, which featured an official competitive gaming event. The inaugural event organized by the venture was the Free Fire Pakistan League, a competitive series dedicated to the game Free Fire (Esports Insider, 2023). In this continuation, the Garena Free Fire ESport 'Soobai' Series 2022 featured the participation of four teams from Punjab, three teams each from Sindh and KP, and two teams from Balochistan. This memorable provincial (Soobai) level eSport event awarded a substantial cash prize of Rs 4 million to the top performers (The Nation, 2022). Galaxy Racer, an eSport organization founded in Dubai, announced a cooperation with Pakistan's Special Technology Zones Authority (STZA). The STZA is a recent government initiative aimed at attracting foreign technology businesses to invest in Pakistan. Galaxy Racer became the inaugural eSport company to invest in the program. The company announced its plans to organize an eSport competition in Pakistan,

with a prize pool of \$100,000 (Šimić, 2021). The event organized by Galaxy Racer in collaboration with STZA kick started at Pakistan-China Friendship Center in Islamabad (Special Technology Zones Authority, 2022). In this regard, the most notable achievement was made by Gamer Pakistan, an eSport company, by entering their 115<sup>th</sup> university eSport Memorandum of Understanding (MoU) with affiliate Elite Sports Pakistan. This MoU grants Gamer Pakistan exclusive rights to organize, broadcast, and monetize eSport competitions at these universities (Henderson, 2023). James Knopf, Gamer Pakistan CEO declared that they have experienced breathtaking growth in Gamer Pakistan eSport collegiate network. Gamer Pakistan alleviated 100 university MoU's in March 2023 to 115 today, providing concrete testament to the popularity of university eSport in Pakistan. With analysts estimating growth from 36.8 million gamers in 2022 to 50.9 million gamers in Pakistan by 2026, we are excited to continue engaging with the highly desirable collegiate demographic (Henderson, 2023). Seeing an immense potential in Pakistani youth for eSport, Garena Free Fire launched a collaboration with Pakistan's renowned cricketers, Babar Azam and Shadab Khan, naming them brand ambassadors, with the aim of promoting ESport in Pakistan and fostering the concept of gaming culture, which eases social cohesion and community engagement (Guest Author, 2022). Next Generation ESport (NGES) have achieved a significant milestone in the Pakistani eSport industry by successfully bringing together Free Fire and Red Bull in a groundbreaking collaboration. This partnership, known as Red Bull M.E.O., allowed Team Hotshot to represent Pakistan at the Free Fire World Series (FFWS) in Thailand (Maryem, 2023). Free Fire has also collaborated with Jazz; Pakistan's largest privately owned mobile network and internet services provider. Free Fire and Jazz GameNow have collaborated to introduce a new eSport competition called the Game Now Free Fire Sea Invitational Qualifiers (FFSIQ). The event will highlight a prize fund worth PKR 2 million, generously provided by Jazz Game Now (The Nation, 2023). In another groundbreaking collaboration, Pakistan's leading telecoms conglomerate, Pakistan Telecommunication Limited (PTCL) (a public telecom company) and Ufone 4G (a private telecommunication subsidiary owned by PTCL), has announced a partnership with PUBG MOBILE through its recently developed ESport gaming platform, GameKey. This collaboration will involve a series of joint gaming activities (Ufone, 2023). In December 2023, NODWIN Gaming, the prominent gaming and eSport media firm in South Asia, revealed a significant strategic alliance with Trans Group, the largest Sports Management and Business organization in Pakistan (ProPakistani, 2023). One of various turning points in Pakistani eSport business is the entry of financial institutions such as Habib Bank Limited (HBL) that now ventures into the realm of ESport by introducing the Konnect by HBL, EAFC Gaming Tournament. The tournament will provide a platform for both aspiring and established ESport players to show their talents and engage in competition (Profit, 2024). Recently, FATE eSport, a known company in the MENA region based in Jordan collaborated with a Pakistani company Raptr Games to promote Pakistani players and events (RAPTR GAMES, 2024). This partnership between FATE and Raptr aims to discover emerging talent within Pakistan's gaming communities, bring further foreign players and events to the region, and prove Pakistan's skill on the global ESport arena through the combined impact of both organizations (RAPTR GAMES, 2024).

### ***eSport Infrastructure***

Pakistan's gaming sector saw an increase in its growth in 2022, primarily because to the establishment of Google's inaugural Gaming Growth Lab and the support provided by the Pakistan Software Export Board (PSEB) and the National Information & Communication Technology & Research and Development (ICT R&D) Fund programs. Pakistan currently has a total of 257 game production businesses and three hundred gaming studios as of the year 2023 (Akhtar, 2024). Platforms such as "The Manifest" to aid developers in Pakistan who are interested in pursuing game development and choosing eSport as a profession (Shah, 2022). The nation has a highly skilled group of 8500 individuals specializing in the development and playing of video games, who have been recognized with prestigious accolades such as the Develop Industry Excellence Award in 2014 and the Dota 2 Asian Championship in 2015.

Pakistani video games such as *Lost Twins 2* and *Explotens* have achieved international recognition by winning prestigious prizes. In October 2023, 'Gamer Pakistan,' a firm focused on ESport situated in Pakistan, achieved the distinction of being the first entity to be listed on the US stock exchange (Akhtar, 2024). Telenor and PepsiCo have played a crucial role in setting up the groundwork for the growth of eSport in Pakistan. They have organized events such as the Mountain Dew Gamers Arena and supported platforms like GameBirdPK to promote the development of the country's eSport industry (Jafri, 2021). Establishing a robust eSport ecosystem is essential for sustainable expansion. This entails setting up forums, organizing events, and developing online platforms that facilitate connection, education, and competition among gamers (Mallick, 2023). The launch of Riot Games servers in Bahrain to service players in the Middle East and Pakistan, impacted by a rise in engagement in the region (Jafri, 2021).

### ***Cybersecurity and Digital Rights***

Cybersecurity and digital rights issues in Pakistan's eSport industry are significant concerns that require attention and action. The challenges faced by eSport players and organizations in this context can be broadly categorized into the following areas:

#### ***Data Privacy***

eSport players and organizations often share sensitive personal and financial information online, making them vulnerable to data breaches and cyber-attacks. This can lead to identity theft, financial fraud, and other forms of cybercrime.

#### ***Intellectual Property Rights***

The eSport industry heavily relies on the creation and use of original content, such as game designs, character concepts, and player strategies. However, there is a lack of strong legal frameworks and enforcement mechanisms to protect these intellectual property rights in Pakistan.

#### ***Online Harassment and Cyberbullying***

eSport players and organizations are often targets of online harassment and cyberbullying, which can have severe psychological and emotional impacts on individuals and the overall industry.

#### ***Fair Play and Cheating***

The prevalence of cheating and unfair practices in online gaming can undermine the integrity of the eSport industry and lead to a loss of trust among players and fans.

To address these challenges, several steps can be taken:

#### ***Strengthening Cybersecurity Measures***

eSport players and organizations should adopt robust cybersecurity measures, such as using strong passwords, enabling two-factor authentication, and regularly updating software and hardware.

#### ***Promoting Digital Literacy***

Educating players and organizations about digital rights and cybersecurity best practices can help them make informed decisions and protect themselves from potential threats.

#### ***Developing Strong Legal Frameworks***

The government and relevant stakeholders should work towards developing and enforcing strong legal frameworks to protect intellectual property rights and combat cybercrime in the eSport industry.

#### ***Encouraging Positive Online Behavior***

Promoting responsible and positive online behavior among players, fans, and organizations can help reduce instances of online harassment, cyberbullying, and cheating.

### ***Collaborating with Industry Partners***

eSport organizations, game developers, and cybersecurity experts should collaborate to develop and implement effective solutions to address the challenges faced by industry.

By addressing these issues, the eSport industry in Pakistan can create a safer and more secure environment for players and organizations, ultimately fostering growth and development in the sector.

### **Conclusion**

Pakistan hosts a rapidly growing community of the gamers who like to take part in various online and offline tournaments. This movement is a true ground roots one which interacts with these players solely with their amazing talent and equally amazing enthusiasm, paving the way to a thriving and sustainable eSport ecosystem. The political economy lens used in analyzing the Pakistani eSport scene illustrates the role of government policies in this process. The recent inclusion of eSport into the list of sports signifies a better policy, which will lead to an industry that is growing in a healthy manner. Bringing these three key elements; government, industry stakeholders and enthusiastic gamers community in harmony has the capability to not only make Pakistani eSport dominance in global arena but also to contribute to the economy of the country and cultural landscape of the nation.

To study the perceptions of players and organizers, five hypotheses were developed and tested about the growth of eSport in Pakistan through a political economy framework, additional to the quantitative analysis of the survey data. Based on the results of the chi-square tests, the following conclusions can be drawn:

#### ***Government Support (H<sub>1</sub>)***

Consequently, the hypothesis that the sufficient policy and financial support from the Pakistani government exists for eSport cannot be approved. It is also observed that compassion for the government's support is not significantly different for diverse roles and to some extent deem insufficient policy and financial endorsement for the sector.

#### ***Market Potential (H<sub>2</sub>)***

The hypothesis of this research that the eSport market can grow to be another stream of revenue in Pakistan is rejected. In fact, the views about the market opportunities for eSport do not differ significantly between the organizers and the players, in other words, the market remains unprofitable.

#### ***eSport as a Serious Profession (H<sub>3</sub>)***

The hypothesis that most of the population view eSport as a professional sport is also not supported. Specifically, the conclusions indicate that participants do not believe, or are uncertain, about the growing society's perceptions of eSport as a genuine profession.

#### ***Infrastructure Adequacy (H<sub>4</sub>)***

The hypothesis that current infrastructure (internet speed, gaming arenas, sponsorships) is enough to host professional eSport in Pakistan is conditionally considered. Likelihood ratio test further shows that there is a possibility of significant difference between the perception of infrastructure adequacy by students and staff, though Pearson Chi-square did not support this implication. Thus, this provisional endorsement calls for further research by using a greater sample size.

#### ***Societal Attention (H<sub>5</sub>)***

This research also rejects the hypothesis that the society pays more attention to traditional sports than eSport in Pakistan. Nevertheless, 50% of the respondents indicated that such kinds of advertisements are acceptable; there is no significant variation in the attitude with reference to different roles thus suggesting uniformity in the eSport population.

The rejection of most hypotheses means that there are several constraints in the development of eSport in Pakistan such as lack of support from the government, social attitudes and constraints creeping from the infrastructure. That the H4 hypothesis has only been accepted conditionally is a pointer to the same that research must go further in assessing the extent of infrastructure readiness which could form the foundation for the flow in the future. There is a need to call for the promotion and development of eSport in Pakistan by ensuring policy makers, awareness creators and infrastructural developers ensure that they undertake the right measures to allow eSport to fully bloom.

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