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From Japan to the GCC:

Paving Pathways to Localize Games and Hardware

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Introduction

The Middle East and North Africa (MENA), and in particular the Gulf Cooperation Council (GCC) markets of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE, have become one of the most strategically important growth regions in the global video games industry.

While the GCC is notable for its impressive track record of both public and private support for video game companies, gaming culture, and esports, this is buoyed by increased player demand, high consumer confidence, and market characteristics that make the region both exciting and as-of-yet underrealized by the global games industry. While there is opportunity here, international games companies continue to find the region challenging.

This research brief, published by Niko Partners and Media City Qatar, explores how Japanese video game companies have uncovered increasing demand for their games, IP, and hardware in the GCC markets. This brief uses this lens to assess the clear opportunity that exists for global video game companies seeking new revenue growth and deeper player engagement across the GCC.

Japanese video game companies have begun addressing this gap, building on existing cultural and commercial relevance of Japanese IP, anime, manga, games, and broader entertainment content within the GCC, and finding great success. Japanese video game companies have begun partnering with GCC government entities and private companies to localize, publish, distribute, and activate their IP for regional audiences and these strategies are paying dividends.

This research brief examines these strategies and explains why now is the right time for global video game companies to invest in the GCC. An authentic presence can help close the gap between demand and supply by supporting accurate localization, regional operations, distribution, brand building, and audience development. Perhaps most importantly, success in the GCC can become a strategic entry point for wider opportunities across MENA and the Arabic speaking world.

GCC Market Model & Forecast

GCC's games market is among the most exciting that Niko Partners covers, characterized by high revenue growth, high average ARPUs, and steady audience development.

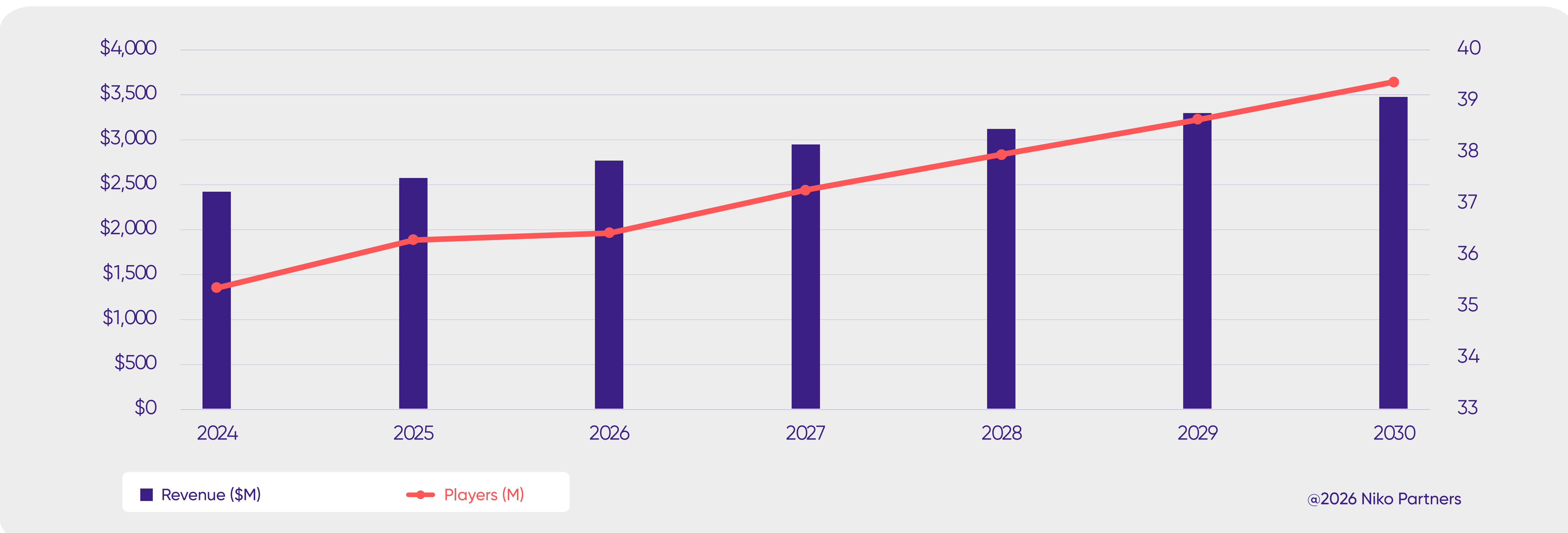
Niko Partners projects that the GCC region will represent $3.5 billion in player spending opportunity by 2030 and reach 40 million gamers. Revenue is forecast to grow at a 5-year CAGR of 5.9%, while the total number of players is forecast to grow at 2%. Annual ARPU across the GCC is also set to reach $88 in 2030, with Qatar leading the way at an impressive $150. Meanwhile, Saudi Arabia and the UAE account for nearly 80% of revenue across the GCC and contribute 84% of players, making these the trend leaders for the region.

GCC markets boast high per capita spending, large youth populations, strong government support, and excellent internet penetration, all of which contribute to a fast-growing culture of gaming and valuable opportunities for video game companies who can successfully navigate the region. At the same time, there are key risks and challenges that publishers must be aware of including the regulatory environment, content restrictions, cultural sensitivities, localization hurdles, and ecosystem complexity.

Growth in the GCC through 2030 will primarily be driven by rising spend per user, continued investment in local gaming ecosystems, and the increasing role of the GCC as a regional hub for publishing, localization, esports, IP collaboration, and hardware distribution.

At the same time, the market remains underserved relative to its commercial potential, with a lack of localization and limited local presence being the most significant factors creating this gap. This points to a structural oversight in global publishing strategy, where many companies see the GCC as a second- or third-tier market, rather than one with both high player demand and a growing support ecosystem from both governments and private entities.

Figure 1: GCC Video Game Market Size (2024-2030)



Japanese Video Game Companies entering the GCC

GCC's games market is among the most exciting that Niko Partners covers, characterized by high revenue growth, high average ARPUs, and steady audience development.

For many MENA consumers, Japanese content first entered the household through anime – from older imports like Grendizer to later Arabic-dubbed series such as Captain Majid (known globally as Captain Tsubasa). For gamers, Japanese IP had a niche presence with Mario and Sonic in the 80s and 90s, with Winning Eleven 3 helping elevate Japanese development in 1998, but it was PlayStation's official entry into the region in the early 2000s that helped video game IP such as Gran Turismo and arcade-style fighting games such as Tekken, Street Fighter, and The King of Fighters find larger audiences.

As with anime, which circulated thanks to Arabic translations, Sony's focus on Arabic localization was met with appreciation from local players and paved the way for more Japanese games to enter the market. In the niches that found success, there has been a history of cultural give and take – for example, most fighting games now have Arab representation via in-game characters.

Japanese companies are now moving from basic localization and availability to more deliberate regional strategies. Part of this is built on increased government support, which also includes relaxed regulations, allowing for more mature content or previously banned games to be released.

The Japan-GCC partnership landscape now also spans several business models, from capital investment, to publishing and localization support. At the capital level, Saudi Arabia's PIF has built stakes in Japanese and global game companies, including Nintendo, Nexon, Capcom, and Koei Tecmo. This provides new business ties in the market that can be leveraged for success. At the publishing and localization level, Manga Productions has partnered with multiple Japanese video game companies to localize and distribute their games in the region. This creates more opportunities for international titles to reach and connect with local players.

In terms of government support and ecosystem building initiatives, Media City Qatar and SEGA signed an MoU to localize and grow gaming in MENA through collaboration on new titles, local talent, production resources, IP, licensing, and responsible AI. The Japan Cooperation Center for the Middle East has also supported Saudi game developer training in Tokyo. Together, these moves show that Japanese companies increasingly see the GCC as both a commercial market and a strategic partner for regional growth.

Collectively, these trends have created a new landscape in the region, where IP and companies, which may have already had a toehold in the market, are now finding solid ground to build more robust market initiatives on top of. How Japanese companies have leveraged these opportunities and partnerships can be instructive for other companies looking at the GCC with fresh enthusiasm.

Key Partnerships between GCC entities & Japanese video game companies

GCC Entity	Japanese Entity	Type of Agreement	Outcome
Media City Qatar	SEGA	MOU	Support with Arabic Localization, Talent Development, Regulatory guidance
PIF	Nintendo	Minority Stake	7.45% stake
PIF	Capcom	Minority Stake	6.6% stake
PIF	Bandai Namco	Minority Stake	5.05% stake
PIF	Nexon	Minority Stake	10.71% stake
PIF	Koei Tecmo	Minority Stake	9.3% stake
Electronic Gaming Development Company	SNK	Acquisition	EGDC owns iconic gaming franchises like The King of Fighters and Samurai Shodown
Advanced Initiative	Nintendo	Official Distributor	Advanced Initiative is responsible for regional distribution, marketing, sales of Nintendo consoles, games and peripherals
Manga Productions	Square Enix	MOU	Strengthening its regional presence and expanding Arabic-focused content offerings
Manga Productions	Koei Tecmo	Publishing	Launched Nioh 3, Dynasty Warriors: Origins and Fatal Frame II: Crimson Butterfly Remake with Arabic localization
Ministry of Investment Saudi Arabia	JP Universe	MOU	Led by legendary game developer Hajime Tabata and focusing on planning, development, and production of premium games
Red Dunes Games	ACQUIRE Corp	Partnership	Partnership | Co-developing Project Tremor, Project Umbra, and Project Shadowcar that will be launched on PC and Console
Red Dunes Games	Kohachi Studio	Partnership	Development and exhibition of Black Finger JET at Tokyo Games Show
Saudi Digital Academy, Ministry of Communications and Information Technology	Japan Cooperation Center for the Middle East	Partnership	3 week bootcamp program for Saudi developers that combined lectures, studio visits, and mentoring
Saudi Esports Federation	Japan Esports Union	MoU	Exchange of personnel and instructors between Saudi Arabia and Japan, enhancing the competitive abilities and curriculum for both countries' esports athletes. The partnership also paved the way for esports tournaments between Japan and Saudi Arabia
Saudi Ministry of Investment	Quantum Solutions	Partnership	Enhance the growth and development of the gaming sector, in addition to facilitating and reducing the cost of releasing games in the Saudi market
Savvy Games Group	SBI Holdings	MOU	Savvy will provide strategic guidance to SBI Holdings and its subsidiaries for entering Saudi Arabia and the MENA gaming market and vice versa

How GCC Partnerships Benefit Game Companies

Japanese video game companies have strong IP, loyal fan communities, and growing recognition across the GCC, but scaling in the region requires more than product availability and basic localization. Offering a truly compelling game to local players requires local knowledge across language, culture, regulations, pricing, payments, distribution, marketing, operation, and community management – something that is true worldwide. GCC-based companies and governmental entities strive to provide a soft landing to foreign companies hoping to enter the market.

This research brief spotlights Japanese companies that have successfully forged such partnerships. The strategies, as well as key examples of these partnerships, that have had the most outsized impact on market success include the following:

Strong Culturalization

GCC partners can support localization that goes beyond translation. This includes UI adaptation, content review, dialect voice-over assessment, cultural advisory services, customer support, and region-specific marketing support.

Example: Manga Productions' partnership with Koei Tecmo on Nioh 3, saw Manga Productions handling Arabic localization, culturalization, marketing, and regional publishing for MENA, while also involving local creatives in the localization process.

Audience Development & Community Building

Japanese companies also need local audience development, not just distribution. GCC partners can support creator outreach, esports activations, local events, Arabic social content, retail launches, and community management.

Example: Capcom signed a three-year partnership with the Esports World Cup to bring a Street Fighter 6 esports tournament to the region. Meanwhile, its investment in a Capcom MENA site and Arabic social channels demonstrates Japanese publishers can build a direct regional feedback loop with players, creators, and media.

Regulatory Support & Business Incentives

GCC partners can support game approvals, age ratings, content compliance, company setup, and government engagement. This matters in a region where approval timelines, cultural expectations, and platform requirements can vary by market. Several media hubs and free zones in the Middle East can also offer a more attractive operating environment.

Example: In Qatar, the Qatar Free Zones Authority can offer eligible companies 100% foreign ownership and zero customs duties, with support from the Qatar Financial Center and Media City Qatar who can assist with office space, local talent, visas, and provide financial and non-financial incentives."

Official Distribution & Integration

Local partners can help Japanese companies move beyond grey market reliance with official launches, localized pricing, regional storefronts, and payment options.

Example: Nintendo officially entered the GCC market for the first time with the launch of the Switch 2 through a partnership with Saudi-based Advanced Initiative. The partnership included bringing the Nintendo Eshop and Online to the region, with support for direct purchasing and BNPL options through local platforms, Tabby, Tamara, and Emkan, aligning with local consumer payment behavior and lowering friction for premium purchases.

Key Partnerships with Entities in the GCC

Considering recent partnerships between Japanese game companies and local entities in the GCC, the most notable is the recent collaboration between SEGA and Media City Qatar.

On October 22, 2025, Media City Qatar and SEGA signed an MoU, with the stated goal of strengthening the gaming industry in Qatar and the wider MENA region. This partnership came on the heels of Media City Qatar's roadshow in Japan with media, gaming, and creative industry executives. The agreement aims to go beyond the more common Japan-GCC partnership models and instead positions the partnership as a wider ecosystem-building initiative.

According to the MOU, Media City Qatar has the capabilities to support SEGA with Arabic localization and cultural adaptation, voice-overs, subtitles, UX adjustments, and design elements that reflect local context. Support in these areas is key to the development of a local presence. While the Sonic IP has legacy recognition among Arab gamers, this partnership aims to go beyond that, potentially drawing on local talent and production facilities to create new games and improve exposure and foothold.

More significantly, the arrangement also includes education and talent development through training programs, workshops, and school-based initiatives. This could also include esports where Media City Qatar has partnered with SNRG to build out a domestic esports ecosystem. One example of this is the opening of the 321 Esports Lounge as a permanent esports development hub at the 3-2-1 Qatar Olympic and Sports Museum, with the aim to offer structured training courses designed to bridge the gap between casual play and competitive readiness.

These initiatives would allow SEGA to improve their operational functions in Qatar while also providing a long-term benefit to Media City Qatar, as the creation of a local talent pool and industry culture are keys to long term growth and sustainability. The partnership also provides regulatory guidance, national platform integration, knowledge exchange and much more.

A second notable partnership in the region is between Advanced Initiative Company (AIC) and Nintendo. Historically, Nintendo's presence was limited to grey market distribution in the GCC, with fragmented official distribution across the region. Since 2025, AIC has supported Nintendo's official entry into the market with the launch of the Nintendo Switch 2, simultaneous with the device's global launch. Crucially, this also included the local launch of the official Nintendo Eshop. The timing of these launches meant that the launch of the Switch 2 benefited locally from global marketing and excitement.

From a marketing standpoint, AIC supported the launch with a localized, multi-channel campaign. Activities included an eight-hour Kingdom Tower takeover in Riyadh, timed one day before Eid al-Adha, digital out-of-home screens across 10 malls in Riyadh, Jeddah, and Dammam, digital campaigns generating more than 65 million estimated impressions over 25 days, and launch coverage from more than 35 influencers and media outlets. The campaign also adapted Nintendo messaging for Saudi consumers through Arabic creative materials, Arabic voice-over, localized social media content, and Eid-related campaigns.

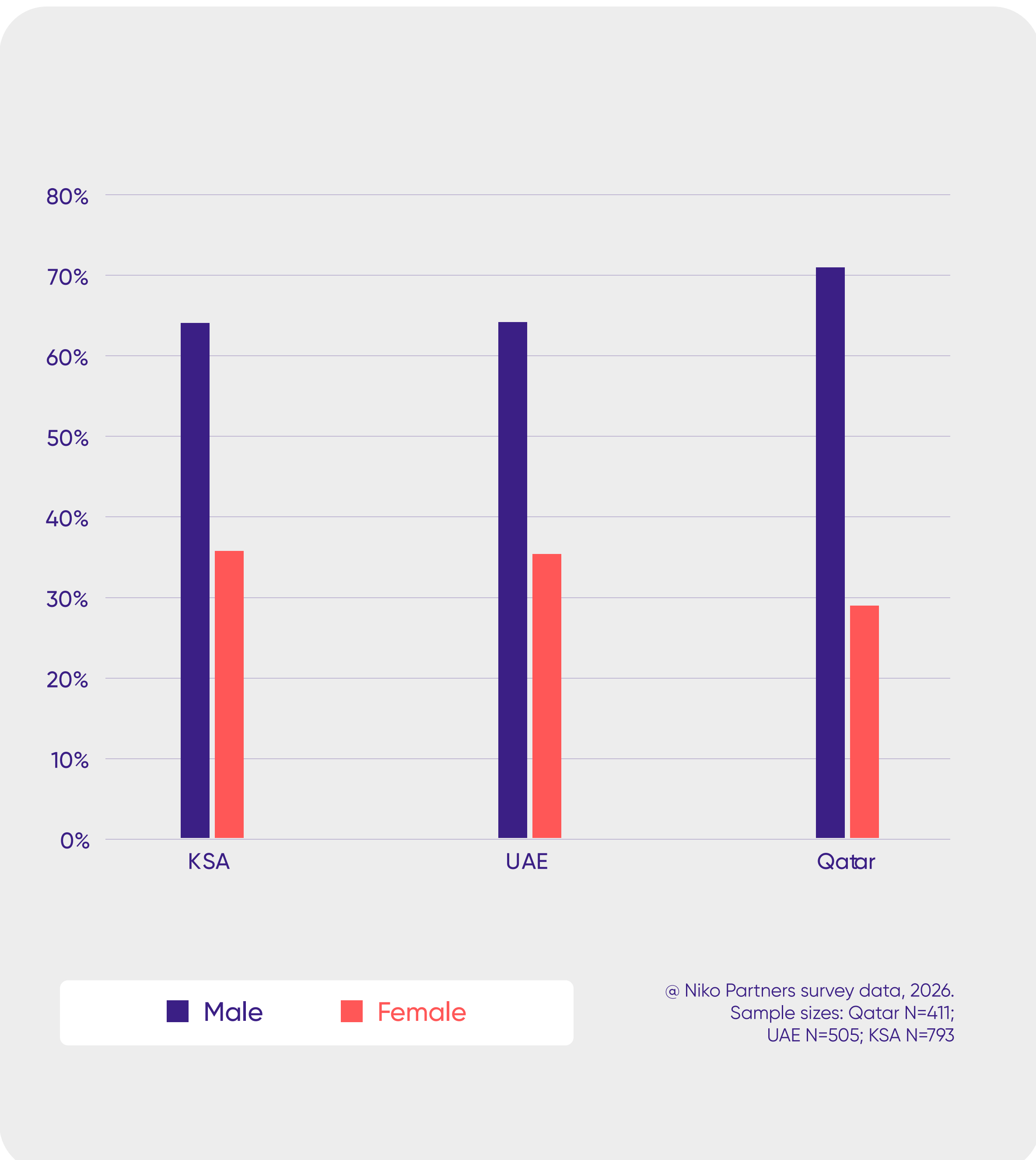
These two unique cases demonstrate how GCC partnerships can evolve from market entry support into broader regional growth. In the case of SEGA and Media City Qatar, the partnership exemplifies how mutual collaboration can be a boon for both international market entrants and local ecosystems. Meanwhile, Nintendo's support from AIC reveals the synergistic potential of a localized media campaign that syncs up with a larger global event like a platform launch.

GCC Player Demographics & Preferences

Niko Partners conducted a survey of 411 gamers in Qatar in June 2026, specifically for this research brief and as a complement to our existing survey data on Saudi Arabia and the UAE.

Niko Partners' market model data shows there are 1.4 million players in Qatar, with a demographic split of 71% male and 29% female. This skews slightly more male than other key markets in the region, which compares to 64% male and 36% female in Saudi Arabia and the UAE. Notably, while still an overrepresentation of men across all three markets, the region traditionally skewed 80% male in the past, meaning that women's participation is increasing as gaming becomes more mainstream.

Figure 2: Players by Gender

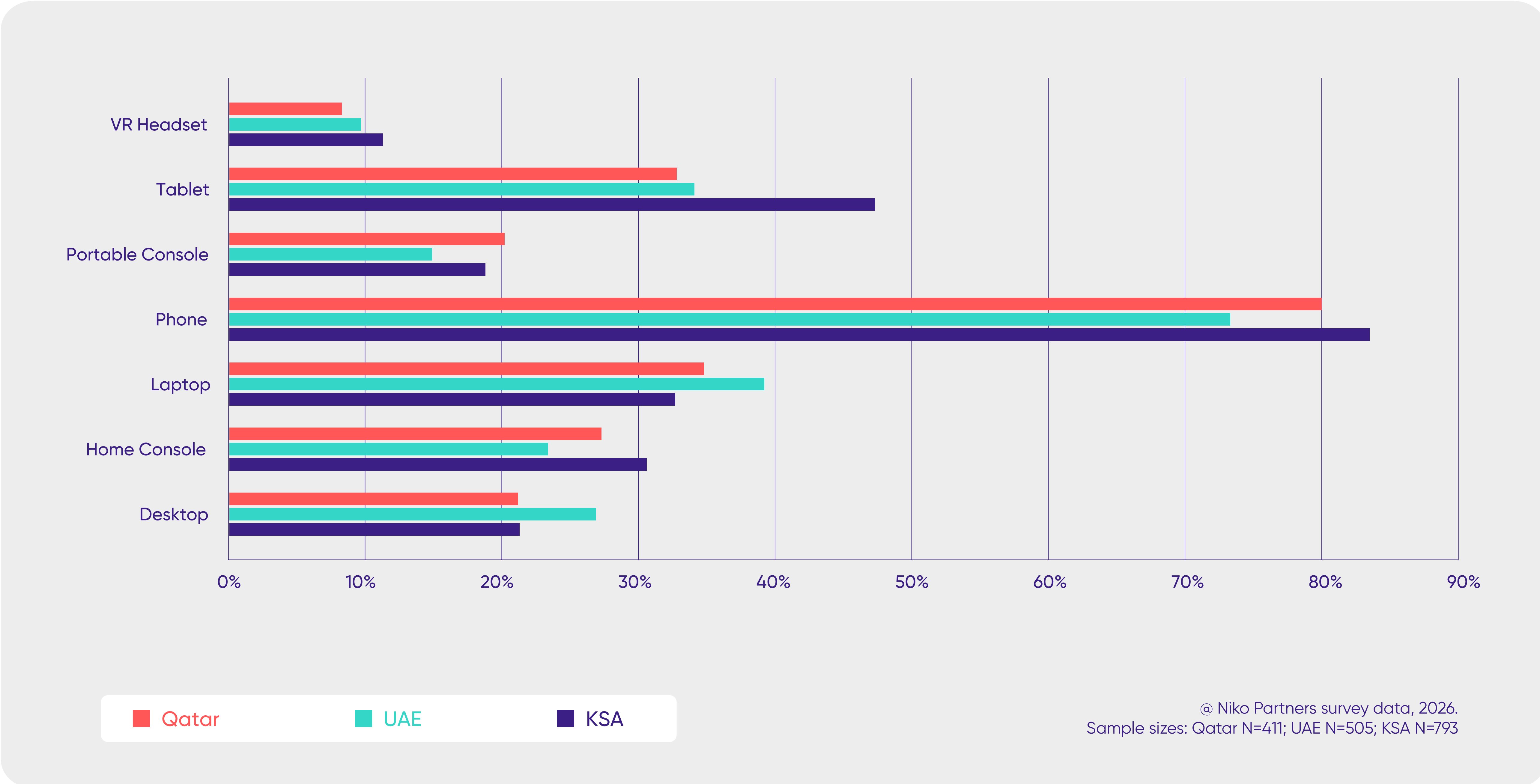


Qatar is also a young and cosmopolitan market. Nearly 60% of respondents are between 21 to 35 years old. This represents a large demographic of comparatively young gamers, which bodes well for future industrial development as the audience of gamers mature with the market. Another significant demographic trend is citizenship status. We found that 78% of respondents were non-Qatari citizens, owing to the large expat population in the country. While this lowers the overall need for language localization, we still found lack of localization to be the dominant barrier to adoption.

The average salary for a player in Qatar is approximately $3,500 per month, jumping to nearly $6,000 when you isolate Qatari citizens. 4 in 10 paying players are classified as super-high spenders, meaning they spend over $50 a month on video game related content. One of the leading strengths of the GCC region is its high ARPU. As we noted earlier, annual ARPU across the GCC is also set to reach $88 in 2030, with Qatar leading the way at an impressive $150 ARPU projected within the next 5 years.

Mobile remains the largest gaming segment, but we see relatively strong engagement with other platforms as well. 87.8% of respondents in Qatar play on mobile, followed by PC at 46% and console at 38.7%. Crucially, this split is not significantly different from core Western markets, meaning that companies in any platform segment can likely find an eager audience for their titles. Smartphone gamers are the most engaged, spending an average of 10 hours per week playing video games.

Figure 3: Players by Device



Social platforms are key to reaching gamers in all three of these leading GCC markets. In Qatar, 42% of respondents watch gaming video and livestreams online, in line with Saudi Arabia and the UAE. Meanwhile, 22% say they are part of a dedicated online video game community.

When asked what matters most in terms of localization, all 3 markets rank the lack of dedicated servers as their #1 option. In Qatar, a lack of support for local payment and currency ranks #3 (30%), while the need for Arabic text and voice support is much lower compared to Saudi Arabia due to the large expat population.

Figure 4: Gaming Related Activities – Player Participation

Japanese Video Game Franchises

A major focus of the survey conducted for this research brief pertained to the perception of Japanese game companies in Qatar.

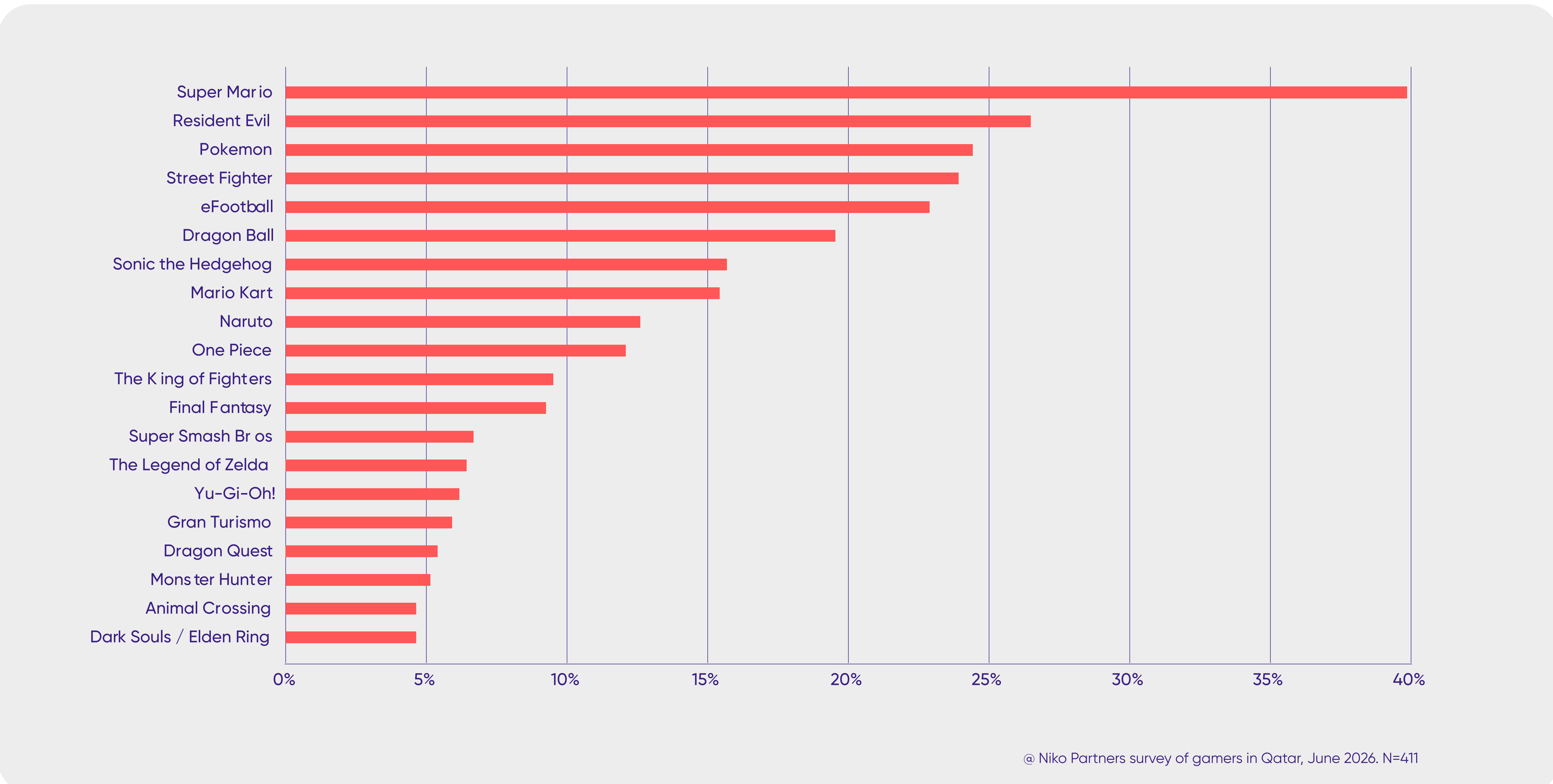
Specifically, we asked players in Qatar about their familiarity with the top 25 Japanese video game franchises and found that Japanese video game companies' recognizability is strong thanks to their increased presence in the GCC over the past few years.

Among the survey respondents, 94.6% were able to identify at least one or more Japanese game franchise. Nearly half (48%) were able to identify more than five. Classic franchises such as Super Mario, Pokémon, and Dragon Ball had the highest rate of familiarity to players in Qatar.

This was followed by a second tier of leading titles, including Street Fighter and Resident Evil from Capcom, Sonic the Hedgehog from SEGA, and eFootball from Konami.

Super Mario was the most played franchise among respondents, although we note that this is likely on legacy consoles and via emulated versions. The franchise's 45-year legacy and association with the Nintendo brand, clearly lends to its ubiquity. Perhaps more impressive, over 1 in 4 have also played a Resident Evil game before, with two-thirds of players having been fans of the franchise for over a year.

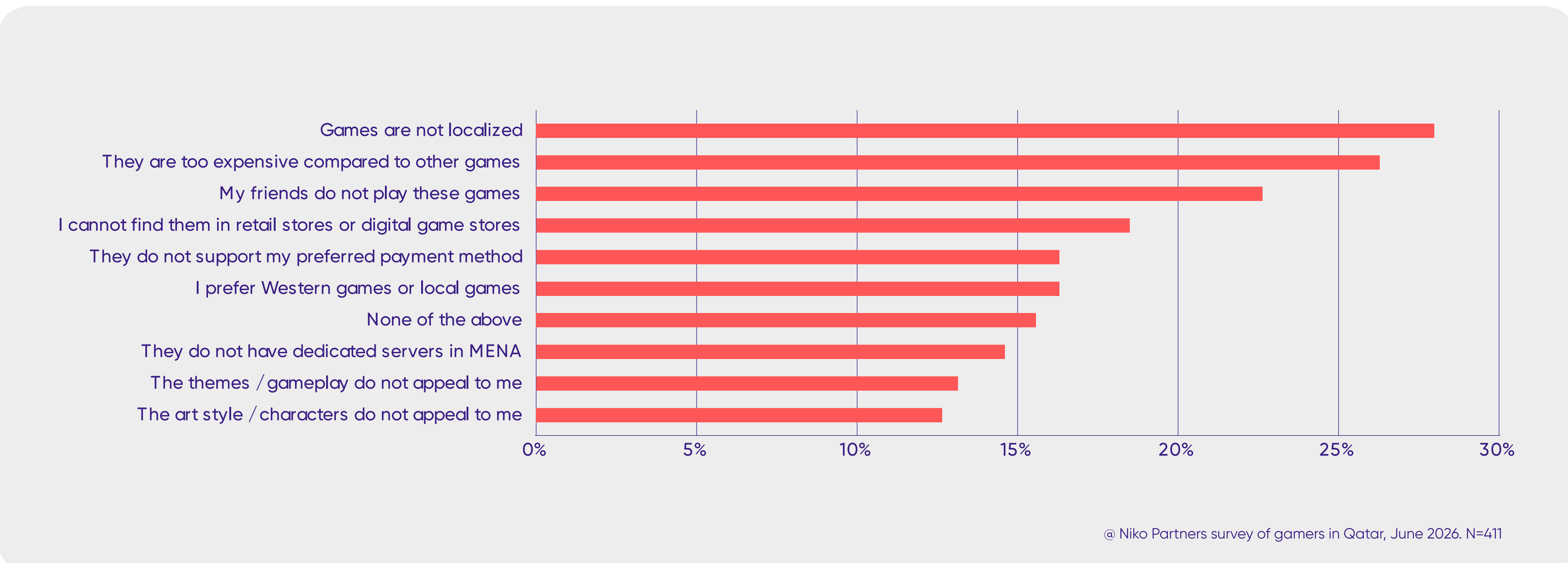
Figure 5: Have played a game in the franchise before



We also see evidence of increased uptake of certain franchises in the past year. For example, 58% of those that played a One Piece game have become a fan in the past year, compared to 51.5% for Mario Kart, and 42% for Street Fighter. In fact, only 27% of Elden Ring players said they were fans back when the game first came out, with 47% becoming fans after it was confirmed the game would get an Arabic localization via the release of its Nightreign standalone expansion. What these details suggest is that while the recognizability of certain IP has been high for some time, more users are discovering Japanese titles in the recent turn, a strong indication that current localization efforts are paying dividends.

In fact, a lack of localized release (28%) is the top barrier for players in Qatar when it comes to buying Japanese video games. The second reason is that they are typically priced higher compared to other games, highlighting a need for a greater focus on regional pricing, while the third reason is because their friends do not play those games. Only 16% said they prefer non-Japanese developed games.

Figure 6: Top barriers for playing Japanese game IP

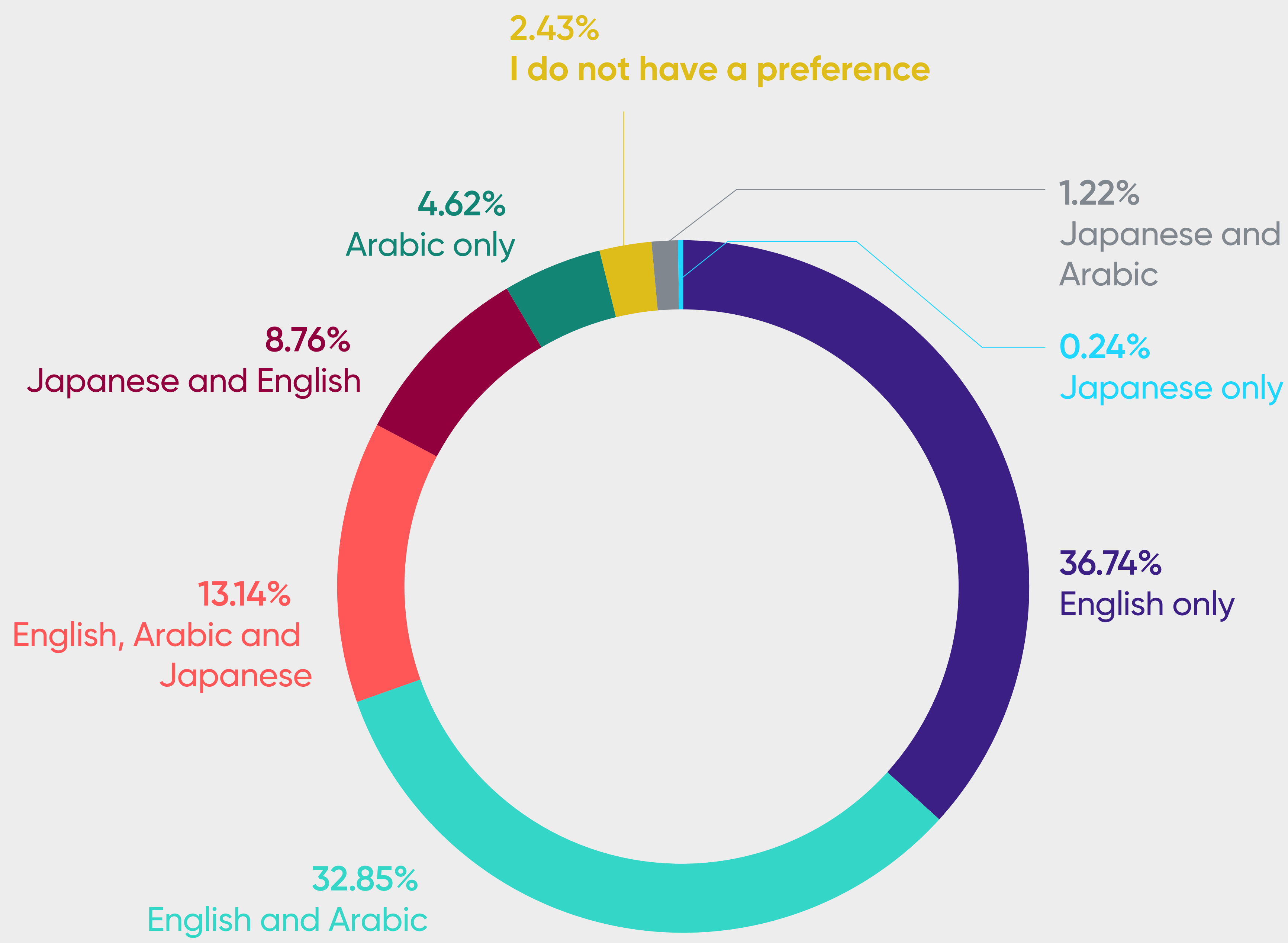


Given the high number of expats in Qatar, 37% are content with an English-only release for a Japanese game, while 33% would prefer a release with English and Arabic support. A majority, 52% have a preference for Arabic when accounting for all options, indicating that local language support is needed for broader adoption. When looking at Saudi Arabia, which has a lower expat population, the need for an Arabic localization is the second most important localization factor, highlighting that Arabic is more important in the largest GCC market.

One key trend that emerged from data, for those that prefer an Arabic localization, is that not only do they want a localization in the first place, but they also want improved localizations over what exists today. This makes sense in a historical context, as many past and poor localizations have included translation errors or mismatched expectations over elements like Arabic dialects and linguistic phrasing.

This means, while localization is key to reaching gamers in these markets, there is still a lot of runway for improvement as well. We expect that as the region develops as a key gaming market, expectations for localization quality and the importance of localization partnerships will continue to rise.

Figure 7: Localization preference for Japanese games



@ Niko Partners survey of gamers in Qatar, June 2026. N=411

Outcomes: Japanese Games that Have Found Success in the GCC

Japanese video game companies are increasingly embracing active regional strategies built around localization, cultural adaptation, community engagement, and partner-led execution.

The shift is being driven by an understanding that the GCC has emerged as a growth region for gaming with high ARPU players, especially in Qatar where ARPU is double the regional average, with many now expecting direct support, official access, and more authentic recognition. Furthermore, as our survey demonstrates, the regional appetite for localization efforts is high, meaning players respond well to overtures that recognize their needs and wants.

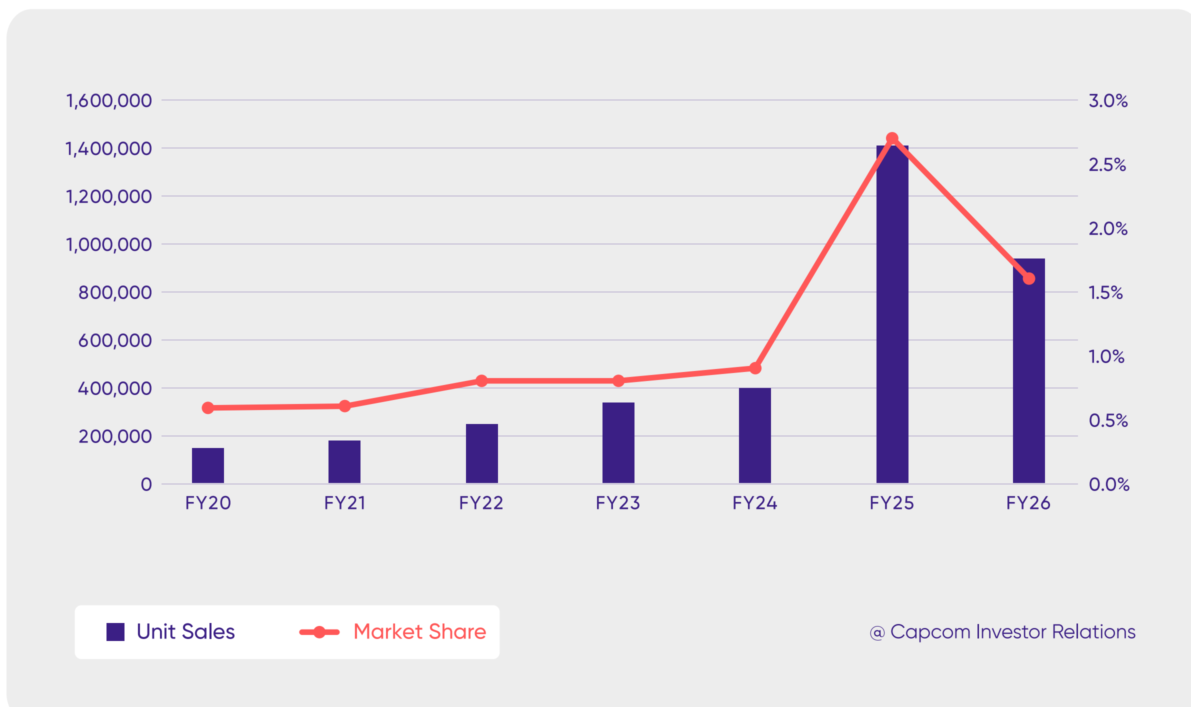
Capcom is one of the clearest examples of this shift, having identified that the Street Fighter franchise had fans in the region over a decade ago and building this into long-term success. Fighting game franchises such as Street Fighter, Tekken, The King of Fighters, and other arcade-style games had gained popularity in the region because they were competitive, visually intuitive, and strong in local multiplayer settings. These titles gained an audience despite a lack of localization, in part, because they did not require the same level of language comprehension as story-driven RPGs or adventure games, lowering the barrier to adoption. Capcom has taken this initial foothold and developed it into a long-term and nuanced local strategy. The developer worked with Pluto Games, its partner in the region, to develop Rashid, a Middle Eastern fighter for Street Fighter V, giving Arabic gamers a crucial point of representation in the title.

Capcom also localized the game in Arabic and built a dedicated ecosystem around the game in the region, including esports. In fact, Amjad "AngryBird" Al-Shalabi, a Jordanian/Emirati player, won the Street Fighter 6 competition at EVO 2023, demonstrating that MENA is not only a market for Japanese fighting games, but is also part of the growing global esports scene for the game.

More recently, Capcom has started localizing and culturalizing its other core franchises, such as Resident Evil and Monster Hunter, for the MENA region. This focus aligns with its improving MENA performance. In the fiscal year ending March 2020, Capcom sold 150,000 software units across MENA, accounting for 0.6% of its total sales. By the fiscal year ending March 2025, this had increased to 1.41 million units, or 2.7% of total sales – an 840% unit increase over the period.

Following this success, Capcom dispatched a new research team to MENA in 2025 to better understand how its games are received and played, and to inform brand-building and market-formation strategies over the next five years. This is a key example of how a nuanced localization approach can develop from small overtures in a particular title to strategy-shaping initiatives at an organizational level, and how all these initiatives can have a cumulative effect on regional and institutional wins.

Figure 8: Capcom – Game Software Unit Sales in Middle East



Outcomes: Japanese Platforms & IP Growth

While Capcom's route to success in MENA provides a key roadmap for how other titles can leverage localization for success in the region, Sony provides an earlier model of sustained regional commitment with a lesson for platform operators and hardware adoption. PlayStation has long worked with local partners to distribute hardware and software in MENA, supported by high-profile localized launches and regional marketing.

During the PS4 generation, Sony added Arabic support to the PlayStation Store and also expanded the PlayStation Network to support new accounts in Saudi Arabia and the UAE with local currency support and payment services such as Zain and STC Pay. At the title level, Sony has built Arabic support into key first-party games such as Marvel's Spider-Man 2 and God of War Ragnarök, both of which were well received in the region. Niko Partners estimates more than 4 million PS5s have been sold across the MENA region since the console's launch.

Square Enix has also shown renewed attention to the region. The introduction of a 21+ age rating in Saudi Arabia and the UAE has created a clearer pathway for mature titles to release officially without content changes. Square Enix was an early example of an international developer to capitalize on this change, launching NieR Automata and Life is Strange: Reunion in the GCC over the past year. Crucially, this demonstrates that regulatory changes and regional demand can unlock back-catalog opportunities for publishers.

Partnership-backed localization is where the commercial case for localization efforts becomes clearest. Manga Productions partnered with Koei Tecmo to localize, publish, and market Dynasty Warriors: Origins and Nioh 3 in MENA, while creating opportunities for Saudi talent to participate in the localization process. These efforts paid dividends. The Arabic version of Dynasty Warriors: Origins won a Best Localization Award at the Grand Game Awards 2025, recognizing the quality of its regional adaptation. In addition to its partnership with Media City Qatar, SEGA has also partnered with Manga Productions to publish Sonic Racing: CrossWorlds in MENA, again linking regional publishing with Saudi talent participation.

Most importantly, the outcomes speak for themselves

Niko Partners' analysis of 10 Japanese franchises that recently launched with Arabic localization and local GCC support found that these localized titles generated a 33.2% uplift in GCC sales share over prior non-localized franchise entries, with all 10 exhibiting an increase in share. Even when adjusting for the median, the uplift is 32.0%, showing a roughly one-third uplift is realistic for companies that tackle these efforts earnestly.

Key Japanese video game titles localized for MENA

Game Name	Japanese developer / publisher	Localization
eFootball	Konami	Full Arabic text including the option for Arabic commentary in-game by Fahad Khalid Alotaibi
Captain Tsubasa / Majid Mobile	Klab	Added Arabic support and Ramadan campaign in 2020
Street Fighter 6	Capcom	Full Arabic text localization. Includes an Arab fighter (Rashid) and is part of the Esports World Cup
Tekken 8	Bandai Namco	Full Arabic text localization. Includes an Arab fighter (Shahin) and is part of the Esports World Cup
Elden Ring	Bandai Namco / FromSoftware	Nightreign added Arabic support after a petition from Arab gamers.
Nioh 3	Koei Tecmo	Full Arabic text localization thanks to Manga Productions
Sonic Racing Crossworlds	Sega	Distribution across MENA
Dynasty Warriors: Origins	Koei Tecmo	Full Arabic text localization thanks to Manga Productions
The King of Fighters XV	SNK	Full Arabic text localization. Includes an Arab fighter (Najd) and is part of the Esports World Cup
Fatal Fury: City of the Wolves	SNK	Full Arabic text localization. Added Cristiano Ronaldo and Salvatore Ganacci as playable characters.
The Legend of Zelda: Breath of the Wild	Nintendo	A fan translation by Eternal Dream Arabization added Arabic support to the game
Monster Hunter Wilds	Capcom	Full Arabic text localization
Resident Evil: Requiem	Capcom	Full Arabic text localization
Gran Turismo 7	Sony	Full Arabic text localization
Naruto X Boruto Ultimate Ninja Storm Connections	Bandai Namco	Full Arabic text localization

Dynasty Warriors: Origins generated a 30.5% uplift in GCC sales share compared with Dynasty Warriors 9, while Elden Ring: Nightreign generated an 88.9% uplift, compared with the original Elden Ring, which did not ship with Arabic at launch. Regional fans of Elden Ring had even previously petitioned for Arabic localization, highlighting that the demand was visible before the publisher acted.

The strategic implication is clear: while some Japanese IPs have built up niche fanbases prior to localization and marketing support, stronger results come when companies pair that IP with Arabic localization, official distribution, local marketing, community building, and partner-led execution.

Key Takeaways, in Summary

1. The GCC is a high value growth market

The GCC is emerging as one of the most important growth opportunities for global video game companies seeking to expand across MENA. The region's high spending power, young and highly engaged player base, strong multi-platform adoption, robust digital infrastructure, and growing public and private investment in games, esports and entertainment have created a commercially attractive environment for publishers, platform holders, hardware companies, and IP owners.

2. Demand is growing faster than localized supply

Many global game companies have historically underserved the region through limited Arabic localization, inconsistent official distribution, delayed launches, weak regional marketing, and limited community support. This creates a clear demand gap as gaming grows as a key entertainment vertical. Players increasingly expect day-one access, Arabic language options, culturally appropriate marketing, local pricing, regional payment options, and direct engagement from publishers.

3. Localization and local launch support have a measurable impact

Niko Partners analysis of 10 Japanese franchises that recently launched with Arabic localization and local GCC support found that these titles generated a 33% higher GCC sales share than prior non-localized franchise entries. This indicates that localization and regional marketing can lead to an increase in player share from the GCC while also improving player sentiment and growing the local ecosystem.

4. GCC partnerships help solve operational barriers

Local partners in the GCC can support publishers who are unfamiliar with the region with Arabic localization, cultural adaptation, ratings and regulatory approvals, official distribution, payment integration, retail activation, content creator outreach, esports operations, community management, and launch marketing. These capabilities can be difficult and resource intensive for foreign companies to build alone and partners act as a guiding hand with tangible benefits.

5. Partnerships are also ecosystem-building tools

The strongest Japan-GCC partnerships are not just limited to market access. Media City Qatar × SEGA, AIC × Nintendo, Saudi Esports Federation × Japan Esports Union, and other examples show how partnerships can also support talent development, production knowledge transfer, local creative participation, and long-term gaming ecosystem growth, which in turn leads to increased opportunities for global gaming companies in the region.

In essence, global video game companies can use GCC partnerships to bring IP to MENA more effectively, while GCC entities can use those partnerships to build local capability, strengthen regional gaming infrastructure, and position the region as a hub for games, IP, hardware, esports, and transmedia growth.

Appendix

Media City Qatar

Media & Innovation Hub

Media City Qatar is a global hub that brings together media companies, entrepreneurs, and creative talent to drive the future of media and innovation in Qatar. With a modern regulatory framework, advanced infrastructure, and access to business setup support, Media City Qatar enables media production, digital publishing, and creative industries to thrive in Doha's growing economy.

As part of Qatar's vision for economic diversification, Media City Qatar supports the development of digital media, film production, and content creation. We provide a flexible environment for company formation, licensing, and growth — helping startups and established businesses scale within the Qatar business ecosystem.

Through partnerships with leading international media organizations, Media City Qatar promotes innovation, encourages cross-industry collaboration, and strengthens Qatar's position as a global media hub.

With world-class facilities, modern office spaces, and a supportive ecosystem, we empower media professionals, entrepreneurs, and production companies to achieve new levels of success.

Get in Touch

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Niko Partners

Market Intelligence

Niko Partners is the world's leading global market research firm focused on video games and esports in Asia, the Middle East, and North Africa. Leveraging unmatched local expertise with a global perspective, Niko Partners delivers the most in-depth business intelligence and consumer insights on the world's fastest-growing regions.

With our deeper understanding of these markets, game developers, publishers, investors, and suppliers can make smarter business decisions with the utmost confidence. Our detailed reports, online SaaS tools, and custom consulting services dig into the details of nuanced, complex markets, empowering firms with a stake in the video game and esports ecosystems to make the right moves for their organizations. Detailed coverage areas include China, East Asia (Japan, Korea), Southeast Asia (Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam), India, and MENA (Egypt, Saudi Arabia, and UAE).

The company is based in Silicon Valley, with offices in Shanghai, Bangkok, Jakarta, and London.

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