STRATEGIC HANDBOOK (SHORT AND LONG TERM)

2025

Prepared by: Esports Association of Brunei (ESB)

Introduction

Esports Association of Brunei (ESB) is a non-profit organization registered under the Registrar of Society, Royal Brunei Police Force and a national sports association under the Youth & Sports Department, Ministry of Culture, Youth and Sports since 2019. ESB is also an affiliated member of the Brunei Darussalam National Olympic Council (BDNOC) further strengthen its position as a legitimate national sports association of Negara Brunei Darussalam.

ESB is part of 3 key regional and international federations namely, Asian Electronic Sports Federation (AESF) since 2020, who is sanctioned by the Olympic Council of Asia (OCA), International Esports Federation (IESF) since 2020 and lastly Global Esports Federation (GEF) since 2020.

ESB has been actively promoting esports in Negara Brunei Darussalam through all levels from grassroots to the national level by organizing competitions, workshops, exhibitions and sending potential athletes abroad to compete regionally and internationally.

The purpose and objective of this strategic handbook is to identify the issues observed domestically and apply knowledge and experience gained from other esports organization around the world to further improve our domestic esports ecosystem such as athlete's skills and professionalism, career pathways, business opportunity and to be a potential host country.

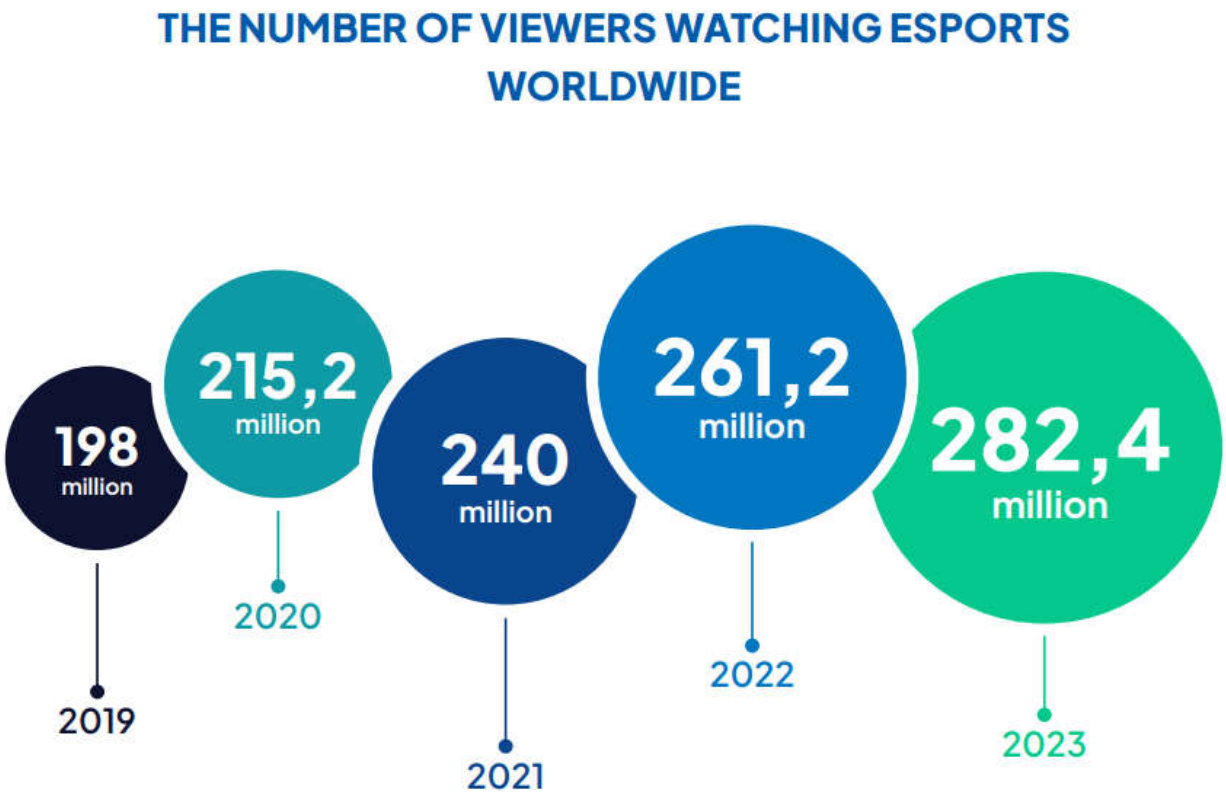
The objective of this handbook can be broken down into the categories below:

i) Skills and Professionalism
ii) Career Pathways
iii) Business Opportunity
iv) Host Country Opportunity

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According to a report by Newzoo, 2022 recorded 532 million esports viewership worldwide and this includes 271 million occasional viewers and 261 million regular viewers. The number of regular viewers continues to grow with projections it will reach 318 million by 2025. The growth rate from 2020 to 2025 is estimated to be at 8.1% annually.

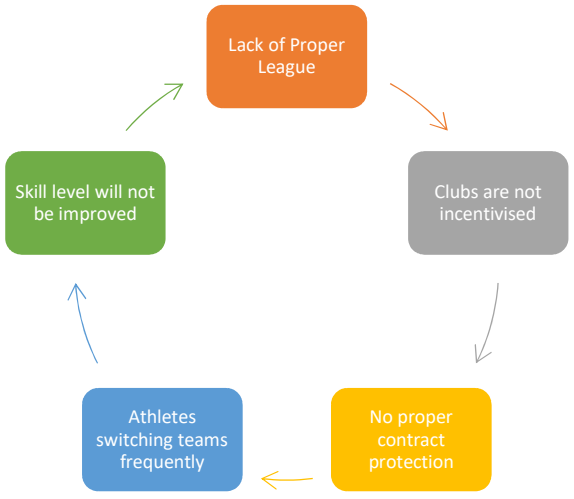


The fastest growing regions are Southeast Asia, Central-Southern Asia, Latin America with average growth rates of 27.6%, 23.4% and 19% respectively from 2020 to 2025. Global esports revenue is projected to exceed $1.8 billion by 2025, reflecting an annual growth rate of around 13.4%

Although there are no official data recorded for the market size in Brunei Darussalam, we can estimate based on the consensus conducted by the Department of Economic Planning and Statistics in 2023 that the age group for 15-29 years old stands at 109,300 persons which are usually the targeted group for esports and gaming sector.

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With the absence of a proper domestic league, clubs are not properly registered with the appropriate authorities which results in a lack of information on the active player base. This further jeopardize the development of the athlete due to lack of support from functioning clubs with athletes jumping from one team to another for one competition to the other. This will not be a proper platform for new athletes coming into the esports scene as they do not see the support system provided by the local ecosystem.



Esports Ecosystem and Stakeholders in Negara Brunei Darussalam

ROLE	STAKEHOLDERS	IDENTIFIED CONCERNS
MINISTRIAL SUPERVISION & GUIDANCE	JABATAN BELIA DAN SUKAN KEMENTERIAN KEBUDAYAAN, BELIA DAN SUKAN NEGARA BRUNEI DARUSSALAM	
POLICY ENFORCER AND SAFEGUARD	ESB ESPORTS ASSOCIATION BRUNEI	Lack of funding from private sectors to support initiatives from organizers to push for more awareness, activities, competitions. Has to go through multiple agencies to get permission for organizing events (Eg: MOHA for event permit and sponsorship approvals) Lack of clarity from authorities to stop companies/organizers from organizing their own esports competition that did not get approval from the association. (Eg: BDF approaching 3rd party companies to organize esports competition without prior consent and approvals from ESB but has gotten approval from MOHA.)
ESPORTS EVENT ORGANIZERS	CR!TESPORTS BRUGAMES Brunei's E-Sports Event Team	Proper companies such as CRIT Esports and BruGames Management Services gone through proper channel to ensure their event is supported by the national association. However, the process is long and not streamlined. Raised proposition if ESB can act as a one stop agency to get permission from both MOHA and JBS for event and sponsorship approvals.
PARTICIPANTS	**CLUBS, ATHLETES & PLAYERS**	Raised concerns that certain competitions are not following the proper competition regulations and causes unfairness in certain scenarios. Competition set up are not standardized and certain event organizers have their own sponsored teams participating in the event resulting in favoritism.

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The above table are some concerns raised by stakeholders regarding the current esports ecosystem issues in which can be improved with the proper structures and systems set in place, following the example from Malaysia and Indonesia. Unregulated competition may not be all bad but there are certain companies that tend to exploit such loopholes to increase profit and harm the competition integrity which in the long run will turn esports into a negative image to the public eye. If the Ministry of Home Affairs (MOHA) is able to work with ESB prior to granting approvals for esports event, this will help regulate the competition integrity in a way which all event organizer shall comply with ESB's competition policy and guidelines before their event will be supported by ESB and approved by MOHA. Shall there

be any event not supported by ESB and the organizer chose to continue organizing, ESB shall be given full authority to report to the Royal Brunei Police Force and stop the competition from happening.

I. ATHLETE'S SKILLS AND PROFESSIONALISM

As esports is becoming more competitive worldwide, the skill gap for most of the top athletes will be smaller and if our athlete does not keep up, the gap will be wider for us and unable to catch up with the rest of the world. At the moment, Brunei Darussalam has a pool of athlete that is able to qualify to World Championships, Regional Competitions in which they are able to secure podium finishes.

YEAR	COMPETITION	RESULT	GAME TITLE
2020	Razer SEA Invitational 2020	3rd Place	PUBG MOBILE
2021	Razer SEA Invitational 2021	3rd Place	PUBG MOBILE
2022	14th IESF World Esports Championship 2022	2nd Place	PUBG MOBILE
2023	15th IESF World Esports Championship 2023 Asia Qualifier	3rd Place	PUBG MOBILE
2023	15th IESF World Esports Championship 2023 Finals	6th Place	PUBG MOBILE
2023	MyBorneo E-Force Invitational 2023	1st Place	PUBG MOBILE
2023	MyBorneo E-Force Invitational 2023	2nd Place	MLBB
2023	Sarawak Esports Championship 2023	1st Place	PUBG MOBILE
2023	Sarawak Legends Assemble Invitational 2023	2nd Place	PUBG MOBILE
2023	Sarawak Legends Assemble Invitational 2023	3rd Place	PUBG MOBILE
2023	Sarawak Legends Assemble Invitational 2023	4th Place	MLBB
2024	21st SUKMA Sarawak 2024	1st Place	PUBG MOBILE
2024	Mekong Challenge Cup Season 3	5th Place	MLBB
2024	Campus Legends Invitational 2024	Joint 3rd	MLBB

From the table above, we can conclude that we do have high caliber athletes that can compete at the highest level even with our less developed ecosystem domestically. In the same period of 2023 – 2024, ESB managed to produce 2 high quality athletes (Md Safwan Hakimi and Md Danish Haqeeme) that was eventually exported to Malaysia to play professional scene in the PUBG MOBILE SUPER LEAGUE (PMSL) South East Asia, which is the highest tier competition for PUBG MOBILE in Southeast Asia.

Short Term Plan (1-2 Years): Firstly, ESB would need to introduce a guideline on how to set up a proper esports club/team either registered with the Registrar of Society or a company with the Registrar of Company. This should include how a club should be administered and maintain sustainability. Proper agreements or contracts shall be prepared and signed by all athletes under the club and any transfer of athletes shall be properly documented for transparency purposes.

By having a proper structure within a club/team, professionalism must be upheld by both club/team and/or athlete at the highest level to foster proper culture and real life professional experience when they move on to their next career pathway in the future in both esports and non esports industry.

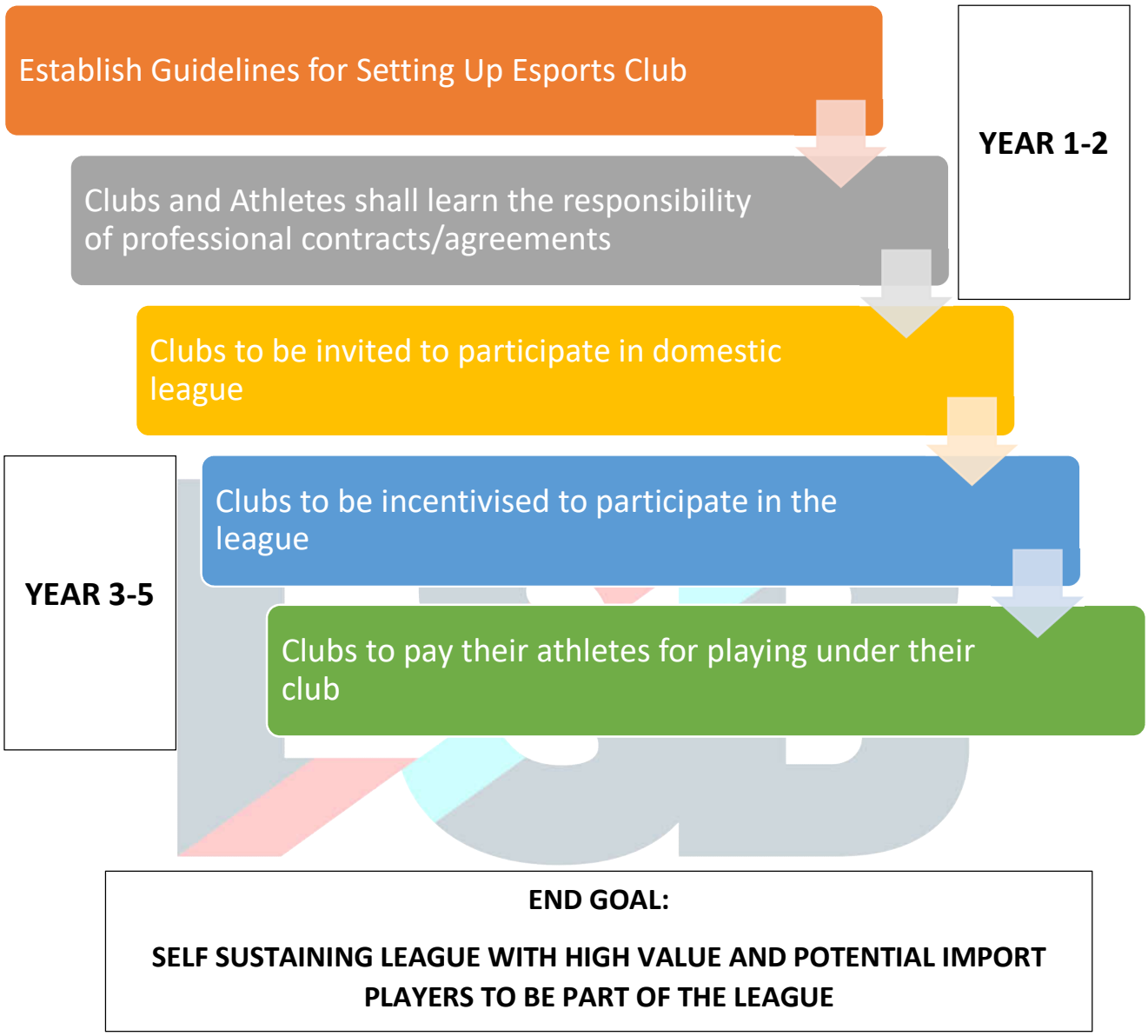
Long Term Plan (3-5 Years): ESB will need to draft a promotion-relegation system domestic league to ensure there are enough competition matches throughout the year for its club to compete and increase competitiveness among its athletes to be at their best all season. For this, sufficient funding must be raised and secured through sponsorship and/or grants to cover operational expenses, including club incentives for participating in the league. Athletes from these leagues will then be ranked in our database to be selected to be part of the national squad for international/regional competitions.

Competition marshals are also key members of this plan as marshals serves as a referee for all competition matches to ensure fairness and integrity of the league. Currently ESB has partnered with Politeknik Brunei Esports Club and IBTE Esports Club to train new marshals in our annual ESB National Cup and any other competitions supported by ESB. Currently ESB has 2 experienced International Technical Officials that have both referee in 31st and 32nd SEA Games, and they will be the lead Technical Official to do refresher course, trainings for newly recruited marshals to officiate the league. Further trainings will be conducted via invited Technical Officials from abroad potentially

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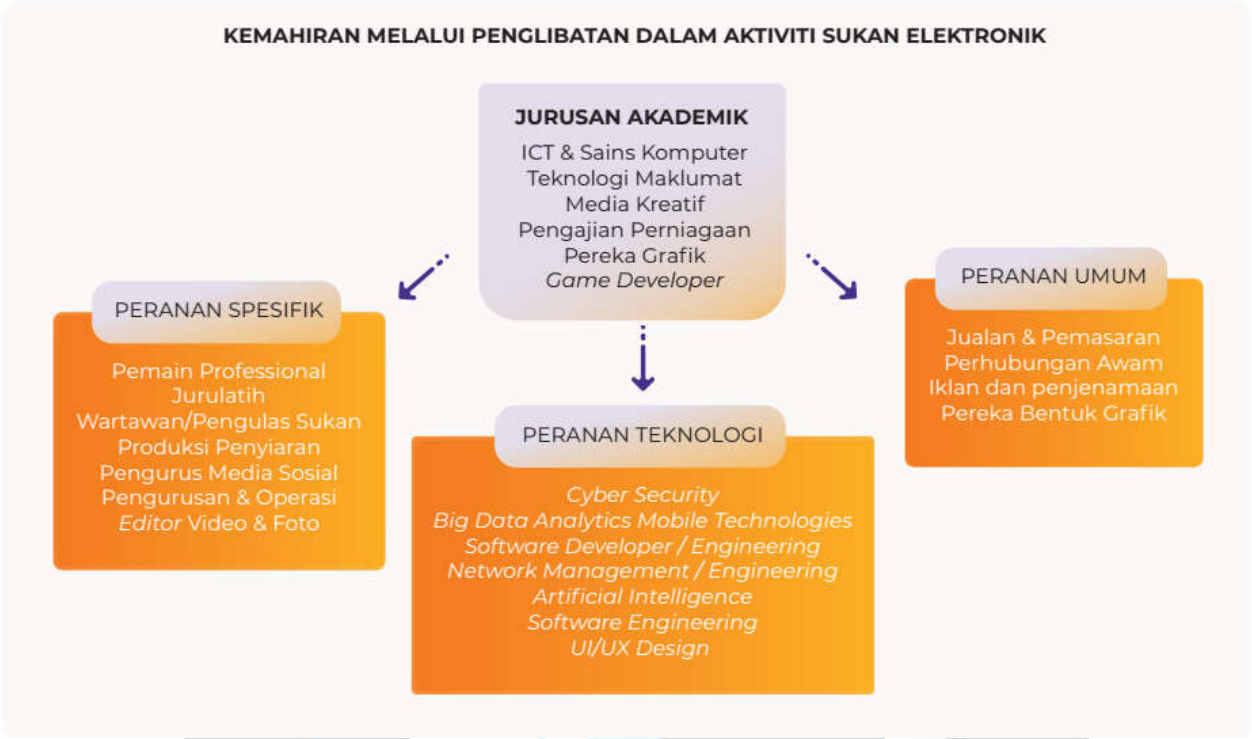
countries which already has a professional league in their country to further share knowledge and case studies for our trainings.

Summary:

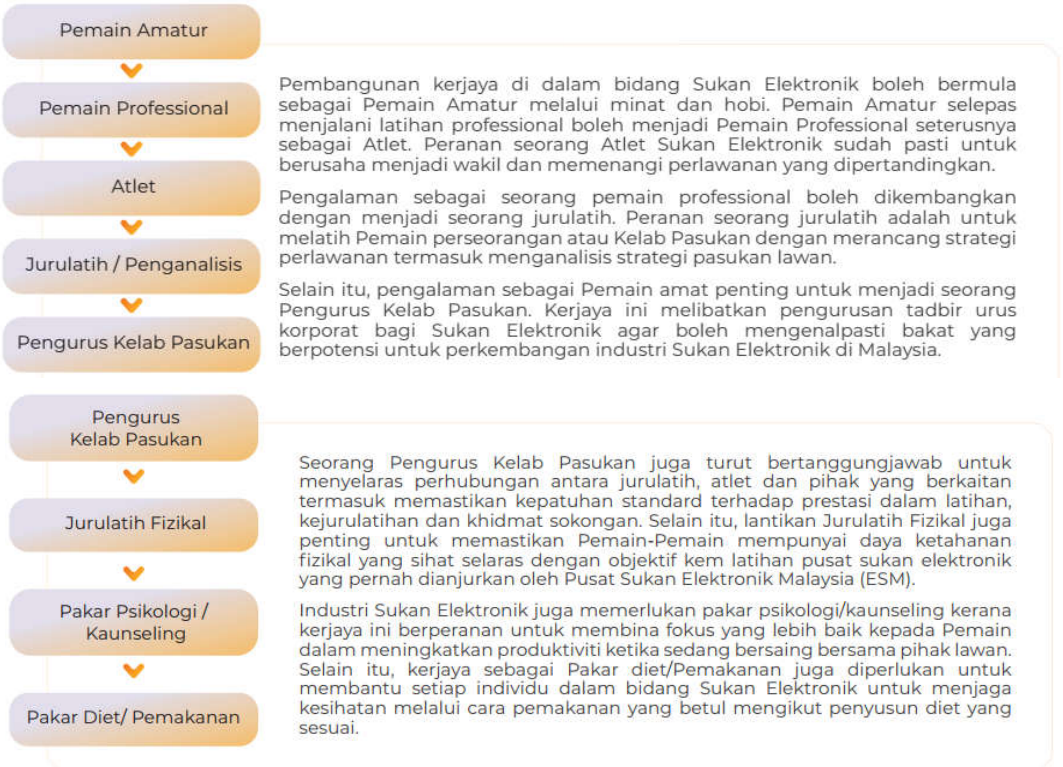


II. CAREER PATHWAYS

Esports ecosystem contains a lot of career opportunities ranging from professional athletes, coaches, managers in the club industry to talent manager, designer, videographer, video editor in the agency industry. There are several other industry that exist within the esports ecosystem and this offers a vast opportunity for our Bruneians to be part of the ecosystem.

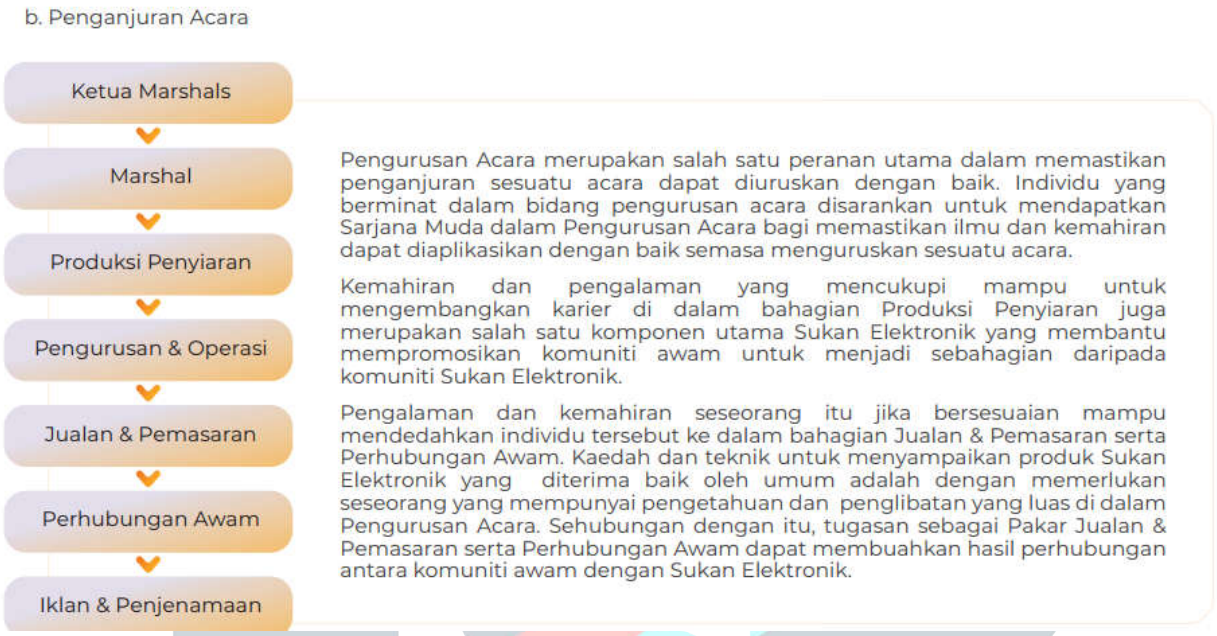


The most highlighted areas in which esports is known for is its professional esports athletes where they can potential earn millions of dollars if they reach the highest level. However, there are also the backbone of a successful club which allows for such athletes to flourish shown below:



ESB aims to fill in these gaps where key roles such as coaches, team managers, fitness coach, dieticians, psychologists and analysts are also part of the domestic club structures in order to create job opportunities within the country. Key personals shall be part of the team's organization for esports club that is approved and under the national association's list.

Another potential career opportunity comes in the event organizing industry where all successful esports event requires experienced and well knowledge team of staff in the company. A few of the key members are outlined below:



So far most of the companies in Brunei Darussalam that organizes esports event does not have all the key staff outlined above and relies on their past event experience. With the ever changing landscape of esports competition and regular update of competition rulebook, one must continue to learn and improve through continuous training and creative thinking to be on top. ESB plans to conduct an internship program with some of the leading esports organizers in South East Asia to have first hand experience in executing Tier 1 competitions, namely the World Championships of each game title (M Series by MLBB, PMGC by PUBG MOBILE and etc) so that they gain first hand experience on what needs to be improved for the Brunei esports industry.

Short Term Plan (1-3 Years): ESB to conduct awareness/workshops to share information to tertiary institutions on the esports career pathways available and the steps required to achieve the roles. Invited guest speakers from industry leaders in Malaysia, Indonesia and Philippines to be invited in selected programs to share their knowledge and experience in their respective markets and what are the challenges faced. ESB to foster collaboration from each countries' Esports Federation to invite these guests from abroad. ESB is also in discussion with the Philippines Esports Organization (PESO) who are the national sports association in the Philippines to have an athlete training program where we can conduct extensive training with their top tier athletes and access to their coaching team for improvement in the MLBB game title.

Long Term Plan (3-5 Years): Signing an MOU with all respective esports club from tertiary institutions such as IBTE, Politeknik Brunei, UBD, UTB and etc to have their students to join ESB as members and volunteer to be part of the referee and event organizing team to gain first hand experience in the esports industry. ESB to conduct courses to certify our referees and coaches via supervision from established Esports Federation. ESB to also promote local talent to overseas companies for job vacancy in the esports industry as outlined above. Currently ESB have exported 2 local esports athletes to play professionally in Malaysia (Md Safwan Hakimi and Md Danish Haqeeme) in PUBG MOBILE and is looking to continuously produce more promising athletes to be readily signed by Tier 1 esports club.

END GOAL:

TO PROMOTE ESPORTS AS A VIABLE CAREER PATHWAY AND ESTABLISH BUSINESS MODEL FOR ESPORTS CLUB AND ATHLETE TO BE PROFITABLE

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III. BUSINESS OPPORTUNITY

As WAWASAN 2035 comes closer, one of the pillars focus on Dynamic Economy in which esports industry can fall under. As outlined above, esports is a niche market with a diverse market size in the world. However, this is untap in the Brunei market and can be further expand to be part of the dynamic and digital sector. As esports mainly involves digital and technology, our youths can adapt easily in today's era. Small Medium Enterprises (SMEs) can be set up to venture into each category of the esports ecosystem like marketing and agency industry, event organizing industry, esports club business industry and education and training industry.

A : Wawasan Brunei 2035 mempunyai 3 matlamat iaitu:

1. Rakyat yang Berpendidikan, Berkemahiran Tinggi dan Berjaya
2. Rakyat yang mempunyai Kualiti Kehidupan yang Tinggi
3. Ekonomi Negara yang Dinamik dan Berdayatahan

ESB together with other government agencies such as Ministry of Culture, Youth and Sports, Ministry of Primary Resources and Tourism and Ministry of Transport and Infocommunications needs to work closely to share resources in order to support and initiate programs to ensure that this SMEs have viable projects to work on. ESB solely does not have the resources to support such programs and with private companies unwilling to invest large sums makes it even more challenging to boost the economy. Existing large companies like D'Sunlit Sdn Bhd and Cityneon Displays and Constructions Sdn Bhd have a big market share locally and will be difficult for the SMEs to compete against as a start up. In the esports market, there are currently no leading companies that can fully organize a competition or event without the support and technical consultation from ESB and hence SMEs have an equal chance to compete against the giant companies in Brunei.



When there are enough competitions in the market and high quality esports organizing, ESB can pitch to game publishers to look into investing in the Brunei market to have its own official professional league which can bring foreign investment to the country and boost the economy event higher. Currently Brunei does not have its own professional league in the country due to the market still being immature and yet to be emerging hence the game publishers like Tencent (PUBG MOBILE) and Moonton (MLBB) does not see the return on investment (ROI).

ESB has always been ready to work with local companies to organize more esports event given they follow the process and guidelines set by the association (permits, rulebook, competition layout, equipment and etc).

Another business opportunity to venture into is investing in an event arena which can cater to esports competition, seminars, tedtalks, workshops, training centres and banquet halls. As currently there are no suitable venue in Brunei

that can meet the set up requirement for esports competition, investing into an event space that can cater to esports competition for small to large scale events while at the same time repurpose for different event functions would make more economical sense in the long run. Average esports event set up can cost from minimal $50,000 to $100,000 depends on the equipment selection to stage/seating arrangement. If the event space is built for this setting, the cost would be saved over time and reinvest into other areas for development. This event arena can also be utilized by esports club from colleges/universities for their programs by being part of ESB official member.

Case Study

The Ohio State University Esports Arena

One of the most innovative universities in the country, The Ohio State University is always on the forefront of new technologies and research advancements. With Esports now a $1B+ industry, The Ohio State University wanted to create a space that encouraged and empowered students to explore gaming in a welcoming and secure environment, allowing them to further discover a rapidly growing industry and delve into new areas of potential career opportunities.

Results:

In just over one year (from initial budgeting to move-in), The Ohio State University's vision was realized. This state-of-the-art facility features 4,000 sq. ft. of space that truly works for all - tables with interior legs and integrated cable management, stations that can easily be cleaned and maintained, and areas for both casual players and competitive gamers alike to learn and grow.

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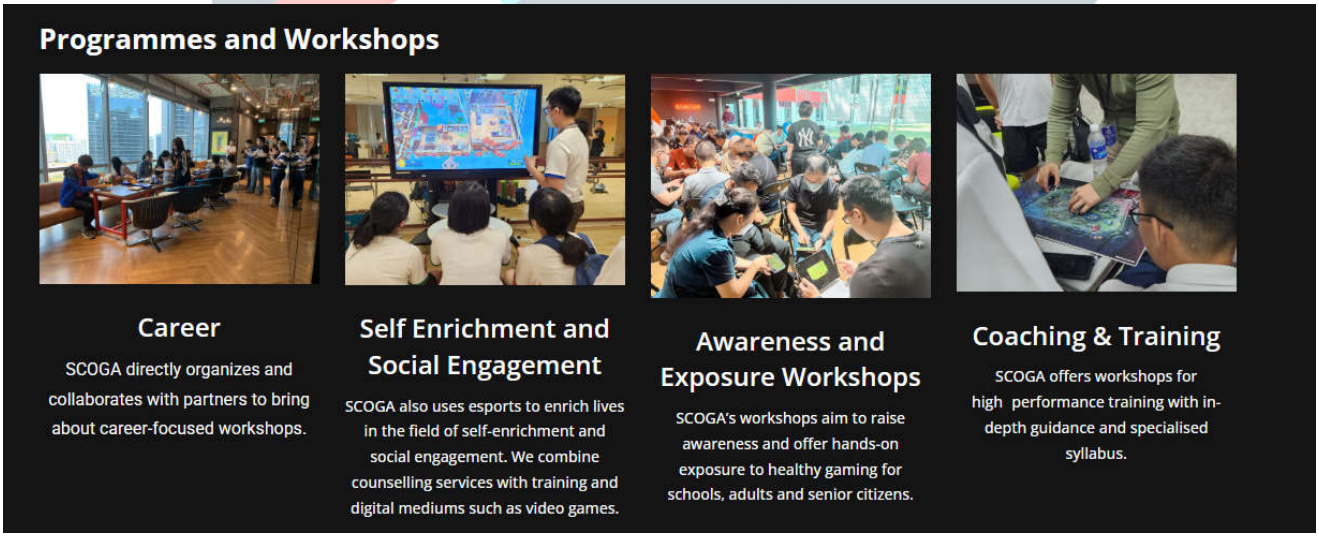






Short Term Plan (2-3 Years): Create several communities and grassroot level IP annually and open to SMEs to quote/tender for such projects. This way the SMEs can plan their projects ahead and spend according to what they can earn and be self-sustaining and eventually growth. Currently ESB has its annual National Cup that is solely run by ESB and is conducted online and low budget. We plan to transition to offline model where physical competition is much preferred but cost much higher. With sponsorship getting harder to secure, ESB will not be able to conduct the offline model as the financial need to be allocated to athletes training, welfare, international travels and etc.

Long Term Plan (4-6 Years): 3 offline esports competition annually (circuits) for ranking system that allows for year long event and consistent projects to work on and portfolio building for SMEs, training centers for education and certification of coaches and referees which can target not just local market but also neighboring market. Esports event arena for long term utilization rate for competition, trainings, seminars, meetings & event space. Initial investment might be high but will be able to offset over the long term via a sustainable business model.



(Eg: Singapore Cybersports & Online Gaming Association)

This long term plan can only be achieved with the full support from government agencies and the private sector with their resources. ESB will be a facilitator role to which guidelines, expertise and processes will be shared with them SMEs in order to help them achieve industry standards.

Policies such as Anti-Doping, Children Safeguarding and Cyberbullying will also be shared and make aware to all involved operators (SMEs) to ensure their Standard Operating Procedure (SOP) will include such policies and provide

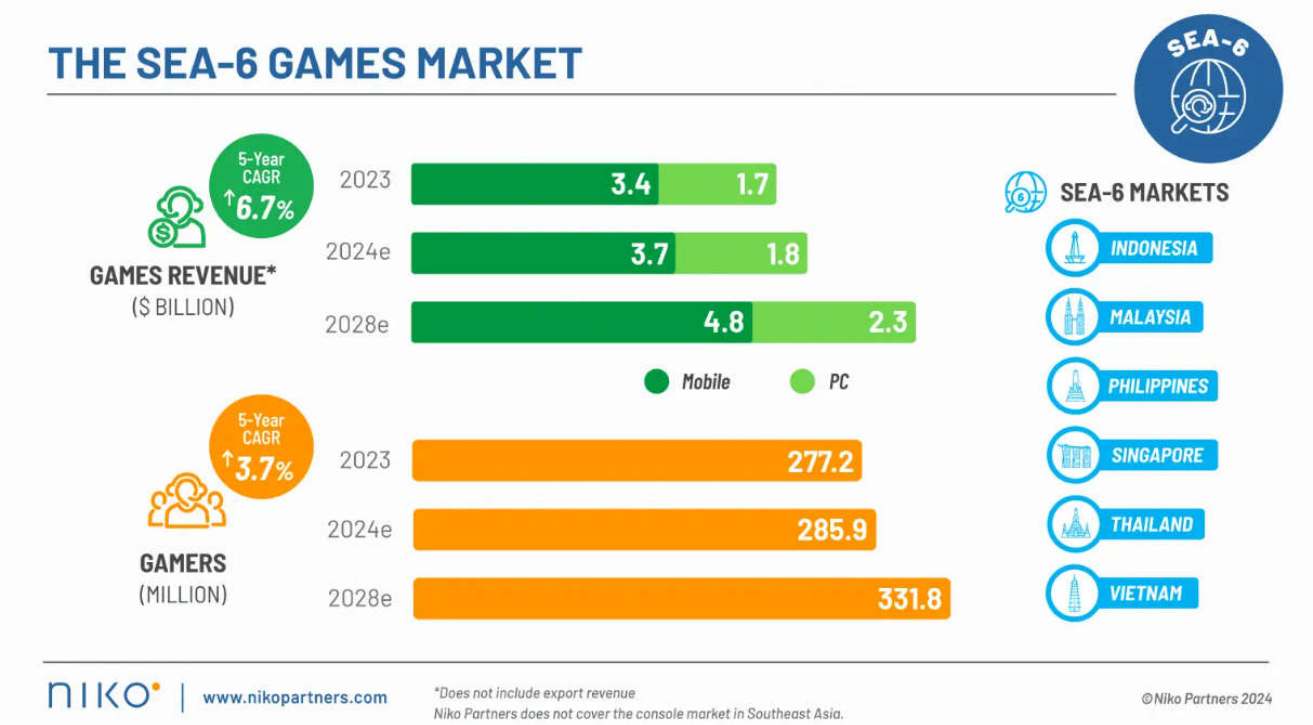
awareness talks when needed to all the participating athletes. ESB to work with Brunei Darussalam Anti Doping Committee (BDADC) to carry out such activity when required to offer proper guidance to the athletes.

END GOAL:

TO ESTABLISH A FUNCTIONAL ESPORTS ECOSYSTEM THAT ENABLES BUSINESS TO VENTURE INTO THE ESPORTS MARKET AND CREATE ENTERPREURSHIP

IV. HOST COUNTRY OPPORTUNITIES

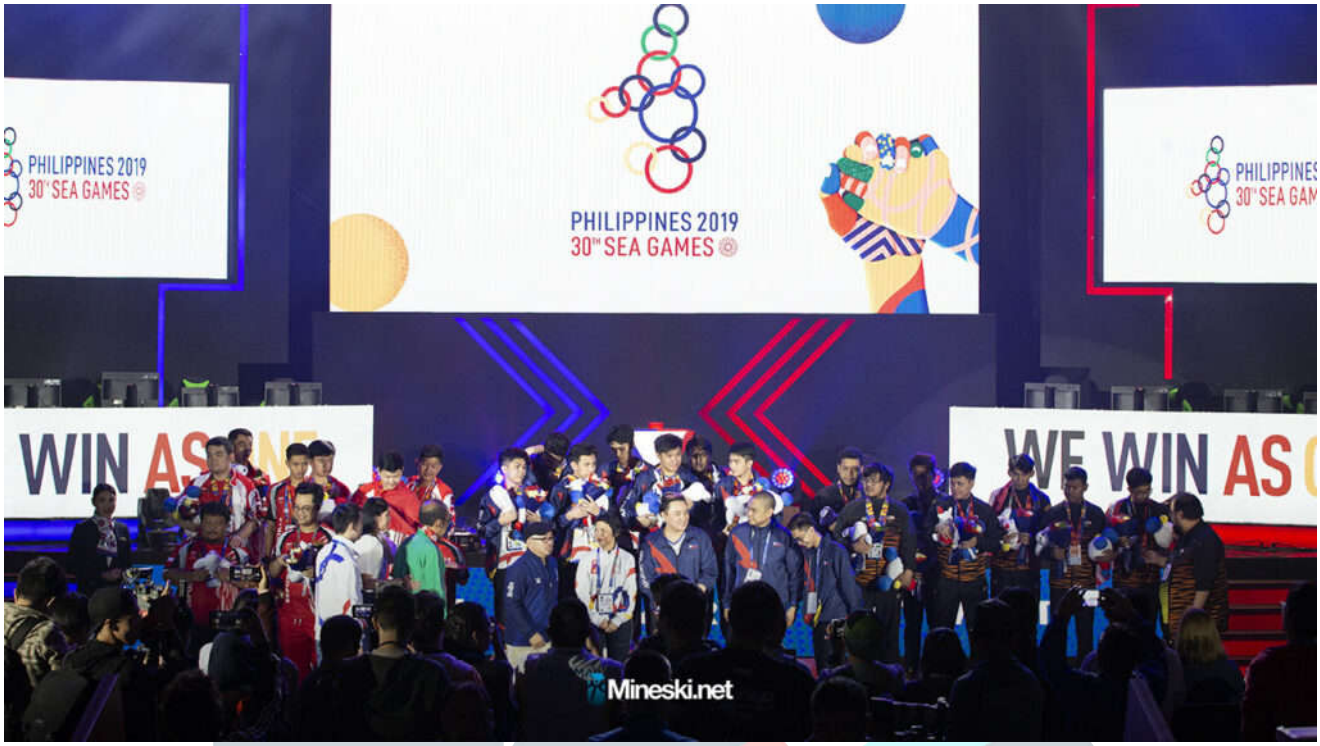
South East Asia is one of the fastest growing regions within the global video game industry landscape. Reports from Niko Partners shared that big 6 markets in South East Asia on the data collected from 2023 and projected to increase in 2028.



With SEA Games officially recognized esports back in 2019, South East Asia is one of the regions with one of the highest number of professional esports event hosted. 3 editions of SEA Games in Philippines, Vietnam and Cambodia have successfully been organized and well received by the public and their respective local organizing committees *(verified with each country's esports federation)*. Other than national events, there are also commercial events organized by the publishers themselves such as M6 World Championship 2024, PUBG MOBILE Global Championship 2024, Freefire World Series 2024 which resulted in an influx of tourism and spending in the host country further boosting its economic activity during the competition period.

Malaysia has been the preferred host country over the past 2 years for publishers due to its ease of entry, readily public infrastructure and lower operating expenditure compare to the other ASEAN countries. ESB believe that Negara Brunei Darussalam has the potential to be one of the esports hub in ASEAN in the next 5 years if we can develop the esports ecosystem properly and increase the frequency of competitions domestically over the years. This will tackle 2 issues raised by publishers:

I) Lack of esports competition in the country
II) Lack of support from government for esports activities


PHILIPPINES 2019
30TH SEA GAMES
PHILIPPINES 2019
30TH SEA GAMES
WIN AS
WE WIN AS
Mineski.net


PUBG
MOBILE
ESPORTS
31ST SEA GAMES
VIET NAM 2021
KRAFTON
VIRESA
E-DRA



Negara Brunei Darussalam has participated in the esports category for the past 2 editions of SEA Games in Vietnam and Cambodia and these participations has allowed ESB to have a deeper understanding of how a proper esports competition shall be organized and executed. We are confident that we do have the capability to organize such caliber competitions if given enough resources. One of ESB's plan in the next 5 years is to organize a South East Asia level eFootball competition which is much smaller in participation size and technical set up wise is much more straight forward. Given the lack of public infrastructure such as public transportation and the likes, solutions can easily be solved by renting shuttle busses and accommodation like hotels are readily available in the country. This way, ESB can explore ways to boost the economy by bringing in tourism and domestic spending. ESB is currently in discussion with the other South East Asia esports federation of forming SEA Esports Federation and each country has the opportunity to propose organizing an esports competition in their home country for promoting its culture and tourism to the other countries.

Long Term Plan: ESB to propose organizing a SEA level eFootball competition in Negara Brunei Darussalam in the next 5 years to promote our culture and tourism to the neighboring countries. Investment required are proper event arena outlined above, experience tournament operators/organizers, marshals as well as financial support for operation expenses. As more regional event is organized in the country, we can promote Negara Brunei Darussalam as another host country for game publishers to host their annual World Championships to boost our local economy.

END GOAL:

TO SET UP THE FOUNDATION FOR ESPORTS INFRASTRUCTURE IN NEGARA BRUNEI DARUSSALAM AND TURN ITSELF INTO AN ESPORTS HUB TO PROMOTE TOURISM, CULTURE AND BOOST THE ECONOMY

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Overall Summary: All the strategies outlined above plays hand in hand with each other and we are unable to grow if we do one and not the other. Esports as a newly recognized sports in the industry, there are a lot more we can do to regulate and set up proper structures to achieve professionalism and policies to prevent cyberbullying, doping and child safety issues. We believe by working together with the government agencies will enable the growth of esports faster and systematic and allow our passionate youth to take esports seriously as a proper sport.

With the International Olympic Committee (IOC) announcing the Olympic Esports Games that will take place in 2025, esports will continue to grow in terms of player base as well as viewership which will result in more money coming into the gaming market to target the youth demographics. Negara Brunei Darussalam must take this opportunity to follow closely and not fall behind to avoid playing catch up down the road. Results have proven that the Bruneian athletes in selected game titles are competitive to other countries so we must take this opportunity to provide the much needed resources and support for them to make it into the highest stage and bring pride to our nation.

