An Overview of E-Sports Industry in Malaysia

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Introduction

E-sports in Malaysia has seen significant growth, emerging as a major sector within the country's entertainment and digital economy. The Malaysian government has recognized e-sports as a legitimate industry, leading to substantial investments and initiatives aimed at fostering its development. As of 2024, the e-sports market in Malaysia is projected to be worth USD 347 million.

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1. Government Support and Infrastructure

The Malaysian government has implemented the National E-sports Blueprint, which aims to position Malaysia as a regional e-sports hub. This includes establishing e-sports academies, improving infrastructure, and promoting events. The Malaysia Electronic Sports Federation (MESF) serves as the regulatory body overseeing the e-sports landscape, ensuring fair practices and promoting inclusivity within the industry.

In recent years, the government has allocated significant budgets to support e-sports development, including RM 20 million in 2024 for further growth initiatives. Additionally, the Higher Education Ministry has integrated e-sports into its Sports Centres of Excellence, emphasizing its importance in education and youth engagement.

2. E-sports Integrated (ESI)

E-sports Integrated (ESI) plays a pivotal role in shaping and developing the e-sports ecosystem in Malaysia. Established under the Ministry of Youth and Sports, ESI aims to create a vibrant, sustainable, and inclusive environment for e-sports. The key roles and contributions of ESI are:

2.1. Government Support and Funding

ESI has been instrumental in securing government funding for e-sports development. In 2024, the Malaysian government allocated RM20 million to support various initiatives aimed at enhancing the e-sports industry. This funding is part of a broader strategy to promote e-sports as a legitimate sport and economic sector.

2.2. Organizing Major Events

ESI is involved in organizing significant e-sports events, such as EsportsCon Malaysia 2024, which provided a platform for networking, exhibitions, and discussions on the future of e-sports. This event

aimed to unite stakeholders from various sectors, including gaming enthusiasts, industry professionals, and educational institutions.

2.3. Educational Integration

ESI is working on integrating e-sports into educational curricula, promoting it as part of co-curricular activities in schools. Discussions with the Ministry of Education aim to introduce e-sports programs that can provide students with skills relevant to the growing industry.

2.4. Creating Competitive Leagues

The organization supports the establishment of competitive leagues across various gaming titles, such as Mobile Legends: Bang Bang and VALORANT. These leagues not only foster local talent but also enhance Malaysia's reputation in the regional and international e-sports scenes.

2.5. Regulatory Framework

ESI contributes to developing regulatory frameworks that ensure fair play and protection for players and organizers. The launch of the National E-sports Development Guidelines in 2023 provides essential guidance for stakeholders within the industry.

2.6. Community Building

By organizing events like EsportsCon, ESI aims to build a community around e-sports, encouraging collaboration among gamers, developers, sponsors, and educational institutions. This community-centric approach helps raise awareness about e-sports and its potential career paths.

2.7. Promoting Inclusivity

ESI emphasizes inclusivity within the e-sports ecosystem by ensuring that various demographics can participate in gaming activities. This includes initiatives aimed at dispelling myths surrounding e-sports related to health and fitness, thereby promoting a healthier perception of competitive gaming.

3. Malaysia Electronic Sports Federation (MESF)

The Malaysia Electronic Sports Federation (MESF) plays a crucial role in the development and regulation of e-sports in Malaysia. Established in December 2014, MESF serves as the governing body for all electronic sports activities in the country. The roles and responsibilities of MESF are:

3.1. Governing Body for E-sports

MESF is responsible for overseeing all aspects of e-sports in Malaysia, ensuring that activities are conducted fairly and in accordance with national laws and standards. It acts as the central authority for managing competitive gaming within the country.

3.2. Organizing Competitions and Events

The federation organizes national tournaments and qualifiers, such as the SEA Games qualifiers, where Malaysian teams compete for medals. For instance, MESF successfully organized qualifiers that resulted in gold and bronze medals in games like Hearthstone and Mobile Legends: Bang Bang.

3.3. Development of the E-sports Ecosystem

MESF collaborates with the Malaysian Ministry of Youth and Sports to implement the Malaysia Esports Blueprint, which aims to develop the e-sports ecosystem from 2020 to 2025. This blueprint focuses on enhancing infrastructure, supporting grassroots initiatives, and promoting ethical practices within e-sports.

3.4. Talent Development and Welfare

The federation emphasizes the welfare of gamers by implementing programs aimed at nurturing local talent. This includes establishing training facilities, academies, and support systems for aspiring e-sports athletes.

3.5. Standardization and Regulation

MESF works on standardizing e-sports practices across various games and events to ensure consistency and fairness. This includes creating guidelines for tournament organization, player contracts, and ethical sponsorships.

The federation has also introduced the National E-sports Development Guideline (NESDEG) to provide a framework for stakeholders, ensuring that all parties involved adhere to best practices in managing contracts, event organization, and maintaining player integrity.

3.6. Collaboration with Stakeholders

MESF collaborates with various stakeholders, including government bodies, educational institutions, and private organizations, to promote e-sports as a legitimate sport. This partnership approach helps create a supportive environment for the growth of e-sports in Malaysia.

3.7. Promoting International Participation

The federation aims to enhance Malaysia's presence on the international e-sports stage by facilitating participation in global competitions and fostering relationships with other e-sports federations worldwide.

4. Economic Impact

E-sports is increasingly recognized for its potential economic contributions. With over 14 million gamers in Malaysia, the sector is poised to enhance job creation and stimulate related industries such as technology and entertainment. The popularity of mobile gaming has further accelerated this growth, making e-sports more accessible to a broader audience.

4.1. Government Commitment and Funding

The Malaysian government has committed RM20 million specifically for e-sports development as part of the Malaysia Madani Budget 2025. This funding aims to enhance infrastructure, support talent development, and foster grassroots initiatives within the e-sports ecosystem.

A total allocation of RM230 million for sports development includes significant support for e-sports, indicating a long-term commitment to nurturing the industry.

4.2. Job Creation and Economic Growth

The e-sports industry is expected to create thousands of jobs across various sectors, including event management, marketing, media, coaching, and technical roles. This job creation contributes to overall economic growth and provides diverse career opportunities for the youth.

The gaming industry has already contributed approximately USD 100 million to Malaysia's revenue, with an expected annual growth rate of 10.9%, reflecting the sector's potential as an economic driver.

4.3. Tourism and Local Business Boost

Major e-sports events attract large crowds, boosting local tourism. Events held in shopping malls or dedicated venues can draw thousands of spectators, benefiting surrounding businesses such as hotels, restaurants, and retail outlets.

The multiplier effect of hosting large-scale competitions means increased spending in local economies, from food and beverage consumption to transportation usage.

4.4. Increased Foreign Direct Investment (FDI)

Malaysia has attracted significant foreign direct investment in the e-sports sector, such as the USD 10 million investment from Galaxy Racers in 2022. This influx of capital not only enhances the local ecosystem but also positions Malaysia as a competitive player in the global e-sports landscape [3].

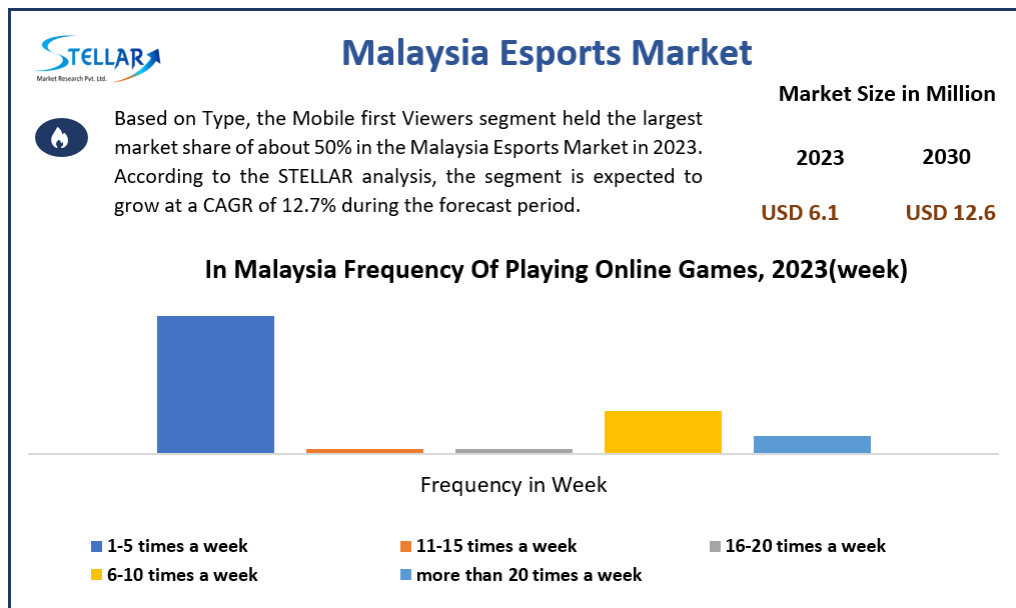### 4.5. Skill Development and Innovation

The rise of e-sports promotes skill development among younger generations in areas such as digital communication, creativity, critical thinking, and collaboration—skills that are increasingly valuable in today's job market.

The government's focus on integrating e-sports into educational institutions through programs like the Sports Centres of Excellence aims to nurture talent and prepare students for careers in gaming and related fields.

4.6. Cultural Shift and Community Engagement

As e-sports gains recognition as a legitimate form of entertainment and competition, public perception is shifting positively. This cultural acceptance encourages greater participation from diverse demographics and fosters community engagement through shared interests in gaming.

Initiatives aimed at increasing awareness about e-sports as a viable career path further contribute to building a supportive environment for aspiring gamers.

Malaysia Esports Market

STELLAR
Market Research Pvt. Ltd.

Based on Type, the Mobile first Viewers segment held the largest market share of about 50% in the Malaysia Esports Market in 2023. According to the STELLAR analysis, the segment is expected to grow at a CAGR of 12.7% during the forecast period.

Market Size in Million

2023	2030
USD 6.1	USD 12.6

In Malaysia Frequency Of Playing Online Games, 2023(week)

Frequency in Week

- 1-5 times a week
- 11-15 times a week
- 16-20 times a week
- 6-10 times a week
- more than 20 times a week

STRATEGIC PLAN FOR ESPORTS DEVELOPMENT MINISTRY OF YOUTH AND SPORTS 2020-2025

🇲🇾 THE MALAYSIAN GAMER*

KEY CONSUMER INSIGHTS

newzoo

NUMBER OF GAMERS	TOTAL GAME REVENUES
14.0M	**$586.7M**

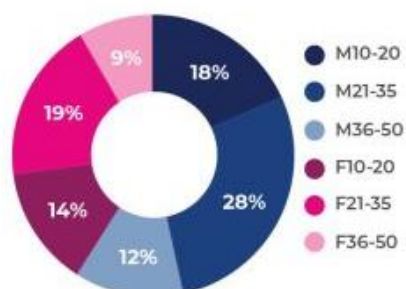**#21** MARKET IN THE WORLD

*These consumer insights are representative for the online urban population

AGE/GENDER
ACTIVE PC/LAPTOP PLAYERS*

- M10-20 — 18%
- M21-35 — 28%
- M36-50 — 12%
- F10-20 — 14%
- F21-35 — 19%
- F36-50 — 9%

*PLAYS MORE THAN ONCE A MONTH

WATCHES VIDEO CONTENT
59% OF PEOPLE WHO WATCH GAMING VIDEO CONTENT WATCH TIPS AND TRICKS FOR GAMES

CROSS-PLATFORM GAMERS
39% OF GAMERS PLAY PC, MOBILE & CONSOLE GAMES

OWNS A GAMING CONTROLLER
45% OF ALL GAMERS OWN A GAMING CONTROLLER

USES DIGI
MOBILE PLAYERS VS MOBILE PAYERS

digi

- PLAYERS
- PAYERS

27% | 29%

BRAND ATTITUDE
POSITIVE BRAND ATTITUDE MONSTER: PC GAMERS VS PAYERS

- PLAYERS
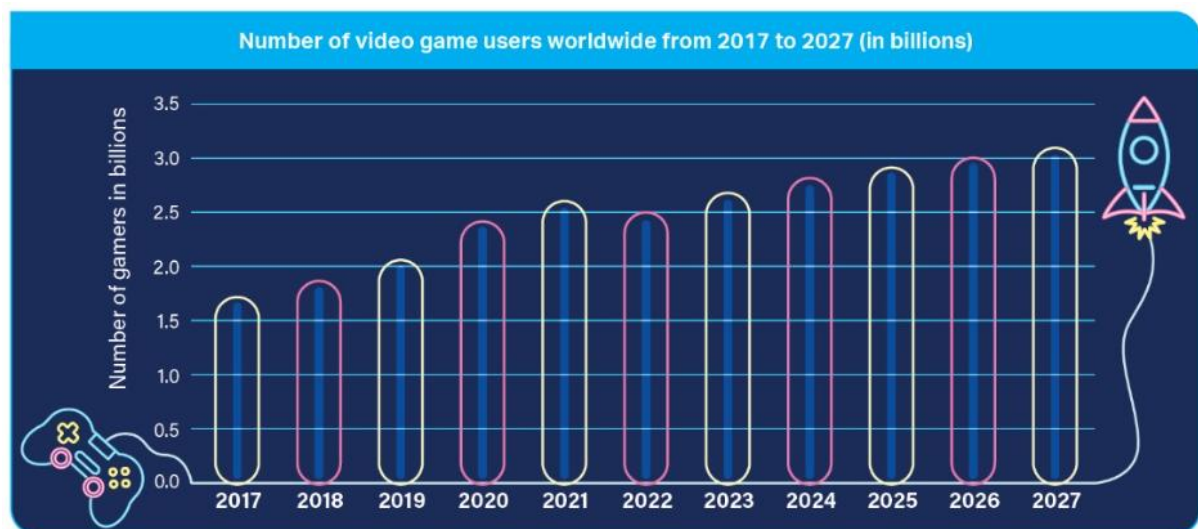- PAYERS

30% | 39%

Sources:

GLOBAL VIEW
GLOBAL GAMES MARKET REPORT (QUARTERLY)
$6,900/YR

CONSUMER INSIGHTS
MALAYSIA CONSUMER GAMER INSIGHTS (200 VARIABLES)
$5,000/YR

newzoo.com/consumer-insights

The Malaysia Games Market report from Niko Partners, Inc.

Source: Statista, 2023
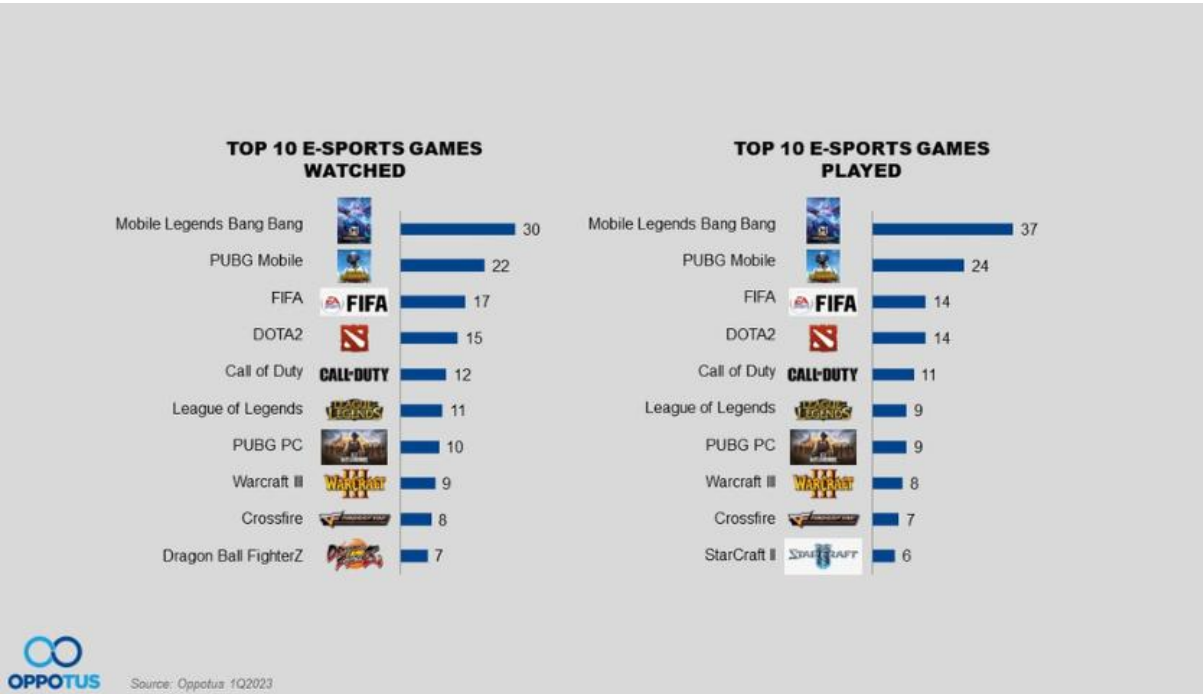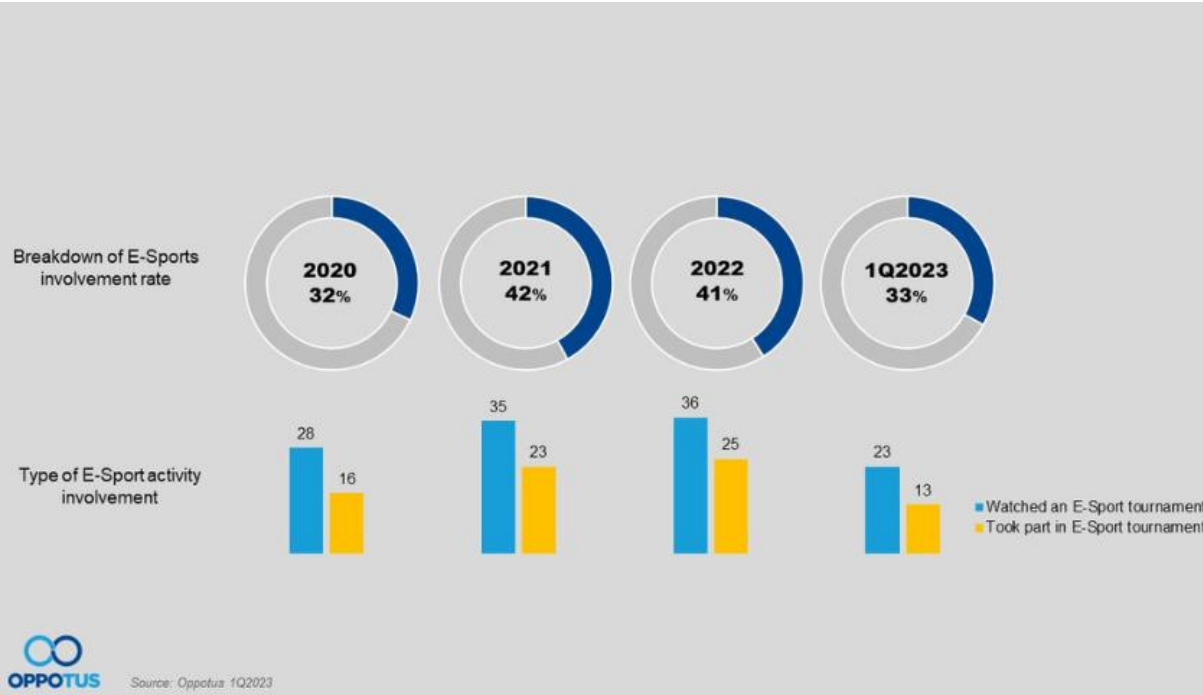
5. Challenges in Malaysia's E-sports Ecosystem

Despite its rapid growth, the Malaysian e-sports industry faces challenges, including securing sponsorships and navigating legal frameworks for contracts within the sector. However, with ongoing government support and a robust infrastructure, Malaysia is well-positioned to become a leading player in the Southeast Asian e-sports landscape. Challenges of the E-sports Ecosystem in Malaysia:

5.1. Inadequate Infrastructure

Lack of Dedicated Venues: There is a shortage of specialized e-sports arenas capable of hosting large-scale tournaments. This limits the ability to attract prestigious events and hampers the development of local talent who require consistent competitive opportunities to hone their skills.

Training Facilities: The absence of sufficient training hubs and resources for players to practice and improve poses a significant barrier to talent retention and development.

5.2. Financial Constraints

Limited Sponsorships: Despite recent government support, financial backing from private sectors remains scarce. Many players struggle to secure sponsorships, which affects their ability to sustain careers in e-sports.

Prize Money Issues: There have been instances where tournament organizers failed to pay out prize money, leading to distrust within the community and discouraging participation in competitions.

5.3. Perception and Stigma

Negative Public Perception: There is still a prevalent stigma surrounding gaming, particularly among older generations who may not view e-sports as a legitimate career path. This perception can deter potential sponsors and investors from engaging with the industry.

Educational Integration: While there are initiatives to integrate e-sports into educational curricula, broader societal acceptance is needed to destigmatize gaming as a viable career option.

5.4. Talent Drain

Loss of Players to International Teams: Many talented Malaysian players join international teams due to better opportunities abroad, leading to a talent drain that undermines the local scene. The lack of sustainable career paths within Malaysia makes it difficult for players to remain in the country.

5.5. Technological Challenges

Internet Connectivity Issues: While there have been improvements, stable and affordable internet access remains a challenge for many gamers, impacting their ability to compete effectively in online tournaments. Latency issues can significantly affect gameplay quality and streaming experiences.

5.6. Regulatory Framework

Need for Clear Regulations: The e-sports industry lacks comprehensive regulations governing various aspects such as player contracts, sponsorship agreements, and tournament organization. This can lead to disputes and inconsistencies within the ecosystem.

5.7. Cybersecurity Concerns

As e-sports becomes more digitalized, issues related to cybersecurity threats and ethical challenges arise. Protecting player data and ensuring fair play are critical for maintaining trust within the community.

6. Steps Taken to Address the Challenges in Malaysia's E-sports Ecosystem

The Malaysian government and various stakeholders have implemented several strategies to address the challenges facing the e-sports ecosystem in the country. Here are some key initiatives:

6.1. Government Investment and Funding

Substantial Financial Support: The Malaysian government has allocated RM20 million under the Malaysia Madani Budget 2025 specifically for e-sports development. This funding will support talent development, coaching, infrastructure, and grassroots activities, including the establishment of a national e-sports centre that can host both national and international events.

Long-Term Commitment: A broader allocation of RM230 million for sports development includes a significant portion earmarked for e-sports, indicating a long-term commitment to nurturing the industry.

6.2. Infrastructure Development

National E-sports Centre: Plans are underway to create a dedicated national e-sports centre, which will serve as a hub for training, competitions, and production facilities. This facility aims to enhance the infrastructure necessary for hosting major tournaments and providing resources for players.

Support for Local Venues: The Malaysian Digital Economy Corporation (MDEC) is facilitating the establishment of e-sports companies and training facilities across the country, ensuring that players have access to adequate resources for practice and competition.

6.3. Regulatory Framework

National E-sports Development Guidelines (NESDEG): Launched by the Ministry of Youth and Sports, NESDEG aims to protect e-sports athletes and promote ethical practices within the industry. These guidelines provide a framework for tournament organizers and stakeholders to ensure fair play and proper governance.

Amendments to Legislation: The recognition of e-sports in the Sports Development Act 1997 has formalized its status as a legitimate sport, which is crucial for attracting investment and support from various sectors.

6.4. Talent Development Programs

Grassroots Initiatives: MDEC has conducted numerous programs aimed at supporting grassroots e-sports, such as competitions featured in major events like the Malaysia Digital Content Festival. These initiatives help identify and nurture local talent.

Integration into Education: The Higher Education Ministry has begun implementing programs that integrate e-sports into educational institutions, promoting skill development among students interested in pursuing careers in gaming.

6.5. Community Engagement and Collaboration

Industry Collaborations: MDEC facilitates partnerships between game developers, tournament organizers, sponsors, and content creators to enhance the overall e-sports ecosystem. This collaborative approach promotes investment opportunities and attracts international events to Malaysia.

Public Awareness Campaigns: Efforts are being made to improve public perception of e-sports through awareness campaigns that highlight its legitimacy as a career path and its potential economic benefits.

6.6. Addressing Cybersecurity Concerns

As part of developing a more robust ecosystem, there is an ongoing focus on enhancing cybersecurity measures within the e-sports industry to protect player data and ensure fair competition.

7. Major E-sports Events in Malaysia

1. APAC Predator League 2025

Dates: January 11-12, 2025
Location: MITEC, Kuala Lumpur
Description: The APAC Predator League 2025 Grand Finals will feature elite teams competing in Dota 2 and VALORANT for a substantial prize pool of USD 400,000. This event marks the first time Malaysia hosts the Grand Finals, promising a festival-like atmosphere with gaming, live performances from notable artists like Aina Abdul and Sandara Park, and a cosplay competition with a RM 25,000 prize pool. Attendees can choose from various ticket tiers, including VIP options that offer exclusive perks.

2. Predator League Malaysia 2025

Dates: November 2-17, 2024
Location: 1 Utama Shopping Centre, Petaling Jaya
Description: This tournament is part of the Asia Pacific Predator League series and includes both online and offline matches. The playoffs feature eight teams competing in a double-elimination format for a prize pool of RM 31,000. The lower bracket final and grand final will be held offline at the shopping centre, with the winner qualifying for the APAC Predator League.

3. MPL Malaysia (Mobile Legends Professional League) - Seasonal Event

Description: The MPL Malaysia is a premier league for Mobile Legends: Bang Bang, featuring top teams from the region. The league has garnered significant viewership, peaking at over 630,000 viewers in its last season. It serves as a platform for local talent to compete at high levels and gain exposure on larger stages.

4. PUBG Global Championship - Annual Event

Description: Malaysia has hosted several significant PUBG tournaments, including the PUBG Global Championship LAN event in 2023. This championship attracts international teams and showcases competitive PUBG gameplay on a global scale.

5. Kuala Lumpur Major 2018

Dates: November 9 - 18, 2018
Location: Axiata Arena, Bukit Jalil
Description: A significant Dota 2 tournament that attracted top teams globally. It was part of the Dota Pro Circuit and featured a prize pool of USD 1,000,000.

6. M1 World Championship 2019

Dates: November 10 - 17, 2019
Location: Axiata Arena, Bukit Jalil
Description: The inaugural world championship for Mobile Legends: Bang Bang, held in Kuala Lumpur. It featured teams from various countries competing for a prize pool of USD 250,000.

7. Mobile Legends Bang Bang SEA Cup 2022

Dates: June 11 - 19, 2022
Location: MITEC, Kuala Lumpur
Description: A regional competition showcasing top Mobile Legends teams from Southeast Asia, contributing to the growth of competitive gaming in the region.

8. ESL One Kuala Lumpur 2023

Dates: December 15 - 17, 2023
Location: MITEC, Kuala Lumpur
Description: Another major Dota 2 event that drew international attention with a substantial prize pool, reinforcing Malaysia's status as a Dota 2 hub.

9. Free Fire World Series – Malaysia 2024

Dates: February 17 – March 3 & June 15 – July 27, 2024
Location: Malaysia
Description: A global tournament for Free Fire, featuring teams from around the world competing for a significant prize pool.

8. Notable Achievements

1. Mobile Legends: Bang Bang Southeast Asia Cup (MSC) 2024

Date: July 14, 2024
Location: Riyadh, Saudi Arabia
Achievement: SRG (Selangor Red Giants) became the first Malaysian team to win the MSC, defeating the Philippines' Falcons AP Bren Sport in the grand finals. The team took home USD 1 million, marking a historic victory that placed Malaysia prominently on the global e-sports map and inspired future talents in the industry.

2. Hangzhou Asian Games 2022

Date: 23 September – 8 October 2022
Location: Hangzhou, China
Achievement: Malaysia secured it's first-ever e-sports medal, winning a silver medal in Arena of Valor. This achievement highlighted the growth of e-sports in Malaysia and increased recognition of gaming as a legitimate sport.

3. Global E-sports Games 2023

Date: December 12-16, 2023
Location: Riyadh, Saudi Arabia
Achievements: Malaysia emerged as the overall champion, winning 1 gold medal in the Dota 2 Women's Category and 2 silver medals in the Dota 2 open category and Street Fighter 6. The Dota 2 women's team defeated Peru 2-0 in the finals, showcasing the country's growing talent in e-sports.

4. 32nd SEA Games 2023

Date: May 5 – 17, 2023
Location: Cambodia
Achievements: Malaysia secured 2 silver medals and 2 bronze medals in various e-sports categories, including Mobile Legends: Bang Bang. This performance highlighted Malaysia's competitive presence in regional e-sports.

5. Commonwealth E-sports Championships 2022

Date: August 6 – 7, 2022
Location: Birmingham
Achievements: Malaysia clinched 3 gold medals, further establishing its status in the global e-sports arena. This event showcased various games, including Dota 2 and others, contributing to Malaysia's medal tally.

6. PUBG Mobile Global Championship 2021

Date: November 30/2022 – January 23/2022
Achievements: Malaysian teams represented the country on a global stage, showcasing their skills and competing against top teams worldwide. Their participation marked a significant milestone for Malaysian e-sports.

7. Dota 2 Achievements

Achievements: Malaysian teams have consistently performed well in various Dota 2 tournaments, including finishing second in The Games Expo and other regional competitions. The country's teams have been recognized for their competitive spirit and skill. Notable players like Cheng "NothingToSay" Jin Xiang and Yap "xNova" Jian Wei have achieved significant success in international Dota 2 tournaments, contributing to Malaysia's reputation in the Dota community. The country has hosted major events such as ESL One Kuala Lumpur and PGL's Kuala Lumpur Major, further solidifying its status as a Dota hub.

8. E-sports Awards Recognition

Achievements: In the inaugural Malaysia E-sports Awards 2023, several players and teams were recognized for their contributions to the e-sports community, with awards given for various categories including Player of the Year and Team of the Year.

Summary

E-sports in Malaysia has evolved into a thriving industry, recognized as a key segment of the nation's entertainment and digital economy. With government support and robust infrastructure development, Malaysia aims to establish itself as a regional hub for e-sports. The market, valued at USD 347 million as of 2024, reflects its rapid growth and economic potential.

The Malaysian government's initiatives, including the National E-sports Blueprint, highlight its commitment to fostering the industry. This plan encompasses the establishment of e-sports academies, improved infrastructure, and regular events. Significant investments, such as RM 20 million in 2024 under the Malaysia Madani Budget, underscore this dedication. The integration of e-sports into educational curricula through the Higher Education Ministry further emphasizes its role in youth development and education.

The E-sports Integrated (ESI) initiative under the Ministry of Youth and Sports has played a vital role in structuring Malaysia's e-sports ecosystem. ESI focuses on funding, organizing major events like EsportsCon Malaysia 2024, educational integration, and fostering inclusivity. Through competitive leagues and a regulatory framework, ESI is nurturing local talent and ensuring fair practices.

The Malaysia Electronic Sports Federation (MESF), established in 2014, serves as the governing body for e-sports in the country. It oversees the industry, promotes talent development, and ensures standardization. MESF has been pivotal in organizing national tournaments and international qualifiers, contributing to the country's recognition in global e-sports.

Economically, e-sports is a significant driver in Malaysia. The sector supports job creation in areas such as event management, marketing, and technology. Large-scale tournaments stimulate local businesses and tourism, while foreign investments, like the USD 10 million injection from Galaxy Racers, position Malaysia prominently on the global e-sports map. The gaming industry's contribution of USD 100 million to national revenue and its projected annual growth rate of 10.9% signify its importance.

Despite its successes, challenges persist. Limited infrastructure, financial constraints, societal stigma, and the loss of local talent to international teams remain hurdles. Technological issues such as inconsistent internet connectivity and inadequate cybersecurity measures also hinder progress. However, the government and stakeholders are addressing these challenges through targeted investments, regulatory improvements, and grassroots initiatives.

Malaysia has hosted major international e-sports events, including the APAC Predator League and the ESL One Kuala Lumpur. These tournaments attract global audiences and underscore Malaysia's reputation as a key player in the e-sports scene. Malaysian teams and athletes have achieved notable successes, such as winning gold at the Global E-sports Games 2023 and the MSC 2024.

Malaysia's e-sports industry demonstrates immense potential as a contributor to the economy, youth development, and international reputation. With continued investment and strategic efforts, Malaysia is poised to solidify its position as a leader in the Southeast Asian e-sports landscape.

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