



EU - Gulf Cooperation Council (GCC) Dialogue on Economic Diversification

EU – GCC Dialogue on Economic Diversification Gulf Cooperation Council (GCC) countries

**Project Identification No.
EuropeAid/138630/DH/SER/Multi
Service Contract No. PI/2017/393165**

**Exploring Synergies: Strengthening EU-GCC
Collaboration in the Cultural and Creative Industries**

June 2023



This project is funded by
the European Union



A project implemented by
GFA Consulting Group
Centre for European Policy Studies
DMI Associates



Your contact persons within
GFA Consulting Group GmbH are

Mr. Lukas Kudlimay (Project Director)
Mr. Douglas Aitkenhead (Team Leader)
Dr. Tom Fleming (Senior Non Key Expert)

**EU-GCC Dialogue on Economic Diversification
Gulf Cooperation Council (GCC) countries**

Contract Number PI/2017/393165

Disclaimer

This publication was produced with the financial support of the European Union. Its contents are the sole responsibility of GFA Consulting Group GmbH and Ms. Daniela Stratulat and do not necessarily reflect the views of the European Union.

GFA Consulting Group GmbH
Eulenkrogstr. 82
D-22359 Hamburg

Phone: +49 (40) 6 03 06 170

Fax: +49 (40) 6 03 06 159

E-mail: lukas.kudlimay@gfa-group.de



An EU funded project
managed by the Service
for Foreign Policy
Instruments (FPI)

Implemented by



Contents

Executive Summary	1
1 The Cultural and Creative Industries in the European Union	5
2 The Cultural and Creative Industries in the Gulf Cooperation Council.....	7
2.1 Kingdom of Bahrain.....	8
2.1.1 Policy Context for the Bahrain CCIs.....	8
2.1.2 Main CCI Strengths, Assets and Opportunities.....	10
2.1.3 Key CCI hubs and cultural / educational infrastructure.....	11
2.1.4 Bahrain – a Hub for CCI Festivals and Events.....	13
2.1.5 Ones to Watch – Bahrain as an emergent hub for CCI talent	14
2.1.6 Summary of Opportunities for EU / Bahrain Collaboration and Exchange	14
2.2 State of Kuwait	16
2.2.1 The Policy Context for CCIs in Kuwait	16
2.2.2 Main CCI Strengths, Assets and Opportunities.....	18
2.2.3 Key CCI hubs and cultural / educational infrastructure.....	19
2.2.4 Kuwait – a Hub of CCI Festivals and Events	21
2.2.5 Ones to Watch – Kuwait as a growing hub for CCI talent.....	22
2.2.6 Summary of Opportunities for EU / Kuwait Collaboration and Exchange	22
2.3 Sultanate of Oman	24
2.3.1 The Policy Context for CCIs in Oman	24
2.3.2 Main CCI Strengths, Assets and Opportunities.....	27
2.3.3 Key CCI hubs and cultural / educational infrastructure.....	28
2.3.4 Oman – an Emergent Home for CCI Festivals and Events	30
2.3.5 Ones to Watch – Oman as a growing and sustainable hub for CCI talent.....	30
2.3.6 Summary of Opportunities for EU / Oman Collaboration and Exchange	31
2.4 Kingdom of Saudi Arabia	33
2.4.1 The Policy Context for CCIs in KSA	34
2.4.2 Main CCI Strengths, Assets and Opportunities.....	37
2.4.3 Key CCI hubs and cultural / educational infrastructure.....	38
2.4.4 KSA – an Emergent Home for CCI Festivals and Events.....	41
2.4.5 Ones to Watch – KSA as a major regional CCI cluster.....	41
2.4.6 Summary of Opportunities for EU / KSA Collaboration and Exchange	42
3 Headline Opportunities for EU/ GCC Trade and Collaboration in the Cultural and Creative Industries.....	43

Executive Summary

“Cultural and creative sectors are important for ensuring the continued development of societies and are at the heart of the creative economy. Knowledge-intensive and based on individual creativity and talent, they generate considerable economic wealth. More importantly, they are critical to a shared sense of European identity, culture and values. In economic terms, they show above-average growth and create jobs - particularly for young people - while strengthening social cohesion.”

European Union¹.

In the GCC region, there is **significant room for growth and diversification in the Cultural and Creative industries (CCIs)**, with each country presenting a distinctive set of attributes which can enable a dynamic CCI sector to flourish. This can support growth in employment, catalyse innovation, and enhance inward investment and soft power opportunities. Each member country has established Vision Statements for growth and sustainable development. These provide an opportunity to position the CCIs as a foundation for growth, innovation and a range of positive spillover effects which can support each GCC country to deliver on its overarching strategic ambitions.

As the world recovers from the Covid-19 pandemic, with new technologies transforming every sector, it is absolutely vital that GCC countries forge a new economic pathway based on the creativity of their people and the innovation capacity of their enterprises and cultural organisations.

This document provides a headline report on the opportunities for building the Cultural and Creative Industries (CCIs) in the Cooperation Council for the Arab States of the Gulf (GCC), with a focus on EU-GCC cooperation. It forms part of the EU-GCC Dialogue on Economic Diversification project, initiated in April 2018. It is undertaken by TFCC, a global leader in CCI research, strategy and policy². The overall objective of this project is to contribute to a stronger EU-GCC relationship by supporting the GCC countries' ongoing process of economic diversification, away from hydrocarbon dependent sectors.

The project seeks to consolidate EU's position as a partner of choice for GCC countries for cooperation on economic diversification strategies, macroeconomic stability, trade and investment and research and innovation. The specific objective of the project is to promote climate-friendly trade, investment and economic affairs related policy analysis, dialogue and cooperation between stakeholders from EU and GCC at both regional and country levels in the context of the GCC economic diversification process.

This document which focuses on the CCIs, provides:

- An introduction to the CCIs and why they play an important role in growth, competitiveness, innovation and civil society in the EU and GCC.
- Headline overviews of the profile and dynamics of the CCIs in the Kingdom of Bahrain, State of Kuwait, Sultanate of Oman and Kingdom of Saudi Arabia.
- Common CCI collaboration priorities / opportunities for EU-GCC countries, including a set of areas for further research and partnership development.

¹ <https://culture.ec.europa.eu/cultural-and-creative-sectors/cultural-and-creative-sectors>

² www.tfconsultancy.co.uk

The CCIs are one of the major global success stories, driving innovation and nurturing inclusive growth

Across the world, Governments and partners in the private sector and civil society are working to develop and grow their CCIs. This is based on a recognition of their potential for growth, contribution to employment, adaptation to technological change, and the positive spillover effects they contribute across the economy. In emerging markets, the CCIs, driven by freelancers and micro enterprises, are a major driver of informal jobs for an estimated 300 million people and projected to reach a global valuation of US\$985 billion by 2023.

As the Covid-19 pandemic subsides, the CCIs are recovering fast, and some sectors are demonstrating significant growth. These include digitally-driven sectors such as computer games and audio-visual – for which there is a significant demand for new content and experiences and through which significant innovation is underway (e.g. the growth of extended reality and the influence of Artificial Intelligence). Other CCI sectors, from performing arts to music, film to design, fashion to visual arts, are showing resilience as they reboot after the Covid-19 pandemic, showing both growth and innovation, with major shifts driven by technological transformation and by a movement toward ethical and sustainable models across the CCI value chain.

Each GCC country will benefit from **dedicated CCI strategies and sector vision activities**: to ensure the CCIs are foundational to overall national development and competitiveness. In addition, each GCC country will benefit from dedicated CCI development programmes to activate sector development. This can include targeted CCI development agencies to bootstrap enterprises, specialist creative hubs and clusters, and new types of investment and support.

Each GCC country is in the early stages of policy activation in the CCIs, and each presents a set of positive attributes for CCI growth and for the role of the CCIs in generating spillovers across the economy and toward inclusive growth and sustainable development. This includes enterprise support, education and skills development, targeted investment, showcasing and trade activities.

From Consultation to Action: Headline Opportunities for EU-GCC Collaboration and Dialogue

Research for this report and benchmarking with best practice internationally point to a set of specific opportunities for EU-GCC collaboration and dialogue. This includes activities which can prosper at a GCC level and opportunities for each GCC country.

- **Data and evidence development.** The lack of consistent research and data on the CCIs plus the informality of large sections of the industry mean a true picture of the size and profile of this vital sector is hard to define. In coming years, it is vital that GCC countries develop robust data and evidence baselines to inform strategic development across the CCIs. **Each GCC country will benefit from dedicated CCI mapping studies to underpin strategy and policy.** *The EU has the expertise and track record in developing a data-led approach to the CCIs.*
- **Creative Education and Skills.** GCC countries are talent-rich, with young populations; and culturally rich, with distinctive heritage and culture. However, creative education and skills provision is a relatively new element in school curricula and tertiary and higher education. The CCIs are still to be widely validated as a career path with strong options for sustainable employment, CCI courses are limited across all areas of education, and as a consequence, considerable skills gaps have arisen and many CCI workers have sought education and training overseas. **Each GCC country will benefit from dedicated skills development and enterprise programmes for the CCIs, plus from new higher education infrastructure that catalyses innovation across the CCIs.** *The EU has a very comprehensive approach to creative education*

and multiple programmes which support technical, managerial and entrepreneurship development across the CCIs.

- **Creative Entrepreneurship and market development.** GCC countries are well-placed to develop a creative workforce which serves their growing consumer base and delivers content and services to international markets. Coupled with creative education and skills, a wider set of development tools are needed – to include intellectual property (IP) regulation and enforcement, investment (and investment readiness), and access to data and trends analysis which can open-up market opportunities. **Each GCC country will benefit from a review of their regulatory approach to the CCIs, including incentives, IP models and links to investment.** *The EU has a set of proven models to boost creative entrepreneurship, including specialist investment programmes and solid IP frameworks.*
- **Cultural and Creative Infrastructure.** GCC countries are investing significantly in new and improved cultural infrastructure, from new museums, art galleries and concert halls to CCI hubs, clusters and free trade zones. These will be vital catalysts for innovation and growth across the CCIs. There is a major opportunity to develop distinctive place based CCI clusters which feed off and contribute to infrastructure development, plus generate networks and exchange across a wider CCI ecosystem. **Each GCC country can build distinctive CCI clusters which drive innovation and growth.** *The EU has a considerable track record in nurturing CCI clusters, hubs and networks, plus positioning cultural infrastructure as spikes of innovation for the CCIs.*
- **Cultural and Creative Spillovers.** The GCC can both increase its market share of the global creative economy and its growing CCIs can fuel innovation and growth across the economy. This includes, for example, the role of film in driving cultural tourism, the influence of a dynamic cultural sector on inward investment and talent retention, and the impact of creative practice on innovation in science, health and technology. **In each GCC country, the CCIs can drive innovation across the economy and provide significant value-added to inward investment, tourism and overall branding. This requires dedicated activities and incentives.** *The EU has a considerable research base on models for CCI spillovers, and a portfolio of institutions purposefully driving spillovers – e.g., at the interface of science, technology and creative practice.*
- **Sustainable development.** The GCC can develop a distinctive model for the CCIs which links to heritage and traditional cultures, while shaping a future economy which is inclusive, ethical and founded on environmental responsibility. A post-oil economy should not be an ecologically harmful one, and the CCIs open-up opportunities for all communities to enter the workforce, with talent a genuinely sustainable resource. **Each GCC country can catalyse heritage renewal through the contemporary CCIs.** *The EU has some exemplars of best and next practice in CCIs for sustainable development – including, for example, approaches to carbon neutral creative practice, circular economy and talent pathways open to women and minorities.*
- **Policy and Partnership.** GCC countries are demonstrating increasing policy commitment and literacy across the CCIs. The CCIs are featuring as part of national development vision and strategies, CCI units, commissions and task groups are being set up, and the application of creativity across the economy is taking centre stage. It will be important to develop models which are tailored to each country while developing regional approaches where this will drive impact. **Each GCC country will benefit from a dedicated CCI policy and growth / innovation programme, plus from the introduction of dedicated development agencies to drive innovation and growth.** *The EU and its member states have considerable track record in CCI policy and partnership, with opportunities to share knowledge on tools and approaches, plus to build inter-governmental and inter-institutional knowledge exchange and partnership. This process of policy and partnership development will in turn provide a framework and rationale for all of the above.*

With the above opportunity landscape providing a shared opportunity for EU-GCC dialogue and cooperation, this report by TFCC provides insight on the areas and CCI sectors where the EU can assist the GCC countries in improving their capabilities and for where there are opportunities for mutually beneficial partnership.

Methodology

The report is written by TFCC³, supported by the GFA Consulting Group and underpinned by a process of research and consultancy in which TFCC and the EU-GCC Dialogue on Economic Diversification team undertook the following:

- Desk-based situation analysis on the CCIs in each country, including an overview of the policy and partnership context, key sectors, clusters and hubs, networks, programmes and projects.
- A series of one-to-one structured interviews with key intermediaries working in the CCIs of each country – including policymakers, academics and entrepreneurs
- A programme of business breakfast meetings with specially invited partners in CCI development, plus EU delegations. These were held in the Sultanate of Oman, Kingdom of Bahrain and Kingdom of Saudi Arabia.

³ TFCC was also supported by Khaleejisque – which provided extensive insights on the CCIs in different parts of the GCC: <https://khaleejisque.me/about-us/>

1 The Cultural and Creative Industries in the European Union

The European Commission defines CCIs as comprised of all sectors whose activities are based on cultural values, or other artistic individual or collective creative expressions and are defined in the legal basis of the Creative Europe Programme. CCI sectors are important for ensuring the continued social development and are at the heart of the creative economy. Knowledge-intensive and based on individual creativity and talent, they generate considerable economic wealth. More importantly, they are critical to a shared sense of European identity, culture and values. In economic terms, they show above-average growth and create jobs - particularly for young people - while strengthening social cohesion.

The **Creative Europe programme** is the EU's flagship investment and development programme for the CCIs. It consists of the Creative Europe CULTURE and Creative Europe MEDIA (audio-visual) as well as the Cross-sectoral strand. Creative Europe supports cross-border cooperation and networking activities for all cultural and creative sectors and co-finances important platforms and networks.

In order to prepare the programme proposal for the Creative Europe programme 2021-2027, the Commission consulted with a wide range of stakeholders and Member States experts. These consultations were held in parallel with the interim evaluation of the 2014-2020 Creative Europe Programme. The proposal for Creative Europe 2021-2027 intends to remedy these shortcomings by including new specific sectorial support to areas such as music, architecture, books and publishing, and cultural heritage

These sectorial actions will focus on capacity building, talent and professional development. Other priority areas include data collection (to ensure an evidence-based approach to investment) and the contribution of the CCIs to sustainable development. In addition, the mobility of both creative goods/services and talent are priorities for the EU – facilitating friction free trade and mobility.

Entrepreneurship and innovation are important topics for EU in its approach to the CCIs. For example, in the OMC Report on *"The role of public policies in developing entrepreneurial and innovation potential of the cultural and creative sectors"* demonstrates the importance of targeted investment and support to boost creative entrepreneurship and support inclusive growth.

Access to finance and approaches to tax and regulatory incentives for the CCIs are equally important topics at an EU and member state level – as demonstrated in the OMC Report on Access to Finance *"Towards more efficient financial ecosystems."* This is because CCIs too often fall outside the priorities of traditional sources of finance – e.g., in debt and equity, requiring dedicated approaches to investment readiness and tailored financial instruments which support enterprises which are predominantly micro in scale, have very distinctive business models, and operate in intangible content and products and services with a fast-changing market.

Through over 20 years of policy reform, targeted investment and a commitment to data and evidence-led approaches, the CCIs in the EU benefit from a plethora of support initiatives. These include:

- European Institute of Innovation and Technology's funding of new **Knowledge and Innovation Community for the CCIs**⁴, which will boost collaboration across different CCI sectors across Member States and catalyse a new era of inter-institutional and transdisciplinary R&D.

⁴ <https://eit.europa.eu/eit-community/eit-culture-creativity>

- **CCI Networks**, such as: European Creative Business Network, STARTS initiative (Innovation at the nexus of Science, Technology, and the ARTS, EU network of creative hubs, European incubation network(s) for creativity-driven innovation, Pan-European network of Digital Innovation Hubs, Regional Initiatives for Culture and Creativity (e.g., European Regions Research and Innovation Network – Working Group on Design and Creativity).
- **Evidence-based policy-making** – e.g., the European Commission and Eurostat are working on cultural statistics and other relevant studies.
- **Equality, Diversity and Inclusion.** The Council of the EU and other international organisations have for a long time recognised the power of cultural participation to promote inclusion and integration of isolated and excluded groups, as well as supporting cultural diversity and intercultural dialogue. Participation in cultural activities is seen as a tool for promoting equality, empowering individuals and communities to communicate and develop their potential.
- The **“Urban Agenda for the EU”** emphasises the importance of inclusive and cohesive urban development processes, involving civil society and communities in the process of place making. It also advocates the adoption of holistic approaches capable of taking into account economic, environmental, social, territorial, and cultural aspects. This agenda includes recent and ongoing programmes such as the New European Bauhaus⁵. This champions heritage environments as vectors for contemporary creative practice, as part of a wider approach to sustainable place-making.

“Creative industries stand out because of their propensity for innovation...They are not only innovators themselves but have also been an important driver for innovation [as] they account for increasing inputs in the development of other sectors.

Boosting the competitiveness of cultural and creative industries for growth and jobs, European Commission, 2015

⁶.

⁵ https://new-european-bauhaus.europa.eu/index_en

⁶ <https://op.europa.eu/en/publication-detail/-/publication/723a331a-d6be-45e3-8475-8ce6ca0ee050>

2 The Cultural and Creative Industries in the Gulf Cooperation Council

“The creative economy is not a single superhighway, however, but a multitude of different local trajectories. Many of these pathways are to be found in cities, regions and nations. It is clear that the next frontier of knowledge generation rests on understanding interactions, specificities and policies at local levels, and how the creative economy might be practically promoted in cities, regions and nations.”

UNESCO Creative Economy Report, 2013.

Research undertaken for this report focuses on the profile and dynamics of the CCIs in 4 GCC countries: Bahrain, Kuwait, Oman, and Saudi Arabia. Each country presents a different policy and partnership environment for the CCIs. Moreover, each country has a distinctive cultural heritage and contemporary reality – in culture, society and economy.

The following country headline overviews do not intend to describe this complexity in full. Rather, the headline overviews are positioned to offer elementary insight on the CCI context and situation in each country, inclusive of a set of policy priorities, key partners, agencies and their projects and programmes

Each country profile is concluded with some overarching considerations for EU collaboration and partnership. This includes dedicated national development programmes and policy frameworks (plus potential CCI development agencies) – which are needed in each country to drive and coordinate activities.

2.1 Kingdom of Bahrain

With a population of just over 1.5million, Bahrain developed the first post-oil economy in the Persian Gulf, the result of decades of investing in the banking and tourism sectors. Many of the world's largest financial institutions have a presence in the country's capital. It is recognised by the World Bank as a high-income economy.

The performance of the non-oil sector increased YoY real GDP growth of 7.8% in Q1-2022 in comparison to its corresponding quarter due to the lifting of Covid-19 restrictions. While key developments such as the implementation of open banking and growing demand for improved customer experience have highlighted the need for innovative FinTech solutions in Bahrain. Key sub-sectors such as FinTech and AI and emerging sub-sectors such as BioTech, CleanTech and AgriTech are assuming a larger significance in the post COVID-19 world⁷.

The CCIs have an emerging profile in the Bahrain policy and partnership landscape, and development agency Tamkeen provides a vital supporting role for CCI firms, championing entrepreneurship, delivering training and capacity-building, unlocking investment and showcasing Bahrain's portfolio of enterprises across all sectors, including CCI firms⁸. The Bahrain Economic Development Board⁹ provides oversight of the nation's economic development, supporting growth and inward investment.

2.1.1 Policy Context for the Bahrain CCIs.

As with most countries, responsibility for the CCIs in Bahrain spans several ministries and related programmes and projects. A central organising framework is presented by the **Bahrain Vision 2030: National Development Strategy**¹⁰. This focuses on shaping the vision of the government, society, and the economy, based around three guiding principles: sustainability, fairness, and competitiveness.

The Strategy does not specifically reference the CCIs. However, it is clear they provide significant opportunities for employment, innovation and growth, delivering on priority agendas for the Bahrain Government:

“Nationally, our economy needs transformation. Bahrain is facing a shortage of both quality employment and appropriate skills...”

“The most sustainable way of resolving the imbalance and raising the quality of employment is a transformation to an economy driven by a thriving private sector – where productive enterprises,



Ministries with responsibility for the CCIs

- Ministry of Foreign Affairs
- Ministry of Industry and Commerce
- Ministry of Finance and National Economy
- Ministry of Youth and Sports Affairs
- Ministry of Sustainable Development

Key agencies with some remit for the CCIs

- Bahrain Authority for Culture and Antiquities
- General Secretary of Supreme Council for Youth and Sports
- Bahrain Tourism and Exhibitions Authority
- Bahrain Economic Development Board
- Tamkeen

⁷ <https://www.tamkeen.bh/wp-content/uploads/2022/09/Business-Review-Q2-2022-18.09.2022-v2.pdf>

⁸ www.tamkeen.bh

⁹ <https://www.bahrainedb.com/>

¹⁰ <https://www.bahrainedb.com/app/uploads/2021/12/Vision-2030-English.pdf>

engaged in high-value-added activities, offer attractive career opportunities to suitably skilled Bahrainis”.

“Bahrain will strengthen the non-oil GDP growth of recent years. This growth will come from diversified economic activity. Our financial sector will remain our economic engine, but will be increasingly complemented by growth in other high-potential sectors.”

In Bahrain, the CCIs can provide sustainable employment in a high growth sector, supporting economic diversification and providing spillover effects across the economy. With the right level of support and investment, Bahrain can become a regional hub, especially with areas of relative strength – in heritage, design and architecture, visual arts and ICT.

The **Bahrain Authority for Culture and Antiquities**¹¹ has a vision to develop culture in Bahrain, support the role of culture in enhancing Bahraini national identity, implement a national programme for social culture, support initiatives which contribute to societal and cultural development, including partnership with the private sector.

The Authority has a big focus on heritage protection and renewal. Plus, on cultural exchange, inter-cultural dialogue and understanding (vital in such a diverse nation) and preserving and nurturing an ‘Advanced Cultural Environment’. This was demonstrated through the 4th Intangible Cultural Heritage Forum 2022, which explored distinctive intangible heritage assets such as Al-Murada, Bahrain Wedding Festivities, Traditional Music (Al-Sut) and Children Festivities.

The Bahrain Authority for Culture and Antiquities also has shared responsibility for the CCIs, with gaming and audiovisual mentioned in its Vision. However, there is limited evidence of strategic investment in such activities.

Bahrain Tourism and Exhibitions Authority launched a new Bahrain Tourism Strategy 2022-2026¹² – based on seven pillars: developing marine attractions, business tourism, sports tourism, recreational tourism, medical tourism, cultural tourism, and media tourism and cinematography.

The focus on cultural tourism includes investment in heritage renewal, such as the establishment of Manama as a distinctive heritage city and contemporary design hub, and the introduction of new infrastructure to boost cultural production – such as the new Al Dana Theatre. The focus on media tourism and cinematography can position Bahrain as a centre for film production, servicing demand for production and post-production facilities from both Europe and India.

This will take significant strategic investment and development support, building from a relatively low base in terms of cultural tourism and the ‘product’ that drives such tourism – i.e., a strong, dynamic and distinctive CCI sector. However, there is real potential to position Bahrain as an attractive place for cultural tourism, underpinned by a dynamic CCI sector. USD 10 billion worth of investments in tourism infrastructure projects is underway as a post-Covid transformation programme – e.g., with new hotels and museums, to provide a strong support for exploration and tourism in Bahrain. Bahrain is also creating the foundation to support public and private investments’ customers, services and facilities:

“Tourists choose the Kingdom for our superb island setting; our cosmopolitan, relaxed way of life; our rich history and culture; exciting major events; delicious food and varied shopping choices. All of these ingredients combine to create a thriving tourism and hospitality sector, which offers

¹¹ <https://culture.gov.bh/en/>

¹² <https://www.bna.bh/en/Bahrainintroducesnewtourismstrategy.aspx?cms=q8FmFJgiscL2fwlzON1%2BDmHee%2F744FnYnvhm68%2FJgVY%3D>

investors world-class infrastructure and a broad range of retail, leisure, food and hotel investment opportunities in Bahrain.” (Bahrain Tourism Strategy 2022-2026).

Bahrain has 3 designated UNESCO heritage sites offering visitors a unique experience: Dilmun Burial Mounds, Pearl Route, and Qal’at Al-Bahrain. A focus on CCIs will help to re-animate these heritage assets and build a sustainable model for cultural tourism.

Existing CCI International Exchange and Relations Activity in Bahrain

British Council Bahrain:

- Art-Abled - <https://www.britishcouncil.bh/en/programmes/arts/art-abled> - “created to ensure that children with disabilities can showcase their artistic capabilities and are given equal opportunities to contribute to the community.”

U.S. Embassy Bahrain <https://bh.usembassy.gov/education-culture/>:

- Kids and Youth Workshops: Digital fabrication devices
- Academy for Women Entrepreneurs
- Filmmaking Project Documentaries Workshop.

French Embassy www.instagram.com/francebahrein

- Fashion Show of the Fashion Week (Paris to Manama) 2022 - Workshops, talks and fashion show
- Evening Back to Business: French and Bahraini diplomatic, economic and trade relations event.
- La Femis educational programmes for cinematography

Alliance Francaise Bahrain www.instagram.com/af.bahrain

- Poetry and Short Films Soiree
- DJ Workshops
- Art Exhibition Based Events
- Art Residency Programmes

2.1.2 Main CCI Strengths, Assets and Opportunities

In addition to specific strengths in cultural heritage, Bahrain has emerging strengths in ICT, design and architecture, visual arts and music. However, each of these CCI sectors are relatively emergent, fragile, and in need of dedicated support for their growth and sustainable development¹³.

Of these, **ICT** provides the greatest potential for growth. Bahrain is ranked first in MENA for ICT readiness by the World Economic Forum¹⁴, with excellent infrastructure, high skills and strong regulatory and investment landscape. The ICT sector is one of the most productive and innovative sectors in the economy. The sector generates large numbers of high-value jobs, of which 59% of the jobs are held by Bahraini nationals.

Most ICT activities are yet to operate within the CCIs, with content-focused activity still emergent (e.g., in gaming, extended reality and audiovisual). However, the conditions for ICT-enabled CCI growth and innovation are in place. For example, cloud traffic is growing faster in MENA than anywhere else in the world at 41% year over year. As the first Gulf country to adopt a nation-wide ‘cloud-first’ policy, Bahrain is ideally placed to take advantage of the ICT opportunities this trend is creating in areas such as business services outsourcing, cybersecurity.

Bahrain has a growing reputation for its visual arts, craft and design sectors. This has been catalysed by a set of initiatives in recent years. For example:

¹³ For an overview of key CCI sectors, see: <https://culture.gov.bh/en/authority/CulturalHighlights/mcc/CreativeSectors/>

¹⁴ <https://www.bahrainedb.com/>

- The now defunct **ArtBAB** (Art Bahrain Across Borders) Initiative¹⁵, led by Tamkeen, was launched in 2016 to facilitate and enhance cooperation between Bahraini artists and renowned names in this sector, as well as support their participation in prestigious international exhibitions to promote exchange of experiences and enable them to sell their creative outputs. This initiative was short-lived, with Bahrain struggling to build the profile and critical mass required to be a global or regional hub, with ArtDubai driving activity in the GCC.
- The **'Made in Bahrain'**¹⁶ initiative was launched with the aim to build a visual identity for all sectors, including the local crafts and creative industries, to highlight the importance of crafts and handmade products as a part of the Bahraini identity, to educate the audience on the different local crafts and their role in the social/communities' development, to introduce elements of modernity and sustainability to the local handmade product and promote it locally and internationally, and to provide support to the local craftsmen and CCI practitioners. High quality 'made in Bahrain' creative products are available in showcase retail outlets such as in the new International Airport terminal and a boutique in downtown Manama.
- **Muharraq, UNESCO Creative City of Design**, positions Bahrain as a hub for design, connecting historic strengths in architecture to a growing focus on design as a vector for sustainable development:

“With its unique Arabic character combined with international standards of modernity, Muharraq plays a very special role within the Gulf Region. The city presents many opportunities for creativity throughout various types of public events; all of which serve to reskill Bahrainis, build cultural confidence and create synergies on an international level¹⁷”.

The Muharraq, UNESCO Creative City of Design initiative, represents a wider opportunity to establish **Bahrain as a regional creative hub** underpinned by a set of specialisms (e.g., ICT, design, visual arts). The small-scale of the country, its high-density urban nature, and its dynamic business-ready environment, point to an opportunity for Bahrain to operate as a hub for CCI production, innovation and exchange.

This will require interventions that boost the scale, capacity and skills-base of existing creative hubs and networks, and provide an uplift in the quality and industry-relevance of higher education and professional development activities across the CCIs. Key to success will be nurturing an ecosystem of CCI hubs, enhancing cultural infrastructure, and supporting creative talent to build both technical and entrepreneurship skills. Fundamentally, this links to the 2030 Vision, not least its focus on economic diversification.

2.1.3 Key CCI hubs and cultural / educational infrastructure

Prominent CCI hubs and cultural infrastructure to leverage include:

Isa Cultural Center (ICC) – a major centre for culture with libraries, concert halls and multiple cultural development programmes.

<https://www.icc.gov.bh/en/>

RAK Foundation, led by Sheikh Rashed Al Khalifa - A non-profit organization dedicated to empowering artists worldwide by providing opportunities; encouraging cross-cultural collaborations and exchange; and fostering international partnerships.

<https://rakartfoundation.com/>

¹⁵ <https://www.artfairmag.com/artbab-art-bahrain-across-borders/>

¹⁶ <https://export.bh/made-in-bahrain/>

¹⁷ <https://culture.gov.bh/en/authority/CulturalHighlights/mcc/>

AlRiwaq Art Space – a vital independent art space and development organisation, established in 1998 and growing into one of the most important hubs for critical engagement with contemporary arts in the region.
<https://www.alriwaqartspace.com/>

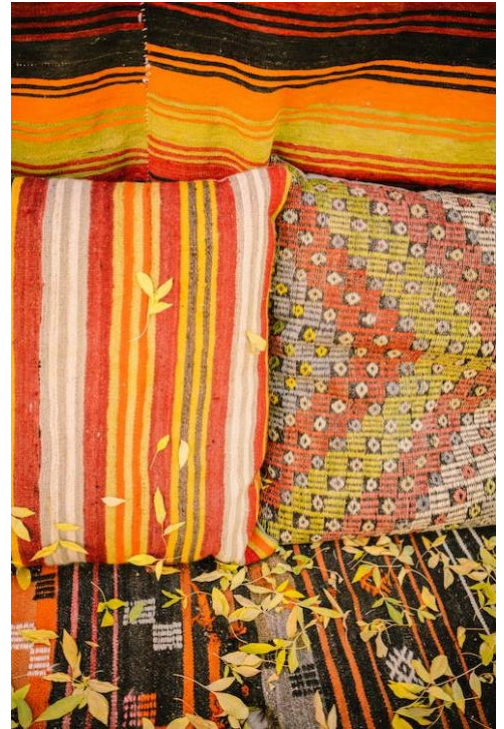
The Collective – a leading co-working space which brings together creative and knowledge-intensive enterprises to drive exchange and innovation.
<https://www.collectivehub.co>

The Art Centre – a state institution, art museum, gallery and development centre, committed to enhancing the appreciation and understanding of modern and contemporary arts.
https://culture.gov.bh/en/authority/cultural_sites/art-centre/

Studio 224 – a state institution which provides a multidisciplinary platform fostering creativity and knowledge through various forms of interaction. Based in the heart of a natural reserve overlooking Arad Bay, it is a joint initiative between the Supreme Council of Environment, and Bahrain Authority for Culture and Antiquities. This “allows this space to act as a hub for culture, arts and knowledge, through a wide range of activities and programmes that engage the public”.
https://culture.gov.bh/en/authority/cultural_sites/STUDIO244/

Al Bareh Art Gallery – a reputable and established art gallery showing the work of established and emerging artists from the MENA and Diaspora assembled in special exhibitions that explore historical and contemporary themes.
<https://www.albareh.com/>

Akkas Gallery – a contemporary art space and hub for exchange and workshops on art, design, photography and literature.
<https://akkasgallery.wordpress.com/>



Mashq Art Space – an independent creative hub with a focus on visual arts and artist development.
<https://www.instagram.com/mashqart/>

Ammar Basheir Creative Studios – leading edge contemporary design company and hub.
<https://www.instagram.com/ammargasheir/?hl=en>

Jehan Saleh Studio - Bahrain’s first studio dedicated to printmaking.
https://www.instagram.com/jehansaleh_studio/?hl=en

Shaikh Ebrahim bin Mohammed Al Khalifa Center for Culture and Research – an interdisciplinary hub of art and creative practice; a forum for dialogue between people in philosophy, literature, poetry, culture and the arts.
<https://shaikhebrahimcenter.org/>

Tenmou - the Bahrian Business Angels Network, also with two co-working hubs. The CCI sector is not yet well represented, with scope to feature as a priority for angel investment,
<https://tenmou.me/>

Art Reach Bahrain - non-profit group of artists and designers engaging the community in public art projects to beautify Bahrain.
www.instagram.com/artreachbahrain

Bahrain Arts Society – a forum for artists, offering exchange and supporting ecosystem development.
<https://www.instagram.com/bahrainartssociety/?hl=en>

Enki Performance Art Center – Based at the National Theatre – a key hub for performing arts development.
<https://www.instagram.com/enki.bh/?hl=en>

2.1.4 Bahrain – a Hub for CCI Festivals and Events



CCI Higher Education Provision in Bahrain

The following are examples of key programmes which support CCI talent development at degree or postgraduate level. This is a very emergent offer in Bahrain, with significant room for growth and international collaboration:

Royal University for Women - <https://www.ruw.edu.bh/college-art-design>

- College of Art and Design Undergraduate Programmes: Pearson BTEC RQF Level 3 Foundation Diploma in Art, Design and Media Practice, Bachelor of Arts in Fashion Design, Bachelor of Arts in Graphic Design and Bachelor of Arts in Interior Design.
- The College of Art and Design Graduate Programmes: Master of Design Management, and Master of Fine Art in Drawing and Painting.

American University of Bahrain - <https://www.aubh.edu.bh/bachelor-arts-multimedia-design> - <https://www.aubh.edu.bh/master-arts-multimedia-management>

- The College of Media and Design Undergraduate Programme: Bachelor of Arts in Multimedia Design
- The College of Media and Design Graduate Programme: Master of Arts in Multimedia Management

University of Bahrain - <https://www.uob.edu.bh/academics/#search>

- College of Arts Undergraduate Programmes: Bachelor of Arts in Arabic Language and Literature, Bachelor of Arts in Islamic Studies, Bachelor of Arts in Mass Communication, Bachelor of Arts in Tourism, Bachelor of Arts in Fine Arts and Graphic Design, Bachelor of Arts in English Language and Literature, Bachelor of Arts in History and Bachelor of Arts in Sociology.
- College of Arts Graduate Programmes: Post Graduate Diploma and Master in Arabic Language, Master of Arts in Mass Communication.

Gulf University Bahrain - <https://www.gulfuniversity.edu.bh/>

- Undergraduate Programme: Bachelor in Mass Communication
- Graduate Programme: Master in Mass Communication

The AI (Artificial Intelligence) Academy <https://ai.polytechnic.bh>

2.1.5 Ones to Watch – Bahrain as an emergent hub for CCI talent

Bahrain's CCI ecosystem, supported by the above infrastructure, is made up of micro enterprises and SMEs with room for growth. It is a country with some incredible creative talent, but collaboration is still emergent – both locally and internationally. Future activities which combine professional skills development, business support, investment and investment readiness, showcasing and innovation capacity, will enable the following exemplars of CCI talent and new talent to thrive in an increasingly connected CCI hub.

The current portfolio of Bahraini creative talent includes:

***Playbook** – a women-led leadership platform for entrepreneurship and investment.*

<https://www.get-playbook.com>

I Heart Film Productions – led by Shereen Shaltout – an innovative film production company working internationally.

<https://www.iheartfilm.net>

***Two Desk Studio** – micro design agency led by Jenine Sharabi.*

<http://www.twodeskstudio.com>

***Annada** – contemporary fashion brand led by entrepreneur Nada Alawi.*

<https://www.annadaonline.co>

***Amina** – a boutique luxury Art and Design Gallery, led by Al Abbasi.*

<https://aminagallery.com/>

***Zainab Al Sabba** - conceptual artist and architect. <https://instagram.com/zainabalsabba>*

2.1.6 Summary of Opportunities for EU / Bahrain Collaboration and Exchange

Overall, there is an opportunity to build policy literacy and capacity, supporting Bahrain to **develop a national CCI policy and framework** – as a key element to deliver the 2030 Vision. This will set out the key building blocks for growth and innovation and facilitate structured exchange and trade activities with the EU. This includes specific opportunities to support the Bahrain Authority on Arts and Culture (BACA) in developing strategic plans for film and audiovisual, for youth development and cultural education, and for national awareness raising regarding culture and creativity.

Priority activities should include:

- **Set up a dedicated sector development agency** (or department within an existing agency) to coordinate sector development, build networks, support knowledge exchange and advance investment readiness.
- **Build a baseline of the CCIs:** to provide evidence on the scale, diversity and development needs of the sector.
- Establish a **dedicated innovation programme for the CCIs** – to accelerate CCI businesses by incentivising innovation.

- Building from the above, set up a **National Development Programme for the CCIs** – a new CCI policy for growth and innovation.

In addition, and working to support Bahrian as a CCI Hub, the following areas present opportunities for which future collaboration can be positively impactful:

- **Skills development** and creative education – supporting institutions and intermediaries in Bahrain to build programmes of creative entrepreneurship and management and to ensure technical skills gaps (e.g. in design, extended reality, gaming) are bridged. This can include consultancy support and partnership between EU and Bahrain universities, enterprise agencies and skills providers.
- **Public / Private partnership and investment readiness** – working with BACA through its 'Invest in Culture' initiative, to build strategic partnerships with the private sector to support the cultural landscape in Bahrain. This can include provision of expertise to increase investor awareness and investment readiness of CCI opportunities in Bahrain, and co-investing in infrastructure and development programmes such as festivals, exhibitions, and other cultural activities.
- **Showcasing and CCI Validation** – building B2B and joint showcasing opportunities in priority sectors of ICT, visual arts, design, architecture and heritage. This can boost the profile of Bahraini talent in Europe and bring EU talent to Bahrain for co-production activities, R&D and trade. Tamkeen and the Bahrain Economic Development Board will be key partners to CCI exchange activities; plus independent CCI hubs and networks can be boosted as centres of innovation and exchange.



2.2 State of Kuwait

Kuwait is situated in the northern edge of Eastern Arabia. Most of the country's population reside in the urban agglomeration of the capital Kuwait City. As of 2022, Kuwait had a population of 4.45 million people of which 1.45 million were Kuwaiti citizens while the remaining 3 million foreign nationals from over 100 countries.



KUWAIT

Kuwait's **Vision 2035** emphasises economic diversification through non-oil sectors and through expanding a sustainable knowledge economy. The main aspirations of Vision 2035:

- 1) Restore the regional leadership role of Kuwait as a financial and commercial hub and reviving the pivotal role of the Kuwaiti private sector in the leadership of development.
- 2) Reconstruct the important and different positions, as well as the bodies and institutions of the country. In addition to enabling work empowerment and productivity.
- 3) Provide new infrastructure, appropriate legislation and an enabling a business environment conducive to development and providing controls and climate to ensure total and balanced human resource development. Aiming on consolidating the values of society, preserving its identity, as well as achieving justice, political participation and freedoms.

2.2.1 The Policy Context for CCIs in Kuwait

The pillars of the **National Development Plan Vision 2035** include: sustainable diversified economy, effective civil service, sustainable living environment, developed infrastructure, high quality healthcare, creative human capital, global positioning.

The CCIs can play a formative role in the delivery of Vision 35 and the National Development Plan – such as by supporting economic diversification, driving innovation and increasing the nation's attractiveness for investment, talent and tourism. Considerable research and strategic development have been underway to understand the specific CCI opportunities for Kuwait. These include:

- In 2017, The National Fund for SME Development commissioned a **Kuwait Creative Economy Report**¹⁸ through the World Bank which indicated:

“About 35,000 individuals work in Kuwait's creative sector, which generates hundreds of millions of Kuwaiti dinars in output and products. This makes it one of the largest non-oil sectors in Kuwait, equivalent to 24% of the value of the non-oil manufacturing sector and 72% of the business services' sector.”

Market research shows:

“The industry has already reached a considerable size—about 1.5 times that of food and beverages manufacturing, 5 times that of machinery manufacturing, and 8 times that of plastics.”

- In 2019, The Ministry of Information and National Council of Culture, Arts, and Letters commissioned a **National Creative Economy Strategy** through British Council Kuwait and conducted by Tom Fleming Creative Consultancy (TFCC). The National Creative Economy Strategy is planned to launch in 2023. This includes the prioritisation of creative skills and

¹⁸ <https://www.worldbank.org/en/news/feature/2017/01/25/mentoring-the-creative-industries-sector-in-kuwait>

education; enterprise and management support; creative clusters and hubs; export and international collaboration¹⁹.

- Amiri Diwan has built two of the **largest cultural complexes in the Middle East**, JACC (Sheikh Jaber Al-Ahmed Cultural Centre) in 2016 and ASCC (Sheikh Abdullah Al-Salem Cultural Centre) in 2018. These have boosted capacity for CCI production and presentation, catalysed a process of audience development, and given confidence at a strategic level regarding the role of culture as a foundation for nation building.
- The **private sector** is involved in various training and development programmes related to the CCIs, especially in technology, media production, and visual arts.
- Underpinning this focus on CCI development, culture is viewed as a foundation for civic renewal and national development. The **Kuwait Cultural Strategy programme** was launched in 2022.

Facilitated by the National Council for Culture, Arts and Letters (NCCAL), the Strategy prioritises:

“Investing in talents, creative economy, institutional sustainability and digital development. Also aims to launch six cultural centers in all six governorates, as well as develop children and women's culture and provide awards for creative people.” (Acting Secretary General Dr. Essa AlAnsari)²⁰.

In addition to this increasing commitment to culture and the CCIs, a suite of strategic plans and development programmes are being developed to deliver on Vision 35. These provide wider enabling conditions for CCI development. They include:

- **Kuwait Ministry of Information Strategy: 2021-2026.** Priorities include: maintaining administrative, financial and artistic repairs as a priority to ensure a sustainable future; upgrading existing services which are provided by the ministry and highlighting youth contributions;

Existing CCI International Exchange and Relations Activity in Kuwait

EU – GCC Dialogue on Economic Diversification – Project funded by the European Union. Main Goal: To support climate friendly trade, investment and economic affairs between the European Union and the GCC at both regional and country levels in the context of the GCC economic diversification processes. Primarily the project focuses on three main outputs.

https://www.eeas.europa.eu/eeas/EUintheGCC_en

UNESCO - During the UNESCO World Conference on Cultural Policies and Sustainable Development "Mondiacult 2022" held in Mexico City on September 28-30, 2022, Kuwait reaffirmed its commitment to making diverse cultural contributions to UNESCO. Kuwait's officials emphasized the State's active participation in supporting culture, safeguarding heritage and promoting cultural diversity.

<https://www.kuna.net.kw/ArticleDetails.aspx?id=3056118&Language=en>

British Council Kuwait - Creative Entrepreneurs Bootcamp (2022-23): For more than 3 years, the British Council Kuwait has been collaborating with NCCAL on CCI development – leading to the National Creative Economy Strategy. Guided by Vision 2035, this includes a Boot Camp programme with the Royal College of Art. This supported 25 creative entrepreneurs, boosting their management and entrepreneurial capacity.

<https://www.britishcouncil.com.kw/en/programmes/arts>

Goethe Institut - a series of cultural events and competitions to promote German Language Learning, and cross-cultural exchange within the MENA region. <https://www.goethe.de/ins/ae/en/spr/unt/ver.html>

Institut Français du Koweït - Cooperation and Cultural Development Presentation - the promotion of cultural, scientific and technical cooperation between Kuwait and France.

<https://kw.ambafrance.org/La-cooperation-culturelle-scientifique-et-technique>

U.S. Embassy in Kuwait - active in providing cultural and creative events and programmes. The Embassy regularly partners with the National Council of Culture and universities in cultural events. It has also launched an artist mentorship programmes in collaboration with local firm Visual Therapy to train and develop young Kuwaiti artists.

<https://kw.usembassy.gov/embassy/kuwait-city/sections-offices/public-affairs/cultural-affairs/>

¹⁹ See the following links for an overview of the consultation process:

https://creativeeconomy.britishcouncil.org/media/uploads/files/RFP_CE_Bootcamp_Kuwait_Aug2022.pdf

<https://www.britishcouncil.com.kw/en/programmes/arts/Creative-Economy-in-Kuwait>

<https://www.britishcouncil.com.kw/en/en/programmes/arts/online-workshops-creative-entrepreneurs>

²⁰ <https://www.kuna.net.kw/ArticleDetails.aspx?id=3057969&Language=en>

collaborating with Kuwait's private sector and civil society to foresee the strategy's implementation and execution.

- **Human Development Index to Support the Kuwait National Development Plan 2022.** The Kuwait Public Policy Center, in collaboration with the UNDP, have compiled the Kuwait Human Development Index. This aims to propel Kuwait's economy towards a sustainable economic framework which is less reliant on Kuwait's oil production. The programme's numerous goals include: the promotion of a sustainable future through international partnerships, safeguarding cultural and historic sites, prioritising initiatives that impact SGDs, and fostering a human-centric environment, as well as the establishment of anchor infrastructure projects.

2.2.2 Main CCI Strengths, Assets and Opportunities

The National Creative Economy Strategy points to specific CCI strengths in TV, Film, and Radio, Software and computer services, Visual arts and Crafts. With a youthful, diverse, and growing population, significant investment in technology incubators and accelerators led by the private sector; high investment in multimedia production and training, including TV, film, theatre, podcasts; and a strong focus on heritage innovation and the transformation of traditional skills; Kuwait is well-placed to diversify its economy through the CCIs.

Creative employment is increasingly popular in the younger demographic (evidenced by the British Council and US Embassy programmes). This process of validation is supported by entrepreneurship support and the introduction of new cultural infrastructure which showcases Kuwaiti culture and innovation to the world – such as the JACC and ASCC, which are two of the largest cultural complexes in the region.

Guided by Vision 2035, the national Creative Economy Programme and new Cultural Strategy, partnership agencies are playing an increasingly collaborative and coordinated role in CCI development. This includes the work of:

- **The Youth Public Authority**²¹ – A Governmental initiative which involves training and development programmes targeting Kuwaiti youth, unlocking opportunities to create non-profit developmental projects, workshops, funding educational scholarships and cultural events.
- **A suite of skills development, entrepreneurship and accelerator projects and programmes**, with increasingly dynamic public-private partnerships. Working predominantly in the digital and media space, activities include:
- **VO** – Integrated incubator and creative hub for local talent, providing training and development activities and funding creative productions and projects²².
- The **National Creative Industries Group (NCIG)**²³ – a collaborative content development, screenwriting and media innovation programme supported by Netflix:

“Operating in a newly launched studio campus and multi-media facility, the NCIG family is hard at work, forming a collaborative ecosystem of talent, incubated by a network of companies, public/civic institutions, and skilled professionals, in a bid to weave the creative tapestry for the global expansion of a post-oil “New Kuwait”.”

²¹ <https://www.youth.gov.kw/>

²² <https://thestartupscene.me/MenaEcosystems/Kuwait-s-First-You-Talent-Incubator-VO-to-Launch-in-Summer-2021>

²³ <https://www.ncig.com.kw/>

- **CODED**²⁴ – the first coding bootcamp in the MENA; supported by the **Kuwait Foundation for the Advancement of Sciences (KFAS)**²⁵ - a private non-profit organisation which promotes and encourages research in science, technology and innovation in Kuwait to promote a sustainable future.
- **INJAZ Kuwait**²⁶ – An NGO that inspires and prepares young people to succeed in the global economy. INJAZ delivers business programmes on entrepreneurship, work readiness and financial literacy. This is increasingly moving toward ideas of creative entrepreneurship and cross-sector collaboration.
- **LOYAC**²⁷, a non-profit organisation which aims to empower youth and transform them into impactful leaders in society. It has a programme of cultural events and capacity building activities, often targeting people facing social-economic challenges. The LOYAC Academy of Performing Arts (LAPA) works to empower talented youth to “*develop their skills and nurture their passion*”.
- **Al Qabas**, a prominent Kuwaiti newspaper and media company, has launched **Sasha VOD**²⁸, their in-house production arm. This invests in the production of original content and is streamed on their independent platform. It is a game-changer for supporting local talent and catalysing Kuwaiti content development.

2.2.3 Key CCI hubs and cultural / educational infrastructure

The above-mentioned projects and programmes are working to boost creative participation, enhance skills and validate the CCIs as an aspirational career path in Kuwait. Long-term, this is to support economic diversification and build a more entrepreneurial and innovative economy.

Also, of vital importance to Kuwait’s CCI development is an ecosystem of creative hubs, cultural and educational infrastructure. Increasingly, this involves public-private partnership, as well as a set of increasingly impressive public-led and private-led interventions. These include:

A major cluster of world class cultural venues which includes:

Dar al-Athar al-Islamiyyah - a museum which houses the extensive Islamic art collection owned by Sheikha Hussa AlSabah.

<https://darmuseum.org/>

JACC (Sheikh Jaber Al-Ahmad Cultural Centre) - owned by Amiri Diwan – one of the largest cultural centres and opera houses in the Middle East.

<https://www.jacc-kw.com/>

ASCC (Sheikh Abdullah Al-Salem Cultural Centre, owned by Amiri Diwan) –a vast, globally significant cluster comprising the Natural History Museum, Science Museum, Space Museum, Arabic Islamic Science Museum, Fine Arts Centre and extensive public realm.

<https://www.ascckw.com/>

Creative hubs and clusters, including:

Zain – the major private Kuwaiti Telecom Company, which is playing a leadership role in CCI talent development and supporting content creation and innovation via the Zain Great Idea startup accelerator and the tech coworking space ZINC.

<https://www.zaingreatidea.com/>

²⁴ <https://www.joincoded.com/>

²⁵ <https://www.kfas.org/>

²⁶ <https://injaz-kuwait.org/>

²⁷ <https://loyac.org/LandingPage/index-ar.html>

²⁸ <https://www.shasha.com/>

<https://www.kw.zain.com/en/zinc>

Boubyan Bank - via the Boubyan Tech Startup Accelerator, offering accelerator services to tech companies, including those with CCI applications.

<https://boubyan.bankboubyan.com/en/explore-boubyan/investors-relations/boubyan-innovation-and-partnership/>

Sadu House - a museum/space which hosts workshops, lectures and cultural events to promote the uniqueness and significance of Kuwaiti heritage. This includes a SADI residency programme to encourage creativity and innovation in contemporary textile arts.

<https://alsadu.org.kw/>

Abdullah AlSalem Cultural Centre - art and culture centre owned by the Amiri Diwan with extensive cultural programming and a yearly Artist in Residence, AiR, programme. <https://www.culturalinnovations.com/sheikh-abdullah-al-salem-cultural-centre>

Circular - co-working space for entrepreneurs, artists and SMEs.

<https://www.circulargroup.com/about>

Niu - Co-working space and development organisation for entrepreneurs, artists and SME owners. With a strong focus on creative practice, ethical and open creative collaboration.

<https://niu.nu/>

Wejha – private-led contemporary art centre and hub.

<https://www.instagram.com/wejha.arts/?hl=en>

Contemporary Art Platform - a non-profit local gallery and exhibition space.

<https://www.capkuwait.com/>



Safat Studios – a creative co-working space which holds networking and exchange activities for CCI SMEs.

<https://www.instagram.com/explore/locations/103395352255267/safat-studios/>

The Hub – a key café, gallery space and meeting point for Kuwaiti creatives.

<https://thehubkuwait.com/>

2.2.4 Kuwait – a Hub of CCI Festivals and Events

A Growing festival and events ecosystem – providing platform for creative talent

Kuwait Book Fair – A major annual book fair organised by NCCAL

Kuwait Theatrical Festival – organised by NCCAL

Dar Al Athaar Al-Islammiyah Cultural Season - Lecture talks, artistic and cultural events during Kuwait's winter season.

ComicCon and ComFest - Youth led festivals for comics in collaboration with international comic artists

Sheikh Jaber Al-Ahmad Cultural Center (JACC) Cultural Season - shows, opera, and theatre based cultural programming.

A Growing festival and events ecosystem – with a strong trade and exchange focus

Kuwait Tech Expo - Kuwait's Leading Technology Event

Kuwait Knowledge Economy Forum

Mirzam Expo - Privately owned festival created by Farah AlHumaizi - Interior design, architecture and decor Expo.

CCI Higher Education Provision in Kuwait

The following are examples of programmes which support CCI talent development at degree or postgraduate level. This is an emergent offer in Kuwait, with significant room for growth and international collaboration:

Gulf University for Science and Technology:

Degree Programmes: Bachelor of Arts in Mass Communication (Digital Media Production, Public Relation and Advertising, or Visual Communication.) <https://www.gust.edu.kw>

American University of Kuwait:

Degree Programmes: Bachelor of Arts in Design; and Bachelor of Arts in Communication and Media. <https://www.auk.edu.kw>

Box Hill College Kuwait: Department of Applied Arts and Design: Diploma of Website Development; Diploma of Graphic Design; Diploma of Interior Design and Decoration. <http://www.bhck.edu.kw/en/page/15>

American International University Kuwait: Bachelor of Fine Arts - Graphic Design; Bachelor of Fine Arts - Interior Design. Plus, a nine month programme for a certificate in Film Production. <https://www.aiu.edu.kw>

Kuwait University (State):

- College of Arts: Departments include Arabic Language and Literature, History, Philosophy, and Mass Communication.
- College of Architecture: Department of Architecture and Department of Visual Communication & Interiors. Design Development and Research Lab is a think-tank under the umbrella of the College of Architecture.

Higher Institute of Dramatic Arts: Departments include Acting and Theatrical Production, Criticism and Theatre Literature, Theatre Stage Production, and Television.

Higher Institute of Musical Arts: Taught programmes include composition, musical instruments, and vocal performance.

2.2.5 Ones to Watch – Kuwait as a growing hub for CCI talent

Kuwait's CCI ecosystem, supported by the above infrastructure, is made up of micro enterprises and SMEs with room for growth. The digital and media sphere has already shown considerable growth and the start-up and tech ecosystem is gaining prominence at a regional and global level. However, for the wider CCIs – especially those working in micro enterprises in sectors such as visual arts, fashion and design – there is a significant need and opportunity to boost entrepreneurship capacity and drive collaboration, both within Kuwait and internationally.

Future activities which combine professional skills development, business support, investment and investment readiness, showcasing and innovation capacity, will enable the following exemplars of CCI talent and new talent to thrive in an increasingly connected CCI hub.

The current portfolio of Kuwaiti creative talent includes key intermediaries and influencers such as:

Khaleejesque – founded and directed by **Fouz Al-Sabah**. This is the go-to platform for art, culture and CCIs in Kuwait and the wider GCC. It is a Kuwait-based publishing brand that highlights the dynamic creative and cultural scene of the Arab Gulf countries through inspiring content, engaging events, and thought-provoking exhibitions.

<https://khaleejesque.me/about-us/>

The Object Salon Exhibition - Athoub AlBusaily and Sulaiman AlOmar created the first open call online platform created by local-based Kuwaiti artists and curators to exhibit, and showcase local art.

<https://khaleejesque.me/listings/the-object-salon/>

Studio Khemiae - Photographer Huda AlAbdulMughni launched an open studio natural dye and darkroom, specializing in workshops for cyanotypes, and nature dyeing.

<https://khemiae.com/home-index.html>

Dr. Asseel Al-Ragam - associate professor of architecture and the Vice Dean for Academic Affairs, Research and Graduate Studies at the College of Architecture at Kuwait University. She is also the director of the Graduate Programme in Architecture.

<http://ssuc.ku.edu.kw/>

Manal AlMajed - founder of **Curating Culture, which** specialises in consulting and developing strategic planning to implement cultural and artistic projects to support CCIs regionally and globally.

<https://www.curatingcultures.com>

Dr. Sundus AlRashid - Chair - International Council of Museums Kuwait. Doctoral holder Dr. Sundus AlRashid is a champion for museums, working to raise awareness towards their societal importance.

<https://icom.museum/en/committee/icom-kuwait/>

2.2.6 Summary of Opportunities for EU / Kuwait Collaboration and Exchange

The National Creative Economy Strategy for Kuwait sets out ambitious plans for economic diversification through the CCIs, plus for civic engagement through audience development. Overall, alongside the new Cultural Strategy, there is an ambition to position culture as foundational to national development and for the CCIs to spearhead economic and social renewal. The Creative Economy Strategy is built on 5 pillars, each of which will benefit from EU collaboration, partnership and expertise:

- **Talent:** supporting creative talent to flourish at all stages in career development and each part of the value chain – from education to business.
- **Infrastructure and support:** Preserving and repurposing heritage buildings to drive the creative economy. Ensuring the physical and digital spaces are available for talent to flourish; supporting

creative producers to generate new networks and build markets; ensuring specialist support is in place such as for IP development.

- **Investment:** leveraging dedicated funds for creative talent, better aligning existing investment, increased investment in heritage assets, enhancing public-private partnership and providing specialist support services to enhance entrepreneurship and investment readiness.
- **Promotion:** Building a compelling 'Creative Kuwait' brand narrative and campaign, with cultural and creative tourism at its heart. Establishing Kuwait as a global meeting point for creative talent.
- **Evidence & Knowledge Leadership:** a systemic approach to data capture, dissemination, evaluation and benchmarking – to ensure Kuwait continues to innovate in its approach to the creative economy.

For each of these pillars, Kuwait, through the NCCAL, is looking for partners to building capacity, exchange knowledge and collaborate on provision. A starting point will be reform of governance and partnership models for the Kuwaiti CCIs, with a National CCI Board to be set up. This will benefit from international guidance and strategic consultancy. There will also be a set of pilot activities for each of the pillars – which will also benefit from EU collaboration and exchange.

Priority areas where EU / Kuwait partnership can drive transformation include:

- **Establishment of a dedicated CCI fund and investment programme** – to catalyse sector growth and attract inward investment
- **Establish a private-sector-led innovation programme** for the CCIs: to include entrepreneurship support, R&D in key CCI sectors, and digital capacity building
- **Showcase distinctive Kuwaiti CCI strengths** and build knowledge exchange activities with key EU CCI hubs: to validate Kuwaiti CCIs and drive trade and exchange opportunities.

Plus, in Kuwait there is a distinct opportunity to set up a new **CCI Development Agency** which can support the delivery of the National CCI Development Programme.



2.3 Sultanate of Oman

Situated on the southeastern coast of the Arabian Peninsula, and spanning the mouth of the Persian Gulf, Oman has a population of close to 5.5 million. With a rich and distinctive heritage and increasingly dynamic contemporary cultural landscape, Oman is one of the countries to watch in the regional and global creative economy.



2.3.1 The Policy Context for CCI in Oman

Significant steps have been taken to position the CCIs as a key part of the nation's future. These are linked to the **Oman Vision 2040**²⁹ and a recent Cultural Strategy. The Oman Vision 2040 works for:

“The creation of a Society of Creative Individuals Proud of their identity, innovative, globally competitive, leading a decent life and enjoying sustained well-being”.

The Vision 2040 focuses on economic diversification alongside processes of social reform which focus on wellbeing, quality of life and pride. Culture is positioned as the main pillar. To this end, The Ministry of Culture has partnered with the Oman Vision 2040 Executive and NAZDAHER - the National Programme for Investment and Export Development - to explore areas of expansion and investment in the CCIs.

NAZDAHER³⁰: The programme has two strategic aims. The first is to ease business environment conditions by cutting red tape, making Oman more attractive to live, work and invest in, and attract and retain investments through easing the customer journey. The second is follow up and enabling of major sectors under the mandate of the programme, including food security (agribusiness), ICT, logistics, aviation, tourism, manufacturing, energy and mining. Next on the agenda is culture and the CCIs. A new **CCI micro team** has been set up – which will be a vital interface with the EU. This will lead on a new CCI Strategy for Oman (its first)³¹.

The **Oman Cultural Strategy 2021-2040**³², led by the Ministry of Culture, Sports, and Youth, launched Oman's Cultural Strategy to help:

“Build a society that is able to effectively contribute to building a renewed intellectual and knowledge ecosystem with well-established national and cultural foundations.”

The underlying mission of the strategy is to:

“Organise and develop cultural work and create an ideal environment for creativity in order to consolidate cultural identity and achieve leadership, development and sustainability both locally and globally.”

The Cultural Strategy highlights the following 11 CCI activities as priorities: 1) Identity and intangible cultural heritage, 2) Translation and publishing, 3) Literature, 4) Manuscripts, 5) Visual arts, 6) Performing arts, 7) Festivals and cultural exhibitions, 8) Cultural exchange, 9) Events, competitions, and cultural awards, 10) Libraries, cultural centres and clubs, 11) Cultural initiatives.

²⁹ https://isfu.gov.om/2040/Vision_Documents_En.pdf

³⁰ <https://www.oman2040.om/index-en.html>

³¹ <https://www.omanobserver.om/article/1107085/opinion-extras/creative-industries-plan-to-boost-competitiveness>

³²

There are 7 themes that underpin the work of the Cultural Strategy: 1) Creativity and cultural development, 2) Culture and community, 3) Creative and cultural industries, 4) Cultural identity, 5) Cultural investment, 6) Cultural policy and legislation, and 7) Cultural exchange.

There are 10 strategic projects to achieve the goals of the strategy. These effectively provide a terms of reference for EU-Oman collaboration:

- **Zawaya:** Building a supportive environment for cultural creativity through forums, festivals, exhibitions, as well as cultural competitions and awards.
- **Medad:** Highlighting and supporting published works, by providing printing, translation, supporting researchers, and promoting Omani authors and books locally and internationally.
- **Fada'at:** Organising cultural initiatives related to national, regional, and international events.
- **Tawtheeq:** Preserving and authenticating Omani cultural and urban heritage through recording and documentation.
- **Tharwa:** Developing skills of creative workers and strengthening the creative and cultural industries.
- **Rawabet:** Strengthening Oman's cultural presence internationally and establishing bilateral cultural agreements and strengthening cultural diplomacy.
- **Manasa:** Presenting a digital platform with cultural content and services, as well as data and statistics related to the cultural sector.
- **Khatawat:** Strengthening cultural programmes for children.
- **Otor:** Reviewing and updating regulations, legislation, laws, and policies related to cultural work.
- **Takween:** Developing the foundation and cultural projects within the 5-year national development plans.

Ministries with responsibility for the CCIs

Ministry of Heritage and Tourism
 Ministry of Culture, Sports and Youth
 Ministry of Information
 Ministry of Commerce, Industry, and Investment Promotion
 Ministry of Social Development

Key agencies with some remit for the CCIs

Oman Investment Authority
 Public Authority for Special Economic Zones and Free Zones
 Oman Chamber of Commerce and Industry
 Public Authority for SME Development (Riyada) Authority for Small and Medium Enterprises (ASMED)
 Ithraa (The Public Authority for Investment Promotion and Export Development)
 Nazdaher (National Programme for Investment and Export Development).
 SMEs Development Authority

Alongside the 2040 Vision, new Cultural Strategy and strategic alignment on CCIs via NAZDAHER, the following policy developments are putting the CCIs to the centre of Oman's development plans:

- In October 2022, **The National Employment Programme** launched an initiative to support and promote freelancing activities in Oman in cooperation with governmental and private agencies. This is aimed toward reducing bureaucracy and enabling mobile micro enterprises to flourish³³. This is as part of a wider strategic agenda to increase business start-ups and job creation for Omanis.
- The **Authority for Small and Medium Enterprises (ASMED)** is to set up a CCU Incubator in a strategic partnership with the national Youth Centre³⁴. Based in Muscat, the incubator will target early stage CCI enterprises and provide wrap around support such as business support, office space, investment readiness and skills development.

³³ <https://www.muscatdaily.com/2022/10/30/freelancing-in-focus-as-oman-readies-incentives-for-sector/>

³⁴ <https://www.omanobserver.om/article/1125547/oman/smes-can-apply-for-creative-industries-incubator>

- **Oman National Tourism Strategy 2040** aims to create a diversified framework of tourism services and products through the development of 14 strategic clusters across Oman. The cluster's development strategy aims to achieve the following: 1) Increase global performance and attractiveness, 2) Diversify and strengthen tourism offerings, 3) Offer a compelling destination of distinction, 4) Facilitate engagement and positive experiences between visitors and the destination. This includes a focus on the cultural offer and establishing dynamic and attractive events and experiences. In October 2022, the Ministry launched the 'Marhaba Oman'. The event brought together tourism professionals and key experts from several GCC countries. The goal of the event was to open new avenues in Oman tourism; and to showcase to the world how the Sultanate has developed its tourism offerings over the years
- **Oman Cultural Complex Project:** The centre will be a major new addition to the cultural infrastructure landscape, complementing world class facilities such as the Oman Opera House. Aligned with the 2040 Vision, this is to boost cultural activity in Oman and increase visibility and attractiveness internationally³⁵.

³⁵ <https://www.zawya.com/en/projects/construction/oman-revives-design-and-build-tender-for-oman-cultural-complex-gqcyplee>

2.3.2 Main CCI Strengths, Assets and Opportunities

Oman's main CCI strengths lie in its rich heritage and culture, its unique natural landscape, and its distinctive aesthetic traditions – in architecture, art, music and literature. The stable, peaceful political and business landscape also increase Oman's appeal. The increasing focus on economic diversification, innovation and sustainable development are also key positive indicators for the CCIs, both in terms of generating employment for Omanis (unemployment and under-employment are major challenges) and attracting international talent and investment.

Of the different CCI sectors, digital / ICT, music, performing arts, craft and film show particular strengths – in terms of the variety of enterprises and incentives. This includes the digitalisation of heritage. In film and digital content development, several initiatives have been taken by the Government and grassroots organisations to promote and support the film community in Oman.

The film industry is primarily focused on documentary films, short films, as well as animation. While there are a number of well-known directors and producers from Oman, most have studied in the US and Europe and are continuing their careers abroad. There are local production companies active in Oman and there is increased interest and investment in transforming Oman into a destination for international film-making. This includes potential incentives and regulatory aspects. However, there are concerns that the current skills base is not ready to absorb larger-scale productions which would involve both environmental challenges and support incoming rather than home-grown talent.

The Omani Society for Films and Theatre is active in organising film festivals and events. They organise the **International Short Film Festival**³⁶ as well as **Al-Dakhiliyah International Film Festival**, which includes symposium and awards ceremony. The **Muscat International Film Festival** is in its 11th edition.

Existing CCI International Exchange and Relations Activity in Oman

UNESCO – including extensive work to recover and rehabilitate tangible and intangible heritage and specific projects such as the Sultan Qaboos Prize for Arts, Culture and Literature – “Supporting cultural, artistic and literary fields considering it as a way to promote cultural and human progress, contribute to the movement of scientific development and enrichment of the intellectual”.
<https://en.unesco.org/creativity/policy-monitoring-platform/sultan-qaboos-prize-culture-arts>

The U.S. Embassy in Oman - Project based collaborations to support cultural preservation.
<https://om.usembassy.gov/education-culture/>

Goethe Institut - Gulf German Film Festival Oman 2022: third German language film festival based in Oman, working alongside the Austrian and Swiss Embassies.
<https://www.goethe.de/ins/ae/en/kul/sup/ggf.html>

British Embassy / British Council Oman - UK Oman Digital Hub to support the development of cybersecurity and digital technology. www.instagram.com/ukomandigitalhub

Cultural festivals thematically organized to promote Oman's traditional dance and music -
<https://www.britishcouncil.om/en/programmes/arts/festival-skills>

Aga Khan Awards 2022 - The Aga Khan Award for Architecture recognises that the built environment is fundamental to quality of life, the Award encourages architectural projects that address the aspirations of societies around the world. The Aga Khan Award for Music recognizes and supports exceptional creativity, promise, and enterprise in music performance, creation, education, preservation and revitalisation in societies across the world in which Muslims have a significant presence. The award ceremony for both Aga Khan Awards 2022 were held at the Royal Opera House in Muscat in October 2022. This event signifies Oman's role in cultivating creativity internationally and reflects its cultural diversity and openness for global exchange.
<https://www.omanobserver.om/article/1127546/oman/tourism/sultanate-hosts-aga-khan-awards>

³⁶ <https://www.thearabianstories.com/2022/10/19/woman-child-international-short-film-festival-in-muscat/>

Oman Chamber of Commerce and Industry (OCCI³⁷) – which is boosting its CCI role. For example, the OCCI has signed agreements with Action Films LLC, a post-production company, and Destinations Rising, a company specialised in promotion of international films and TV production sites globally, to promote Oman as an attractive destination for film-making³⁸.

Pitching at the right scale and identifying CCI activities which can strike a balance between local impact and internationalisation, will be a key criterion for the forthcoming Creative Economy Strategy. This applies to all CCI sectors. EU support can help Oman to strike the right balance – ensuring inclusive and sustainable development through the CCIs. This includes the validation of the CCIs as a reputable career path – there is currently low visibility of the opportunities presented by the sector, limited creative education and skills programmes, and thus low levels of awareness of potential routes to employment.

2.3.3 Key CCI hubs and cultural / educational infrastructure

The above-mentioned projects and programmes are working to boost creative participation, enhance skills and validate the CCIs as an aspirational career path. Long-term, this is to support economic diversification and build a more entrepreneurial and innovative economy. Also, of vital importance to Kuwait's CCI development is an ecosystem of creative hubs, cultural and educational infrastructure. Increasingly, this involves public-private partnership, working toward the realisation of the 2040 Vision.

Large-scale, high profile cultural infrastructure includes the incredible **Royal Opera House Muscat³⁹**, a major centre for music, performance, art and heritage, celebrating Omani culture and traditions and providing a platform for excellent and innovative programming. This is also a major meeting point for art and culture from across the country and wider region. The **National Museum⁴⁰** and **Bait Al Zubair⁴¹** are also major focal points for the culture of Oman and key to connecting a distinctive heritage to a creative future.

In addition to such critical cultural infrastructure, Oman has an emergent ecosystem of hubs and networks, all of which need to be strengthened if the CCIs are to grow and deliver impact. These include:

***Youth Centre** - A public-private partnership between several authorities and leading companies led to the launch of Youth Centre that aims to provide the youth with a physical hub, developmental programmes, and a space to connect. The Youth Centre has 80 strategic partners, 16 active programs, and 12,000 beneficiaries. The new CCI Incubator is an important new step in sector development.*

<https://www.yc.om>

La Oficina Coworking Space – a space for micro enterprises in Sohor.

https://www.instagram.com/la_oficina_center/?hl=en

Al Rud'ha MQ Coworking Space – a space for micro enterprises in Muscat.

<https://alrudha.com/>

Mashru Meem Coworking Space – a vibrant community for Muscat creative and knowledge-intensive firms, with a youthful flavour.

<https://twitter.com/MashruMeem>

³⁷ <https://omanchamber.om/>

³⁸ <https://www.omanobserver.om/article/1117008/oman/promoting-oman-as-a-destination-for-film-production>

³⁹ <https://rohmuscat.org.om/en/Pages/default.aspx>

⁴⁰ <https://www.nm.gov.om/en/home>

⁴¹ <https://www.baitalzubair.com/>

Raw Spaces Coworking Space, Muscat – another example of the burgeoning start-up and micro enterprise scene.
<https://www.instagram.com/raw.spaces/?hl=en>

Stal Gallery and Studio – UAE-based Alserkal Group's first cultural project in the Sultanate of Oman. The space operates as a gallery, meeting point, project hub and resource for residencies. The Young Emerging Artists Program (YEAP) is the first program of its kind to support young artists in Oman to work alongside established artist Hassan Meer and other leading Omani and international artists
<https://www.stalgallery.com/about>

Alia Gallery – a contemporary art space led by renowned Omani artist Alia Al Farsi.
<https://aliagallery.com/>

Bait Muzna – a vital hub and platform for emergent and established artists, based in old Muscat.
<https://www.baitmuznagallery.com/>

Suika Art Café – a neighbourhood creative café and hub.
<https://www.instagram.com/suika.cafe>

Makan Studios – contemporary gallery, workshop and education hub
www.makanstudios.com

Creative Mornings Muscat – a meeting point for CCI enterprises www.instagram.com/cm_muscat

Zawraq Collective - a youth-led network of artists creating and curating creative events.
<https://www.instagram.com/zawraq.collective>

Oman House of Fine Arts – an independent art school and hub providing courses and nurturing a creative community. <https://www.instagram.com/omanhouseoffineart/?hl=en>

CCI Higher Education Provision in Oman

The following are examples of key programmes which support CCI talent development at degree or postgraduate level. This is an emergent offer in Oman, with significant room for growth and international collaboration:

Sultan Qaboos University - Fine Arts Education Programme - <https://omanifinearts.com/sultan-qaboos-university/>

German University of Technology in Oman (GUtech) - Undergraduate programmes in computer science, artificial intelligence, urban planning and architectural design, engineering, and tourism.
<https://www.gutech.edu.om>

Dhofar University - a not-for-profit private institution following the American higher education system in Salalah, Dhofar governorate. It includes two colleges of interest to the creative economy, the College of Arts and Applied Sciences, and the College of Engineering.
<https://www.du.edu.om>

The University of Nizwa (UoN) – a not-for-profit private university located in Nizwa in Al-Dakhiliya governorate. The College of Arts and Sciences has Fine Arts programmes specialising in fashion and jewellery design. The College of Engineering and Architecture has programmes in architecture, interior design, and interior design technologies.
<https://www.unizwa.edu.om>

Nizwa College of Applied Sciences (NCAS) - under the University of Technology and Applied Sciences. It has departments in Design (graphic design, multimedia design,

2.3.4 Oman – an Emergent Home for CCI Festivals and Events



2.3.5 Ones to Watch – Oman as a growing and sustainable hub for CCI talent

Oman's CCI ecosystem is still very emergent. Although the country has major and world class cultural infrastructure, talent in the CCIs still struggles to find a sustainable living and to build viable businesses. There are some exceptions – in digital, film, art and design. But even these sectors are under-sized and lack the levels of regulatory and investment support needed for their growth. The opportunity is to build from this and develop talent pathways and an enabling environment that fosters innovation and entrepreneurship across CCI value chains.

The 2040 Vision is a catalyst for the nation's creative renewal, building on its rich heritage to develop a distinctive contemporary role in the GCC and global creative economy. This is likely to involve supporting micro enterprises and SMEs to grow sustainably, linking CCI development to the Sustainable Development Goals. It will involve a 'boutique approach' that champions provenance and quality over scale.

Future activities which combine professional skills development, business support, investment and investment readiness, showcasing and innovation capacity, will enable the following exemplars of CCI talent and new talent to thrive in an increasingly connected and distinctive creative nation.

The current portfolio of Omani creative talent includes key intermediaries and influencers such as:

Barasti Productions - A team of international TV and film producers established in Oman in 2009, focused on producing high-quality TV commercials, feature-length films and documentaries.

<https://www.barastiprod.com>

Gate 10 – a leading edge design, marketing, communications, PR, digital and innovation services team and hub for creative practice. Bringing together top Omani talent, Gate 10 demonstrates how it is possible to build a high quality, home-grown international CCI business in Oman.

<https://gate10.om/>

Sayyida Susan Al Said - Founder of Bait Muzna Gallery, a contemporary multi-media gallery featuring local and international artists. <https://www.baitmuznagallery.com>

Tejarah Talks - With a firm focus on Oman's current and future business, export and investment environment, Tejarah Talks is a series of informal, interactive evening discussions that brings together some of Oman's most inspirational and innovative thinkers to share their stories, insights and ideas with an enthusiastic crowd. Presented by the Ministry of Commerce, Industry, and Investment Promotion, the November 2022 was entitled "Gen Z and the Creative Industries". Tejarah Talks are spearheaded by **Maymuna Al Adawi** - Director Oman Business Forum and PPP at Ministry of Commerce, Industry and Investment Promotion. <https://www.omanobserver.om/article/1127427/business/economy/tejarah-talks-explores-economic-impact-of-art-culture>

Alia Farsi - Artist and founder of Alia Gallery. She is a leading figure in the creative community in Oman and regularly holds exhibits, talks, and events in the gallery and in universities across the country. www.instagram.com/alia_farsi

Nadia Al Lawatiya - Architect and founder of 23 Degrees North, an award-winning architectural consultancy based in Muscat. <https://www.instagram.com/23degreesn>

Samah Al Ansari - Founder of Studio Sein, a creative studio focusing on lifestyle and homeware products. <https://www.studio-sein.com>

Ghudu - Established by Wisal Al-Rashdi, Ghudu - is a community tourism project based in Dhofar. With a strong cultural focus. <https://www.instagram.com/ghudu.om>

2.3.6 Summary of Opportunities for EU / Oman Collaboration and Exchange

It is clear that there is significant energy, appetite and thus potential for CCI development in Oman. Powered by the 2040 Vision, the country can connect its heritage assets to contemporary cultural and creative practice and enterprise. However, there are significant gaps in capacity and expertise, as well as in the scale and growth / investment readiness of CCIs. In this context, it will be important for Oman to 'smartly specialise', focusing on a limited range of value-adding CCI sectors while also attending to fundamental enabling conditions which will allow all parts of the CCIs to develop.

Overall, there is a need for a dedicated **National CCI Development Programme** – to provide overarching vision and leadership and ensure aspects of Cultural Policy are connected to approaches to trade, investment and innovation. This can be enshrined by a national **CCI Policy Framework**, for which the EU can provide capacity-building and innovation support. The process for establishing this Policy Framework should include carefully mediated public-private partnership, co-creating a vision and approach which is distinctively Omani.

The EU can also provide expertise on good practice models for CCI investment and regulation, as well as on models for support and education / skills. Establishing Oman as a beacon for CCIs and sustainable development with a foundational national CCI Strategy.

Additional core areas where EU / Oman dialogue, exchange and partnership can make a difference are:

- **In data and evidence development** – supporting Omani partners to establish a robust baseline of the CCIs from which the impact of future investment and support can be measured and through which international comparison can be made. This requires a review of the approach to industrial and occupational classification as well as new primary research to properly understand the profile and dynamics of the Oman CCIs.
- **In talent development and B2B exchange** – connecting Omani CCIs to their peers in the EU, facilitating knowledge exchange and supporting skills transfer. This includes models to support the

development of CCI curricula and courses, models of higher education delivery, and approaches to R&D.

- **In entrepreneurship and management** – accelerating CCI SME development, connecting hubs and networks, and validating creative jobs as good jobs.
- **In infrastructure** – modelling and supporting innovation in cultural infrastructure, mainstreaming digital innovation and supporting sustainable development in festivals and events.
- **In cultural tourism** – building models which are inclusive, value-adding and environmentally sound.
- **In location-based film and events** – to support a highly skilled workforce capable of developing home-grown content and servicing incoming productions with limited need to import talent and equipment.
- **In social impact investment** – positioning the CCIs as a way to build opportunities for youth and ensuring rural and smaller-city development pathways.
- **In heritage renewal** – identifying ways heritage assets can be re-imagined as contemporary spaces, platforms and resources for the CCIs.



2.4 Kingdom of Saudi Arabia

The Kingdom of Saudi Arabia (KSA) is the largest country in the GCC and the fifth largest by area in Asia. With a population of close to 39 million and a number of large cities and rich and



diverse natural and heritage landscape, KSA is of a different scale to other GCC countries. This makes assessment of the role and potential of the CCIs more complex. Indeed, with multiple ministries, agencies and commissions working across fields that have relevance to the CCIs, partnership requires a tailored approach and successful EU/KSA collaboration will likely be developed across a range of fields, each with a different partnership configuration.

In recent years, KSA has shown a degree of liberalisation and a shift toward a more progressive approach to the role of art and culture in society. This is driven in part by Government's **Vision 2030 vision and plan**, which identifies the CCIs as a key sector for economic diversification, employment and growth. The aim is to increase the contribution of sector GDP to 3%, generating \$20 billion in revenue and creating over 100,000 jobs by the year 2030. In order to achieve this, the Government is investing in infrastructure building projects and programmes to support sector development – e.g. new cultural infrastructure, creative hubs, business support and training, all underpinned by new public-private partnerships.

The Saudi Ministry of Culture, which was only established in 2018, has stated that its vision entails:

“a flourishing of arts and culture across Saudi Arabia that enriches lives, celebrates national identity and builds understanding between people”.

Progress has been rapid. In recent years, KSA held its first Arab Fashion Week, unveiled its new national pavilion at the Cannes Film Festival, and is active in most global festivals and summits. In addition to the direct economic impact of the CCIs, the KSA Government is also keen to leverage their ‘soft power’ value, promoting the country’s refreshed image.

Saudi Arabia’s CCIs demonstrate increased demand globally. The United Nations (2018⁴²) reports that in 2014, KSA’s creative product exports were worth \$746.97 million, up from \$308.5 million in 2005. The EU appears to be a growing export market, as shown by a rise in demand from 7% in 2005 to 30% in 2014 . Similarly, Asia accounts for over 60% of the country’s market demand for the CCIs.

However, the majority of this export is in the fashion and design segment, accounting for 80% of the country’s creative export (United Nations, 2018⁴³), suggesting underdevelopment in CCI sectors such as the audiovisual, new media, performing arts, art, and crafts, visual arts, and publishing. A future rise in global demand can be facilitated by stronger government ties with development partners, technological improvements that facilitate the creation of high-quality international products through research and development, and progress in the country’s training and education across a range of CCI skills.

⁴² <https://ivypanada.com/essays/saudi-arabia-and-the-rise-of-the-cultural-economy/>

⁴³ https://unctad.org/system/files/official-document/ditcted2018d3_en.pdf

2.4.1 The Policy Context for CCIs in KSA

Driving the resurgence of the CCIs in KSA and setting the target of 3% GDP is **Vision 2030**⁴⁴, the nation's development plan. It primarily encompasses three main visions which include: a vibrant society, a thriving economy and an ambitious nation.

The **Saudi Cultural Strategy**⁴⁵ supports this Vision, working to support and enable a vibrant Saudi Arabian culture that is true to its past and looks to the future by cherishing heritage and unleashing new and inspiring forms of expression for all. The main objectives include promoting culture as a way of life, enabling culture to contribute to economic growth, and creating opportunities for global cultural exchange.

The **Saudi Esports and Gaming Strategy**⁴⁶ revolves around three main pillars: improving player experience, creating new opportunities, and making an economic impact that contributes SR 50 billion (~£11.7bn) to KSA's GDP.

The **Saudi Tourism Strategy**⁴⁷ has a strong cultural dimension, especially in terms of heritage renewal and festivals and events:

“By 2022, ten destinations will include 35 sites, and targets 100 million visitors, ten percent contribution to GDP, one million new jobs and a total number of overnight visits to count for 100 million by 2030.”

The **National Development Fund Strategy** has initiated a new **National Development Fund**⁴⁸ as the main enabler for the social and economic Vision 2030 objectives. This facilitates special targeted projects and investments which can be of relevance to the CCIs – e.g. for city planning, cultural and educational infrastructure, and dedicated sector innovation and growth funding.

2.4.1.1 Complex Governance Arrangements

In KSA, to deliver the 2030 Vision, a set of Ministries have shared responsibility for the CCIs. These are: Ministry of Economy and Planning, Ministry of Foreign Affairs, Ministry of Media, Ministry of Tourism, and Ministry of Culture.

The Ministry of Culture has identified **16 CCI sub-sectors of focus** and created independent commissions for each. These lead on sector development and connect, in theory, with the wider strategic goals of Vision 2030 (including with other relevant Ministries). These will be key partners to EU / KSA activities:

Heritage Commission - aims to regulate and enhance the heritage sector with the support of key stakeholders. It holds an independent supervisory role in this vital cultural sub-sector to ensure the maximum efficiency in achieving the overarching missions incorporated in Vision 2030.

Architecture and Design Commission - aims to create programmes and initiatives to support KSA architects and designers and enrich the KSA national identity.

Culinary Arts Commission – established to supervise the development of this sector and introduce Saudi dishes locally and globally, building pride in culinary heritage and talent.

⁴⁴ <https://www.my.gov.sa/wps/portal/snp/content/saudivision/?lang=en>.

⁴⁵ https://www.moc.gov.sa/themes/custom/moc/assets/pdf/MOC_Cultural_Vision_EN_NEW.pdf

⁴⁶ <https://www.spa.gov.sa/2384241>

⁴⁷ <https://mt.gov.sa/about/national-tourism-strategy>

⁴⁸ <https://ndf.gov.sa/en/AboutNDF/Pages/AboutNDF.aspx>

Music Commission - oversees the development of a music sector and provides non-discriminatory access to music education, empowers musical talent and contributes to the development of a music economy.

Libraries Commission - implementing a sector strategy within the framework of the National Strategy for Culture proposing draft laws and regulations, amending and submitting regulations to the Ministry of Culture to complete statutory procedures.

Theater and Performing Arts Commission - the patron of all types of performing arts, namely: theatre, dance, circus, stand-up comedy, street performances, ballet, and the Opera.

Museums Commission – working to strengthen and enhance the quality of museums in line with international best practice, encouraging investment and boosting career opportunities within the museum and related sectors.

Visual Arts Commission – works to nurture the talent of art enthusiasts, practitioners and professionals in KSA, and support the production and exhibition of artwork in all its forms, locally and internationally.

Film Commission – works to advance the film sector and the production environment in addition to stimulating and empowering KSA filmmakers.

Fashion Commission – works to develop the sector, driving its advancement and supporting practitioners in the field.

Literature, Publishing and Translation Commission – works to regulate and manage the literature, publishing and translation sectors in KSA.

In addition to these sector-led Commissions which work for the Ministry of Culture, the following agencies, authorities and commissions play a vital role in investment, development and partnership across the CCIs. Some are place-based and would be key partners to EU firms wishing to operate in specific parts of KSA. Others are sector or thematic-led. They include:

Saudi Cultural Development Fund - invests in the cultural sector and its expanding and significant influence on the growth of the economy.

Saudi Commission for Tourism and Antiquities – Leading on tourism development and bootstrapping heritage assets for the visitor economy.

Saudi Tourism Authority - functions as part of Saudi Arabia's Ministry of Tourism concerned with promoting the travel and tourism industry of the country. The **Tourism Development Fund**⁴⁹ aims to facilitate local and international investors' access to high potential tourism investments across key destinations within Saudi Arabia.

Royal Commission for AIUla – leading on the sensitive and sustainable development of AIUla as an international tourist heritage site. This includes a focus on developing CCIs as part of a wider 'creative city' agenda.

Royal Commission of Riyadh City (RCRC) - **Riyadh Art project**⁵⁰ is one of Riyadh's Four Megaprojects launched by the Custodian of the Two Holy Mosques, King Salman Bin Abdulaziz, on March 2019. The project will be a milestone that contributes to fulfilling a key goal of the Saudi Vision

⁴⁹ <https://www.tdf.gov.sa/content/TDF/TDF/en/Home.html>

⁵⁰ <https://www.rcrc.gov.sa/en/projects/riyadh-art-project>

2030 to promote Riyadh's position among the world's most liveable cities. Projects include Noor Riyadh Light Art Festival, Tuwaiq International Sculpture Symposium, and Urban Art Labs.

NEOM - a global mega project as a re-imagined new build smart city in Tabuk Province in north-western KSA. It will be made up of distinct 'regions' and sectors, fuelled by USD 500 billion from the Public Investment Fund of KSA and local and international investors:

"NEOM will become a community powered by talent and diversity across 14 sectors"⁵¹.

This includes culture and entertainment, and media. It represents a major opportunity for EU trade and collaboration.

Digital Content Council - Focuses on expanding the local content share and creating jobs in four main markets: video, audio, electronic games, and digital advertising.

Public Investment Fund - a global investor which has a world-class investment portfolio with a focus on sustainable investments, both domestically and internationally.



Misk Foundation (Prince Mohammed bin Salman Foundation) – targets KSA-youth and youth-centred institutions to empower future leaders, entrepreneurs, and scientists. This includes the **Prince Mohammed bin Salman Nonprofit City**⁵². The 3.4 kilometre city will be an urban hub for young, dynamic, and creative people. The city aims to become a regional and a global centre that incubates innovative, educational, and creative industries by hosting academies, colleges, 'Misk Schools', a conference centre, a science museum, an arts academy and arts gallery, performing art theatre, a culinary academy, an integrated residential complex, along with a creative center for innovators in sciences and new generation technology such as AI, IOT and Robotics.

⁵¹ <https://www.neom.com/en-us/about>

⁵² <https://miskcity.sa/en/home>

Existing CCI International Exchange and Relations Activity in KSA

The Delegation of the European Union in Riyadh - deals with political relations, economic and trade cooperation, energy, climate change, cultural cooperation, security, space and being a consular focal point. An increasingly large and broad range of EU cultural activities promote cultural diversity, youth, creativity, exchange and multiculturalism. Many of these activities are implemented by the European Union National Institutes for Culture (EUNIC).

<https://newsroom.consilium.europa.eu/collections/eu-saudi-arabia>

The EUNIC cluster in KSA, created in 2021, is a European network that aims to strengthen international dialogue and cultural cooperation. It supports local organisations and creative industries in KSA; and promotes better knowledge of the EU and cultural exchanges and mobility of artists.

www.instagram.com/eunic.ksa

UNESCO - The Permanent Delegation of KSA to UNESCO ensures liaison between the Kingdom and UNESCO's other Member States and its Secretariat. This includes considerable work across UNESCO World Heritage Sites, as well as on the status of the artist. The Misk Foundation signed a Memorandum of Agreement with the UN in 2016 to establish a UNESCO Junior Professional Officer programme to train and develop Saudi youth across its different offices across the world.

<https://hub.misk.org.sa/programs/skills/unesco-junior-professional-officer-programme/>

British Council - connecting the creative sector and audiences in Saudi Arabia with the best of UK contemporary arts. This includes a Research Project to understand KSA Film Skills

<https://saudiarabia.britishcouncil.org/en/programmes/arts/Saudi-Film-Skills>

2.4.2 Main CCI Strengths, Assets and Opportunities

In 2021, Ithra highlighted the state of the CCI in Saudi Arabia:⁵³:

“The CCI contributed 1.5% to Saudi GDP in 2018, with the industry growing 13% annually. The CCI is in the early stages of development with an average score of 4/10 across 9 key dimensions on the KSA CCI Index, however, enabling factors have a higher score – highlighting growth potential. The industry is transforming in these key sectors: Video games earned \$1bn revenue in 2020 (41% growth since 2017). In fashion, there are 40+ local designers and brands specializing in ready-to-wear to haute couture. Podcasting, KSA is the biggest user of YouTube per capita worldwide. Saudi Arabia is well positioned to move to a multi-purpose, digitally advanced infrastructure.”

The main CCI strengths and opportunities for KSA lie in its scale, spending power and strategic commitment. The Vision 2030 provides a driving force for both major infrastructure developments and economic diversification measures. Allied to a wider process of ‘opening up’, plus a push to build international profile and soft power, and the CCIs are a major strategic priority and thus opportunity area. With a growing middle class, extensive digital literacy, and increased exposure to a diversity of cultural forms, content and experiences, and both demand for and supply of CCI goods and services are set to rise.

Illustrative of this opportunity landscape are:

- A **burgeoning visual arts ecosystem**, with multiple commercial spaces opening across the country, accompanied by initiatives to support young artists and connect artists to international networks.

⁵³ <https://ithra.ft.com/present-tense-future-perfect>

- **A digital transformation.** Video game revenue in KSA exceeded \$1 billion 2019, growing by 41% since 2017. Growth is likely to have been even greater through the Covid-19 pandemic. Internet podcasting is consumed significantly by the population, with KSA being the biggest user of YouTube per capita worldwide. Digital mega projects such as those in NEOM and the **Mukaab** digital cube project⁵⁴ in Riyadh. **Ignite**⁵⁵ is a \$1.1 billion-backed initiative to boost digital content and transform KSA into a leading digital entertainment and media production hub.
- **Film** in KSA is starting from a blank slate but rapidly growing since the lift of the ban on cinemas. Consumption of movies on the big screens is growing very fast and local production is expanding with 23 featured films being released since 2017.
- **Fashion** in KSA is witnessing a recent growth after the introduction of multiple fashion events such as Riyadh and Jeddah Fashion Weeks, and Fashion Show Expo. The country is becoming a trend-setter in modest fashion and in the wider Arab beauty market.
- **Architecture and design** – with ongoing and future major development programmes, including new entire new cities.
- **Cultural tourism** is a key area of growth, both in terms of heritage tourism and leisure tourism. Increasingly, CCIs are being positioned as providers of added value to the tourism experience and are providing services to boost the tourism brand and narrative:

“Since launching the National Tourism Strategy in 2019, the Saudi tourism sector has experienced rapid growth in investments due to monumental reforms as part of Saudi Arabia’s economic transformation.”⁵⁶

There are also significant areas of development in sector capacity-building, evidence and insight, creative entrepreneurship, regulation and investment for which international expertise are sought. Such creative services present big opportunities for EU / KSA trade and exchange.

2.4.3 Key CCI hubs and cultural / educational infrastructure

The EU Delegation in KSA plays an important role in navigating through the complex policy and partnership landscape in KSA and brokering trade and exchange opportunities for EU /KSA CCIs. Plus, direct opportunities can be developed through contact with the growing array of CCI clusters, hubs and infrastructure projects and programmes. Plus, by directly focusing on specific cities where the CCIs are being prioritised – namely Jeddah, Riyadh, AIUla, Dhahran, and the new city NEOM.

CCI organisations, clusters, hubs and more to both look out for and connect with (depending on CCI sector) include:

***Misk Art Institute** - which offers workshops, residencies and annual exhibitions to promote cultural and artistic understandings within Saudi Arabia.*
<https://miskartinstitute.org/>

***Misk City Hub** - A physical community and co-working space for Misk Foundation events and programmes.*
<https://hub.misk.org.sa/the-city-hub/>

***Hayy Jameel** - Developed and managed by Art Jameel as a dedicated arts complex and creative hub for Jeddah. Alongside the museum Hayy Arts, the education platform Hayy Learning and Hayy Studios is Hayy Cinema, SKSA’s first independent audiovisual centre. It also includes Fena Hayy, a multi-purpose space for performances, workshops and talks and Saha, a central community courtyard.*

⁵⁴ <https://toposmagazine.com/mukaab-cube-riyadh-saudi-arabia/>

⁵⁵ <https://www.thenationalnews.com/business/2022/02/02/saudi-arabia-launches-11bn-backed-ignite-to-boost-entertainment-and-digital-media/>

⁵⁶ <https://mt.gov.sa/investment-and-attraction/overview>

<https://artjameel.org/centres/hayy-jeddah/>

Merwas – The largest music and entertainment production facility and recording studio in the region, based in Riyadh.

<https://merwas.sa/>

Athr Gallery – A key contemporary art gallery in Jeddah.

<https://athrart.com/>

Garagena - Creative co-working space, Riyadh.

<https://biennialfoundation.org/biennials/diriyah-biennale/>

AlMashtal Community House & Creative Incubator - Creative coworking space, Riyadh. A dynamic creative community, which includes workshop areas, open workspace, a library, dedicated labs and ample outdoor space. It is home to a diverse range of talent from sectors including fashion, interiors, media and visual and performing arts.

<https://www.almashtal.io/en/>

Saudi Centre for Fine Arts – A Jeddah-based arts centre dedicated to various forms of Saudi art and important hub for international exchange.

<https://www.saudiarts.com/en/index.php>

Ithra - King Abdulaziz Center for World Culture - The Ithra Museum has four galleries that feature exhibitions of national and international contemporary art, Saudi and Islamic cultural heritage. (Dhahran, Saudi Arabia). Ithra also plays a key role in commentary and analysis on the KSA CCIs.

<https://www.ithra.com/en>

Saudi Art Council (SAC) - Art fairs, exhibitions and responsible for promoting the cultural scene in KSA (based in Jeddah).

<http://www.sac.art/>

Hafez Gallery – Gallery and hub dedicated to Middle Eastern and international artists, Jeddah.

<https://www.hafezgallery.com/>

Naila Art Gallery - Contemporary art gallery and hub, Riyadh.

<http://gallerynaila.com/>

Ad-Diriya Biennale Foundation - a catalyst for global dialogue between the growing, diverse art communities in KSA and across the world. (Riyadh)

<https://biennialfoundation.org/biennials/diriyah-biennale/>

CCI Higher Education Provision in KSA

The following are examples of key programmes which support CCI talent development at degree or postgraduate level. This is an emergent offer in KSA, with significant room for growth and international collaboration:

AlYamamah University - Creativity and Innovation Center: works as a leading hub to all creative and innovative initiatives for all students through an encouraging and supporting environment.

<https://yu.edu.sa/creativity-and-innovation-center/>

Dar AlUloom University - Courses: Department of Architectural Engineering and Digital Design with academic majors in architectural engineering, interior design, graphic design.

<https://dau.edu.sa/en/>

Princess Nourah Bint Abdulrahman University - Courses: Higher Diploma in English or French for Tourism Sponsored by the Saudi Authority for Tourism -

https://www.pnu.edu.sa/en/Deanship/PostGraduate/Pages/graduatestudies_programs.aspx

Plus, BA in Art and Design - majors include painting, sculpture and printmaking -

<https://www.pnu.edu.sa/en/Faculties/Designs/Pages/Brief.aspx>

The Royal Institute of Traditional Arts - Continuing education (short courses), community programmes and apprenticeships

<https://trita.edu.sa/en>

AlAsala Colleges - College of Architecture and Design - Bachelor in Architecture, Bachelor in Interior Design, bachelor's in graphic design and communication Design and Bachelor of Industrial Design.

<https://alasalaa.edu.sa/>

Prince Sultan University: Undergraduate Programs: Bachelor of Architecture and Bachelor of Arts in Interior Design.

<https://www.psu.edu.sa/en>

Raffles Design Institute - Undergraduate Programmes: Animation, Digital Media Design, Fashion Design, Game Design, Interior Design, Interior Architecture and Design, Jewellery Design, Product Design, Fashion Communication and Journalism, Fashion Marketing and Retail Management.

Graduate Programmes: Design Management.

<https://raffles-college.edu.sg/>

Dar Al-Hekma: Undergraduate Programmes: Bachelor of Design in Visual Communication, Bachelor of Arts in Interior Design, and Bachelor of Architecture. Graduate Programmes: Master of

Architecture. <https://www.dah.edu.sa/en/Pages/default.aspx>

2.4.4 KSA – an Emergent Home for CCI Festivals and Events



2.4.5 Ones to Watch – KSA as a major regional CCI cluster

In addition to the above-mentioned hubs, organisations and institutions, KSA has an expanding base of home-grown talent. Such talent, often educated internationally, is open for collaboration and seeking new ways to build capacity generate innovation across the KSA CCIs. Ones to watch and / or connect with include:

Telfaz11 - A creative media studio with offices in KSA and UAE specialising in locally relevant entertainment content from the Middle East. Telfaz11 is reported to have raised an undisclosed number in funding and has signed an eight-picture deal with Netflix.

<https://www.telfaz11.com>

Thmanyah - A publishing media brand based in Riyadh known for its journalistic Arabic-language podcasts, documentaries, and audio-visual content. Saudi Research and Media Group (SRMG) acquired a 51% stake in Thmanyah in 2021 for \$9 million USD.

<https://www.thmanyah.com>

Adhlal - Adhlal - A research-based consultancy that aims to equip future generations of Saudi designers with the tools they need to succeed and build on the aims of the Kingdom's Vision 2030 national development plan.

<https://www.adhlal.com>

Merwas - The largest art and entertainment factory in the Arab world, comprising 22 audio and video studios, which aims to change the shape of the content industry.

www.instagram.com/merwas.sa

MDLBEAST - An entertainment company with global reach. Their music festivals and events have taken place in Riyadh, Jeddah, as well as at the 2022 World Cup in Doha. They are investing in talent, music innovation, world-class production and fresh content.

<https://www.mdlbeast.com>

Manga Productions - A studio focused on producing animations, developing video games and comics with creative and positive content targeting all demographics.

<https://www.manga.com.sa>

Savvy Games Group - A games and esports company formed with a mission to drive the long-term growth and development of esports and the broader games industry worldwide.

<https://www.savvygames.com>

Saudi Research and Media Group (SRMG) - An integrated media company with a consortium of established and emerging brands. It operates in the following segments: Publishing and visual and digital content, public relations and advertising, printing and packaging, as well as training and educational courses.

<https://www.srmg.com>

2.4.6 Summary of Opportunities for EU / KSA Collaboration and Exchange

Powered by the 2030 Vision, KSA is committed to building a dynamic creative economy which delivers employment opportunities, drives growth, and catalyses investment and collaboration opportunities internationally. **KSA wants to be a serious player in the global creative economy.** This presents multiple short- and long-term opportunities for EU / KSA trade and exchange.

While there is significant investment, there are significant gaps in capacity and expertise, as well as in the scale and growth / investment readiness of CCIs. There are also structural challenges where domestic awareness of career opportunities in the CCIs are low, key segments of the population have very limited access to the CCI labour market, and global appreciation of the KSA brand is still emergent.

Overall, there is a need to develop a **national policy framework for the CCIs in KSA**. This can connect the work of different Commissions and provide overarching strategic direction across a set of shared strategic themes. This can then be activated through KSA's first national **CCI Development Programme**: driving innovation and growth across the value chain. This will most likely need to be led by a dedicated CCI Development Agency – a Creative KSA. The EU can support this process through expert guidance based on proven international best practice.

As part of this proposed national development programme, core areas where EU / KSA dialogue, exchange and partnership can make a difference are:

- **In policy and partnership** – providing expertise on good practice models for CCI investment and regulation, as well as on models for support and education / skills.
- **In data and evidence development** – supporting KSA partners to establish a robust baseline of the CCIs from which the impact of future investment and support can be measured and through which international comparison can be made. This requires a review of the approach to industrial and occupational classification as well as new primary research to properly understand the profile and dynamics of the KSA CCIs.
- **In talent development and B2B exchange** – connecting KSA CCIs to their peers in the EU, facilitating knowledge exchange and supporting skills transfer. This includes models to support the development of CCI curricula and courses, models of higher education delivery, and approaches to R&D.
- **In entrepreneurship and management** – accelerating CCI SME development, connecting hubs and networks, and validating creative jobs as good jobs.
- **In high growth and high priority sectors** – notably film, esports, gaming, music and entertainment – to boost production capacity and quality.

- **In infrastructure** – modelling and supporting innovation in cultural infrastructure, mainstreaming digital innovation and supporting sustainable development in festivals and events.
- **In cultural tourism** – building models which are inclusive, value-adding and environmentally sound.
- **In location-based film and events** – to support a highly skilled workforce capable of developing home-grown content and servicing incoming productions with limited need to import talent and equipment.
- **In cultural exchange** – building bridges so KSA talent can connect with EU talent, build shared perspectives, celebrate differences, and co-create new content which can spark both economic and cultural transformation.

3 Headline Opportunities for EU/ GCC Trade and Collaboration in the Cultural and Creative Industries

This report has provided headline overview of the CCI landscape in 4 GCC countries. It has offered insight on the profile and dynamics of CCI activities, the policy, partnership and investment context, and the opportunities for EU/GCC trade and collaboration. In such a complex and fast-changing region, especially with accelerated digitalisation and post-Covid re-building, it is probable that key activities will have been missed, while some projects and programmes introduced in this report will inevitably change their role and focus over time. However, it is clear that with each of the 4 countries developing national plans and visions, there are 4 clear terms of reference with which EU partners can engage in dialogue and explore opportunities for trade and collaboration.

A Catalyst for sector mapping and policy development

It is recommended that this report be used as a **catalyst for further dialogue and exchange** – to include business breakfasts, briefing activities, study visits and symposia. It is also recommended that the EU work with the GCC to accelerate **dedicated CCI mapping activities and provide expertise to develop national CCI strategies and road maps**. The lack of robust CCI data is a major obstacle to informed policy and investment and an impediment to sector development. The EU and its member states has an excellent track record and ample expertise to support a programme of sector baseline mapping, policy formulation and strategic planning.

In addition to this policy and partnership focus, there are four core areas where the EU can work productively with the GCC to facilitate enhanced trade and collaboration. These are:

- Creative Talent and Enterprise.** *Nurturing a creative workforce, boosting creative entrepreneurship and management skills, validating CIs as a high value sector, and tackling technical skills gaps.*

This can include dedicated inter-institutional partnership between skills agencies, enterprise agencies and universities. Plus, it can feature the co-design of CCI skills and talent development programmes. It can also include the co-design of new courses which will ready future graduates for the transforming CCI landscape. In addition, opportunities can be pursued to initiate knowledge exchange, shared research and development creative apprenticeships and work placements, and enhanced accreditation for CCIs.

- B. Creative Clusters and Hubs.** *Ensuring CCI talent has safe and accessible spaces to develop their work, exchange ideas and co-create new enterprises. Plus, supporting CCIs to cluster to build critical mass, enhance sector profile, and showcase CCI products and services.*

This can include new models for creative workspace, innovation models for cultural institutions seeking ways to support creative practice, and co-production of festivals and events as spikes of creative practice. It can also include exchange of technical and strategic knowledge on, for example, the digital transformation of CCIs, ensuring place-based creative practice continues to thrive. In addition, it can facilitate connectivity and exchange between networks of creative hubs and enterprises in the EU and the GCC.

- C. IP, Regulation, Trade and Investment.** *Ensuring there is a transparent and navigable model for registering CCI enterprises, a fair and supportive IP environment, attractive incentives for trade and investment, and shared market development opportunities.*

This can include technical support to enhance the IP and regulatory landscape for CCIs in the GCC, inclusive of innovation models to overcome barriers to free expression and associated trade. It can include co-design of creative visa and residency models to support labour market mobility and facilitate successful CI clusters. In addition, it can include shared trade missions, showcase events and B2B networks. It can also include co-investment models for cultural infrastructure, CCU R&D and growth.

- D. Spillover Effects.** *Catalysing added value through co-investment and support for the CCIs – to drive innovation across other sectors such as heritage, tourism and ICT.*

This can include co-investment in R&D to drive innovation across the CCIs and boost their capacity to provide positive spillover effects to other sectors. It can include a programme of test-bed projects to accelerate innovation across the economy, supporting CCIs to provide added value. Plus, it can include the development of new models and systems which ensure the CCIs are a vector for sustainable development.