



The Report on the State of Culture

In the Kingdom of Saudi Arabia 2023:

Sustainability in the Cultural Sector



**Ministry of Culture, Research and Cultural Heritage Deputyship 2023
King Fahd National Library Cataloging-in-Publication Data**

Ministry of Culture
The Report on the State of Culture in the Kingdom of Saudi Arabia
2023: Sustainability in the Cultural Sector. / Ministry of Culture. – Riyadh
1442 H. / Ministry of Culture. – Riyadh, 2023

318p. 29.7 x 21 cm

ISBN: 1658-8878

1. Culture - Saudi Arabia - History I - Title

L.D. no. 1442/7391

ISBN: 1658-8878

This report is prepared by the Research and Cultural Heritage
Deputyship at the Ministry of Culture.



“Culture will be a vital driver for a more sustainable world and a more prosperous future for all peoples.”

Bader bin Abdullah bin Farhan Al Saud
Minister of Culture



Acknowledgment

The robust and collaborative engagement of the public and private sectors' entities, as well as the third-sector enterprises, has been pivotal in the realization of the Report's fifth edition in 2023. This task could not have been attained without the substantial cooperation of all the involved parties.

The Report's significance is underscored by its comprehensive mapping of the Saudi cultural landscape, while highlighting the extensive efforts being made within the cultural sector. This significance is further elevated by both quantitative and qualitative data provided by various entities, serving as critical inputs in addressing challenges and enhancing the quality of outputs.

We acknowledge and recognize all the entities that have contributed to this task; and it is anticipated that this year's edition will make a significant impact and play a positive role in the ongoing cultural renaissance witnessed across the Kingdom of Saudi Arabia.



Contents

Executive Summary	09
Introduction	26
Management and Conservation	30
Creativity and Cultural Production	72
Knowledge and Skills	124
Cultural Participation	156
Creative Economy	196
Sustainability in the Cultural Sector	222
Conclusion	262
Appendices	270
• Appendix (1): Methodological Framework and Data Sources	272
• Appendix (2): Cultural Participation Survey 2023	294
• Appendix (3): Glossary	310
Data-Providing Entities	316



Executive Summary

- Management and Conservation
- Creativity and Cultural Production
- Knowledge and Skills
- Cultural Participation
- Creative Economy
- Sustainability in the Cultural Sector

Executive Summary

Although 2022 is marked as a year of sustained recovery, the cultural sector's defining characteristics in 2023 involved the gradual return to development and the strengthening of the sector's empowerment and preservation practices. Growth is no longer distinguished by the rapid recovery associated with the post-pandemic period, as indicated by the stabilization of growth in key metrics, such as cultural attendance rate and domestic cultural tourism. The 2023 data and developments has mapped the sector's progressive navigation through the challenges posed by the COVID-19 pandemic since 2020.

This steady growth is accompanied by the initial outcomes of the institutional efforts initiated several years ago. These outcomes are evident in several documentation projects that employ an integrated approach in documenting cultural heritage and archiving creative production across multiple fields. Furthermore, strategic collaborations between the cultural and educational sectors have emerged, including the training of thousands of teachers in the arts education and talent development programs within the general education system. Significant progress is also reflected in the doubling of participation in the training programs. In addition, organizational activities have remained robust, and that is through the ongoing regulatory issuance, restructuring, and empowerment efforts targeting both existing and newly established frameworks.

In the year 2023, cultural production has thrived across numerous sectors, as reflected in the surge of the theatrical, cinematic, and performing arts activities. This expansion is directly attributable to the strategic support and empowerment that the sector currently benefits from. The Report showcases the pivotal role of the festivals and exhibitions in driving production growth within these sectors through the provision of essential platforms and incentives. Additionally, a range of programs supporting art and literary residencies, writing retreats, cultural research, translation, and business incubation have been spearheaded by government and non-profit enterprises. The Cultural Developmental Fund (CDF) has continued to extend grants, guarantees, and financial backing to an increasing number of projects.

The expansion of support has invigorated most of the key players in the cultural sector: creators and cultural entrepreneurs. This dynamism is particularly evident in the growth of the cultural activities within the amateur clubs, which have surged by over 150% in 2023, spreading across all the Kingdom's regions; the matter which goes against the more corporate nature of other sector activities. A similar dynamism is also evident in the uptake of newly introduced practitioner licenses, the participation of cafés in the Literary Partner Initiative, and the growing number of cultural commercial enterprises, thus surpassing the growth rate of overall commercial registrations within the broader economy.

Despite these positive developments, several challenges persist, necessitating further efforts to be made to overcome them. Such challenges are primarily viewed through the lens of comprehensive sustainability, while focusing on balancing economic, social, and environmental considerations. Key issues include social challenges such as the uneven geographic distribution of cultural activities and the sector's inclusivity across diverse social groups, as well as the economic challenges pertaining to the need for a more conducive regulatory environment to foster investment.

The 2023 Report places particular emphasis on environmental sustainability; a dimension that still requires heightened attention to align with the broader growth and support experienced by the cultural sector. Despite the rising global awareness of the risks posed by the environmental and climate changes to the heritage sites, and the ambitious national objectives in this field, the cultural sector lacks the foundational prerequisites for confronting these challenges. Specifically, the sector requires comprehensive data and research to monitor the impacts of the environmental and climate changes on the cultural and natural heritage sites, and to develop corresponding prevention and adaptation strategies and mechanisms. Moreover, there remains a significant gap in the adoption of sustainability practices within the cultural sub-sectors, activities, and facilities, thus contributing to the sector's overall environmental footprint.

Nevertheless, the Report specified some encouraging indicators toward advancing sustainability, most notably the Kingdom's accession to the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions and its fulfillment of the 2001 United Nations Convention on Biological Diversity, which imposes the protection of 17% of lands and inland waters. Given the unprecedented growth of the cultural sector in the Kingdom, the sector's potential to play a leading role in achieving national environmental and climate objectives is underlined. The sector's

inherent connection to the natural environment, along with its intersection with other high-impact sectors such as tourism, architecture, fashion, and food systems, has positioned it as a key player in promoting sustainability; thereby highlighting the need for further efforts to integrate the environmental sustainability practices within the cultural sector and its relevant sectors such as tourism; ensuring a balanced approach to economic growth, environmental stewardship, and social well-being.





Management and Conservation

In response to the accelerating pace of the technological advancements, the year 2023 witnessed selective developments in the AI technologies supporting the Arabic language, notably the launch of the "ALLaM" App and the "Osus" System. These initiatives represent early steps in addressing the challenges of processing Arabic digital content and constructing language models within the Kingdom. In addition, significant efforts to enhance the Arabic language included the release of the Riyadh Contemporary Arabic Lexicon and the formulation of a guideline framework for multilingualism within international organizations, aimed at promoting the adoption of Arabic as a working language across all global organizations.

Considerable strides were also made in preserving and conserving both tangible and intangible cultural heritage in the Kingdom, particularly in the documentation and sustainable management of heritage assets. Reserves now account for 18.5% of the nation's land area, surpassing the Kingdom's commitment to protect 17% of its lands and inland waters under the United Nations Convention on Biological Diversity (CBD). Furthermore, the "Uruq Bani Ma'arid" Reserve became the first natural site in the Kingdom to be registered on the UNESCO World Heritage List, as it fulfills the World Heritage criteria as an exemplary desert landscape offering panoramic views of outstanding beauty.

As for the intangible cultural heritage domain, two additional items were registered on the UNESCO's Representative List of the Intangible Cultural Heritage of Humanity, i.e. the "Harees" dish and the engraving on metals craft, bringing the total number of Saudi cultural items on the list to 13 items. The Report also highlighted progress in several intangible cultural heritage initiatives, such as the "Saudi Music Memory" Project, which cataloged over 5,200 musical works by 115 artists, and the "Documentation of Oral History of Saudi Theater" Project. Additionally, the "National and Regional Dishes Initiative" classified 15 traditional dishes closely linked to Saudi identity across various regions. Archaeological survey and excavation projects have increased, with conducting 72 projects, compared to 53 in the previous year. In terms of creative production

archiving, significant activities were recorded, particularly in the film and theater domains. The "Theatrical Archive Project" has archived 39 theatrical scripts, while the Film Archive has documented 57 films.

Developments in the cultural facilities were limited over the course of the year. One significant task was the completion of a field survey assessing the state of the theatrical venues in terms of development needs and readiness for performances, focusing on aspects such as lighting, sound systems, and backstage infrastructure. A total of 104 theaters were evaluated and deemed ready for performances. In the Cinema Sector, the first cinema in the Medina region was inaugurated, and the number of cinema screens increased by 5% compared to the previous year, bringing the total to 613 screens. However, regional distribution relative to population remains uneven.

The Chapter also provided an extensive review of the key developments in cultural policies and regulatory frameworks. A major milestone was the Kingdom's accession to the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions. It also noted the expanding range of cultural licenses available through the "Abde'a" platform, which increased to 36 licenses compared to 19 licenses in the previous year, reflecting a broader inclusion of the cultural sectors.

In terms of support and empowerment, the Report highlighted the launch of a business accelerator aimed at fostering the growth and expansion of the cultural startups, with 16 projects participating therein. Several cultural incubators, including the Authors Incubator, were also commended for their role in training emerging authors, facilitating the publication of their works, and promoting them both locally and regionally. Art and literary residency programs experienced expansion, with the inaugural architecture and design residency program being a notable addition. The Cultural Development Fund (CDF) maintained its support through the Cultural Projects Incentive Program, backing 31 projects in 2023. Furthermore, creativity was further encouraged through awards that stimulated production, with total awards exceeding SAR 10.7 million.



Creativity and Cultural Production

A standout feature in the 2023 Cultural Production Indicator was the notable stimulation of creativity driven by competitions organized during the cultural festivals. In the Film Sector, the Saudi Film Festival expanded its program offerings and competition categories, resulting in a record-breaking number of selected submissions, with films and scripts reaching a total of 631 submissions. Similarly, the Red Sea International Film Festival experienced a 40% increase in Saudi film participation compared to the previous year.

Festivals had a positive impact on the Theater and Performing Arts sectors. In addition to the growing diversity of the active entities within these fields, festivals provided invaluable opportunities for theater troupes to showcase their performances across various cities in the Kingdom, as viewed in the Riyadh Theater Festival. University theater groups were particularly engaged through university festivals and amateur club performances, while children's theater attained its highest level of activity in the past three years. Performing arts events nearly doubled in number, and the year saw the emergence of specialized festivals like the "Annaham" festival, which celebrated maritime performing arts. The Second Edition of the International Qimam Mountain Performing Arts Festival in Asir also demonstrated an increase in the number of performances and participations, with new performance groups joining the event.

In the Architecture and Design Sector, the Second Edition of the Saudi Design Festival expanded, taking place across four venues in Riyadh. The design tracks grew to accommodate the interests of 120 participating artists. Meanwhile, the Fashion Sector witnessed a broader range of events and forums, with the Fashion Commission concluding partnerships with diverse entities at both artistic and commercial levels, while highly focusing on sustainable consumption and its environmental and social implications.

In 2023, the production indicators of the Publishing and Translation Sectors varied in terms of their levels. The "Tarjim" Initiative experienced its highest growth since its inception, reaching a growth rate of 74%, with double the number of participating publishing houses compared to the previous year.

On the other hand, the literary publishing activity for Saudi authors experienced a decline, as it reached its lowest level since 2019. However, the external publishing rate for Saudi authors witnessed a positive growth, accounting for 22% of total literary publications in 2023.

Research Writing and Scientific Publishing in Cultural Fields reached a four-year high, with 405 research papers published in refereed journals. Of these, 82% were authored by researchers affiliated with Saudi universities and enterprises, with most publications appearing in scientific journals published by Saudi universities; while international research contributions, primarily published in scientific journals by Saudi research centers and enterprises, accounted for 36%, with independent researchers contributing 7%.

The Report also mentioned that significant activities were observed among Saudi universities in hosting several exhibitions. Despite the general decline in the total number of art exhibitions compared to the previous year, the number of exhibitions held by university art departments, particularly in the Visual Arts and Photography Departments, have increased. University design departments were particularly active; as they hosted ten exhibitions focused on interior design, graphic design, and product design. Furthermore, university fashion exhibitions led the majority of fashion shows, with 22 exhibitions featuring traditional and contemporary fashion, digital design, and sustainable fashion consumption.

Reflecting the expanding number of cultural competition tracks, this year's report recorded 17 national cultural awards, 177 local awards, and 28 regional and international awards. The number of National Award tracks increased to 16 tracks, with the introduction of the International Cultural Excellence and Business Leaders awards. The Film Sector received the highest number of local awards, while the Theater and Performing Arts sectors extended their reach to regional performances that garnered several awards. In the Visual Arts Sector, new competition tracks were introduced locally, resulting in several works receiving regional and international awards.



Knowledge and Skills

In 2023, efforts to implement the "Cultural Capacity Development Strategy" continued, marking a collaboration between the Ministry of Culture and the Ministry of Education to enhance the cultural competencies among students across all general education levels. These efforts centered on the training of teachers to teach newly introduced cultural subjects, and the adoption of nine cultural fields by the Education and Training Evaluation Commission, which included Visual Arts, Performing Arts, Music, Language and Literature, Design Technology, Media Arts, Heritage, Fashion Arts, and Culinary Arts. Furthermore, the Second Phase of the School Theater Initiative was launched, providing training on the performing arts and drama fields to both teachers and students. Training programs were also delivered to 9,086 kindergarten teachers in the musical arts field, while 32 teachers received specialized training to teach culture and arts to students with disabilities.

The Report also underscored the diversity in the extracurricular cultural and artistic activities offered in 2023, encompassing virtual and in-person programs, thereby providing students with various avenues for learning and engagement. Among the virtual activities, oriental musical maqams were included via the Madrasati platform, in addition to the "Manga Education" activity designed under the guidance of experts from the most prestigious Japanese universities, and programs such as "Visual Arts and Heritage Appreciation" and "Musical Culture." In-person programs featured celebrations of both international and national events, such as World Heritage Day and Saudi Founding Day, with the Year of Saudi Coffee emerging as the most prominent event, engaging approximately 3.5 million students across various regions of the Kingdom.

Notable developments were highlighted in the cultural education and training field, particularly in the talent discovery and skills development initiatives introduced at early educational phases. Among the most significant programs was the "Cultural Skills Competition" launched by the Ministry of Culture in collaboration with the Ministry of Education, aimed at identifying and nurturing talents among general education students in fields, such as short films, Arabic calligraphy, fine arts, music

performance, theater, and short stories. In addition, the "Architecture and Design Talents" program, initiated by the Mawhiba Foundation in collaboration with the Ministry of Culture, sought to discover and support talented students in the architecture and design field, benefiting 130 participants. The Literature, Publishing, and Translation Commission also organized the "Literary Creativity Competition" targeting university students, in order to discover and honor the outstanding talents in the creative writing field, with total awards amounting to reaching SAR 1.2 million.

In higher education, the Cultural Scholarship Program sent approximately 185 students abroad in 2023, with 66% pursuing bachelor's degrees, 30% master's degrees, and 4% doctoral degrees. Additionally, the "AIUla Scholarship" Program supported 248 students in fields such as Hospitality, Tourism, Urban Design, Arts, History, Museums, and Archaeology, in line with the labor market needs of AIUla as a booming tourist and archaeological hub. This indicates a growing trend of specialized scholarship programs in the Kingdom designed to meet the evolving demands of the labor market.

The Cultural Training Indicator recorded substantial growth in 2023, with the number of training programs offered by the cultural commissions increasing by 46.81%, while the number of beneficiaries tripling compared to 2021. The majority of these programs were concentrated in the Literature, Publishing, and Translation sectors, which accounted for 43% of the total programs, followed by the Music Sector at 16%. Moreover, the number of programs offered by institutes affiliated with the Technical and Vocational Training Corporation (TVTC) rose to 136 programs in 2023, compared to 127 programs in 2021, with most of the programs centered in the Fashion Sector (36%), followed by the Culinary Arts Sector (21%). Furthermore, 836 programs were provided by public, private, and non-profit cultural enterprises, with the visual arts programs representing 46% of the total, followed by Arabic language programs offered by the King Salman Global Academy for Arabic Language (KSGAAL), which accounted for 19%.



Cultural Participation

The 2023 Cultural Participation Survey showcased a steady rise in the cultural engagement rate, with 69% of respondents having taken part in at least one cultural activity over the past 12 months, marking a growth rate of 5%. Furthermore, the participation frequency has also risen, with 25% of participants involved in multiple activities. However, the Survey underscored varying growth rates across different cultural sectors. Attendance of theatrical performances and live shows surged by 46% between 2022 and 2023, while visits to nature reserves, parks, and art exhibitions witnessed a slight decline relative to the previous year.

Consistent with previous findings, participation rates remained similar across age demographics, with 27.8% of youth and 25.8% of older age groups attending cultural activities six times or more. Nevertheless, income levels had a notable effect on repeat participation, with a more pronounced gap between higher and lower-income groups. The impact of gender on overall participation was minimal, with 69.5% of males and 67.65% of females engaging in at least one cultural activity. However, gender disparities emerged in the types and frequencies of activities; as females demonstrated a higher propensity to attend art exhibitions, theatrical performances, and cultural festivals.

The Survey also showcased sustained growth in domestic tourism associated with cultural activities, with a 24% rise compared to the previous year. This growth extended to reach most cultural tourism activities, with regional differences in focal attractions. Riyadh, for instance, led in local trips tied to festivals and cultural events, while regions such as Asir and the Eastern Province excelled in museum and art exhibition visits.

The Non-Profit Cultural Sector continued its upward trajectory in 2023, marked by organizational development and growth in the number of active organizations. A total of 24 new organizations were established, bringing the total to 95 active non-profit organizations by the year's end. Although diversity in sectors and geographic distribution remained somewhat limited, signs of expansion were encouraging, particularly with the establishment of the first professional associations in the Music and Museum Sectors, alongside the formation of non-profit organizations in Al-Baha and Hail. Furthermore, amateur cultural clubs boomed, with 194 new clubs registered, raising the total to 321 clubs. However, the rate of cultural activities offered by the Non-Profit sector remained modest, averaging approximately one activity per organization or amateur club.

Several prominent cultural festivals and exhibitions were hosted during the year, including the annual Buraidah Dates Festival, which attracted around 400,000 visitors, whereas the Saudi Coffee Festival showcased more than 100 farmers and welcomed 120,000 attendees. In tandem with the Year of Arabic Poetry Initiative, various poetry festivals were held, such as the "Imru' al-Qais Festival: the Poet of Ghazal", the "Tarfah ibn al-Abd Festival", and the "Nabati Poetry Festival". Moreover, the cultural calendar also featured notable music events, including the International Opera Festival, which brought together global opera talents, and artistic showcases like the Rsh street Art festival. The ninth edition of the Saudi Film Festival recorded a substantial growth in the attendance rate by 135% in 2023 compared to 2022, mirroring similar growth at the Red Sea International Film Festival. In 2023, the Ministry of Culture also organized the Eastern Province Book Fair, contributing to a total of four book fairs for the year, collectively attracting over 2.2 million visitors.



Creative Economy

Despite the inherent challenges in quantifying the value of culture and its various dimensions, the contribution of the cultural sector to the GDP remains a key indicator of its economic vitality and effectiveness. This indicator reflects the economic value generated by the cultural activities and offers an overview of the sector's performance over the past five years. Following an exceptional growth exceeding 20% in 2019, the sector faced a sharp recession of 8.46% the following year due to the pandemic. However, the 2023 report presents clear evidence of the cultural sector's trajectory beyond the COVID-19 pandemic, with a growth rate surpassing 10% compared to 2021. The cultural sector contributed a total value of SAR 35 billion, accounting for 1.49% of the non-oil GDP. The Architecture and Design sectors, along with the book and publishing fields, generated 72% of this value, signaling considerable growth potential in underexplored sectors such as music, film, and cultural education.

Although the cultural sector has not yet fully regained its pre-pandemic momentum, data from the cultural commercial enterprises suggest ongoing growth beyond 2021. As of 2023, there were 51,267 registered cultural commercial enterprises, achieving a growth rate of 23.56%, surpassing the national economic growth rate. Cultural commercial enterprises now represent 3.67% of all active commercial enterprises. The design and architectural services enterprises constitute half of these cultural commercial enterprises and have shown the most rapid growth. Other burgeoning sectors include cultural education, performing arts, music concerts, and film screenings.

While other economic indicators for the cultural sector in 2023 indicate a relative slowdown following the rapid post-pandemic recovery, they still reflect continued vitality. For example, cultural tourism grew by 23.73% in 2023 following, a growth rate of 46.38% in the previous year. While the domestic cultural tourism had witnessed a stable growth, inbound cultural tourism experienced a significant rise, with over 13 million international trips involving cultural activities.

Cinema ticket revenues exhibited a significant slowdown totaling approximately SAR 922 million in 2023, with a growth rate of 1.6%, compared to 3.83% in 2022. However, this slowdown did not correlate with the decline in the cinema attendance rate; instead, ticket sales saw a substantial increase compared to previous years, with more than 17.7 million tickets sold, reflecting a growth rate of 21.78%. A similar trend emerged in the book fairs, where number of visitors increased despite a decline in total revenue. In 2023, all book fairs in the Kingdom achieved a total revenue of about SAR 59 million, i.e. a decline by 7% compared to previous year.

Since many cultural activities are incorporated in the day-to-day practices and rely on individual skills, many creators operate in flexible spaces outside the formal economy. The growing prominence of the platform economy and freelance work is also notable within the cultural sector. On the national freelance platform "Bahr," 9,619 freelancers offered cultural services, with approximately half of such freelancers are involved in the literature, publishing, and translation fields, while the remainder spread across the culinary arts, film, and design fields. While these figures do not fully capture the size of the freelance cultural market, they highlight the importance of the platform economy phenomenon and support the freelance work.



Sustainability in the Cultural Sector

The cultural sector faces significant challenges in the context of current and future environmental and climatic changes, underscoring the urgent need for the adoption of environmental sustainability practices across the sector's components. Climate change presents a particularly pressing threat to the preservation and management of the tangible heritage in Saudi Arabia, with potential consequences such as fluctuating precipitation patterns that increase the risks of floods and storms, and elevated humidity levels that potentially accelerate the deterioration of the historic structures. The Report highlights several initiatives designed to enhance preparedness for these environmental risks, including programs like "World Heritage Management: People, Culture, and Nature" and "Disaster Risk Management for Cultural Heritage." Restoration projects have been undertaken at key locations, including the historic areas of Jeddah, such as the Old Town of AlUla, and various historic mosques. These restoration efforts utilize traditional building techniques and natural materials from the local environment, in addition to training on such techniques to improve the resilience of these sites to the climate impacts. However, the Report identifies gaps in research and poor planning and management of climate-related risks at tangible heritage sites.

In the natural heritage field, climate change has manifested in several critical risks, such as the degradation of marine ecosystems due to coral bleaching from rising sea temperatures, and threats to the terrestrial environments, including endangered species and vegetation from drought and water scarcity due to rising temperatures and fluctuating precipitation patterns. The Report also mentions the efforts to mitigate these risks within tourism projects, which include the use of environmental equivalency mechanisms by some royal reserves to offset tourism's negative impacts, through activities like tree planting and limiting tourists' access to designated areas. While major tourism developments, such as the Red Sea Project and Soudah's expansion, have incorporated sustainability practices, these efforts are not yet widespread across most cultural facilities and activities, revealing the need for more robust regulatory frameworks and monitoring systems.

Amid these environmental challenges, sustaining intangible cultural heritage, especially the activities serving as a source of livelihood and closely linked to natural resources and cultural heritage, is considered crucial. Sectors such as coffee beans and date palm cultivation, as well as honey production, face mounting pressures from climate change, including rising temperatures and humidity levels, thus affecting productivity and increasing pest infestations, while limiting the ability of species to reproduce. The "Sustainable Agricultural Rural Development Program (REEF)," launched in 2019, plays a vital role in addressing these issues. Additionally, Saudi coffee cultivation has gained particular attention, highlighted by the International Saudi Coffee Sustainability Forum in October 2022, alongside various government and private sector initiatives aimed at supporting and training farmers.

The Fashion, Culinary Arts, and Architecture sectors have also initiated efforts to promote sustainability. The Fashion Commission, for example, introduced the "Swap Shop" initiative to encourage the reuse of second-hand clothing and organized digital design training programs to minimize the environmental footprint of fashion design. Similarly, the farmer's markets spearheaded by the Culinary Arts Commission and the initiatives established to reduce food waste under the National Strategy for Reducing Food Loss and Waste aim to promote sustainable food consumption and production. In urban sustainability, projects like the Riyadh Green Project and the human-centric initiatives in Medina, along with the King Salman Charter for Architecture and Urbanism (KSCAU) and its associated award and the Sustainable Building Initiative under the Housing Program, have advanced sustainable architecture practices. Nevertheless, the adoption of sustainable green building practices remains limited in the residential construction sector, and is largely confined to select government projects.

Executive Summary

The cultural sector still grapples with challenges related to recycling, energy efficiency, and connectivity to public transportation, all of which contribute to its environmental footprint. However, the cultural sector's continued growth offers an inherent potential to expand the adoption of sustainability practices and significantly contribute to the national objectives on climate change

and environmental conservation. Achieving such objectives will require coordinated efforts between cultural, environmental, and tourism sectors, as well as expanded research on the impacts of climate change on cultural heritage, forming the basis for effective mitigation and adaptation strategies.





Introduction

Over the past five dynamic years, marked by significant events, developments, challenges, and progress, the Report on the State of Culture has sought to serve as both an accurate reflection and a critical analysis of a transformative period in the cultural landscape of the Kingdom of Saudi Arabia. This cultural resurgence draws deeply from the nation's rich civilizational and intellectual heritage, tracing its lineage back from the literary pioneers of the 1920s, to the celebrated singers and composers who gained prominence across the Arab world in the mid-20th century, to the initial archaeological discoveries spearheaded by Saudi archaeologists, and the broad celebration of cultural heritage through festivals like Al-Janadriyah. Despite numerous challenges, culture and creativity have consistently remained a vital societal resource. However, the narrative captured in this Report since 2019 represents a profound qualitative and quantitative transformation across all dimensions, the matter which deserves both recognition as a testament to the tasks carried out within the cultural sector and a critical evaluation to uncover untapped potentials. In 2019, within the framework of Saudi Vision 2030, the National Culture Strategy was launched, establishing an inclusive, comprehensive, and non-elitist vision of culture. This initiative expanded the cultural sector into 16 subfields, each receiving unprecedented levels of support in the form of funding, regulatory frameworks, detailed planning, and capacity-building initiatives.

As outlined in the First Edition of the Report on the State of Culture (2019), strategic efforts to develop the sector began against a backdrop of poor infrastructure and organizational frameworks, despite an abundance of individual creative talent, particularly in previously unnoticeable fields, such as Film Production and Culinary Arts. The sector's stakeholders swiftly responded to the ambitious plan led by the newly established Ministry of Culture, resulting in an immediate surge in the cultural activity, characterized by an increase in events and the launch of foundational projects. However, in the initial phases, efforts to monitor the sector were hindered

by the absence of critical data. Consequently, one of the main objectives for sector development was to enhance the data infrastructure; in order to better lead development strategies, identify gaps, and measure the impact of the cultural initiatives. Among the most prominent metrics linked to the sector's overarching objectives are the measurement of the culture's contribution to the national economy. This edition highlights the significant growth in this field; as it provided proof of the rapid growth witnessed by the other indicators since 2019, with the culture's economic contribution increased by more than 20%.

Nevertheless, the cultural sector's development post-2019 has been closely intertwined with the effects of the COVID-19 pandemic. This Edition reveals the pandemic's considerable impact on the cultural activities, with the economic toll on the sector being more pronounced than on other sectors within the economy. Despite the continued vibrancy of the cultural practices during the pandemic and the unrelenting progress in the strategic initiatives -including the establishment of the cultural entities - the sector's economic contribution experienced a more significant decline than the overall economic recession in 2020. This aligns with previous reports that documented reductions in the cultural activities, such as theatrical performances, exhibitions, and events, along with the closure of key cultural facilities, including museums and libraries.

The data and developments provided in this 2023 report trace the sector's path in overcoming the exceptional challenges faced since 2020. This is evident in the recovery of the sector's contribution, which reached SAR 35 billion, representing 1.49% of the non-oil GDP, i.e. a figure approaching pre-pandemic levels in 2019. Published for the first time, these figures confirm the rapid recovery trend observed in the post-pandemic period. While 2022 can be characterized as a year of sustained recovery, the trends observed in 2023 indicate a transition toward stable growth and continued development within the sector.

General Overview of 2023

The Report reveals a year marked by steady rebuilding and the consolidation of empowerment and preservation practices within the cultural sector. Growth in 2023 was not characterized by the rapid post-pandemic recovery seen in previous years. For example, cultural participation experienced a stable growth rate, which is reflected in a moderate 5% increase in the composite indicator from the Cultural Participation Survey compared to previous years. Similarly, domestic cultural tourism showed slower growth, while the same trend of stable growth was witnessed in emerging fields, as indicated in the Report's results that revealed a slowdown in the opening of new cinemas.

This stable growth is accompanied by signs indicating that the institutional initiatives, which began several years ago, are starting to pay off. These efforts are particularly evident in the systematic documentation and archiving of cultural heritage and creative productions across sectors such as Music, Culinary Arts, Theater, and Film. Notable institutional products include initiatives like the launch of the Riyadh Lexicon. One of the most impactful of these long-term institutional efforts may be the development of strategic collaborations between the cultural and educational sectors. These collaborations include the training of thousands of teachers in arts education and the implementation of talent discovery programs within public schools. The acceleration of cultural training programs is a promising indicator for the sector's future vibrancy and creativity. This momentum extends beyond the educational sphere and is reflected in the doubling of registrations for professional training opportunities, which experienced significant growth throughout the year. More than 13,000 participants engaged in professional training programs, while over 240,000 beneficiaries engaged in the capacity-building initiatives.

2023 also witnessed a prolific output across various cultural fields, as indicated by the growth in the theatrical, cinematic, and performance productions. This expansion is directly linked to the robust support and empowerment currently available to the sector. In this Report, it is stated that the festivals and exhibitions played a critical role in fostering this growth by providing spaces and incentives for creators. In addition, there was a multitude of art residencies, writing retreats,

cultural research grants, translation support initiatives, and business accelerators and incubators provided by government and non-profit organizations. Furthermore, the Cultural Development Fund (CDF) played a crucial role by continuing to offer grants, guarantees, and financing to an increasing number of cultural projects.

While institutional support has been crucial, the main driving force in the cultural sector remains the creators, the artistic and cultural collectors, and the cultural entrepreneurs themselves. The Report highlights the vibrancy of the flourishing cultural activities within the amateur clubs, which experienced a remarkable growth of more than 150% during the year. These clubs, unlike the institutionalized hubs within the sector, are geographically dispersed across all the Kingdom's regions, except for the Northern Borders Region, and are not concentrated in just two or three locations. Further evidence of this vitality is seen in the increased demand for newly introduced practitioner licenses, participation in the Literary Partner Initiative by numerous cafés, and the growth in the cultural business licenses, which surpassed the overall commercial registration growth rate within the economy.



Addressing Major Challenges: The Cultural Sector's Sustainability Amidst Environmental Challenges

Despite the many positive developments in the cultural landscape throughout 2023, several persistent challenges require sustained efforts to resolve. These challenges include the weak areas stipulated in the previous editions of the report, and framed within a broader concept of sustainability. These challenges involve striking a balance between the economic, social, and environmental considerations, starting from issues such as geographical centralization and unequal distribution of cultural activities, up until the sector's capacity to inclusively serve all the social groups. In addition, the economic dimension of sustainability remains a challenge, as the cultural sector continues to lack the regulatory frameworks necessary to foster sufficient investment, as highlighted in the 2022 report.

However, the most pressing challenge - which has not received enough attention - lies in embedding the cultural sector's role in addressing environmental concerns and ensuring that its activities, enterprises, and practices are aligned with the global environmental requirements. The cultural sector must position itself as a pivotal contributor to a sustainable development model that balances between providing livelihoods, promoting social well-being, and preserving environmental integrity. In other words, this requires examining how culture can drive economic growth while respecting environmental preservation and ensuring equitable benefits for all segments of society. While previous reports focused on

investment, the 2023 report provides a comprehensive exploration of the environmental sustainability within the sector, evaluating how deeply sustainable practices are integrated across activities, facilities, and sub-sectors. Additionally, the Report examines the impact of the environmental and climate challenges on the sector, and its preparedness to address such challenges.

One of the most significant environmental challenges that the cultural sector faces is the protection and preservation of the cultural and natural heritage amidst the environmental and climate changes. There is an increasing global recognition of the threat that climate change poses to the heritage sites, emphasizing the need for proactive measures to safeguard these culturally and historically valuable sites. Despite the national efforts focused on environmental protection and climate action, these concerns have not yet been fully integrated into the sector's strategic priorities. A key prerequisite for preparedness—namely, the availability of data and research required to monitor and understand the impact of environmental changes on the cultural and natural heritage sites—remains insufficient. To sustain progress in preserving and conserving these heritage sites and ensure the provision of continued economic and recreational benefits, it is essential to prioritize proactive monitoring of climate change impacts and to develop robust protection and adaptation strategies.



Given the anticipated growth of the cultural sector in the years to come, and its environmental footprint, the sector is expected to play a critical role in helping the Kingdom achieve its national objectives in terms of reducing emissions and preserving land and marine environments. This is especially pertinent due to the sector's intersections with other high-impact fields such as tourism, architecture, fashion, and food production. To achieve this, it is vital to embed environmental sustainability practices across sub-sectors like Fashion, Architecture, Design, and Culinary Arts, and also in relevant sectors like tourism, thus ensuring a harmonious balance between economic development and environmental stewardship.

Despite these significant challenges, 2023 has seen encouraging signs of increased attention towards sustainability within the cultural sector. The Kingdom's accession to the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions and its fulfillment of its international commitments under the 2001 United Nations Convention on Biological Diversity (CBD) -surpassing the target of protecting 17% of

natural lands and inland waters - reflect the alignment of the Kingdom's priorities with the global challenges. These milestones are expected to further encourage the adoption of sustainable practices across the sector, especially by promoting and supporting research, innovation, and studies that lay the groundwork for integrating sustainability into culture and realizing its objectives in a balanced and effective manner.

Ultimately, environmental sustainability is intricately linked to social and economic sustainability. Preserving natural and cultural heritage sites, along with fostering responsible production and consumption in the cultural sub-sectors, does not only ensure the continuity of economic benefits for future generations, but also broadens cultural participation to encompass all the societal segments. This comprehensive approach will guarantee the long-term sustainability of the cultural environment, thereby establishing a thriving cultural environment that not only preserves heritage, but also contributes to environmental conservation and enhances community well-being.

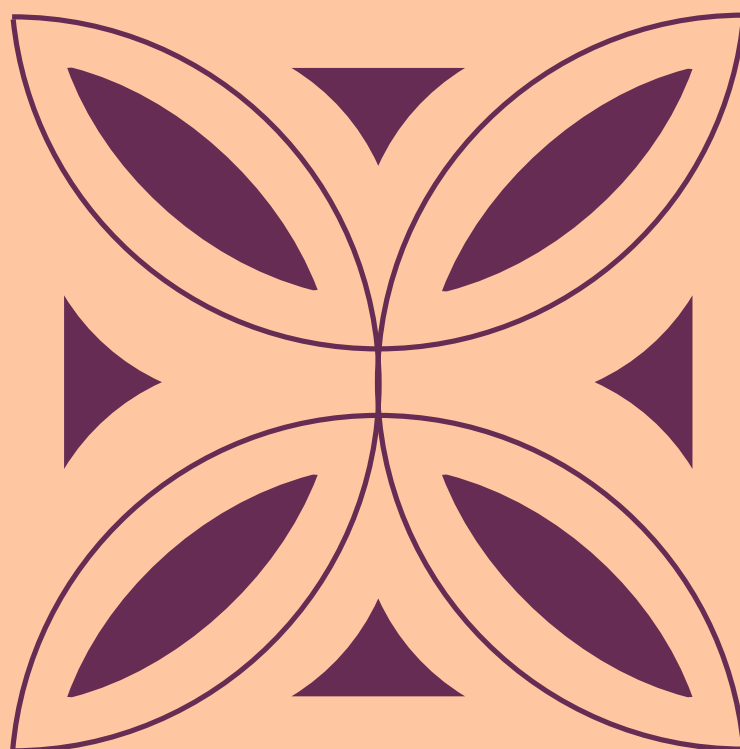
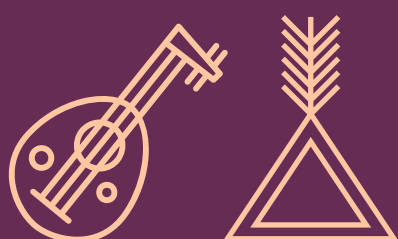
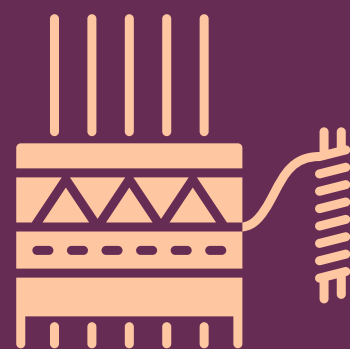


Chapter One



Management and Conservation

- Serving the Arabic Language
- Heritage Conservation and Sustainable Management
- Cultural Facilities
- Empowerment and Regulatory Frameworks





This Chapter monitors the state of the Kingdom's culture within the scope of indicators pertaining to the durability and conservation of the foundations from which the culture originated, starting with the Arabic Language Service being the vessel and foundation of culture. It then considers the sustainable conservation, protection, and management of heritage, while assessing the capacity of the Kingdom's existing heritage forms in its contribution to development by discovering the antiquities of this heritage, interpreting their meanings, documenting them, raising awareness of their significance, and enhancing their function in public life. It ends with addressing the culture's regulatory frameworks and infrastructure, through which developments are monitored to ensure the sustainability of the local cultural heritage and its transition from one generation to another.

In this year 2023, the Kingdom exceeded the target of protecting 17% of its lands and inland waters, to which it committed itself by signing the United Nations Convention on Biological Diversity (CBD) in 2001. This coincides with the registration of the Kingdom's first natural world heritage site, the Uruq Bani Ma'arid Reserve, in addition to 72 archeological survey and excavation projects; and the increase in the number of sites registered in the National Register of Antiquities, which enhances the depth of archeological and civilizational heritage scientifically and pushes for more care and attention to be given, without losing sight of the intangible heritage, as new projects have been launched in various sectors, such as the documentation of the football sports clubs' chants, and the adoption of the Initiative "International Food Atlas and Digital Platform for Conservation, Promoting, and Transmitting Foodways to Future Generations." This year also highlights the endeavor to build foundations in serving the Arabic language field in order to help manage the policies of its presence in the international organizations. As for Cultural Empowerment and Regulatory Frameworks, the Events Investment Fund (EIF) was launched in order to support the cultural sectors, while ensuring the presence of sustainable infrastructure. The Kingdom also acceded to the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions.

Serving the Arabic Language

This indicator provides an overview of the latest updates on Saudi language policies, and also the programs and initiatives that enhance the richness of the Arabic language and its presence in the culture's structures and its development. It also reviews the institutional efforts and prominent projects related to the Arabic Language, as well as education and training efforts for non-Arabic speakers. The year 2023 witnessed tangible developments represented by advances in AI technologies supported by the Arabic Language and the launch of the Riyadh Contemporary Arabic Lexicon. This year, two tests were launched as an important step toward standardized language testing: the first of which is the Arabic Language Proficiency Test for Non-Arabic Speakers "Hamza," while the other is directed at Arabic-speaking children.



Language Policy Updates

Pursuant from the Arabic Language's functional role in promoting culture and constructive communication between peoples, and to ensure its presence in the international authorities, organizations and events, the King Salman Global Academy for Arabic Language (KSGAAL) issued a guiding framework for multilingualism; in order to establish axes that help manage policies for the Arabic Language's presence in international organizations. Among its main axes is the demand to adopt the Arabic Language as the working language in all international organizations, in addition to developing guidelines for building language strategies in international organizations, coupled with translation strategies to ensure effective communication and exchange of data and information, and finally, stating the possible aspects of the Arab delegation's support for the Arabic language. The guiding framework aims to contribute in the development of the Arabic Language

in international organizations' various fields, along with unifying efforts to support it, and coming up with a format that enhances cultural communication between nations based on their languages.⁽¹⁾

The KSGAAL has also released the Saudi Linguistic Guide to Administrative Writing, which falls within the scope of work of the KSGAAL's Language Planning and Policies Sector, aiming to disseminate correct linguistic usages. This Guide is an enriching development of the Administrative Writing Guide issued by the King Abdullah Bin Abdulaziz Center for Language Planning and Policies.⁽²⁾ Among the latest updates to the language policy is the Shura Council's approval of an 18-article regulatory project proposal that aims to enhance the Arabic language by enforcing its use in governmental and non-governmental agencies, while allowing the use of other languages within specific controlled contexts.⁽³⁾



Language Services, Software and Projects Ecosystem

Given the technological acceleration and the spread of AI software, there is an increasing demand to develop and build linguistic corpuses, while enabling Arabic speakers to benefit from these technologies. Although the Kingdom has made significant progress in AI and language computing projects in 2023, efforts in this field are still small and limited compared to the continuous development of these technologies and the urgent need to keep up with their pace as indicated in the previous versions of this report.⁽⁴⁾ Experts and specialists emphasize the challenges facing the sector, such as the providing infrastructure from devices and data that are relied upon in building linguistic corpuses.⁽⁵⁾ This year, several projects have been launched that seek to bridge the gap, either by providing whatever might support the empowerment of the Arabic language in these technologies, or investing them in building lexicons and linguistics corpuses.⁽⁶⁾

Among these projects is the Riyadh Contemporary Arabic Lexicon, issued by the KSGAAL, which relied on a number of linguistic corpuses,⁽⁷⁾ aiming to build a standard lexicon based on modern methodologies in the digital lexicon industry, while including contemporary Arabic words and structures, in addition to providing machine-readable lexical material supported by analyses (morphological, grammatical, lexical, and semantic) for AI models, and utilizing modern technologies in delivering the lexicon to beneficiaries. To enrich the Riyadh Lexicon, KSGAAL launched another initiative, namely Arabic Hackathon (Figure 1), aiming to develop new innovative applications, such as developing games from the lexicon’s content, enabling camera research, and developing automatic image generation for lexical entries.⁽⁸⁾

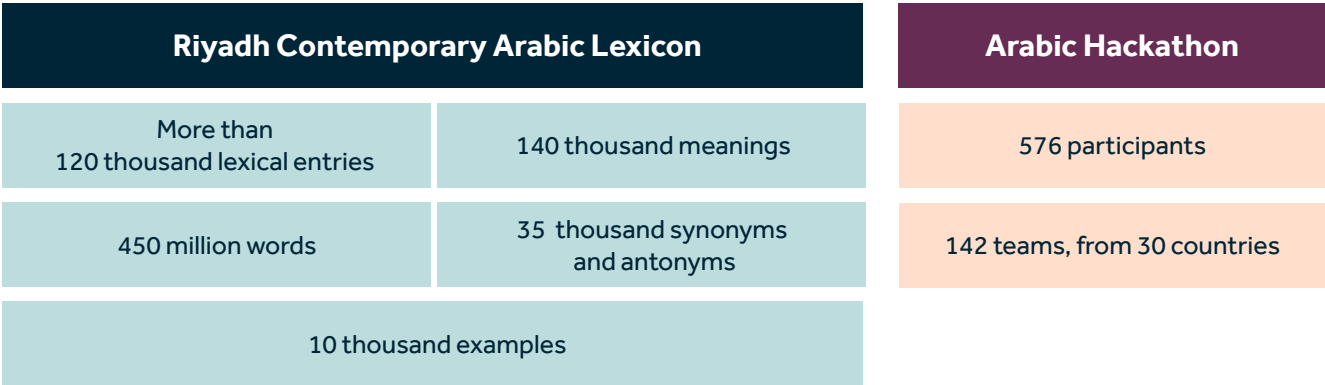


Figure 1: List of Active Technological Projects related to Arabic Language Launched during 2023

In the Artificial Intelligence (AI) field, two projects emerged this year: The first was launched by the Saudi Authority for Data and Artificial Intelligence (SDAIA) in its pilot version under the name of “ALLaM” App, a chat application that supports both standard and colloquial Arabic language. The second was the “Osus” System supported by the Cultural Development Fund (CDF), which is a language model based on the “Mubeen” algorithms developed with the CDF’s support in 2022.⁽⁹⁾ These projects were the first attempts aiming to reduce the gap in the processing of digital content written in Arabic, along with building language models in the Kingdom.

Arabic Language Education

While the Knowledge and Skills Chapter reviews all the education and training indicators in the cultural sector, and their features and developments, this indicator is concerned with the data of Arabic language learners from non-Arabic speakers. Since the report does not contain any data from language institutes affiliated with Saudi universities, the indicator merely monitors the latest developments in standardized test projects – being a close part of the Language Services Ecosystem – along with presenting the training programs provided by the KSGAAL,⁽¹⁰⁾ as it launched the pilot version of the Arabic Language Proficiency Test for Non-Arabic Speakers, “Hamza”, which requires in-person attendance by those residing the Kingdom, and virtual attendance for participants from abroad. The test measures the four language skills (reading comprehension - listening comprehension - writing - speaking), and aims to establish an approved global measure for language proficiency, as the test was built based on the Common European Framework of Reference for Languages (CEFR).⁽¹¹⁾ The total number of beneficiaries reached 869 people, of whom 85% were males and 15% were females.⁽¹²⁾ As for the Education and Training Evaluation Commission, it provided a standardized test for children, which is applied 3 times a year at digital hubs within schools in order to measure the language proficiency of Arabic-speaking children in the target age group, in accordance with the

standards, scientific foundations, and distinguished practices globally applicable in the measurement and evaluation field. This test aims to measure the language proficiency of children within the target age group, and can be used for diagnosis or classification, with a total number of beneficiaries reaching 1,100 children.⁽¹³⁾

This year also saw the emergence of the KSGAAL's Language Immersion Project, which includes short-term educational programs aiming to develop learners' skills by involving them in the local community environment. The Project has several tracks, including: The Arabic Language for Tourism Purposes, which targets tourists who are learning the Arabic language, and the Arabic Language for Cultural Purposes, which targets international students who are learning Arabic as a second language at universities and language teaching centers outside the Kingdom.⁽¹⁴⁾ Among the language projects pertaining to education is the launch of the educational channel (Arabic for the World) on YouTube in order to provide effective educational content in various tracks. The channel includes more than 100 videos designed to teach the Arabic language to non-Arabic speakers.⁽¹⁵⁾ In 2023, the KSGAAL also implemented five qualification programs for teaching Arabic to non-Arabic speakers and training their teachers as shown in (Table 1). The number of their beneficiaries has reached 428 people, with nearly two-thirds of them being males.

Table 1: List of the KSGAAL's Training Programs to Non-Arabic Speakers in 2023

Qualification Program	Number of Male Beneficiaries	Number of Female Beneficiaries
Productive and Receptive Skills Strategies for Teaching Arabic Language to Non-Arabic Speakers	13	21
Strategies for Learning and Teaching Arabic Language to Non-Arabic Speakers	28	1
Training the Instructors of the Arabic Language Teachers for the Non-Arabic Speakers	23	21
Training the Arabic Language Teachers for the Non-Arabic Speakers	186	102
Training the Arabic Language Teachers for the Non-Arabic Speakers in cooperation with ICESCO	25	8
Total	275	153

Heritage Conservation and Sustainable Management

This indicator monitors conservation and protection measures conducted for the tangible and intangible Saudi cultural heritage, including the inventorying and documentation practices for conservation, and sustainable management of the heritage resources, while reviewing developments in the national registries, the World Heritage Lists, and the latest digital archiving initiatives. The year 2023 saw growing efforts in inventorying and documenting the intangible heritage of the culinary arts, performing arts, and music. Furthermore, the indicator dedicated a section to the

protection and development of natural heritage, which includes the Kingdom's ecosystem for reserves, the protection of endangered species and their breeding programs, and afforestation and vegetation cover development efforts. Two of the most prominent events in the Natural Heritage Sector this year were the Kingdom's achievement of one of the objectives of the United Nations Convention on Biological Diversity by increasing the area of the reserves, and the registration of the Kingdom's first site on the UNESCO World Heritage List, which is the Uruq Bani Ma'arid Reserve.

Inventorying and Documentation

Inventorying and Documentation are among the primary pillars for the heritage's conservation and sustainability, while ensuring its survival for future generations. Inventorying is the process of listing the cultural heritage's assets and elements in the registries in order to create a common awareness of culturally important elements. As for Documentation, it is the registration of the cultural heritage in its current state and in its various physical forms, while collecting its relevant documents. The documentation process of the asset or element must be sustainable and continuous, and is clearly reflected in all the procedures.⁽¹⁶⁾ This indicator takes into account the distinction between the tangible cultural heritage on one hand, represented by the developments of the National Registers of Antiquities, Urban Heritage and Industrial Heritage, and the intangible cultural heritage on the other, through which the indicator reviews systematic initiatives and projects for the inventorying and documentation processes.

Inventorying and Documentation of Tangible Cultural Heritage

The National Registers of Heritage reflect the research and documentation efforts pertaining to the antiquities and the urban heritage; as the number of registered sites has increased compared to the previous two years. As for the Register of Industrial Heritage, no new site has been registered after the first two sites registered during the past two years, i.e. the Tapline Pipeline in the Northern Border and the Jax District in Diriyah.⁽¹⁷⁾ As for the antiquities, the total number of sites registered in the National Register of Antiquities in 2023 was 250 sites, bringing the total to 8,848 sites.⁽¹⁸⁾



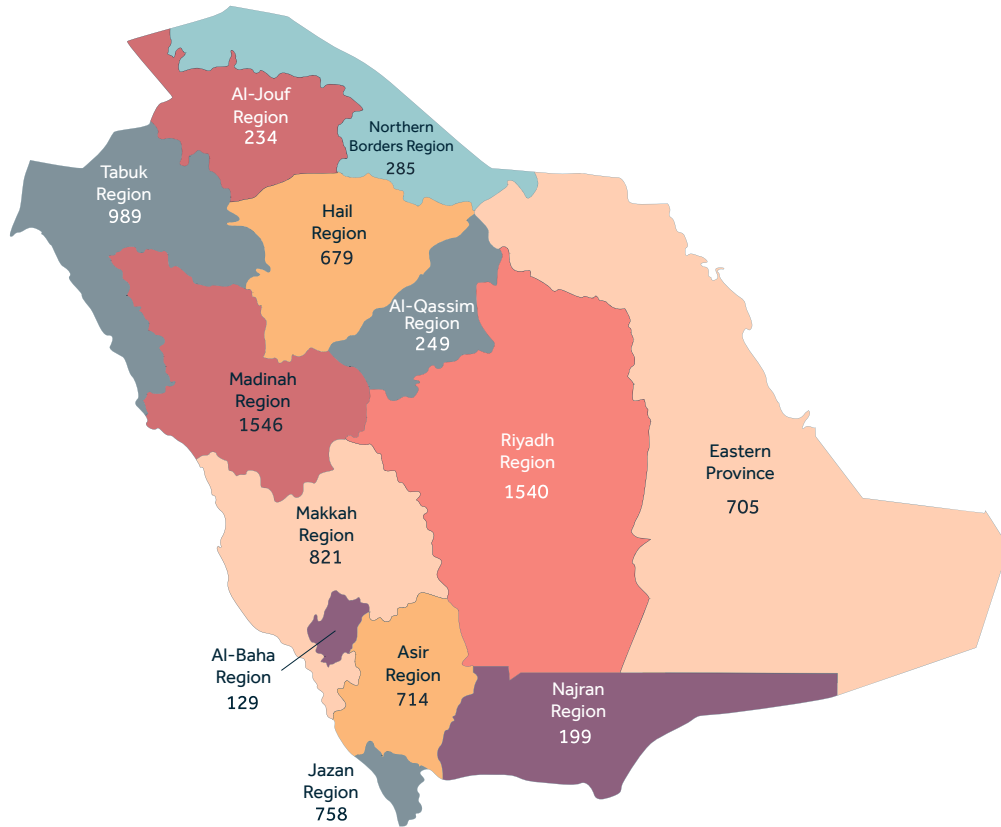


Figure 2: Number of Archeological Sites Registered in the National Register of Antiquities and their Distribution by Saudi Region till the end of 2023

By 2023, the number of registered sites in the National Register of Urban Heritage has reached 3,677 sites,⁽¹⁹⁾ a significant increase from the previous year, when only 2,400 sites were registered, with the Riyadh Region having the highest number of registered sites at 1,778, thus drawing attention to the importance of expanding the geographical scope to include urban heritage in all the Kingdom's regions.



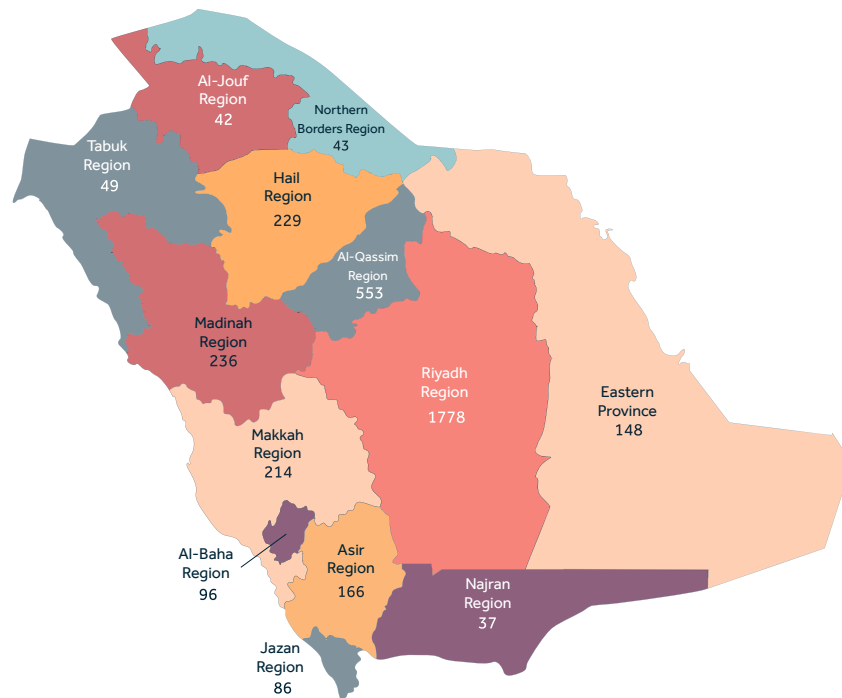


Figure 3: Number of Sites Registered in the National Register of Urban Heritage and their Distribution by Saudi Region till the end of 2023

Inventorying and Documentation of Intangible Cultural Heritage

The Convention for the Conservation of the Intangible Cultural Heritage focuses on viewing protection and conservation as the purpose of the inventorying and documentation practices, and emphasizes the role of the local communities and the civil institutions in this field.⁽²⁰⁾ During 2023, efforts made for the inventorying and documentation of the intangible cultural heritage have grown in the Kingdom, particularly in the sectors of the culinary arts, music, theater and performing arts. A number of inventorying and documentation projects were launched in the culinary arts sector, most notably the Initiative "International Food Atlas and Digital Platform for Conservation, Promoting, and Transmitting Foodways to Future Generations", which is concerned with the preservation of food and its traditional ways as an important tool for communication between peoples. The Initiative is the result of joint work between the Ministry of Culture, the Culinary Arts Commission and the Saudi Fund for Development (SFD) in order to disseminate the Kingdom's experience in inventorying traditional foods and establishing the digital platform, which will serve as an international network for the documentation of the culinary heritage, in accordance with the principles and standards of the organization associated with the

2003 Convention for the Safeguarding of the Intangible Cultural Heritage.⁽²¹⁾ In early 2023, the Culinary Arts Commission also launched the National and Regional Cuisine Initiative, which is a national initiative aimed at inventorying and categorizing local dishes closely tied to the Saudi identity in all the Kingdom's regions. Jareesh was adopted as a national dish, while the maqshush dish was considered a national dessert. Furthermore, 15 dishes were documented through the initiative from all the Kingdom's regions, such as marquq, saleeg, Madini rice, and al-malihiya from the dishes of the Northern Border Region, al-bakila from Al-Jouf, kobeba Hail, al-ruqsh from Najran, kleija, Hassawi rice, al-mughhash from Jazan, and al-muqana bread, which is one of the staples of the people of the Al-Baha region.⁽²²⁾ In addition, another project implemented by the Commission emerged this year to determine the culinary features of wild plants, and this project began with a field survey conducted on plants that grow in the wild without human intervention, followed by their inventorying and documentation in order to make recipes from them. This project aims to create a plant database, documenting the taste and flavor features of plant resources.⁽²³⁾

In both the music sector and the theater and performing arts sector, joint efforts continued in the Saudi Trouq Project, which was launched in 2022, a collaboration between the Music Commission, the Theater and Performing Arts Commission, and civil institutions represented by the Saudi Heritage Preservation Society (SHPS), with the involvement of the local community. In 2023, three phases were completed in this Project. The First Phase was concerned with documenting the Majrouf folk art of the Western Region's Bedouins, while the Second Phase documented collective performing arts in the Asir Region, which amounted to 40 art forms, in addition to the individual Trouq that amounted to 19 in the same region. As for the Third Phase, it was dedicated to the Al-Baha region, where 7 collective performing arts were documented, while 6 individual Trouq were documented, and the number of percussion and musical instruments in the Asir and Al-Baha regions reached 11 instruments. The Music Commission also worked on inventorying Saudi artworks in the Saudi Music Memory Project, which included a definition for the Saudi Music Memory, and its phases and deliverables.⁽²⁴⁾ In 2023, inventorying has been conducted for more than 5,200 musical works by 115 male and female artists between

the 1950s and 1980s.⁽²⁵⁾ Among the notable projects this year was the documentation of the oral history of the Saudi theater, in which the Theater and Performing Arts Commission carried out a series of interviews with a group of Saudi theater pioneers and practitioners with rich theatrical experience in the Kingdom's various regions and governorates. This documentary project aimed to prepare a documentary database that is made available to researchers, scholars and enthusiasts, and it will be considered a comprehensive database detailing the beginnings and the experiences of the pioneers in the theater and their successors in the sector.⁽²⁶⁾

As for the National Register of Craftsmen and Craftswomen this year, it registered 2014 male and female practitioners in 10 fields within the traditional handicraft industries,⁽²⁷⁾ with females outnumbering males by participating in all ten fields, reaching 1482 practices, with the exception of two fields in which males dominated, namely wooden handicrafts and metal handicrafts. The number of females participating based on region has also outnumbered that of the males in all fields, with the exception of the Al-Qassim and Al-Baha regions.⁽²⁸⁾

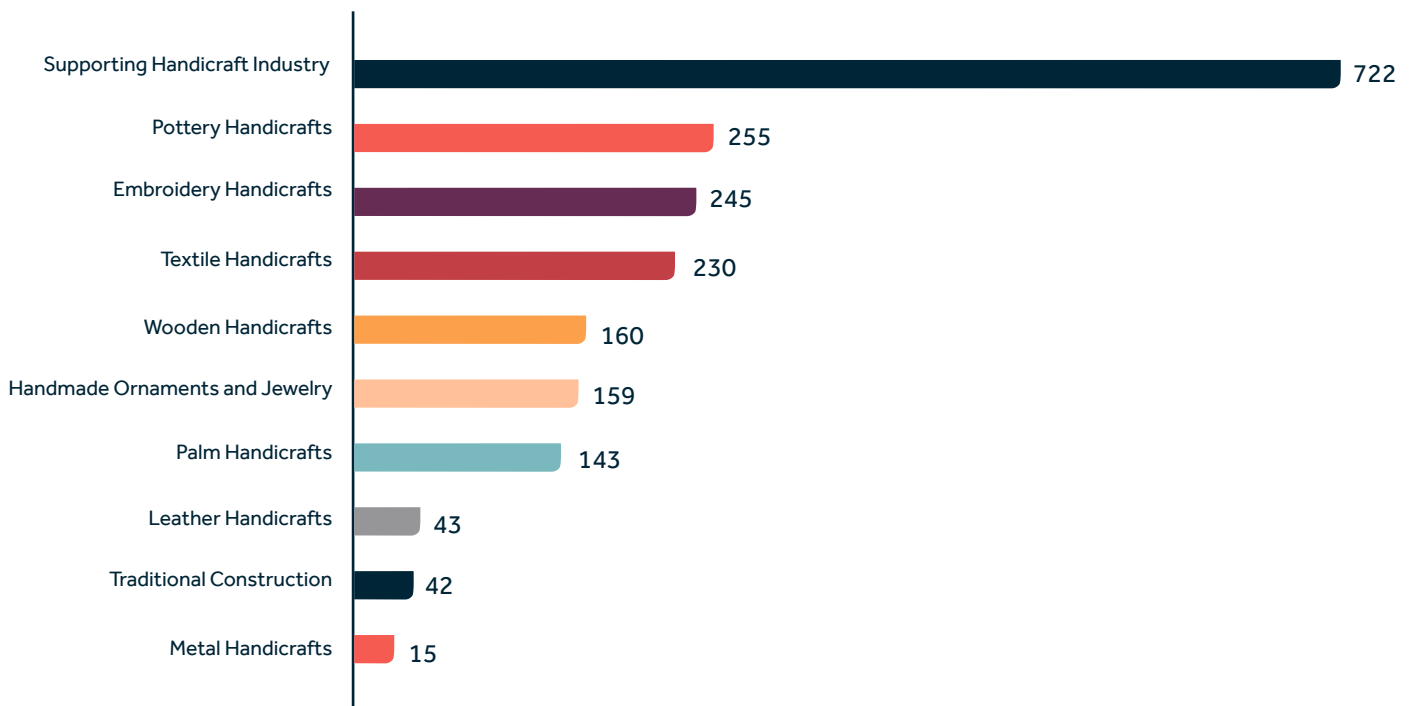


Figure 4: Traditional Handicrafts Industries Fields registered in the National Register of Craftsmen and Craftswomen till the end of 2023⁽²⁹⁾

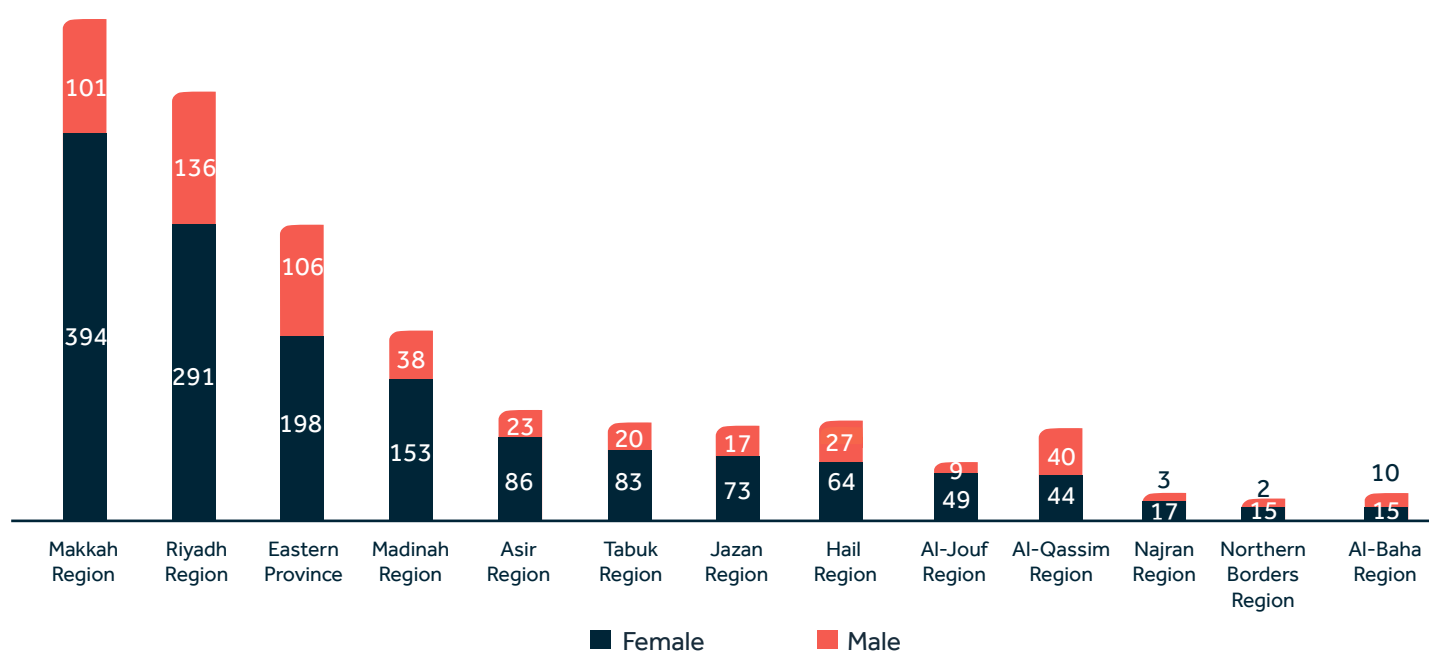


Figure 5: Number of Male and Female Practitioners of the Cultural Handicrafts Industries in the National Register of Craftsmen and Craftswomen, and their Distribution by Region⁽³⁰⁾

World Lists

As part of efforts to document the national heritage in the world lists and to publicize its importance globally, the Kingdom registered two items in the UNESCO's Representative List of Intangible Cultural Heritage, the first being the know-how, skills, and practices associated with the harees dish, as this item was registered in a joint file with the Sultanate of Oman and the United Arab Emirates. The second item was concerned with the arts, skills, and practices associated with engraving on metals crafts (gold, silver and copper), which was registered in a joint file with Iraq, Algeria, Egypt, Mauritania, Morocco, Palestine, Sudan, Tunisia, and Yemen, bringing the number of items registered from Saudi Arabia in the List to 13 items.⁽³¹⁾

As part of the Culinary Arts Commission's endeavors to preserve the historical heritage of Saudi culinary arts, 75 new items were registered in the Ark of Taste (Global Guide to Endangered and Threatened Heritage Foods) in 2023, supplementing the 13 items registered last year, bringing the total number of registered items to 88, thus reflecting the relentless pursuit of protecting and conserving heritage.

As for natural heritage, 2023 witnessed the registration of new sites and items on UNESCO's World Heritage

Lists, most notably the registration of the "Uruq Bani Ma'arid" Reserve, which is located along the western edge of the Empty Quarter in an area of more than 12,750 km². It is considered the first natural World Heritage site to be registered in the Kingdom, as it meets the World Heritage standards being a sandy desert that forms an exceptional panoramic landscape, while including the largest intricate linear dunes in the world.

This year highlights the registration of the City of Taif in the UNESCO Creative Cities Network, which was established in 2004 to extend bridges of cooperation between cities that are inspired by creativity as an important source of sustainable development in seven creative fields: Crafts and Folk Arts, Design, Film, Culinary Art, Literature, Media Arts, and Music. Taif has been registered in the Literature field;⁽³²⁾ in order to be transformed into a world-class city of literature, and to hold literary events throughout the year, create a nurturing environment for the Saudi literature and writers,⁽³³⁾ and become the Kingdom's third city to join this Network, after Al-Ahsa in the Crafts and Folk Arts field in 2015, and the City of Buraidah in the Culinary Arts field in 2021.⁽³⁴⁾

Archiving

This indicator monitors the efforts and practices towards the digital archiving of manuscript cultural and knowledge heritage content and its protection and conservation measures, while reviewing examples of the digitization of original manuscripts by Saudi institutions and libraries, such as the King Abdulaziz Foundation for Research and Archives, whose library contains 7,037 original manuscripts, all of which are digitized,⁽³⁵⁾ and the King Abdulaziz Public Library, which contains 5,042 original manuscripts, of which 89% are digitized.⁽³⁶⁾ These institutions have taken a number of measures to safeguard the manuscripts, including the dry cleaning process to remove dust, the use of chemicals to clean and process papers and stabilize the inks in them, in addition to the art restoration process, which follows precise rules and standards aimed at preserving the historical materials without deformations.⁽³⁷⁾

Creative Production Archiving

In 2023, archiving focused on two projects pertaining to theater and films. As for the Theatrical Archive Project that the Theater and Performing Arts Commission has been working on since 2021, 169 plays were archived by the end of the year, including 39 theatrical scripts in 2023. The preservation process included photographs from some plays.⁽³⁹⁾ As for the Film Commission, it worked on preserving the audiovisual cultural heritage through the National Film Archive, which was announced in 2021. Documentation did not actually begin until this year, as it documented 57 films, including 7 narrative feature-length films and 34 narrative short films. In addition, a feature-length documentary, and 15 short documentaries were recorded in the Archive.⁽⁴⁰⁾



Table 2: Number of Digitized Materials in King Abdulaziz Foundation for Research and Archives till the end of 2023.⁽³⁸⁾

Type	Number of Digitized Materials
Manuscripts	7,037
Newspapers	699
Books	16
Maps	1,835
Audio Materials (Oral Heritage)	276
Historical Films	556
Photographs	33,121
Documents	11,999
Microfilms	350

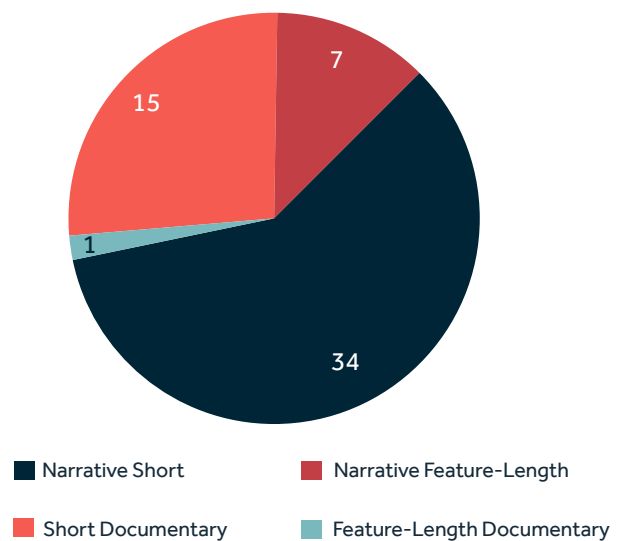


Figure 6: Classification of Films listed in the National Film Archive in 2023⁽⁴¹⁾

Excavation and Archeological Discoveries

Every year, the Kingdom witnesses a significant increase in the number of archaeological survey and excavation projects. Although the total number of excavation projects did not exceed 20 by the end of 2021, it increased to 53 projects in 2022, then to 72 projects in 2023, with varying numbers based on region. The most prominent of these projects was the first season of the Stone Construction Survey and Documentation Project in the Al-Aqiq Governorate in the Al-Baha Region, as its value is represented in the importance of the scientific project in documenting and studying the stone constructions in the Kingdom, aiming to become one of the main exemplary research projects in archeology in the coming years.⁽⁴²⁾

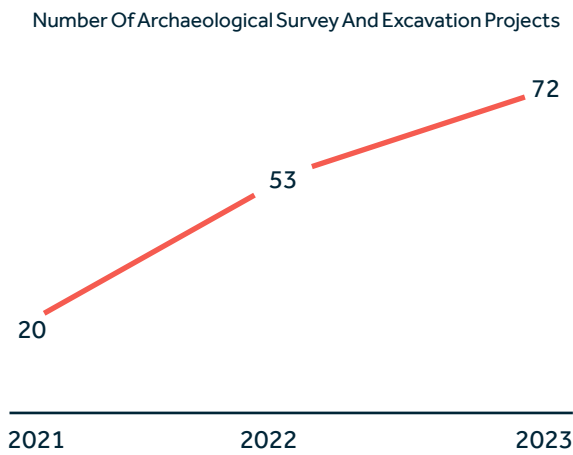


Figure 7: Growth in the Archaeological Survey and Excavation Projects during the Years (2021 – 2022 – 2023)⁽⁴³⁾

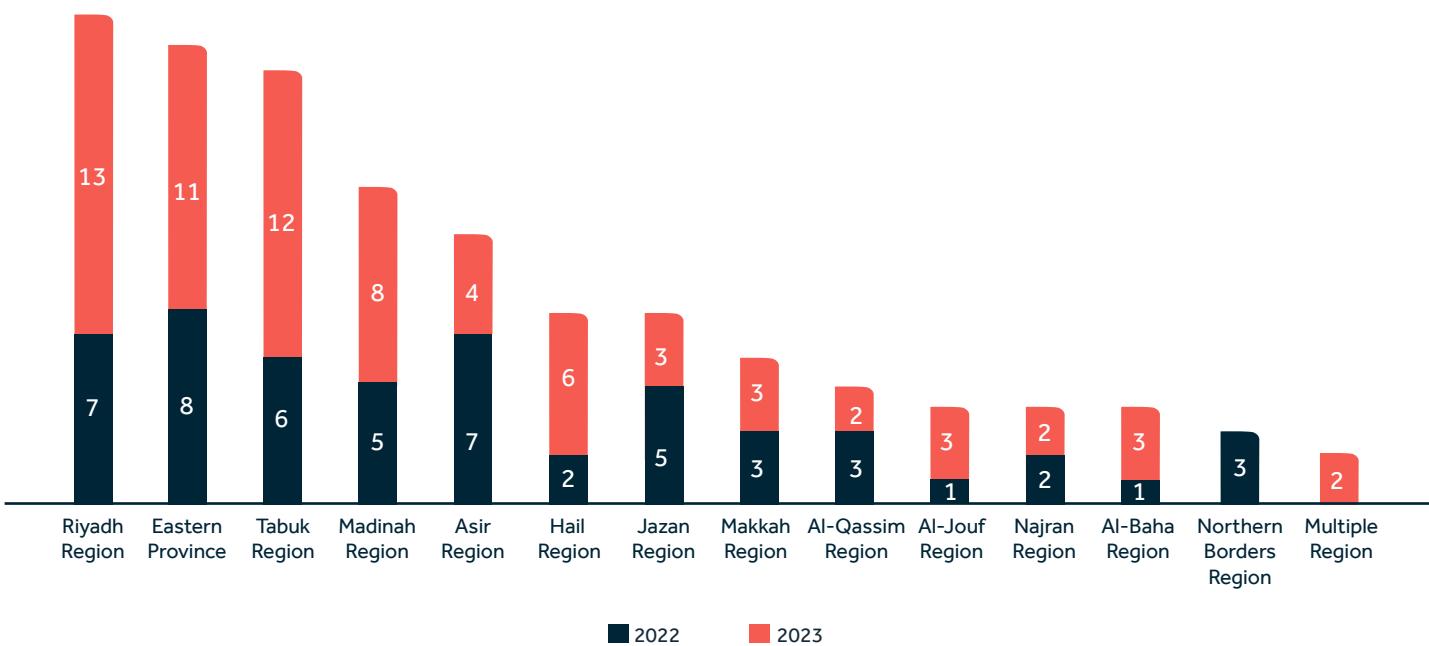


Figure 8: Number of Archaeological Survey and Excavation Projects in the Kingdom Regions during 2022 and 2023⁽⁴⁴⁾



One of the fruits of these projects was the announcement of important discoveries in a number of Kingdom regions. The archaeological excavation project at the Al-Taweer site in the Al-Jouf Region resulted in the discovery of architectural phenomena, and water sources that fed the population.⁽⁴⁵⁾ Furthermore, in the Al-Jouf Region, 9000-year-old stone constructions were found in Al-Dhulayat Mountain.⁽⁴⁶⁾ Whereas in the Najran Region, archaeological discoveries were announced in two sites, namely Al-Okhdood and Hima Cultural Area. In regards to the Al-Okhdood site, Musnad inscriptions, three rings and a bronze bull head⁽⁴⁷⁾ were found therein. At the Hima Cultural Area, its location revealed the Al-Haqqan inscription, whose significance is manifested in being one of the cycles of evolution in Arabic writing, and the sixth oldest early Arabic inscription.⁽⁴⁸⁾ In the Hail Region, among the discoveries have been dozens of stone mills made of local stones of different sizes, circular shapes and rectangular stone slabs, and studies have proven their use in preparing plants and grinding bones.⁽⁴⁹⁾ Another notable discovery this year was the announcement of all the findings at the Al-Abla Archaeological Site in the Asir Region, which uncovered architectural phenomena of industrial residences and manufactures.⁽⁵⁰⁾ In the Jazan Region, the results of the first season of the archaeological survey in Al-Reeth Governorate led to the discovery of 19 rock shelters, including archaeological tombs, pottery pots, and various stone tools, in addition to a 57-meter-long cave that contains three Thamudic inscriptions.⁽⁵¹⁾

Protection and Sustainable Development

The importance of heritage sustainability stems from the fact that it is an authentic purpose aimed at conserving, protecting, and transferring heritage to future generations. On the other hand, the two concepts of Conservation and Sustainability are linked to the heritage's capacity to contribute to sustainable development, making conservation a crucial responsibility. Protection and sustainable development efforts are complemented by the coverage of all heritage types and forms, so cultural institutions seek to develop measures to ensure that the set objectives are reached. In this regard, the chapter under this year's report – namely, Sustainability in the Cultural Sector – discusses the aspect of the practices, impacts and concepts, and focuses on measuring a number of indicators, namely the cultural heritage sites eligible for visitation; the area of the reserves, which increased to 18.05%; the last developments in the Endangered Species Protection Programs; and the vegetation cover development in the Kingdom, which witnessed tangible progress towards achieving the objectives of the Saudi Green Initiative.



Protection and Sustainable Development of Cultural Heritage

The government institutions concerned with heritage conservation and management, such as the Heritage Commission, work on taking care of the archaeological and heritage sites and rehabilitating them to receive visitors in order to achieve heritage conservation and investment in sustainable development. One of the most prominent efforts in this field for 2023 is the completion of the rehabilitation, restoration, and fencing projects for several archaeological sites in the regions of Makkah, Madinah, Asir, Riyadh, Tabuk, Hail, Al-Jouf, and the Northern Borders.⁽⁵²⁾ As for the urban heritage sites, restoration and rehabilitation efforts have been active in them. The most notable achievements in 2023 lied in the restoration of King Abdulaziz Palace in Wadi Al-Dawasir, the restoration of the historical King Abdulaziz Palace in the Lina Center, the restoration and rehabilitation of the historical site of Ibrahim Palace in the Al-Ahsa Governorate, the House of Al-Subaie in Shaqra, the Shada Palace in Abha, and the historical Uqair Port, in addition to the restoration of the historical Al-Jabri Mosque in Al-Ahsa, and the activation of number of

heritage assets in historical Yanbu, and in Al-Bassam Palace in Al-Qassim.⁽⁵³⁾ Given the number of heritage sites eligible for visitation, their total number has nearly tripled between 2022 and 2023. This growth is consistent with the results of the Fifth Edition of the Cultural Participation Survey, which showed a growth in the number of the sample population that visited heritage sites during the past 12 months.⁽⁵⁴⁾ The growth was not limited to the total number of sites eligible for visitation, but also extended to cover new regions during this year, such as the Madinah and Asir Regions, where it increased to 15 and 13 sites respectively. Efforts made in Al-Jouf Region cannot be overlooked, as it had five sites last year, increasing to 27 sites this year. The same was true in both Hail and Jazan. These positive indicators are constrained by the fact that the Northern Border Regions remains without eligible sites, or the stagnation witnessed in the Makkah Region, where the situation remained the same as last year.

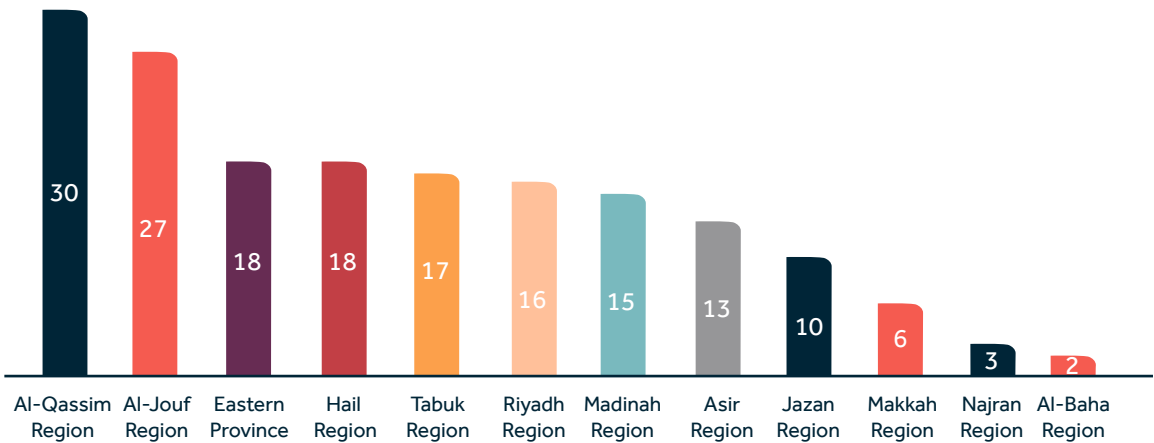


Figure 9: Total Cultural Heritage Sites Eligible for Visitation by the End of 2023⁽⁵⁵⁾

Sustainable Development of Natural Heritage

This indicator monitors sustainable development efforts in protecting the natural heritage in the Kingdom, by monitoring the percentage of the reserves therein and the number of endangered wildlife organisms covered by protective measures. The high percentage of reserves registered in 2023 made the Kingdom exceed the target of protecting 17% of land and internal waters,

a target that it committed itself to by signing the United Nations Convention on Biological Diversity in 2001. The indicator also tracks vegetation cover development efforts, through afforestation levels aimed at achieving the Saudi Green Initiative's objectives. The afforestation process this year included the planting of 460,800 trees, bringing the total number to 10,590,051 trees.

Reserves

The Saudi Green Initiative was launched with key objectives, such as the importance of increasing the reserves' percentage in the Kingdom to more than 30% of land and marine areas, in addition to preserving natural habitats, and achieving the Kingdom's commitment to the Convention on Biological Diversity (CBD) and the Sustainable Development Goals (SDGs).⁽⁵⁶⁾ The main event this year was the significant increase in the reserves' area in the Kingdom, totaling 361,145.7 km². This increase enabled the Kingdom to exceed the target of protecting 17% of land and inland waters that it committed itself to by signing the United Nations Convention on Biological Diversity in 2001. The percentage of land reserves this year reached 18.05% of the Kingdom's area, compared to

16.85% last year, which also means that it exceeded the global average for land reserves, which is 16.11%. The number of reserves proposed for this year, amounting to 87 reserves, with a total area of 362,530.09 km², provides a promising indicator of further growth in the reserves' area.⁽⁵⁷⁾

This year also witnessed the establishment of the Imam Faisal bin Turki Royal Reserve, whose boundaries were delineated by the Royal Decree of 1444 AH / 2023 AD. It is considered one of the largest reserve boundaries in the Kingdom, with its land and sea sides extending over three regions: Makkah, Asir, and Jazan. The boundaries of the Tuwaiq Reserve were also delineated this year based on the Royal Decree of 1441 AH / 2019 AD.⁽⁵⁸⁾

Table 3: Existing Reserves in the Kingdom and their Areas till the End of 2023 ⁽⁵⁹⁾

Reserves	Total Land Area (km ²)	Percentage of the Land Reserves from the Kingdom	Total Marine Area (km ²)	Percentage of the Marine Reserves Area from the Kingdom's Water Area (%)
National Center for Wildlife Development Reserves	25,906.58	1.30%	7433.03	3.35%
Royal Reserves	312,947.97	15.65%	6940.3	3.13%
Royal Commission for AlUla Reserves	12,575	0.63%	-	-
Reserves of Other	9,716.15	0.49%	9.39	0.0042%

Table 4: Reserves Listed on the World Lists and their Areas

Reserve	Area (km ²)	Global Program
Uruq Bani Ma'arid Reserve	12,684	Natural World Heritage
Farasan Islands	5,769	Man and Biosphere
Harrat Uwayrid	4,742	Man and Biosphere

Protection of Wildlife Organisms

In the context of efforts to protect wildlife and its organisms in the Kingdom, the National Center for Wildlife Development has implemented a number of programs aimed at returning endangered local species to their natural environments, while working on their breeding to contribute in enriching the ecosystems with the elements missing from their biological ecosystem.⁽⁶⁰⁾ The report monitored clear annual leaps in the number of organisms included in the reintroduction and breeding programs; as there were five species in 2021,⁽⁶¹⁾ which increased to 51 species in the following year,⁽⁶²⁾ reaching 135 species in this year 2023, in addition to all species of coral reefs, sponges, and sea horses.⁽⁶³⁾

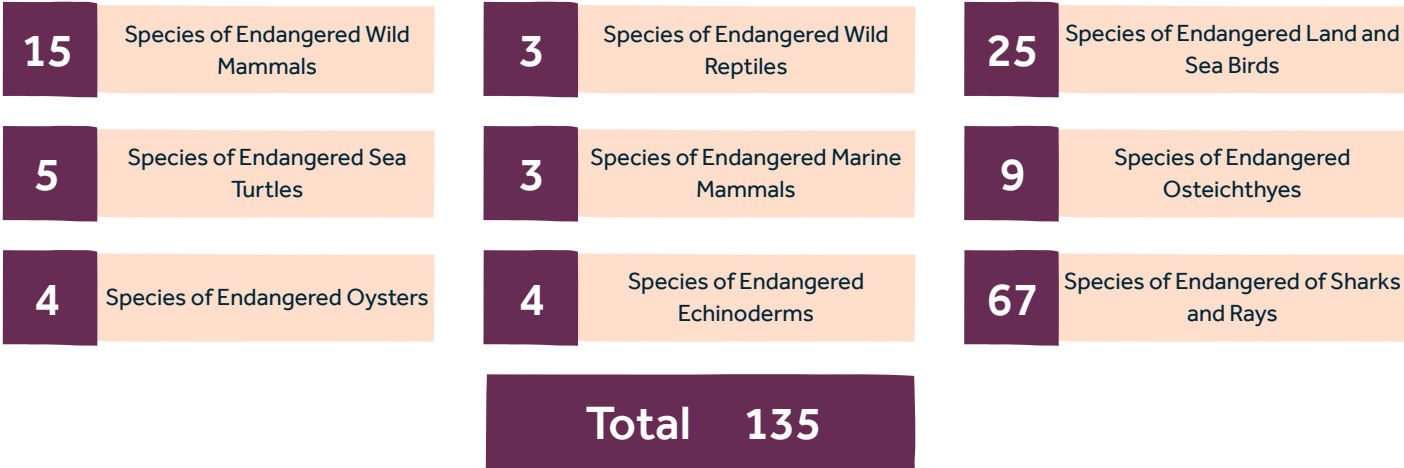


Figure 10: Number of Wildlife Organisms covered by the Protective Measures⁽⁶⁴⁾





Vegetation Cover Development

The Saudi Green Initiative aimed to plant 600 million trees by 2023, and 10 billion trees throughout the Kingdom in the coming decades, through the afforestation initiatives adopted within the environmental track.⁽⁶⁵⁾ In 2023, the number of trees reached 460,800 trees, representing 4.35% of total trees this year, 10,590,051 t. This percentage is comparatively small relative to other years, with the exception of 2020, which recorded a rate of 1.42%. On the other hand, 2022 is considered the highest year, with 4,738,651 trees, representing 44.75% of the total trees at that time.⁽⁶⁶⁾ In 2023, the afforestation level between Riyadh and Jazan is converging, despite the variation in the geographical size of the two regions, so the nature of desertification and the presence of auxiliary vegetation cover in the region may be taken into account, which is why the Asir Region came in third place.

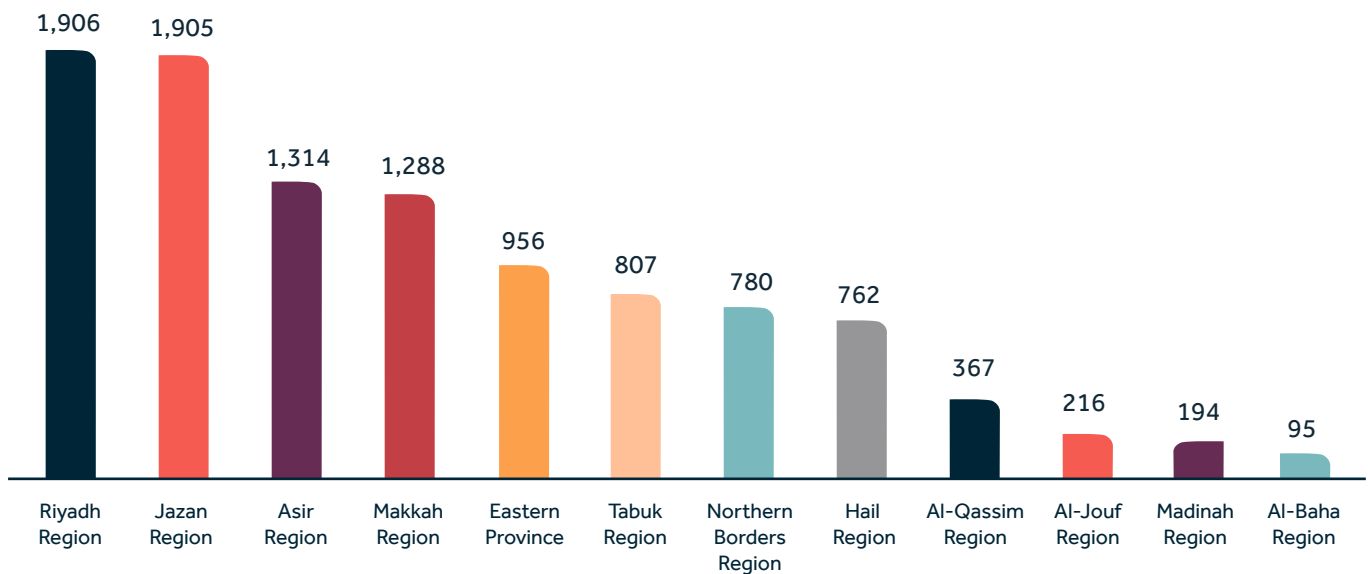


Figure 11: Geographical Distribution of the Planted Trees within the Vegetation Cover Development Projects in the Kingdom during the 2018-2023 Period (in thousands)⁽⁶⁷⁾

Cultural Facilities

The indicator assesses the availability of the culture's infrastructure, represented by cultural facilities and their geographical distribution. Since they usually require long-term investments and projects to establish and develop them, the indicator focuses on monitoring notable developments in the state of cultural facilities, whose structure varies. Some sectors have a past that required rehabilitation of its existing assets and planning the development of standards and specifications that would raise its level, such as theaters, museums and

libraries. Other sectors are modern, such as cinemas, which have continued their rapid growth ever since they were allowed to open, with a natural relative stagnation this year, as well as literary cafes, whose history is linked to literary clubs and cultural forums. This is despite it being a modern qualitative initiative aimed at connecting people to culture directly, and changing the stereotype that confines it to a limited class of workers in the cultural field.

Theaters

The last two versions of the report referred to the challenges facing the development of theater infrastructure in the Kingdom, and the ongoing efforts in setting standards and specifications for defining theaters, and qualifying them to host screenings.⁽⁶⁸⁾ In a significant development, 2023 witnessed the completion of a field survey conducted to assess the state of existing assets based on classification and the need for development, and also readiness to host screenings in terms of lighting, sound equipment, and backstage. According to the data, the number of prepared and qualified theaters is estimated at 104 theaters distributed over the Kingdom regions, except for the Tabuk Region, in which only three theaters were found in need of development as shown in (Figure 12). The number of theaters that require rehabilitation and

development - ranging between extensive and minor development - reached 54 theaters. The data also shows a disparity in geographical distribution. For example, there are 13 theaters in the Najran Region, ranking it fifth among all regions, but since it only has 12 theaters qualified for hosting screenings, this practically raised it to second place after the Eastern Province. Distant regions also vary in the number of qualified theaters. Whereas the Tabuk Region has only one qualified theater, the Northern Borders Region has 8 qualified theaters, bringing its numbers closer to those of the Riyadh Region, which amount to 11 theaters qualified for hosting screenings, indicating that the efforts to develop the theater sector's infrastructure still require taking into account their uneven distribution among regions.

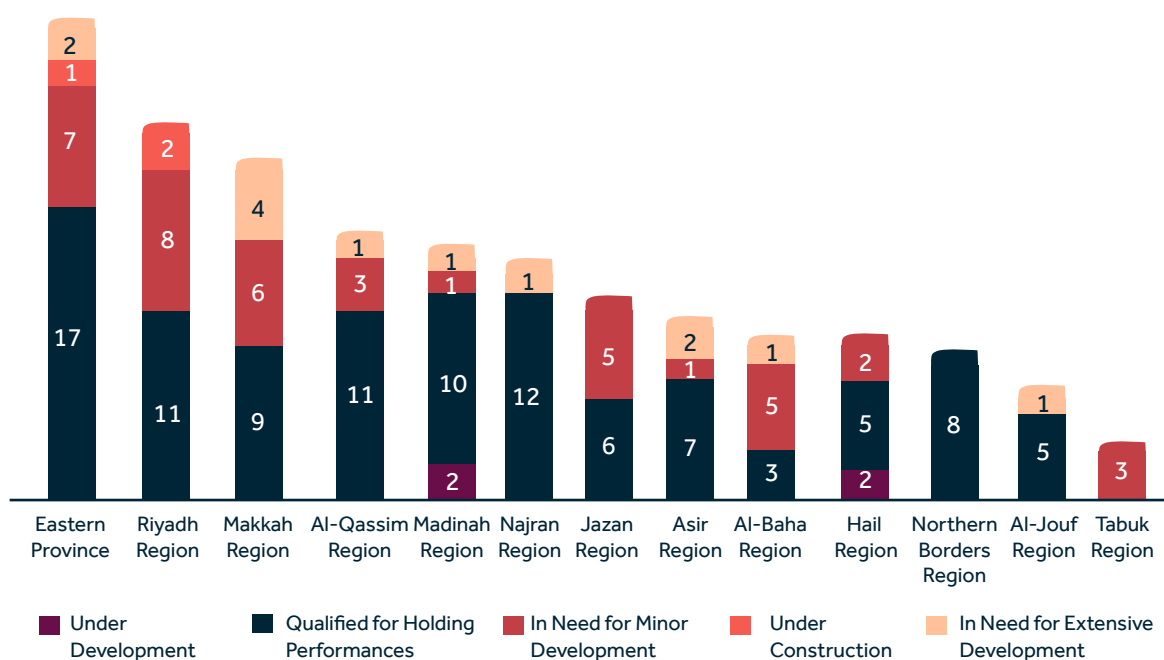


Figure 12: Geographical Distribution of Theaters in the Kingdom and their Classification by Readiness for Use⁽⁶⁹⁾

Cinemas

Following the rapid growth in the number of cinemas in the Kingdom, which has continued to rise since the opening of the first cinema in 2018, this year witnessed a notable slowdown. Despite this stagnation, there has been a slight expansion to include new geographical regions, represented by the opening of the first cinema in the Madinah Region, in addition to an increase in the number of display screens by 5% over the last year,⁽⁷⁰⁾ bringing their total number to 613 screens, compared to 581 screens in 2022. Consequently, the ratio of screens to the population increased from 18 screens per million inhabitants in 2022⁽⁷¹⁾ to approximately 19 screens per million inhabitants, while the regions of Al-Jouf, Al-Baha, and Najran did not have any cinemas until the end of 2023.

Given the geographical distribution of screens relative to the population, the data reflects a clear disparity among regions, with the Riyadh and Hail regions converging in the number of screens per million inhabitants as shown in (Figure 13). In contrast, the Madinah Region has approximately less than five screens per million inhabitants. Jazan exceeds it at a rate of 7.4 screens, followed by Al-Qassim at a rate of 10.9 screens. The number of screens in densely populated regions, such as Makkah and Asir, is below average, drawing the attention of operators to the need for further expansion and growth in proportion to the population in these regions.

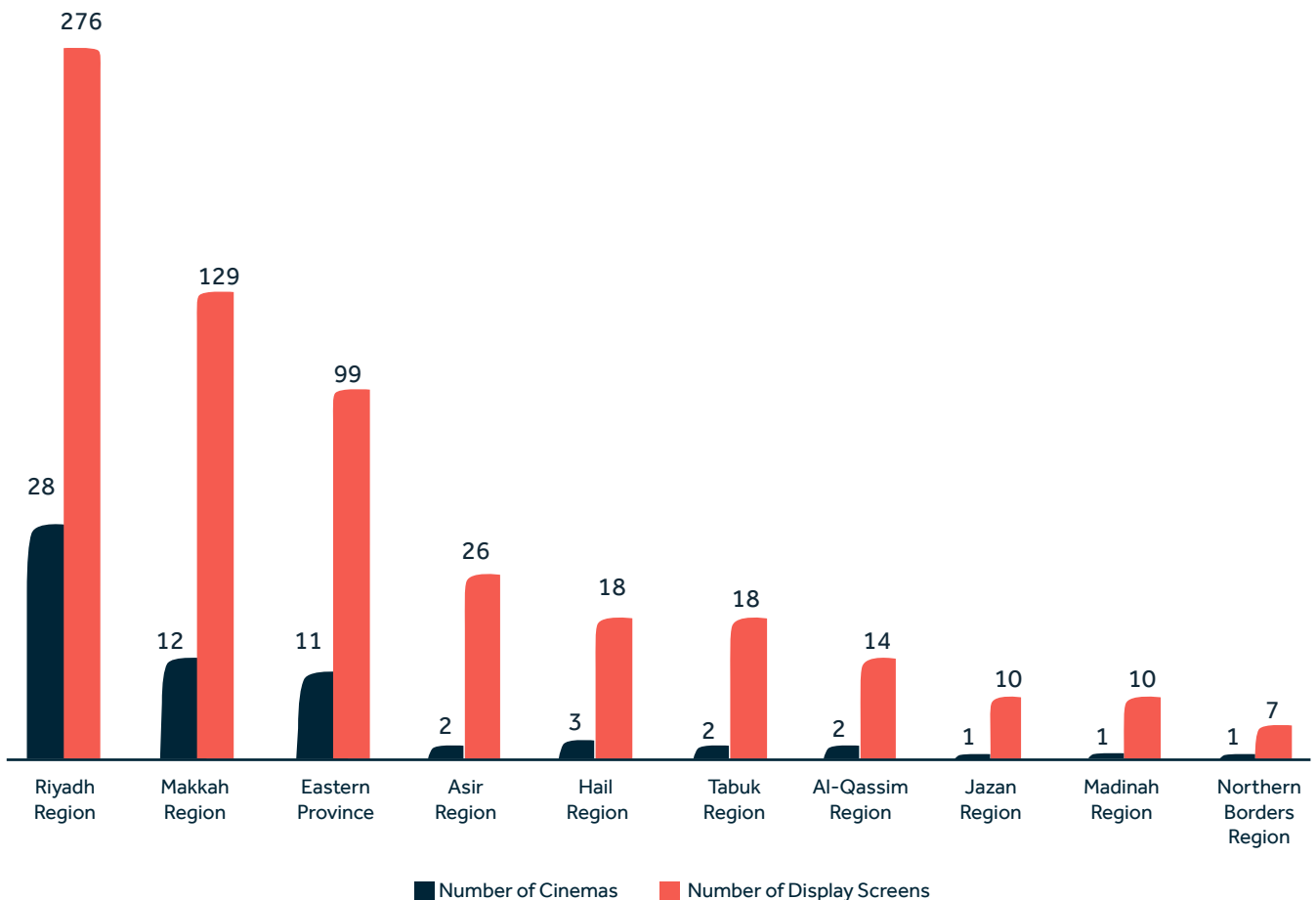


Figure 13: Geographical Distribution of Cinemas and Display Screens in 2023⁽⁷²⁾

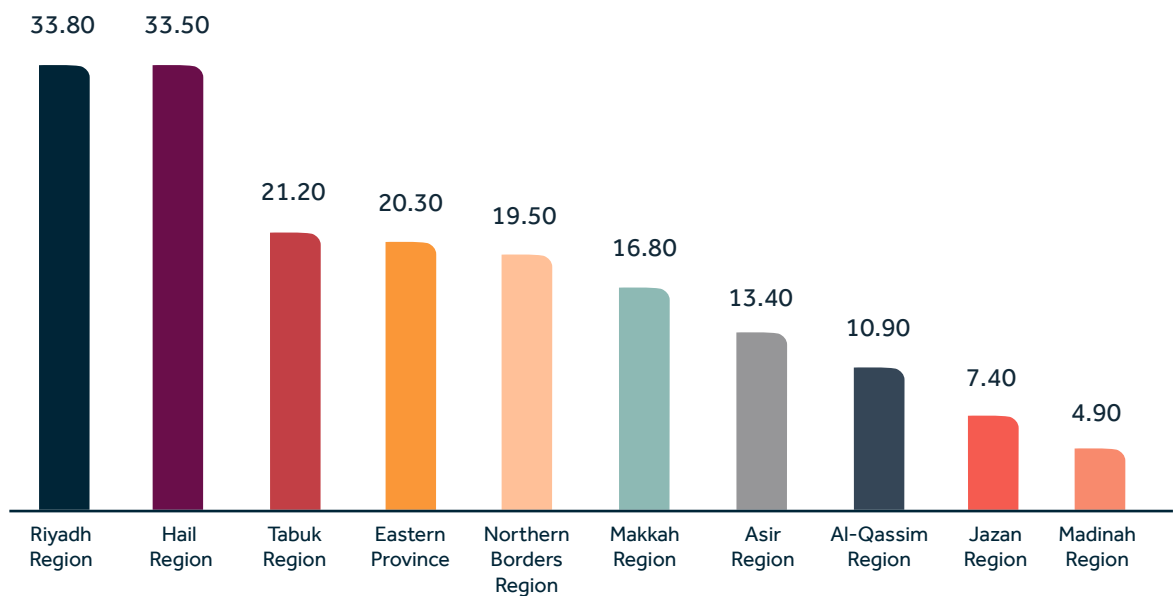


Figure 14: Distribution of Display Screens per Million Inhabitants in 2023⁽⁷³⁾

Literary Cafes

The Literary Partner Initiative, launched by the Literature, Publishing, and Translation Commission in 2021, is a model for investing in public spaces and promoting interaction between place, man and culture. The Initiative enables cafes to contribute to activating cultural activity by providing programs and events at cafes, bringing the culture closer to all segments of society. The number of cafes registered in the Initiative experienced a promising growth. It started with 20 cafes registered in 2021 and increased to 80 cafes in 2023 as shown in (Figure 15). It is worth noting that the cafes registered in the Initiative now cover all the Kingdom's regions.⁽⁷⁴⁾

The geographical distribution of these cafes reflects their variation from one region to the other. Despite the number of cafes in Riyadh and Makkah, their availability relative to the population in these regions is still below average, as the number of literary cafes per million inhabitants therein reached 2.4 and 2.1 cafes respectively. In contrast, the Northern Borders Region leads with 5.4 cafes per million inhabitants, followed by Jazan with 3.6 cafes, and then Tabuk and Al-Jouf with 3.4 cafes per million inhabitants in both. It is hoped that The Initiative will contribute to a broader geographic coverage that keeps pace with the population's growth in the Kingdom's regions.

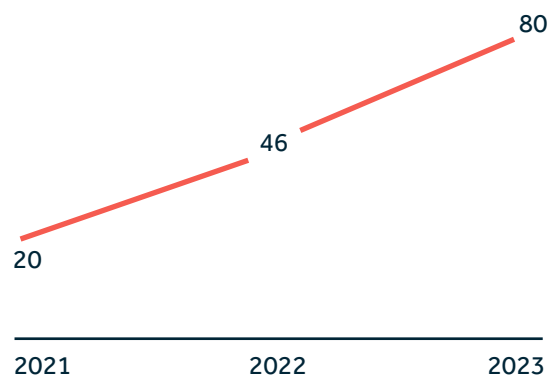


Figure 15: Growth in the Number of Literary Cafes during the 2021 - 2023 Period⁽⁷⁵⁾

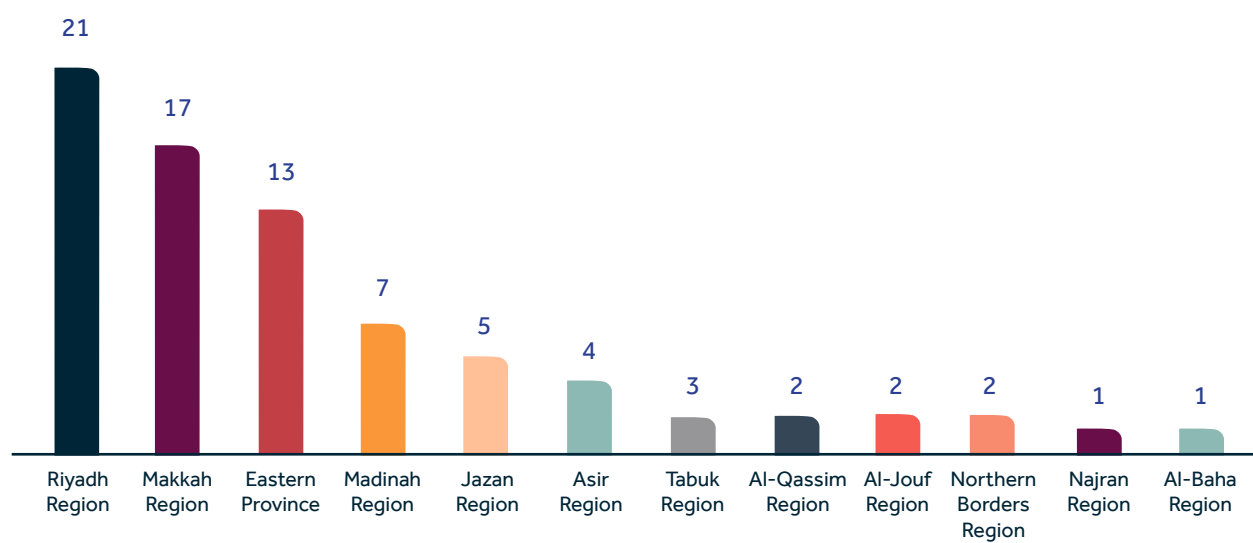


Figure 16: Geographical Distribution of Literary Cafes Registered in the Literary Partner Initiative till the End of 2023⁽⁷⁶⁾



Traditional Craft Houses (Handicraft Houses)

The Craft Houses Initiative, overseen by the Heritage Commission, is an extension of the Craft Creativity Centers and one of the initiatives of the National Program for Handicrafts and Traditional Industries “Bari”. The initiative primarily aims to qualify and train traditional handicraft practitioners in Saudi Arabia, while also providing a supportive and stimulating environment for creativity. Additionally, these houses feature spaces for hosting events and festivals, as well as outlets for showcasing traditional handmade products. Notably, their locations are concentrated in areas of cultural significance and key tourist attractions. By the end of 2023, the number of craft houses reached 12, distributed across seven regions as detailed in (Table 5).

Table 5: Number of Facilities Registered in the Craft Houses Initiative and Their Distribution by Region⁽⁷⁷⁾

Region	Number of Craft Houses
Madinah	3
Eastern Province	3
Tabuk	2
Al-Jouf	1
Al-Qasim	1
Asir	1
Makkah	1



Empowerment and Regulatory Frameworks

Culture's Regulatory Frameworks

This indicator is concerned with tracking developments in cultural regulatory frameworks and policies, aiming to raise cultural participation levels in public life and the national economy. 2023 began with the launch of the Events Investment Fund (EIF), aimed at supporting cultural sectors by establishing a sustainable infrastructure through supporting the culture, tourism, entertainment, and sports sectors. The EIF seeks to contribute to enhancing the Kingdom's position as a global hub for diverse events and activities in the EIF's relevant sectors.⁽⁷⁸⁾ Additionally, this year saw the approval of the Procedural Manual for the Museums and Heritage Commissions' Licenses, which is expected to positively impact the cultural sector's efficiency and its investment attractiveness. Furthermore, the Royal Decree came to introduce a new Saudi national cultural day dedicated to flag day on March 11 each year.⁽⁷⁹⁾

Laws and Policies

The cultural sectors witnessed the adoption of several regulations supporting culture and its sustainability. The year began with the approval of the Kingdom's accession to the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions.⁽⁸⁰⁾ This accession underscores the importance of integrating culture as a strategic element in national and international development policies and in international development cooperation efforts.⁽⁸¹⁾ Furthermore, the Convention aims to enable artists, cultural professionals, practitioners, and citizens to create, produce, promote, and enjoy a wide range of cultural goods, services, and activities.⁽⁸²⁾ In addition, the cultural sector witnessed the adoption of a regulation by His Highness the Minister of Culture to empower Historic Jeddah with the powers granted to the Heritage Commission under the Regulation on Antiquities and Urban Heritage and the Regulation on the Inspection and Violations of the Law of Antiquities, Museum and Urban Heritage and their Consideration.



Table 6: List of the Most Important Decisions and Laws Supporting the Cultural Ecosystem Issued in 2023

Decision or Law	Date
Royal order that designates March 11 every year as Saudi Flag Day	March 2023
High order to transfer tasks and specialties of the National Center for Saudi Ardah and anything related to Al-Diriyah Troupe from the National Center of Saudi Ardah to the Theater and Performing Arts Commission	August 2023
High order to establish the Imam Faisal bin Turki Royal Reserve	October 2023
The decision of His Highness the Minister of Culture to grant Historic Jeddah the authority over the powers assigned to the Heritage Commission according to the Antiquities and Urban Heritage Regulations, the Inspection Regulations, and the Violations of the Antiquities, Museums, and Urban Heritage System Regulations	October 2023
Launching the Events Investment Fund to support the culture, tourism, entertainment, and sports sectors	January 2023
Approval for the Kingdom to join the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions	January 2023
Approval to Transfer the Supervision, Management, and Annual Budget of the Madinah's Al-Salam Museum to the Ministry of Culture	August 2023
Approval of the Regulation of the General Organization for Conservation of Coral Reefs and Turtles in the Red Sea	December 2023
Regulation of the Royal Institute of Traditional Arts (TRITA)	July 2023
Activation of the Law of Antiquities Violations Committee	October 2023

Table 7: List of Key Regulations and Guidelines Supporting the Cultural Ecosystem Issued in 2023

Regulations and Guidelines	Date
Approval of the Cultural Scholarship Regulations and their Executive Rules	January 2023
Approval of the Procedural Guide for Licenses for the Museums Commission	February 2023
Approval of the Procedural Guide for Licenses for the Heritage Commission	February 2023
Approval of the Organizational Structure and Manual for the Ministry of Tourism	April 2023
Adoption of a Detailed National Aquaculture Products Manual in the Kingdom	October 2023
Adoption of the National Aquaculture Products Export Manual	October 2023
Adoption of the National Aquaculture Policy and Practice Manual	October 2023



Licenses

In an effort to raise the quality of cultural works presented and grant them more credibility and regulatory frameworks, with the aim of improving the cultural sector's efficiency and investment attractiveness, and making culture an influential factor in the national economy, the "Abde'a" Platform continues to grant various licenses to cultural actors, and support them in establishing connections with talented individuals on one hand, and private sector institutions on the other.⁽⁸³⁾ The report noted an increasing growth in the number

and type of cultural licenses available via the Platform year after year. The types of licenses granted in 2023 via the Platform increased to 36 licenses, compared to 19 in the previous year; whereas the number of licensed enterprises this year reached 409 enterprises, compared to 114 in the previous year.⁽⁸⁴⁾ Furthermore, the sectors covered within the Platform varied as shown in (Figure 17), with this year marking the first issuance of a license to hold a fashion show and the first license for conducting an archaeological survey or excavation.

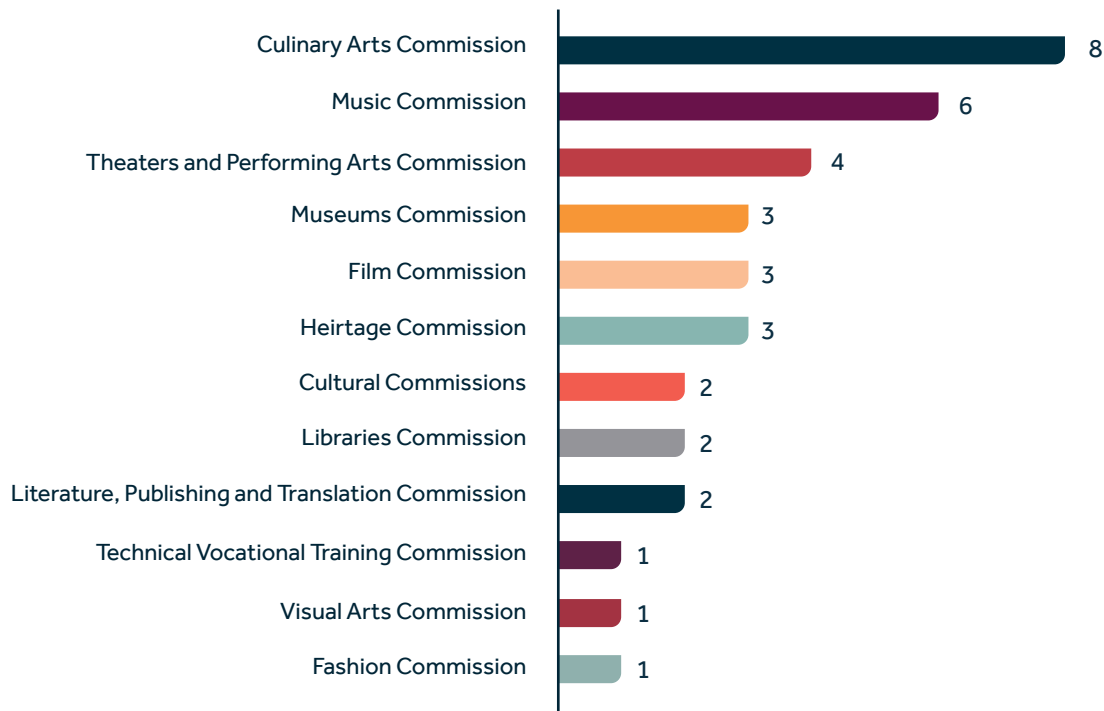


Figure 17: Number of Licenses Available via the Abde'a Platform by Applicant till 2023

Table 8: Number of Licensed Institutions and Enterprises on the Abde'a Platform for 2023⁽⁸⁵⁾

License Name	Number of Licensed Enterprises
Permit to Hold Ardah Events	98
Training Enterprise License	86
Approval of a Training Program	73
Private Museums License	60
License to provide Library Services	28
Fashion Show License	15
Activation of a Training Program	15
License for a Shop Selling Heritage Handicrafts	13
Public Museums License	9
Visual Arts Galleries License	6
Archaeological Survey or Excavation License	2
Literary Agency Activity License	2
Cinema Operation License	1
Registration and Classification Service for Heritage Restaurants	1

As for licenses issued to practitioners in the cultural sectors, this year saw the issuance of 3,699 licenses, compared to 682 licenses in the previous year, indicating a growth rate of 442%, which is a significant regulatory indicator. For example, the Performing Arts Practitioner License was issued to only six males last year, while this year it was granted to 589 individuals, both male and female. In terms of gender distribution, males dominated in all the licenses, with the exception of the "Museum Collection Care Expert" license, in which females slightly tipped the balance by two females, and the "Crafts Practitioner" license, in which females dominated both this year and last year, consistent with their global dominance in this sector.⁽⁸⁶⁾

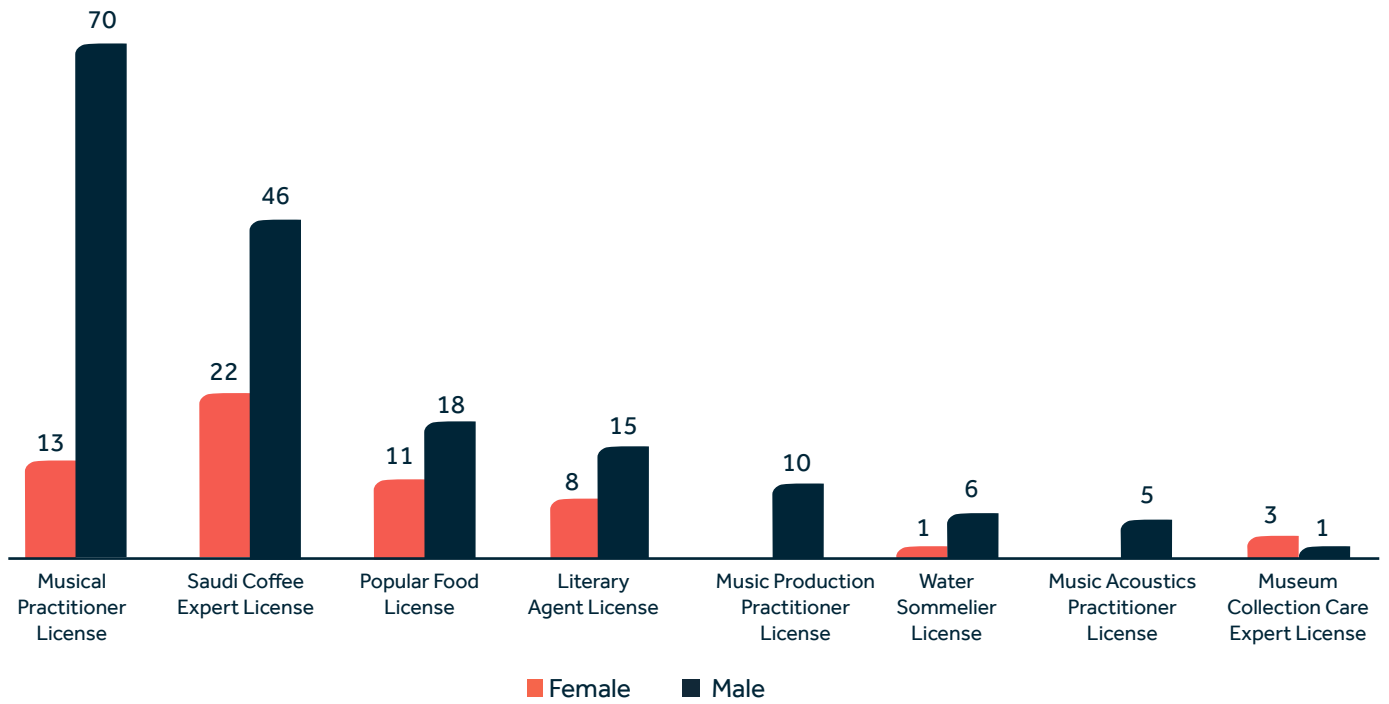


Figure 18: Distribution of Licensed Practitioners via the Abde'a Platform by Gender in 2023⁽⁸⁷⁾

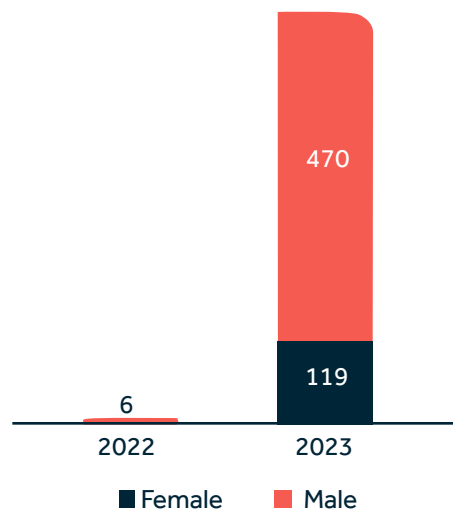


Figure 19: Number of Licensed Performing Arts Practitioners via the "Abde'a" Platform in 2022 and 2023

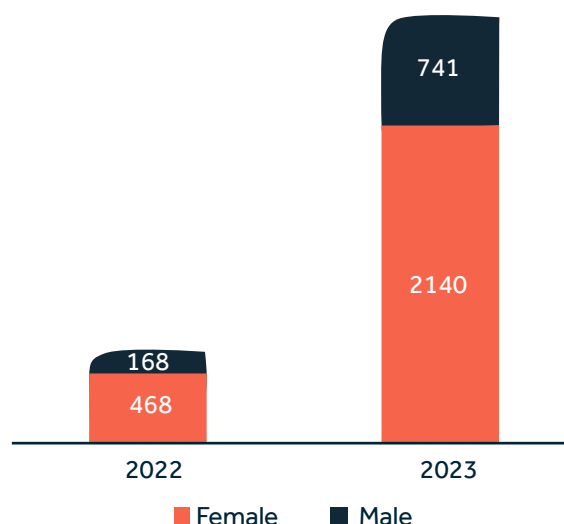


Figure 20: Number of Licensed Cultural Handcraft Practitioners via the Abde'a Platform during 2022 and 2023⁽⁸⁸⁾



Culture and Creativity Support

The Cultural Development Fund (CDF), the cultural commissions, and other commissions in both the public and private sectors offer several programs to empower cultural activities and support creators. This indicator monitors two types of support: Financial support, such as cash prizes, grants, and financing; and non-financial support, such as training, development, and investment opportunities provided by incubators and accelerators

Expenditures on Heritage Sites

The indicator monitors the volume of public expenditures or investments allocated for cultural and natural heritage conservation and management. Given the absence of sufficient data in the previous editions of the report, the indicator suffices with providing a general overview based on information from two commissions: the Heritage Commission and the Royal Commission for AlUla. The Heritage Commission allocated SAR 382 million for cultural and natural heritage sites. As part of the Business Acceleration Program, the Heritage Commission brought in sponsors for the cultural heritage assets for investment and business development purposes at a cost of SAR 950,000.⁽⁸⁹⁾ As for the Royal Commission for AlUla, it estimated its budget for the cultural heritage conservation and protection at over SAR 380 million, with a budget allocated for natural heritage protection at more than SAR 73 million.⁽⁹⁰⁾



Support Funds

The CDF aims to develop the cultural sector and achieve its sustainability by supporting its relevant activities and projects, while facilitating investment in cultural activities, enhancing the sector's profitability, and enabling enthusiasts to engage in cultural works. In 2023, the CDF's budget reached SAR 212 million.⁽⁹¹⁾ The CDF continued its efforts to support cultural projects and activities, as it supported 31 projects in 2023 through the Cultural Projects Incentive Program, including five projects in the education and training fields: ZADK, Higher Institute for Tourism and Hospitality (HITH), Saudi Film Academy - Danya, Production Studio for Training - Ram, and Minhaj, and that is compared to 28 projects in 2022⁽⁹²⁾ and 4 projects in 2021.⁽⁹³⁾

Through the Film Sector Financing Program, the CDF financed two entities in 2023: Telfaz11 and Tamkeen Talent Foundation, marking the first financing under this Program, which was announced in 2022 as part of the "Ignite" Initiative aimed at stimulating the sustainable growth in the Film Sector, while empowering the private sector through financing to support the local content and its production and distribution. The CDF also financed 29 entities of various specializations via the Kafalah Program. In the Education and Training Sector, it provided support to two entities: the Minhaj Institute of Arts and the Al-Nomor National Educational Company. The "Kafalah Program" is a financing product offered by the CDF in partnership with the financial sectors, aimed at encouraging local and foreign investors to invest in cultural projects, and support cultural projects and the sector's infrastructure, while providing financing to implementing companies.

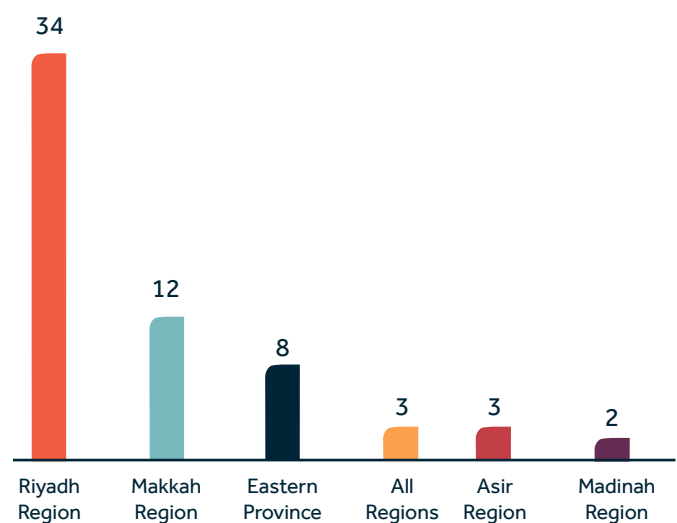


Figure 21: Number of Projects and Beneficiaries from the CDF's Support by Region in 2023⁽⁹⁴⁾

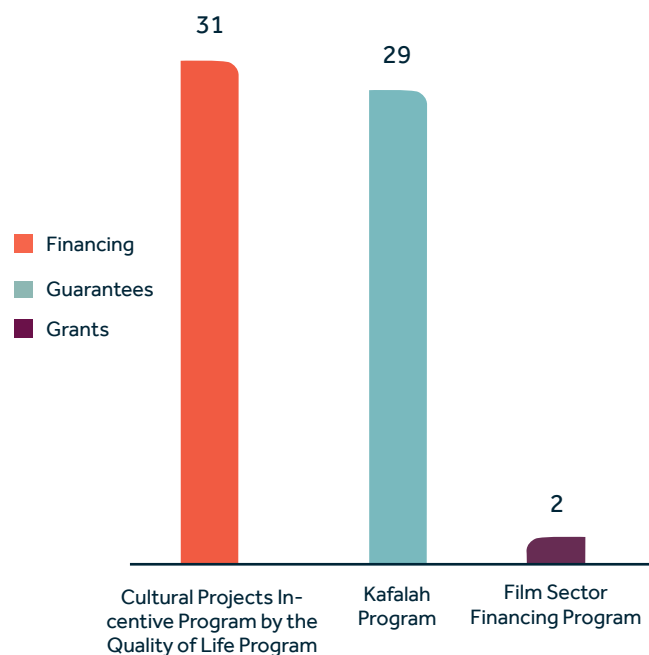


Figure 22: Number of Projects and Beneficiaries from the CDF's Support by Support Type in 2023⁽⁹⁵⁾

The Red Sea Fund, which is part of the Red Sea International Film Festival, is one of the leading authorities supporting the region's film industry. It targets filmmakers in four rounds: Projects in Progress, Development, and Production. This year, the Fund awarded grants to 92 films across its four rounds as shown in (Table 9).⁽⁹⁶⁾ Among the Saudi films supported by the Fund in 2023 are the documentary "Dod El Cinema" and the feature film "Thoukoub" in the In-Progress Stage. In the Production Stage, the Fund supported six feature-length films: "Oummi", "Nabih Afea", "Bolbol Bila oash", "Ams Baada Bokra", "Kalbon Jaea" and "Mall Al Bahja"; as well as five short films: "Al Baba Al Mahrous", "Wafat Al Asi", "Toyor Samawiya", "Santa fi Al-Jubail", and "Kan Ya Ma Kan". In the Development Stage, the feature film "Al-Dar" and the animated film "Malikat Jamal Al Ebel" received support.⁽⁹⁷⁾

Table 9: Number of Films Supported by the Red Sea Fund in 2023⁽⁹⁸⁾

Program	Number of Films
First Film Finance Round In-Progress Phase	8
Second Film Finance Round Development Phase	35
Third Film Finance Round Production Phase	36
Fourth Film Finance Round In-Progress Phase	13

The Small and Medium Enterprises General Authority (Monsha'at) plays a vital role in supporting enterprises in the cultural sector; providing support to 1,076 micro, small, and medium enterprises in 2023 as shown in (Figure 23), of which 65% are micro-enterprises. The data indicate that the enterprises, which are supported in the book and journalism activities, the audiovisual media, and the design and creativity services, are in the lead.

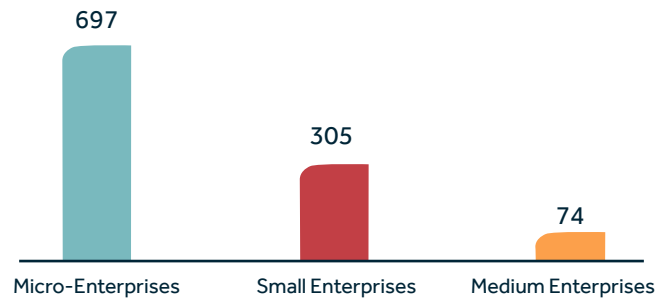


Figure 23: Number of Cultural Sector Enterprises Benefiting from the Monsha'at Support in 2023⁽⁹⁹⁾

Art and Literary Residencies

In regards to art and literary residencies, the Management and Conservation Chapter focuses on the non-financial support provided by the relevant authorities to artists and authors within an environment that stimulates creativity. The Knowledge and Skills Chapter reviews them under the cultural training indicator. This year, an expansion has been observed in the provided residency fields, including art residencies, literary residencies, and writing retreats, in addition to the architecture and design field, and the creative industries. A residency program was organized for the first time in the architecture and design field in collaboration with the Architecture and Design Commission and NEOM, involving five designers.⁽¹⁰⁰⁾ The King Abdulaziz Center for World Culture (Ithra) provided the Third Edition of the Creative Solutions Residency Program, with five creators qualified from 147 participants.⁽¹⁰¹⁾ This Program focuses on storytelling and digital product design using advanced technologies, such as Augmented Reality (AR), Virtual Reality (VR), and Mixed Reality (MR), aiming to deepen participants' engagement with the creative process and explore the entrepreneurial, technological, and narrative

foundations for the technologies developed in Ithra's Ideas Lab.⁽¹⁰²⁾

Misk Art Institute continues to support and empower artists, with 41 artists participating in its 2023 art residency programs within the Kingdom as shown in (Figure 24). The Institute also offered several international residency programs: two in Egypt in collaboration with the Ramses College and the B'saraya for Arts Center, two in Germany in collaboration with the Berlin Art Institute, and one in South Korea in collaboration with the Art Center Nabi. This year, the Visual Arts Commission was active in the residency programs, offering two art residencies, one within the Kingdom, which is the Open Studio Residency in its first and second editions, and one abroad, the Bouche-Paris Residency. 32 artists have benefitted from these two programs. This year, the AIUla Arts, which is part of the Royal Commission for AIUla, also organized a residency program in collaboration with the French Agency for AIUla Development, aimed at enhancing AIUla's artistic presence and encouraging the participation of contemporary artists.⁽¹⁰³⁾

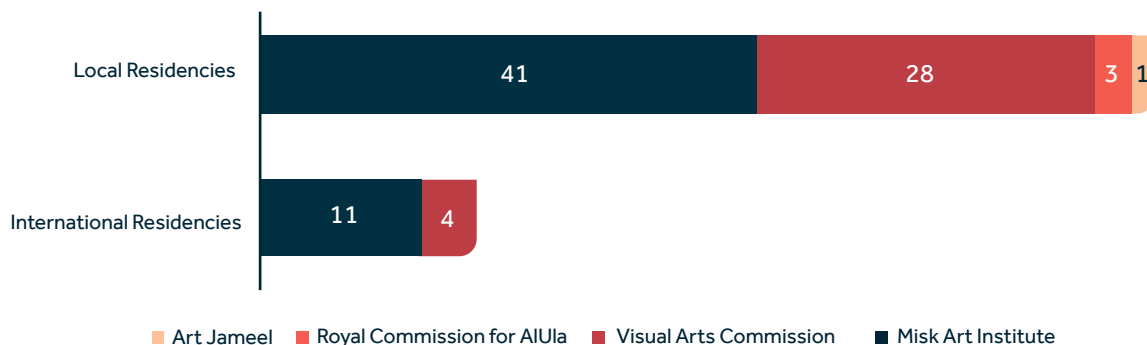


Figure 24: Number of Beneficiaries from Artistic Residencies by Issuing Authority in 2023⁽¹⁰⁴⁾



As for literary residencies, the Literature, Publishing, and Translation Commission provided four residencies: two within the Kingdom in Abha and AlUla and two abroad in Tunisia and South Africa, each lasting 20 days. As for writing retreats, they varied by literary genre spreading across the Kingdom, with the highest number of retreats in the novel genre, held in Al-Ahsa, Umluj, Al-Wajh, Al-Baha, and AlUla, followed by the children's literature genre in three regions, the poetry and short stories genres in two regions, and the narrative genre in one region (Hail), totaling 14 retreats this year as shown in (Figure 25), with the participation of 89 authors. This is compared to three retreats in 2022,⁽¹⁰⁵⁾ and four retreats in 2021.⁽¹⁰⁶⁾

Madinah		Asir		Jazan	
French Novel Retreat	5	Children's Literature Retreat	7	Children's Literature Retreat	6
Poetry Retreat	14	Short Story Retreat	7	Poetry Retreat	7
Tabuk		Eastern Province		Hail	
Novel Retreat	12	Novel Retreat	7	Narrative Retreat	7
Al-Baha		Al-Jouf		Makkah	
Novel Retreat	6	Children's Literature Retreat	6	Short Story Retreat	5

Figure 25: Distribution of Writing Retreats Held in 2023 by Type, Region, and Number of Participants⁽¹⁰⁷⁾

Incubators and Business Accelerators

Incubators and business accelerators are among the main non-financial support programs. They contribute in generating innovative ideas for emerging authorities and helping them accelerate their growth and ensure success. They also provide financial grants for participants in some projects.⁽¹⁰⁸⁾ Accelerator projects began in 2021 with a single accelerator provided by the Literature, Publishing, and Translation Commission for children's and young adult literature. The Commission provided the First Edition of the Publishing Business Accelerator in 2022, whose second edition comes in 2023 with ten diverse projects, each serving a modern field, such as publications focusing on AI, or addressing contemporary issues in an engaging and enjoyable manner following the Japanese manga-style, or publishing services aimed at elevating the market or creating a new market for culture, entertainment, and other fields.⁽¹⁰⁹⁾ The Heritage Commission also launched a business accelerator that serves entrepreneurs and supports the growth and expansion of start-ups in the sector, involving 16 projects. The Program included 15 workshops and an award of SAR 50,000 for each project.⁽¹¹⁰⁾

As for incubators, three were offered this year, two of which represent two other seasons of previous projects, the first of which is the "Kawin" incubator provided by the Culinary Arts Commission, which includes three main programs: "Kawin Culinary Arts Incubator", "Chef Challenge," and "Kawin Lab," with the Commission's

aim to develop start-ups with innovative concepts in the world of culinary arts, while establishing a Saudi entrepreneurial environment supportive of innovation in the sector, along with empowering and developing male and female entrepreneurs in the culinary arts field, and enhancing the Kingdom's presence as a top culinary destination worldwide,⁽¹¹¹⁾ with the participation of 61 beneficiaries this year. The second project is the Theater and Performing Arts Incubator, which aims to develop emerging projects in the Theater Sector, focusing mainly on providing training, connecting participants with the relevant authorities, and supporting them in finding investment and funding opportunities. Its second edition this year included 13 teams and start-ups, with the project still under implementation. Its first phase, the training camp, began on December 31, 2023, with 22 teams, followed by the incubator phase starting on January 14, 2024, with the qualification of 13 teams.⁽¹¹²⁾ As for the new project, which is the Authors Incubator provided by the Literature, Publishing, and Translation Commission, it aims to support new authors and provide a comprehensive training experience through a six-month incubation period, ending with the printing, publishing, and promotion of their works locally and regionally. Three female and two male authors benefitted from this project, representing those who qualified from among 30 participants chosen in the project in order to attend a training camp with the aim of learning.⁽¹¹³⁾

Program	Kawin Incubator, Second Edition	Theater and Performing Arts Incubator, Second Edition	Authors Incubator, First Edition	Publishing Business Accelerator, Second Edition	Heritage Commission's Business Accelerator
Issuing Authority	Culinary Arts Commission	Theater and Performing Arts Commission	Literature, Publishing, and Translation Commission	Literature, Publishing, and Translation Commission	Heritage Commission
Type	Incubator	Incubator	Incubator	Business Accelerator	Business Accelerator
Number of Beneficiaries	61	13	5	10	16

Figure 26: Examples of Incubators and Business Accelerators provided in 2023 and Number of Beneficiaries

Grants

2023 witnessed the launch of several knowledge and creative grants, some of which targeted creative production in the arts and Arabic content production field in its readable, visual, and audio forms, while others focused on research grants. In the Arts Production field, the Misk Art Institute continues to offer its annual "Misk Art Grant," which was awarded to three artists and two designers this year.⁽¹¹⁴⁾ The grant aims to support artists and designers, including the provision of orientation and guidance programs with a group of specialists, as well as technical support. As for content production, the Film Incentive Program provided by the Film Commission stands out. This program offers incentives and partial grants to filmmakers, with 60 Saudi films supported by the program in 2023. Additionally, the King Abdulaziz Center for World Culture (Ithra) supports the Arabic Content Initiative, which benefited 37 projects this year in various fields such as translation, publishing, visual content, podcasting, etc. This initiative is considered important, as it seeks to produce content reflecting local community details and also use it as a tool for critiquing the cultural scene and sparking discussions on various topics.⁽¹¹⁵⁾

Cultural institutions continue to provide research grants, a trend of providing support that has been observed since last year. The Ministry of Culture continued to provide its research grant programs. It launched two new grants this year: the Arabic Poetry Grant, in conjunction with the Year of Arabic Poetry 2023 Initiative, and the Saudi

Art History Grant, which includes the history of arts in the Kingdom through four fields: visual arts of all kinds, performing arts, music, and cinema.⁽¹¹⁶⁾ The Literature, Publishing, and Translation Commission, in collaboration with the Arabic Observatory of Translation, provided research and studies grants in the translation field in order to enrich research in the translation field in the Arab world. It is considered one of the largest research grant programs in the cultural sector in 2023, as it was awarded to 110 researchers as shown in (Table 8). Furthermore, the Commission also provides philosophy research grants in order to stimulate philosophical production, enrich Arabic libraries' content, and raise the quality of philosophical works in the Kingdom.⁽¹¹⁷⁾ As for non-profit initiatives aiming to bridge cultural work between its practitioners in the Kingdom and the countries of the world,⁽¹¹⁸⁾ the grants provided by the Al-Manwar Initiative this year aimed to enrich the research and knowledge field with selected studies on various cultural topics. Three research grants - with an award of SAR 30,000 per grant - were provided in the following fields: the development of the cinematic movement in the Kingdom, the podcast revolution in the Arab world, and the phenomenon of influencers and social media celebrities.⁽¹¹⁹⁾ Generally, the number of male researchers benefiting from these grants exceeded female researchers, which is consistent with the research production indicator observed in the Creativity and Cultural Production Chapter.⁽¹²⁰⁾

Table 10 : Number of Male and Female Beneficiaries of the Research Grant Programs Provided in 2023

Program	Issuing Authority	Number of Male Beneficiaries	Number of Female Beneficiaries
Arabic Poetry ⁽¹²¹⁾	Ministry of Culture	12	8
Saudi Art History ⁽¹²²⁾	Ministry of Culture	7	3
Philosophical Research Grant Project ⁽¹²³⁾	Literature, Publishing, and Translation Commission	9	1
Research and Studies Grants in the Translation Field ⁽¹²⁴⁾	Literature, Publishing, and Translation Commission, and the Arabic Observatory of Translation	73	37
Research Grants	Al-Manwar Initiative	4	1
Research Grants within the Prince Abdulaziz bin Ayyaf Award for Humanizing Cities	King Saud University	-	2



Cultural Competitions and Awards

In this indicator, the Management and Conservation Chapter monitors the number of winners and the total award money, leaving the review of the creative trends and the artistic content of the winning works to the Creativity and Cultural Production Chapter. Competitions and awards represent strategic pillars for supporting creativity, stimulating cultural production and activities, and empowering them, whether for individuals

or institutions. Cultural awards were launched for the first time in 2023, such as the Irth Award, targeting those interested in photographing the environment, nature, antiquities, and wildlife, in order to visually document the elements of the King Salman bin Abdulaziz Royal Reserve, while reflecting its scenic beauty and wildlife,⁽¹²⁵⁾ with the awards totaling SAR 232,000.

Table 11 : Examples of Key Cultural Awards in 2023 and the Number of Winners

Award	Organizer	Number of Winners	Total Awards
Saudi Film Festival Awards	Cinema Association in partnership with Ithra and supported by the Film Commission	35	1,155,000
Saudi Film Festival Awards (Market Participants Awards)	Cinema Association in partnership with Ithra and supported by the Film Commission	33	2,240,000
Yusr Awards	Red Sea International Film Festival	12	778,200 (Approximately)
Film AIUla Awards	Film AIUla in partnership with the Red Sea International Film Festival	2	375,000
Red Sea Souk Awards	Red Sea International Film Festival	9	937,650 (Approximately)
Red Sea Souk Awards (Market Participants Awards)	Red Sea International Film Festival	8	1,256,460 (Approximately)
King Salman Global Academy Award for Arabic Language	KSGAAL	8	1,600,000
Prince Abdullah Al-Faisal Award for Arabic Poetry	Academy of Arabic Poetry	6	1,500,000
Literary Partner Initiative Award	Literature, Publishing, and Translation Commission	8	900,000
Riyadh International Book Fair Awards	Literature, Publishing, and Translation Commission	5	250,000
Ithra Art Prize - Sixth Edition	Ithra in collaboration with the Royal Commission for AIUla	1	375,000
Irth Award	King Salman bin Abdulaziz Royal Reserve Development Authority	9	232,000
Creative Article Competition	Architecture and Design Commission	3	60,000
Radwi Art Award	Saudi Arabian Society for Culture and Arts (SASCA) sponsored by the University of Business and Technology (UBT)	10	50,000
Children's Recitation Prize	KSGAAL	30	200,000
Total		179	10,756,110

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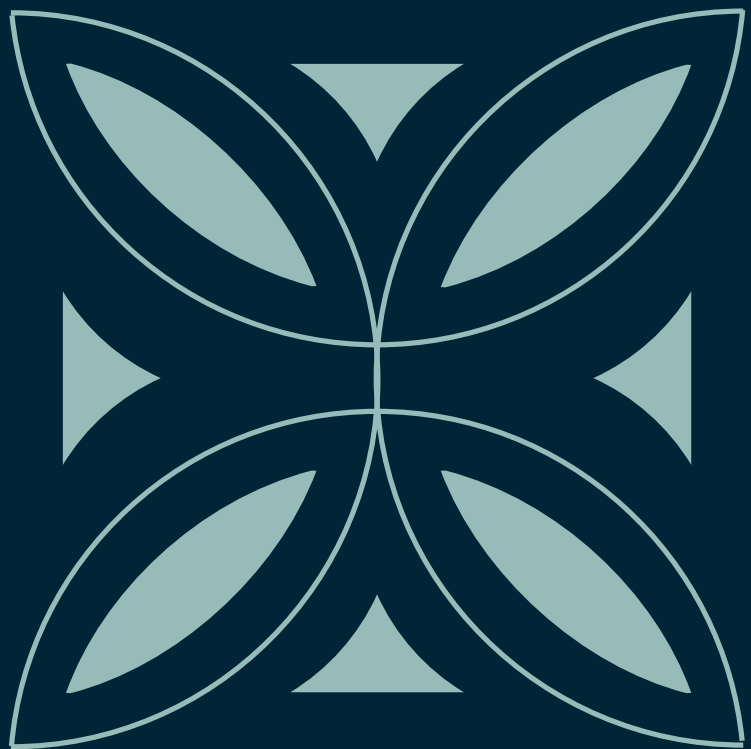
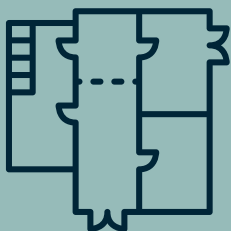
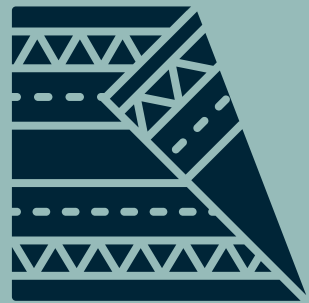


Chapter Two



Creativity and Cultural Production

- Cultural Production
- Creativity





Based on the 2009 UNESCO Model adopted by the report, the Creativity and Cultural Production Chapter focuses on two dimensions of the culture cycle: Cultural Production and Cultural Creativity. The Cultural Production Dimension is monitored by five key indicators, reviewing production types and levels, while providing an analysis for gender and region, and comparisons with data from previous years in order to create a broader picture showcasing the change in the Kingdom's cultural production over the years. The report then reviews the Innovation Indicator as a complement to the Production Dimension, highlighting the artistic and creative trends and paths that were focused on this year through the main awards presented in cultural sectors at the national level, as well as the main awards presented locally, regionally, and globally.

Cultural Production

This section addresses the Cultural Production Dimension, and monitors its new trends in terms of production quality and levels through providing an objective perspective for artistic and cultural trends in production based on five main indicators: Publishing and Translation, Audiovisual Production, Theater and Performing Arts Production, Arts, Designs, Cultural Handicrafts Production, and Copyright Works. One of the main features that this Chapter focuses on this year is the creative stimulation generated by cultural festivals through competitive competitions and support programs for different sectors, especially in the Theater and Performing Arts Sector, which is positively reflected in the large number of performances and their diversity. Furthermore, developments in the regulation of the Non-Profit Sector are also reflected in the diversity of production levels in amateur clubs and specialized associations in different cultural sectors. In addition to creative production, research production has also emerged in cultural fields, including the cultural sustainability field, setting a record high in the past four years.



Publishing and Translation

Literary Publishing

In 2022, after Saudi authors' literary publishing recovered from the decline in their numbers due to the pandemic, literary publishing started to decline again this year by 25% compared to last year. Based on the statistics of the Literary Authorship and Publishing Bibliography in Saudi Arabia for the year 1444 / 1445 AH (2023) by Researcher Khaled Al-Yousef, the total literary publications for this year amounted to 523 books (Figure 1) compared to 701 books in the previous year, which is the lowest number recorded by the Bibliography since 2019. However, it should be noted that this rate does not mean a decline in the publishing of all literary production genres. For example, a total of 75 literary criticism books were published in 2023, constituting 14% of total literary publishing, whereas it previously represented 11% of total literary publishing in 2022.⁽¹⁾ This slight increase in the percentage of criticism books may be partially due to the "One Hundred Saudi Books" Initiative, launched by the International Encyclopedia of Arabic Literature (Adab), with the support of the Cultural Development Fund (CDF) in order to publish 100 books by Saudi authors in various literature and

culture branches, aimed at enriching and stimulating publishing activity in the Kingdom, of which 63 books were published in 2023.⁽²⁾ The Initiative gave critics and academics the opportunity to publish their books, which may face rejection from commercial publishing houses governed by profit and loss factors, which make up the vast majority of publishing houses in the Kingdom, as they prefer the novel genre due to its high sales.

Considering published literary genres (Figure 1), the data shows that there has not been much change in their types or publication levels, with novels continuing to be the most widely published genre for the second consecutive year, followed by Arabic poetry. It should be noted that the number of published theatrical scripts continues to decline, as this year's data recorded only five published theatrical scripts, which is the lowest number recorded in three years, despite the rise in the number of theatrical performances this year. This will be addressed later in the Theater and Performing Arts Indicator, suggesting that theatrical scripts in the Kingdom are strictly being written for the sake of being performed, rather than being published and read.



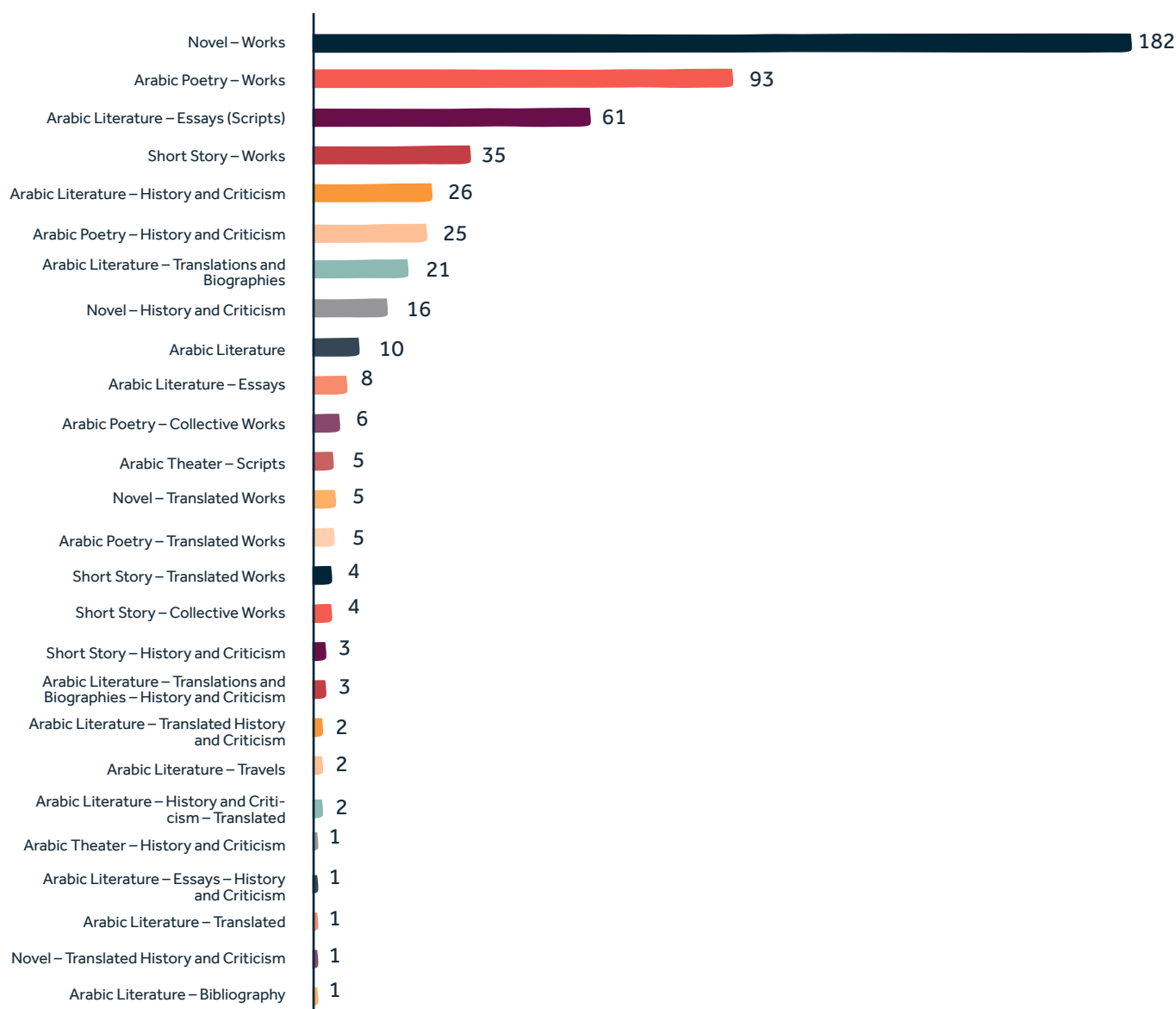


Figure 1: The Kingdom's Literary Production and Publishing in 2023 by Literary Genre⁽³⁾

In 2023, publishing activities of Saudi Literary Clubs have also significantly declined, with a total of 65 published books, the lowest number since 2020 (Figure 2). This decline in the publishing activity of literary clubs coincides with the regulatory decision issued in early 2023 to transfer the activities of literary clubs from the Ministry of Culture to the National Center for Non-Profit Sector (NCNP),⁽⁴⁾ which may affect their publishing and distribution production.⁽⁵⁾ In addition, clubs' activities rely heavily on joint publishing with publishing houses outside the Kingdom. As will be seen later, this year's 2023 report monitored a decline in the size of the external publishing, which may have led to the decline in publishing activity at club branches. Among the most affected clubs are the Abha, Najran, Al-Jouf, and Northern Borders clubs. The data in (Figure 2) showed

a decline in their publishing numbers for this year, after their relatively high production in 2022. Publishing activity in the Riyadh Club remained stagnant, as it was last year, after being one of the most active clubs in previous years. The Taif Literary Club remains the most prolific literary club in 2023 with 14 books, followed by the Al-Baha Club in second place, with 7 books. Of course, this regulatory change does not mean that literary clubs are doomed to have their publishing activity decline because of their transition to the Non-Profit Sector; a large segment of the clubs' activity is connected to joint publishing with publishing houses outside the Kingdom. Publishing figures have rebounded in some clubs, such as the return of Tabuk Club to normal activity after a five-year hiatus.⁽⁶⁾

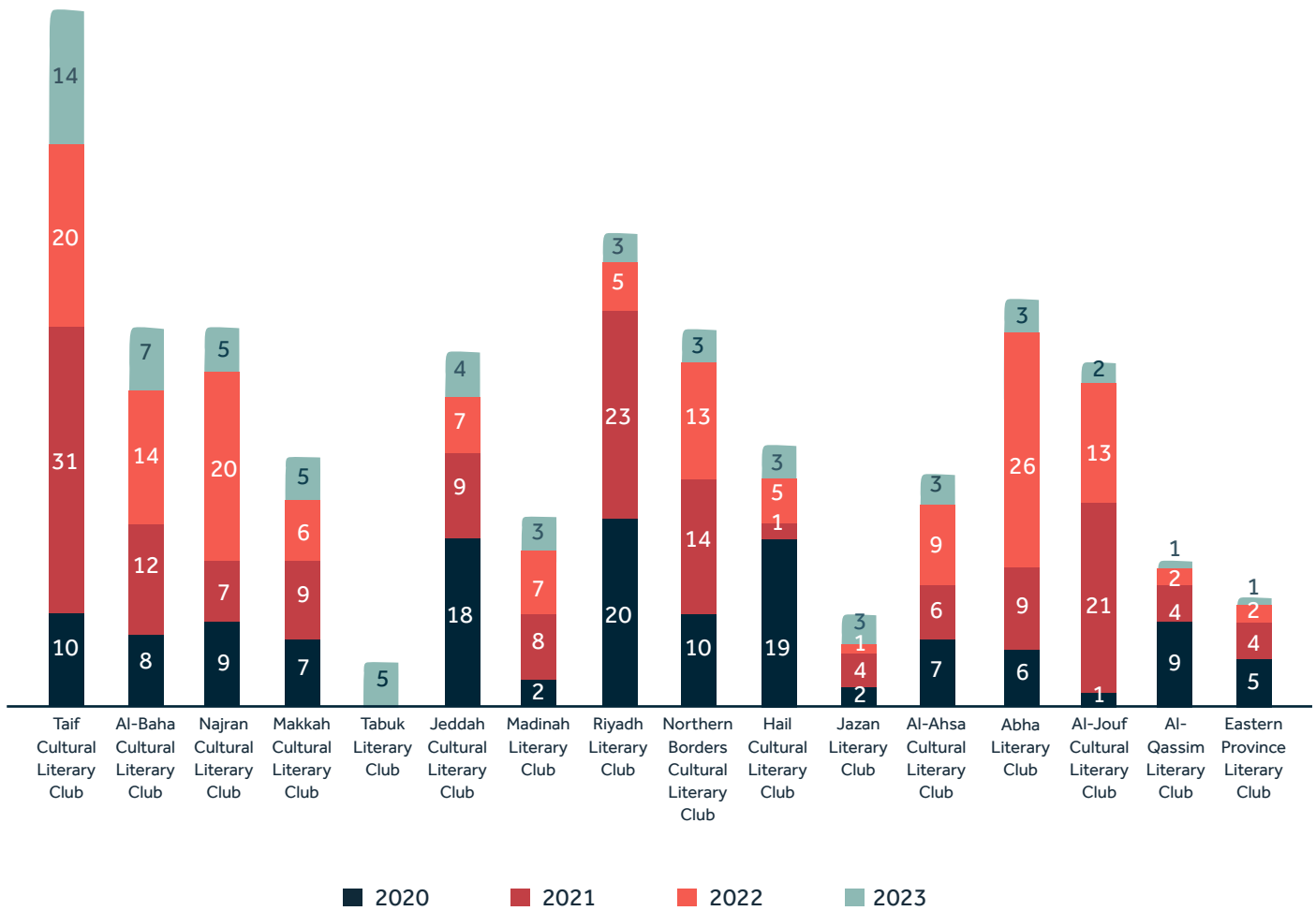


Figure 2: Literary Clubs Production by Branch during the 2021 - 2023 Period⁽⁷⁾

The gap between the male and female authors has also widened to its highest level in five years (Figure 3). The report observed that the percentage of female literary authors in 2023 did not exceed 32% of the total number of authors, after reaching 42% in 2022, and 36% in 2021, as shown in (Figure 3).⁽⁸⁾ This gap has left room for active institutions to develop in the sector by providing more empowerment programs for female authors and channeling support initiatives for their literary production in order to reduce the gap in the coming years.

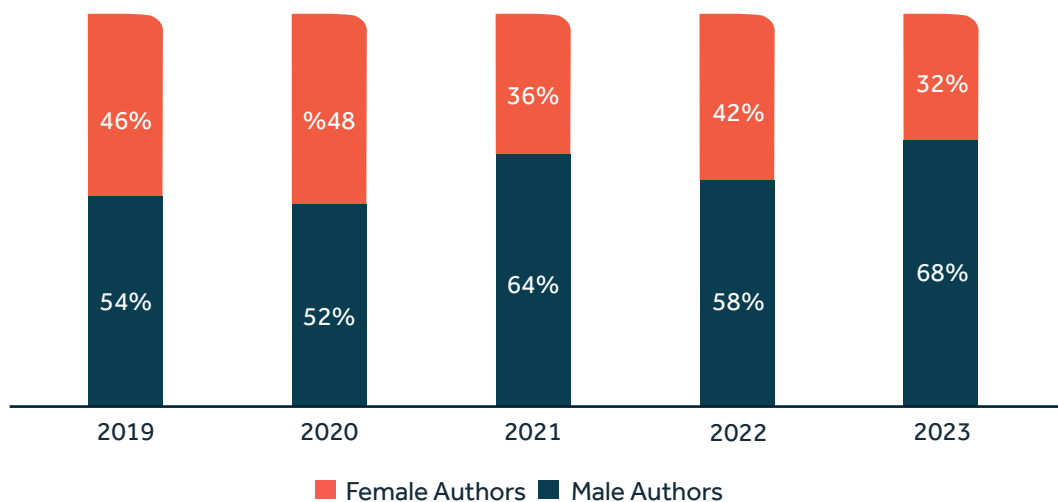


Figure 3: Proportional Distribution of Literary Production by Author Gender in the 2019 - 2023 Period

In 2023, the novel and essay continued to dominate female publications in 2023, despite the constant decline in their essay production since 2019, and their absence from the Theater Literature and Poetry fields. Furthermore, their short story production has significantly dropped compared to last year, from 49 books to only 14 books in 2023, out of the 297 books they wrote in 2022 compared to only 168 books in 2023, as shown in (Figure 4).⁽⁹⁾

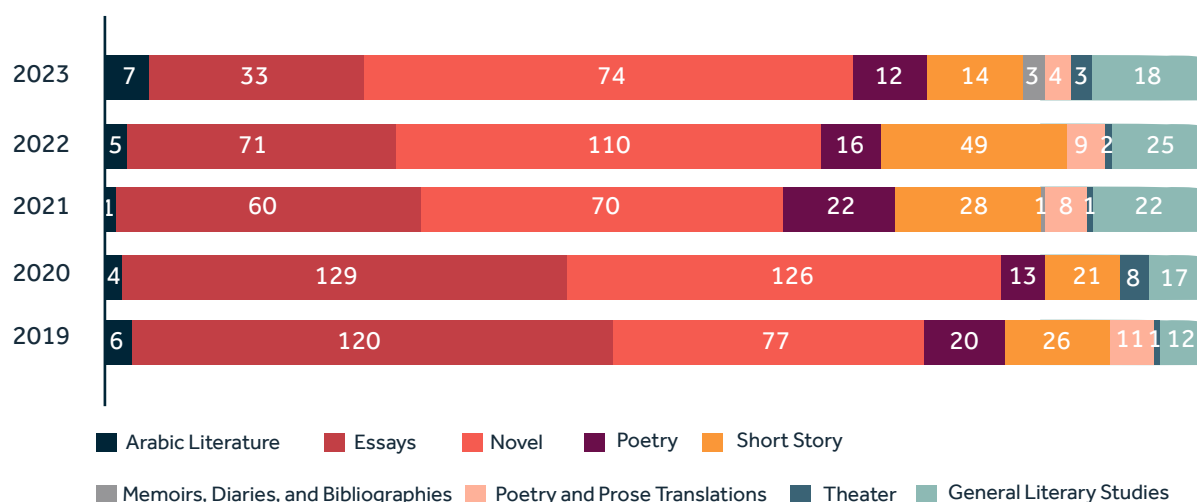


Figure 4: Literary Production of Saudi Female Authors in 2019 - 2023 Period by Literary Genre

The external publishing rate of Saudi male authors has remained low, in line with what was documented in the Report on the State of Culture in previous years;⁽¹⁰⁾ as its percentage this year amounted to 22% of the total publishing rate, as shown in (Figure 5). Before 2016, the Kingdom's external publishing percentages were about half of the publishing rates, but they have been declining year by year until reaching 19% in 2022.⁽¹¹⁾ In this context, the support and qualification initiatives for the Kingdom's publishing houses are highlighted, such as the Publishing Accelerator,⁽¹²⁾ as well as the "Ant" training program, and the international training program for Saudi publishing houses, in order to provide a boost to the Publishing Sector, in hopes that their results will be reflected on the sector in the future.⁽¹³⁾



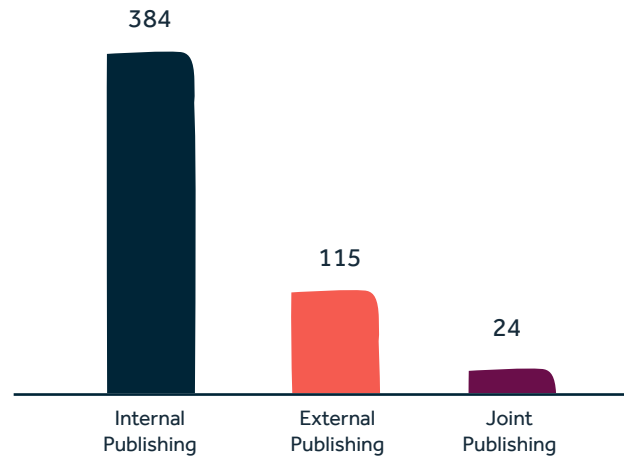


Figure 5: Distribution of Internal, External and Joint Literary Publishing Figures in 2023⁽¹⁴⁾

Digital Publishing

Since its inception in 2021 by the Literature, Publishing and Translation Commission as part of its plan to support digital books, the Digital Publishing Program continues as the most prominent motivation for publishing in this field within the Kingdom, aiming to facilitate beneficiaries' access to the Saudi books, while promoting diversity in publishing vessels, enriching Arabic content in digital books, and supporting Saudi publishers by covering book digitization costs. This Program was designed with multiple tracks to reach all segments of society from children to adults. These tracks include the Audiobooks Track, which aims to support the production of 50 audiobooks, of which 30 books were published on audiobook platforms in 2023, including various applications, channels, and outlets for listening to books. The Digital Books Track converts books into digital formats compatible with e-reading devices, resulting in a total of 202 books in 2023, compared to 198 books in 2022, while the Digital Children's Books Track resulted in the digitization of 140 textbooks.⁽¹⁵⁾

Research Production and Scientific Publishing in Cultural Fields

The Report on the State of Culture continues to monitor production indicators in scientific research and publications in cultural fields by relying on a special survey for refereed scientific journals, carried out for the report's purposes, which provides an impression of refereed research production in the Kingdom. The 2023 survey included 31 refereed scientific journals,⁽¹⁶⁾ in which 1,362 research papers were published during the 2020 - 2023 period that can be classified within 26 fields. In 2023, the number of published research papers totaled 405 research papers in several refereed scientific journals (Figure 6),⁽¹⁷⁾ which is the highest number of cultural research papers published during the past four years, while continuing to grow year after year, at a rate of 10.96% compared to last year.

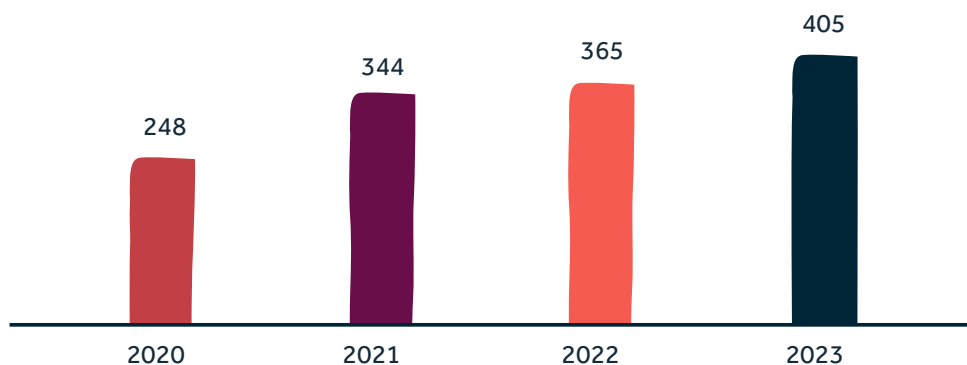


Figure 6: Total Number of Research Papers Published in the Cultural Fields in the Kingdom's Scientific Journals during the 2020 - 2023 Period⁽¹⁸⁾



This growth must be considered in the context of the increasing number of scientific journals in the Kingdom. The survey monitored new journals whose first issue was released in 2023, most notably the Journal of King Abdulaziz Complex for Endowment Libraries, which is concerned with publishing research on libraries in general, and endowment libraries in particular, as well as studies related to manuscripts, cultural and historical collectibles, indexing and classification, and digital libraries. The King Salman Global Academy for Arabic Language (KSGAAL) launched two journals: the Journal of Arabic Language Sciences and the Journal of Language Testing. The survey also observed the return of the King Fahad National Library Journal to publishing issues this year after a two-year hiatus.

As for research topics, published research in the language and literature fields ranked among the top four in 2023 (Table 1), while the topic of the Arabic language and its sciences continued to be one of the most published research topics in 2023, with particularly high contributions from male researchers. In 2023, the fields that saw a notable increase in numbers of published research in general were: Cultural Tourism, Culture and Sustainability, Fashion and Jewelry, Libraries and Information, and Documents and Manuscripts. Women's progress in research production was noted

in Cultural Tourism, Fashion, and Jewelry. On the other hand, research publishing remained generally weak in the following topics: Traditional Arts, Museums, Theater Studies, Children's Literature, Culture and Childhood Studies, and Culture and Arts Education. This year, research production was absent in the Arabic Calligraphy field, which is still the least addressed topic among research papers monitored by the survey during the past four years, with only two research papers. The Film and Music Sectors lack recorded research for the fourth consecutive year, requiring more support and attention from researchers and relevant authorities in the future to fill this void.

It should be noted that research on Cultural Tourism topics in 2022 was only conducted by female researchers. Male researchers, however, have made research contributions in this field during this year 2023, at a time when women were absent from the Translation, Arabization, Policies and Language Planning research fields. In contrast, female researchers recorded high activity in cultural tourism research fields after their absence last year, while male researchers' production in the Architecture and Design field declined, as they did not conduct research in the fields of Children's Literature, and Culture and Childhood Studies this year (Figure 7).

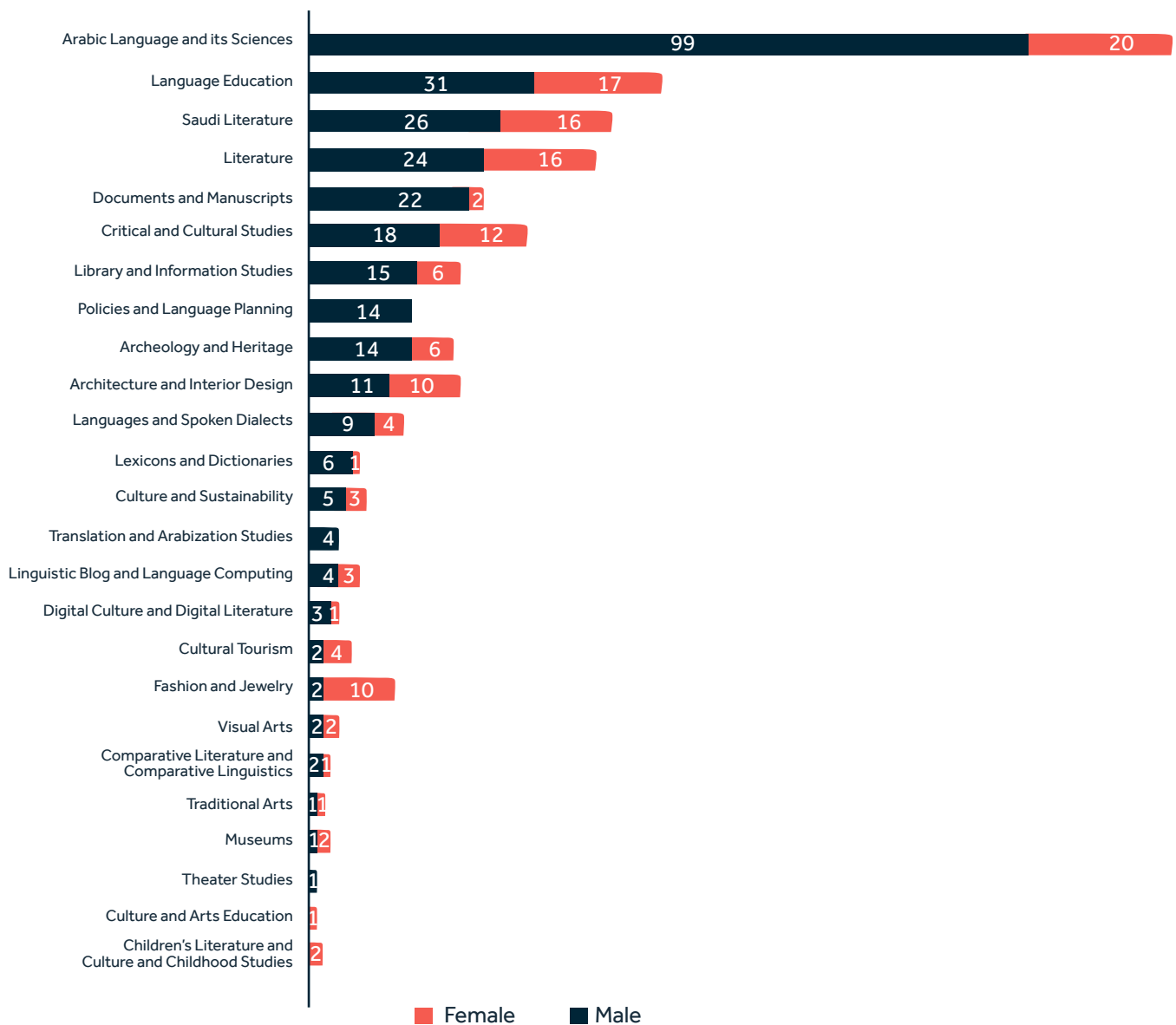


Figure 7: Research Production and Scientific Publishing in the Kingdom's Refereed Scientific Journals in 2023 by Cultural Field and Author's Gender



Table 1: Number of Research Papers Published in the Refereed Scientific Journals in the 2020 - 2023 Period, by Topic ⁽¹⁹⁾

Intersecting Topics	2020	2021	2022	2023	Total
Arabic Calligraphy	0	1	1	0	2
Traditional Arts	0	0	4	2	6
Museums	2	2	0	3	7
Theater Studies	2	2	3	1	8
Cultural Tourism	2	1	1	6	10
Children's Literature and Culture and Childhood Studies	3	4	2	2	11
Culture and Arts Education	0	7	3	1	11
Translation and Arabization Studies	4	2	6	4	16
Comparative Literature and Comparative Linguistics	6	3	5	3	17
Digital Culture and Digital Literature	1	4	10	4	19
Fashion and Jewelry	0	5	4	12	21
Culture and Sustainability	5	5	3	8	21
Linguistic Blog and Language Computing	4	5	7	7	23
Visual Arts	5	8	8	4	25
Documents and Manuscripts	2	2	2	24	30
Policies and Language Planning	6	6	8	14	34
Languages and Spoken Dialects	7	12	9	13	41
Library and Information Studies	11	2	7	21	41
Lexicons and Dictionaries	11	9	16	7	43
Architecture and Interior Design	21	19	11	21	72
Archeology and Heritage	19	21	18	20	78
Critical and Cultural Studies	20	25	36	30	111
Language Education	19	27	31	48	125
Saudi Literature	30	40	45	42	157
Literature	41	62	61	40	204
Arabic Language and its Sciences	69	121	114	119	423

As for the distribution of the research production and the international contribution of research authorities in the Kingdom, most of the research (82%) was conducted by male and female researchers affiliated to Saudi universities and institutions. Scientific journals published by Saudi universities accounted for 89% of these publications. As for international contribution, its percentage was similar to that of 2022 (15.35% and 15.21%, respectively), with the highest rate achieved in scientific journals issued by Saudi research centers and institutions amounting to 36%, while the same goes for the contributions of independent researchers, amounting to 7% of the total journals issued by the research centers and institutions. However, they did not exceed 1% of research production in refereed scientific university journals (Figure 8), thereby reflecting a greater diversity between international and local contributions in cultural centers and institutions than in the Kingdom's universities.

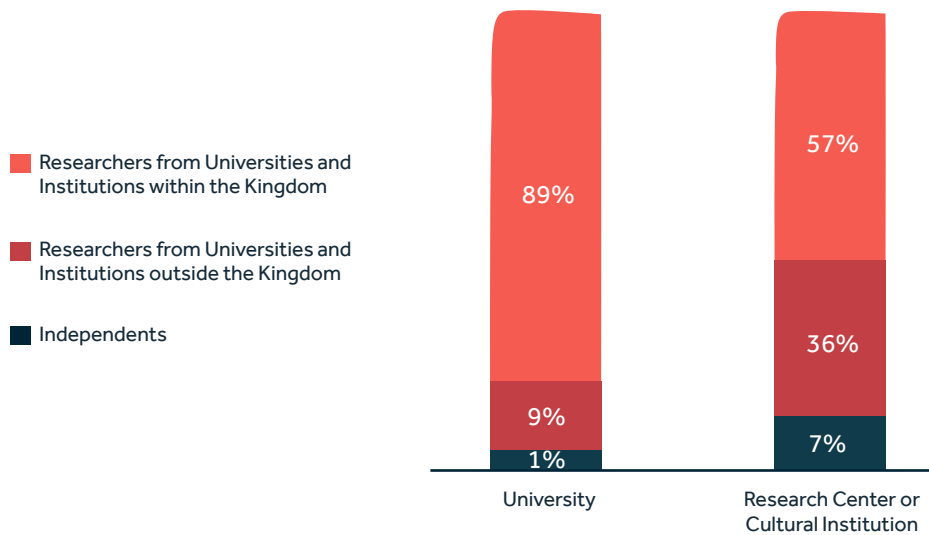


Figure 8: Proportional Distribution of Published Research in 2023 by Researcher's Institution

Coinciding with interest in the Sustainability Concept, which was the focus of this year's report, the report noted the release of 21 research papers in cultural sustainability fields since 2020. Most of these research papers were published this year, with a total of eight research papers issued by authorities inside the Kingdom, all of which were universities, except for one research paper issued by a research center. Five of these research papers were published by male authors, compared to three by female authors. The topics of these research papers varied to include the fields of Archeology and Heritage, Cultural Tourism, Fashion and Jewelry, Architecture and Interior Design, and Documents and Manuscripts.



Publishing of Translations

In the Translation Sector, the publishing indicator relies greatly on data from the “Tarjim” Initiative launched by the Literature, Publishing and Translation Commission in 2021. However, this Initiative is not the only activity in this sector. The report monitors production by several other institutions in the translation field, such as libraries and universities. In 2023, the “Tarjim” Initiative translated 595 books, the highest number achieved by the Initiative, with a growth rate of 74% (Figure 9). This high percentage was achieved through the participation of 48 publishing houses, almost double the number of participants last year. This can also be attributed to the diversity in translation topics, as they are slightly higher than last year (22 and 20 topics respectively). As for the proportional gender distribution of translators, male translators continue to dominate this field, as was the case last year 2022, with the percentage of female translators amounting to 30%, while translators’ pools represented 9%.⁽²⁰⁾

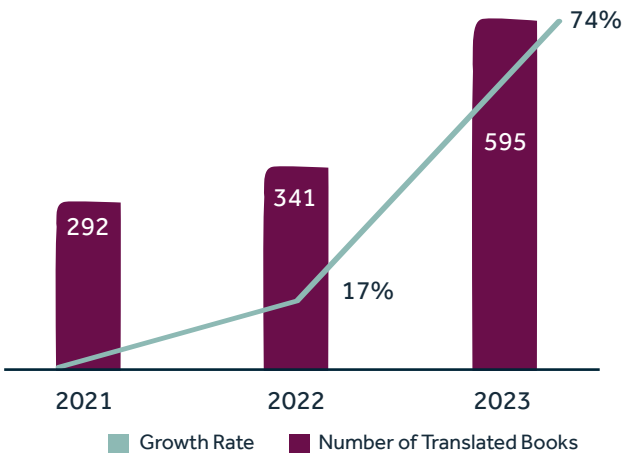


Figure 9: Number of Translated Books under the “Tarjim” Initiative and their Growth Rates in the 2021 - 2023 Period

Among the total number of translated books under the “Tarjim” Initiative, 115 books were translated from Arabic into other languages in 2023, which is a significant increase compared to 20 books translated by the Initiative from Arabic in 2022. On the other hand, 480 books were translated to Arabic from other languages this year. 2023 also saw an increase in the number of languages translated into Arabic, including new languages such as Korean, Norwegian, Croatian, and Indian, as opposed to the absence of other languages from which works were translated into Arabic in 2022, such as Japanese.

English still holds the highest percentage of books translated into Arabic at 79%, followed – by a wide margin – by French at 10%, while Chinese came in third place for the first time with the number of translated books to Arabic rising from 6 to 21 books this year (Figure 10). This is consistent with the agreements signed between the Kingdom and the People’s Republic of China, including the signing of an executive program by the Literature, Publishing and Translation Commission with the National Press and Publication Administration (NPPA) in the People’s Republic of China in order to cooperate in the literature, publishing and translation fields, through which literary classics are translated from Arabic to Chinese and vice versa.⁽²¹⁾

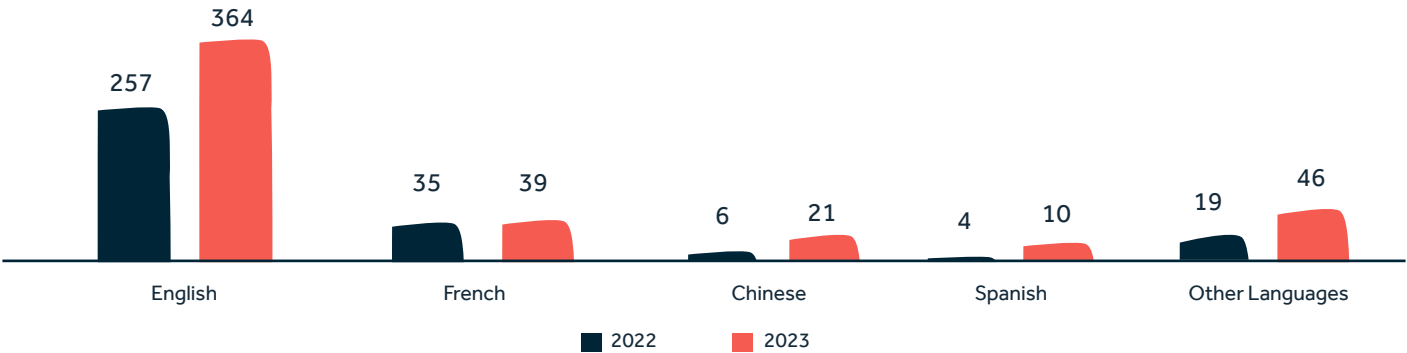


Figure 10: Number of Books translated into Arabic within the Tarjim Initiative in 2023 by Source Language

As for literary genre, novels occupied the highest percentage of translated books, as shown in (Figure 11), constituting 32% of the total number compared to 15% last year, rising to first place among the categories of translated books after ranking third in 2022 following children's and Young Adult books, and followed by

cultural criticism and philosophy, respectively. In 2023, children's and Young Adult books maintained a similar percentage to last year, while translations of cultural criticism and philosophy books declined this year compared to last year 2022 (9% and 23%, respectively).⁽²²⁾

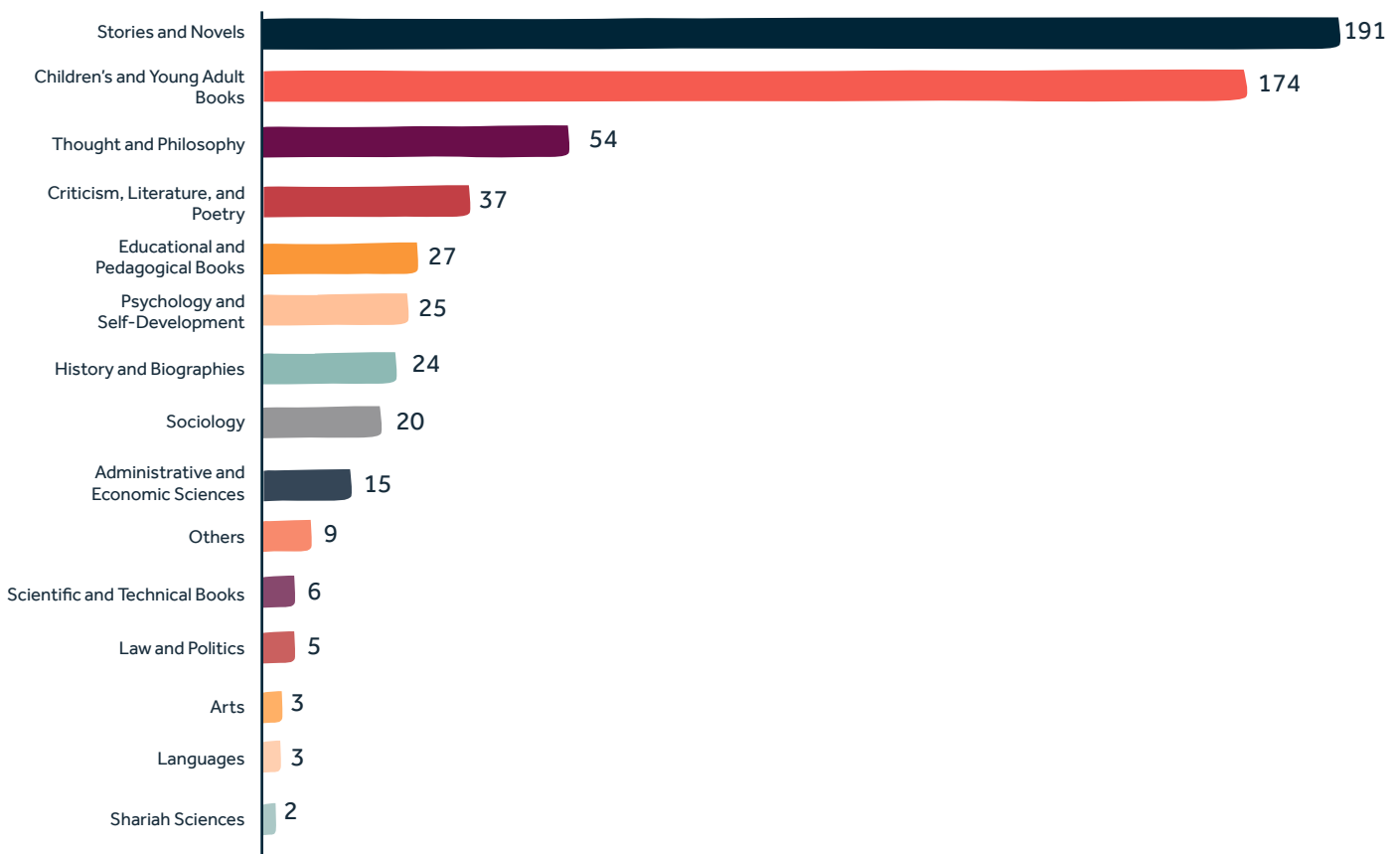


Figure 11: Topics of Books Translated into Arabic under the Tarjim Initiative in 2023

As an extension of the Initiative's direction towards focusing on Saudi literature and its dissemination, the Initiative focuses on translating this production and sharing it with new audiences outside the Kingdom. In this regard, the number of translated books by Saudi authors under the "Tarjim" Initiative this year reached

111 books, representing 19% of the Initiative's total books. Stories and novels were at the top with a total of 58 books, while criticism, literature and poetry ranked second, followed by children's and Young Adult Books, as shown in (Figure 12), in line with the literary publishing production figures mentioned earlier in the Chapter.⁽²³⁾

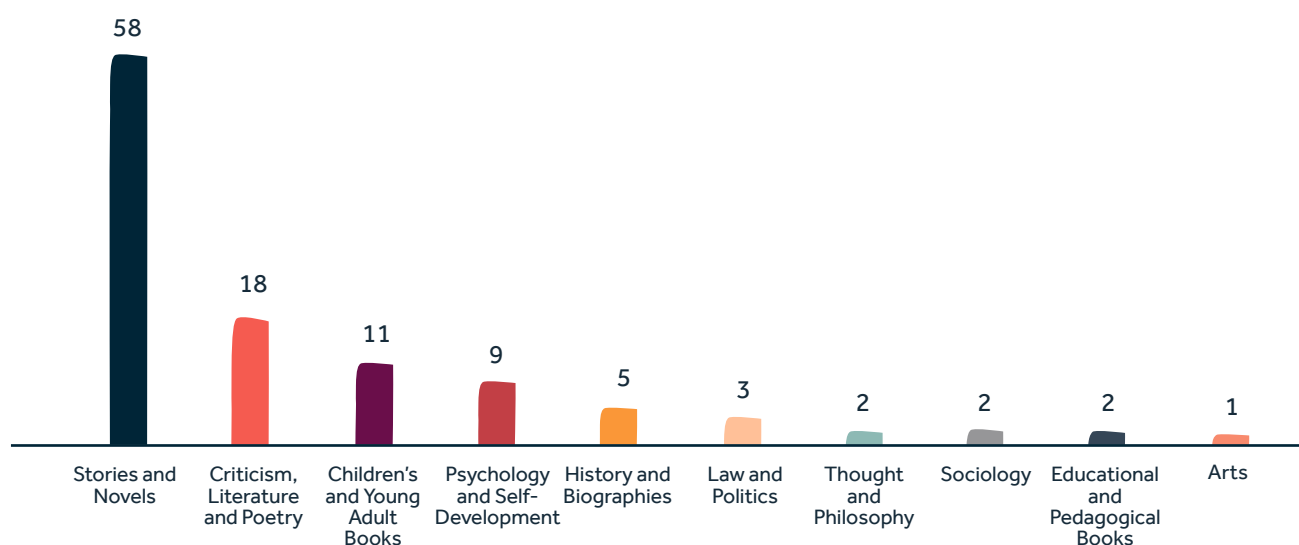


Figure 12: Classification of Translated Books by Saudi Authors under the 2023 Tarjim Initiative

The Translation Sector's production was not limited to the "Tarjim" Initiative. Some government agencies also recorded notable activities, the most prominent of which was the King Abdulaziz Public Library (KAPL) in Riyadh, which translated 11 works, including two translations from English to Chinese, and two

translations from Arabic, with one into English, and the other into Chinese. Furthermore, the Northern Border University, the King Abdulaziz Foundation (Darah), and the Translation, Authorship and Publication Center at the King Faisal University have also recorded other works translated from English to Arabic.⁽²⁴⁾

Periodicals and Articles

As for periodicals, the Initiative resulted in the translation of 14 periodicals, all of which were issued by two authorities: the Digital Future House, which translated two magazines, namely "Beijing News" and "China News," with one periodical each, and the Maani Platform, which translated two magazines: the British magazine "Philosophy Now" with seven periodicals, and the "New Philosopher" magazine with five periodicals, all of which were translated from English to Arabic. Hence, the number of translated periodicals declined after reaching 33 translated periodicals last year, which naturally impacted the diversity of translation topics with the limited sources from which they were translated, in addition to the decline in translated languages, as the 2022 periodicals included translations to and from Arabic.⁽²⁵⁾

As for article translation, the situation was the opposite. The Initiative resulted in the translation of 174 articles with a total of 359,733 words, representing a slight increase from 2022, during which 150 articles were translated, with a total of 336,360 words. As was the case last year, the Philosophy Association was in the lead by translating 100 articles, whereas the Mana Platform's translations increased from 50 articles last year to 74 articles this year, with a diversity of target languages between Arabic, English, and Chinese, including intellectual, philosophical, social, educational and technological fields related to artificial intelligence, while the the Philosophy Association's translations focused on translating philosophical articles from English to Arabic.⁽²⁶⁾



Audiovisual Production

Films

Unlike previous editions of the report, the Report on the State of Culture 2023 sets a mechanism for measuring the Film Production Indicator based on the first official year for a film's screening, whether in cinemas, digital platforms, or film festivals within and outside the Kingdom. It takes into account the various phases that the film goes through - as a creative cultural product - ending with its arrival to audiences through the screen. Accordingly, the indicator monitored a growth in the number of films produced this year compared to the previous year,⁽²⁷⁾ especially in the categories of feature-length films and short films. The number of Saudi feature-length films reached 25 films, with a growth rate of 127% as shown in (Figure 13),⁽²⁸⁾ which is considered a major sign of progress for the sector given the increasing size of financial, service, and logistical challenges in their production compared to short film production. Various support and financing funds aim to compensate for the shortage by providing financial and service support. Most premieres were released at festivals held within the Kingdom, namely the Saudi Film Festival and the Red Sea International Film Festival, followed by cinema screenings, and finally digital platform screenings, which screened two films

as premieres, namely "Ras Bras" by Malik Nejer and "Al-Khatabah" by Abdulmohsen Al-Dhabaan.⁽²⁹⁾ Among this year's highlights was the submission of three feature-length films at the 48th Toronto International Film Festival as premieres (Table 2). It should be noted that some filming locations in the Kingdom, such as Jeddah and the NEOM region, witnessed the filming of some scenes of the Bollywood film (Dunki) starring Shah Rukh Khan in 2023, a continuation of the efforts to attract global cinema productions to the Kingdom.⁽³⁰⁾



Table 2: Saudi Films Submitted to the 48th Toronto International Film Festival 2023⁽³¹⁾

Film	Director	Production	Festival's Screening Section
Mandoob Al-Layl	Ali Al-Kalthami	Telfaz11 Studio supported by the Red Sea International Film Festival	Discovery
Hajjan	Abu Bakr Shawky	Ithra Center	Discovery
Naga	Meshal Aljaser	Telfaz11 Studio	Midnight Madness

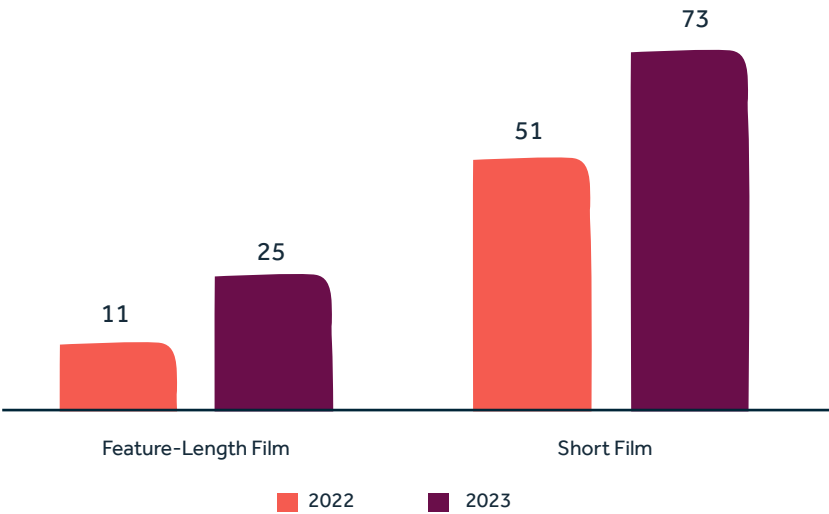


Figure 13: Numbers of Saudi Films' Premieres in 2022 and 2023⁽³²⁾

Furthermore, short films recorded an increase from last year with a growth of 61%, totaling 71 films. Since designated short film venues are not yet available, premieres have been limited to the Saudi Film Festival and the Red Sea International Film Festival, in addition to international screenings, such as the Saudi Film Nights in France and the Swedish Malmö Arab Film Festival, in which the Kingdom was the guest of honor in its thirteenth edition.⁽³³⁾

Film Festivals and Production Projects

The Saudi Film Festival, now in its ninth edition, continued to introduce new talents at the local level, while granting 23 awards for film competitions, and 6 awards for the unexecuted script competition. In this edition, the Festival recorded an increase in its overall statistics. The number of applications submitted to the Festival reached 1,325 submissions, of which 631 were selected, including 401 scripts and 230 films. This number of nominated submissions represents a significant increase compared to the past two years (214 and 89 submissions respectively).⁽³⁴⁾ Of these, 78 films were selected to participate in the Festival's screenings, distributed between 27 parallel film screenings and 51 film screenings competing for the Golden Palm Awards "Palme d'Or" (6 feature-length films, 28 short films, and 17 documentaries), compared to 36 competing films in the Eighth Edition. This represents a significant increase from the previous two years (Figure 14). However, it should be noted that the festival awards' tracks have grown this year – as will be seen later this chapter in the Creativity Indicator – which may have a direct impact on the rise in the number of nominated and selected films.

In the 2023 edition, the Festival included four film screening programs: The Competition's Nominated Film Screenings, the Parallel Film Screenings, the Children's Film Screenings, and the Comedy Film Screenings, the latter of which was selected as a theme for this year's edition. In the context of the festival's role as a catalyst for the film production process in general, which is not limited to film screenings, the 2023 edition presented 15 enrichment and scientific programs, varying between cultural seminars, advanced classes (Master Class), dialogue sessions, in addition to five training workshops, and two script development labs. The production market also included 20 authorities from sponsors, production and distribution companies, and key sector players. 67 projects were submitted to the production market, which allocated 39 awards to the market's winning projects between monetary and service awards. In addition, the Festival presented 17 knowledge publications as part of its annual series of books, research and translations on topics, such as cinema, film analysis and criticism, etc.⁽³⁵⁾



Figure 14: Number of Films Nominated to Compete in the Saudi Film Festival in the 2021 - 2023 Period⁽³⁶⁾

Table 3: Films Competing in the Feature-Length Film Competition at the Saudi Film Festival in 2023⁽³⁷⁾

Director Name	Nationality	Film Title	Language	Category
Mohamed Nasser Al- Salman	Saudi	Raven Song	Arabic	Comedy
Gigi Hozimah	Saudi	The Abandoned Place	English	Drama
Mansour Assad	Saudi	The Slave	Arabic	Thriller
Khalid Fahad	Saudi	Valley Road	Arabic	History
Saeed Ali Al-Sabbagh	Iraqi	The Last Postmen	Arabic	Drama
Qutaiba Mohammed Aljanabi	Iraqi	The Woodman	Arabic	Thriller

Coinciding with the Festival, the Film Criticism Forum was held at the Ithra Center in Dhahran, as part of a series of forums held in 2023 in six cities around the Kingdom: Jeddah, Dhahran, Tabuk, Al-Qassim, Abha, and Riyadh, in a new approach towards highlighting the critical, theoretical, and intellectual aspects of filmmaking. This Forum included dialogue sessions and lectures discussing various film and cinema-related issues, their analytical and intellectual theories and economics, and other new topics, with the participation of researchers, artists, and academics from all over the world.⁽³⁸⁾ The growth in festivals' activities and the number of films submitted also extended to the Third Edition of the Red Sea International Film Festival, which screened a total of 28 Saudi films (8 feature-length films and 20 short films), similar to last year's edition. However, when

looking at the number of submissions, it should be noted that their numbers have increased this year, reaching 184 Saudi films (22 feature-length films, 157 short films, and 5 documentaries),⁽³⁹⁾ at a growth rate of nearly 40% compared to last year, which recorded 132 submissions.⁽⁴⁰⁾ The steady increase in the number of submissions year after year comes as a continuation of the state of activity witnessed by this modern sector, which was monitored by the Film Production Indicator. A total of 23 short films and 17 feature-length films from Asia, Africa, and Arab countries were submitted to the Red Sea Competition. Among them were 5 films, some of which were solely produced by the Kingdom of Saudi Arabia, while others were co-produced (Table 4).⁽⁴¹⁾ 19 Saudi short films also participated in the New Saudi Cinema Program.⁽⁴²⁾

Table 4: List of Feature-Length Films Produced from the Kingdom and Submitted to the Red Sea Feature-Length Film Competition in 2023.

Film	Director	Production Country
Night Courier	Ali Al-Kalthami	Kingdom of Saudi Arabia
Norah	Tawfik Alzaidi	Kingdom of Saudi Arabia
Backstage	Afef Ben Mahmoud and Khalil Benkirane	Morocco, Tunisia, Belgium, France, Qatar, Norway, and Kingdom of Saudi Arabia
Behind the Mountains	Mohamed Ben Attia	Tunisia, France, Belgium, Italy, Kingdom of Saudi Arabia, and Qatar
Inshallah a Boy	Amjad Al-Rasheed	Jordan, Kingdom of Saudi Arabia, Egypt, France, Qatar

The Red Sea Souk included the Business Proposals Program for projects-in-progress to support post-production, in addition to seminars and networking sessions. It also included the Project Market that supports the development and production phases, and finally, the Talent Days dedicated to promising filmmakers, which offer workshops, programs, and dialogue sessions by experts and specialists from around the world.⁽⁴³⁾

Music

The Report on the State of Culture continues to monitor the state of commercial music production by relying on Rotana Company's production and distribution data, which serve as an indicator of the state of music production in the Kingdom, being one of the most prominent Saudi companies in this field, specifically through the number of singles and albums produced and distributed by Saudi singers, as an alternative to the sector's central numbers, which are not yet available.⁽⁴⁴⁾ In addition to what has been stated in the report's previous editions, the indicator expanded this year to include the musical production of non-Saudi singers to enrich analysis and comparison, while taking into account the link between the production state in the Kingdom and regional production, which is reflected in the production of the Saudi Rotana Company that extends to various

Arab countries. Based on the available data, 2023 has reached a record high of singles in the past four years, with a total of 52 songs, including singles performed by male or female singers, as well as singles performed by a group of male or female singers (Figure 15). This growth is attributed to an increase in the number of songs performed by female singers, which is the highest increase in female production in the past four years, with a growth of 600% over the previous year, in addition to the release of five songs performed by groups, after being absent last year. As for male singers' production, it dropped to 33 songs, as it was in 2020, but is still higher than its lowest level, which was 25 songs in 2021. However, this does not eliminate the large gender gap in production (Figure 16).

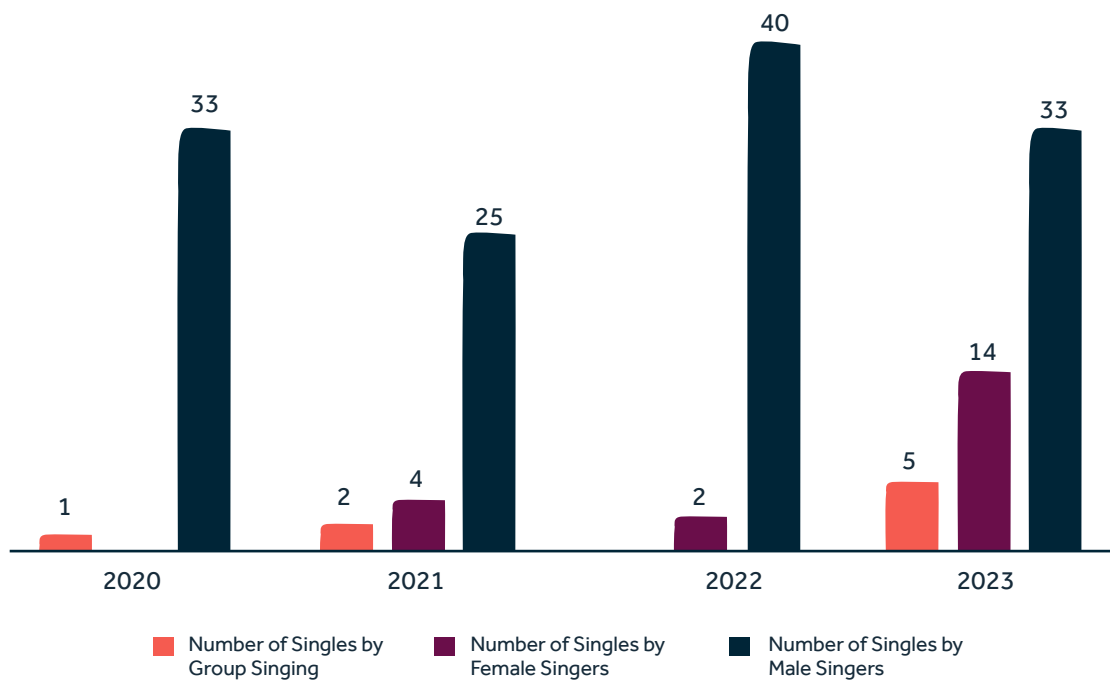


Figure 15: Number of Singles by Saudi Singers during the 2020 - 2023 Period



As for album production in the Kingdom, the available data did not record the release of any albums by a Saudi female singer or group for the third consecutive year. As for male singers, their album production dropped to three albums, compared to eight albums in 2022, indicating that music production is moving towards singles instead of albums.⁽⁴⁵⁾

With the expansion of singles production by nationality in 2023, the production of non-Saudi male and female artists is ahead of their Saudi counterparts, although the difference is small in regards to female singer production. The data here also shows that there is a huge gender gap in the production of non-Saudi artists, with male singers producing more singles than female singers by a large margin. (Figure 17)⁽⁴⁷⁾

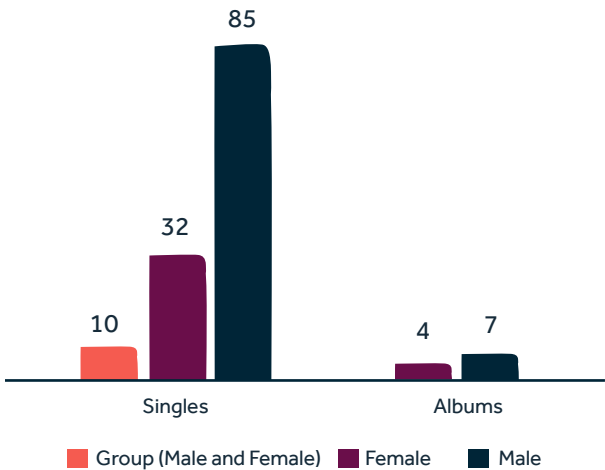


Figure 16: Number of Albums and Singles in 2023 by Singer's Gender⁽⁴⁶⁾

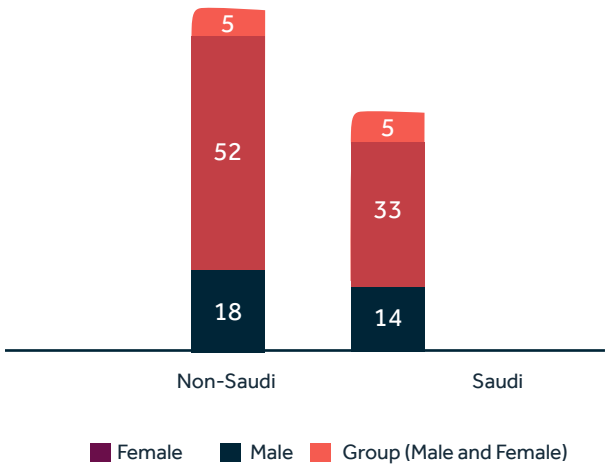


Figure 17: Total Number of Singles by Singer's Nationality in 2023

Podcasts

The Digital Radio (Podcast) Production Indicator focuses on a special survey conducted in 2023 for the purposes of the report on a sample of programs that focus their content on cultural fields.⁽⁴⁸⁾ The data provided by the survey sample presents an outline for the content of these programs, indicating the diversity of the cultural fields involved in such productions. As shown in (Table 5), the popular culture, music, publishing, and book

fields were among the most produced podcast topics this year. Other podcasts discuss film, language, theatre, and other fields. Certain cultural sectors are absent from this type of production, such as culinary arts, fashion, and visual arts, which need to be viewed as untapped publishing fields to attract different audience demographics.

Table 5: Number of Episodes Produced in a Sample of Podcasts Related to the Cultural Field in the 2022 - 2023 Period

Podcast	Field	Number of Episodes in 2023
Akl Ghair Hadi Podcast	Popular Culture	10
Al-Hewarat Al-Marifia Podcast – by the King Abdulaziz Public Library		58
Qafilah Podcast – by the Qafilah Magazine		1
1949 Podcast – by the Ministry of Culture		20
Al-Molhaq Al-Thaqafi Podcast		8
Al-Nadi Podcast	Music	16
Musiqana Podcast – by the Music Commission		1
Asharq Podcast – Lel Ghenaa Kessa		22
Lawha Podcast	Publishing and Books	2
Kotobiology Podcast		13
Asharq Podcast – Kotob Ghayartna		15
Asmar Podcast	Literature	11
Joulan Podcast		12
Lamahat Podcast	Film and Books	1
Kham Podcast	Film	9
Al-Fosha Podcast	Heritage	6
Lasen Podcast	Language	1
Tashakeel Podcast	Theater and Performing Arts	8
Shorfa Podcast - Samawah	General	27
Abjoura Podcast		15
Finjan Podcast – by Thamanya	Others	37



Theater and Performing Arts Production

As noted in the report's last edition, the theater and performing arts sector continues its exponential growth in the number and level of productions. This is partially due to the recovery brought about by the organization of festivals, which was reflected in the increase in the number of plays and live performances of all types and the diversity of their performances. The most prominent of these are the Riyadh Theater Festival and the Second Edition of the Qemam Festival for Mountain Performing Arts in Asir. As for the sector's organizational level, which saw several changes, the most important of which was the reorganization of the

Saudi Arabian Society for Culture and Arts (SASCA) under the umbrella of the National Center for the Non-Profit Sector (NCNPS),⁽⁴⁹⁾ SASCA and the Theater and Performing Arts Commission emerged with their activities as the two largest authorities in providing performances. In addition, the number of authorities providing performances have varied after being limited in the past. The indicator also monitored a diversity in this year's performances, the most prominent of which were children's theater plays, which recorded their highest number in the past five years.

Theatrical Plays

In 2023, the number of theatrical plays has significantly increased, with a total of 221 plays and 97 children's theater plays,⁽⁵⁰⁾ compared to 150 plays and 36 children's theater plays in 2022. However, the increase in this year's plays does not necessarily represent an increase in production, but rather reflect the expansion in the coverage and monitoring of players in this field compared to the previous year, or the possibility of new players entering the theater sector. This increase can be partly attributed to the sector's vitality, specifically through theater festivals, the most important of which is the Riyadh Theater Festival, whose founding edition was held at the Princess Nourah bint Abdulrahman University Conference Center. The Theater and Performing Arts Commission organized a festival aiming to revitalize the theater sector, support local production, and discover talents through holding workshops and intellectual seminars with the participation of playwrights and specialists from Gulf and Arab countries. The festival's plays were presented in eight cities across the Kingdom, in which 20 theater troupes participated. Ten plays qualified to compete for the festival's awards.⁽⁵¹⁾ With similar goals, the third edition of the Ithra Short Play Contest was held, an annual contest dedicated to plays that do not exceed 25 minutes, targeting theater troupes in the Kingdom. In this contest, eight plays were presented,⁽⁵²⁾ in addition to workshops and training programs provided by local and international experts.⁽⁵³⁾

Overall, based on this year's plays (Table 6), SASCA, the oldest incubator for playwrights' activity, was the largest implementing authority of theatrical plays for the second consecutive year, by holding a total of 103 plays, including children's theater plays, in its various branches around the Kingdom, with a growth rate of 45% over last year. This was after its plays declined in the period from 2019-2021 - due to organizational and structural changes in the theater sector following the establishment of the Ministry of Culture and the Theater and Performing Arts Commission (Figure 18).⁽⁵⁴⁾ The General Entertainment Authority (GEA) came in second place with a total of 54 plays,⁽⁵⁵⁾ followed by the Theater and Performing Arts Commission with 14 plays.⁽⁵⁶⁾ The Commission's activity has significantly increased this year. Not only did it perform plays, but it also provided financial and logistical support to produce plays for troupes and associations,

being one of the key players in the sector. Furthermore, university theater performances rose to 13 plays. Such can be explained through the holding of the third edition of the University Theater Festival for Saudi Universities in 2023, featuring the Duo Drama Theater, a theater based on only two actors on stage. This Festival was held at the King Saud University Theater in Riyadh, in which ten theater troupes participated.⁽⁵⁷⁾ The sector's general activity should be mentioned here, which was also monitored in the Cultural Participation Chapter, with a notable increase in the number of amateur clubs established in the Theater and Performing Arts Sector for the second consecutive year.⁽⁵⁸⁾



Table 6: Number of Theatrical Plays by Implementing Authority and Theater Type in 2023

Authority	Theatrical Play	Theatrical Play Contest	University Theater	Total
SASCA Branches	72	2	-	74
General Entertainment Authority (GEA)	54	-	-	54
Theater and Performing Arts Commission	14	-	-	14
Civil Associations and Institutions or Theatrical Production Companies	5	-	-	5
Ministry of Culture	4	-	-	4
Ithra	4	8	-	12
Literature, Publishing and Translation Commission	2	-	-	2
King Abdulaziz Public Library	2	-	-	2
Theatrical Clubs	1	4	-	5
Theater Troupes	1	14	-	15
Universities	-	-	13	13
Total	159	28	13	200

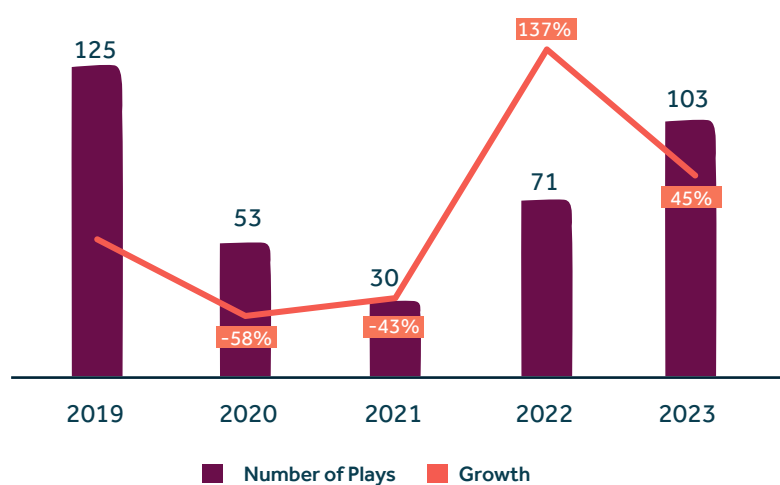


Figure 18: Number of Theatrical Plays Presented by the SASCA in the 2019 - 2023 Period⁽⁵⁹⁾

Children's theater plays ranged between ones presented by the Theater and Performing Arts Commission, which were the highest in terms of numbers,⁽⁶⁰⁾ and others presented by the SASCA branches,⁽⁶¹⁾ followed by plays presented by the General Entertainment Authority,⁽⁶²⁾ and finally those presented by the King Abdulaziz Public Library (Figure 19).⁽⁶³⁾ These 97 performances are the highest in the past three years, indicating a return of people's interest in this type of theater after its decline since the pandemic.⁽⁶⁴⁾

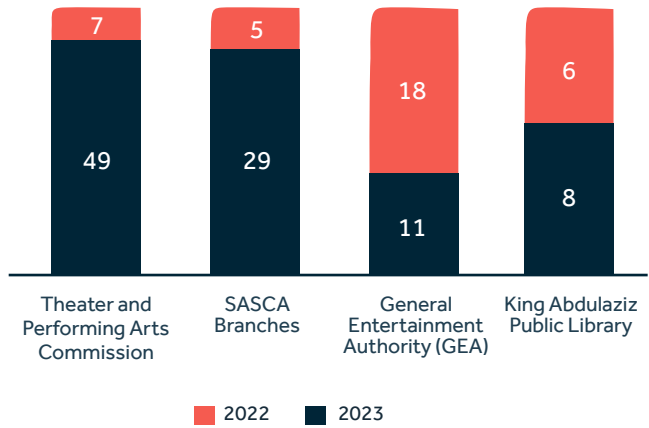


Figure 19: Number of Plays dedicated to Children's Theater in the 2022 - 2023 Period, by Implementing Authority



Live Performances

As is the case with theatrical plays, the sector's movement extended to live performances, reaching a total of 469 performances, significant increase of 95% compared to last year.⁽⁶⁵⁾ Traditional Performing Arts remains the type with the highest number of performances, accounting for 75% of this year's live performances, followed by stand-up comedy. The number of musical performances has more than doubled compared to last year, ranking third (Figure 20).⁽⁶⁶⁾ It is also shown here that the performances of the Theater and Performing Arts Commission have made progress. The performances' organizers around the Kingdom are in the lead by a large margin compared to the rest of the organizers, followed by SASCA, and then Ithra Center, whereas the number of performances presented by the remaining organizers are close to one another (Figure 21). This progress can be attributed mainly to the holding of quality performance festivals, such as the Annaham Festival in Dammam specializing in marine performing arts and the Al-Nahma art, with 13 performance troupes participating therein from the

Kingdom and GCC states, along with the participation of 17 individual performers of the Al-Nahma art.⁽⁶⁷⁾ Furthermore, the second edition of the Qemam Festival for Mountain Performing Arts was held in Asir, which saw improvements in its activities compared to its first edition in 2022. More than 14 performing arts troupes from around the world participated to present 25 diverse performing arts, in addition to 16 troupes from various cities in the Kingdom, which in turn presented 16 performing arts over a period of 7 days. The Qemam Festival is characterized by its specialization in the performing arts, while aiming to introduce the local community and tourists to the origins of mountain performing arts and create opportunities for talents in the region.⁽⁶⁸⁾ The Festival also provides theatrical plays, including children's plays.⁽⁶⁹⁾ As shown in (Figure 22), the distribution of performances among regions showed the Asir Region in the lead, followed by the Eastern Province in second place, and Riyadh in third.

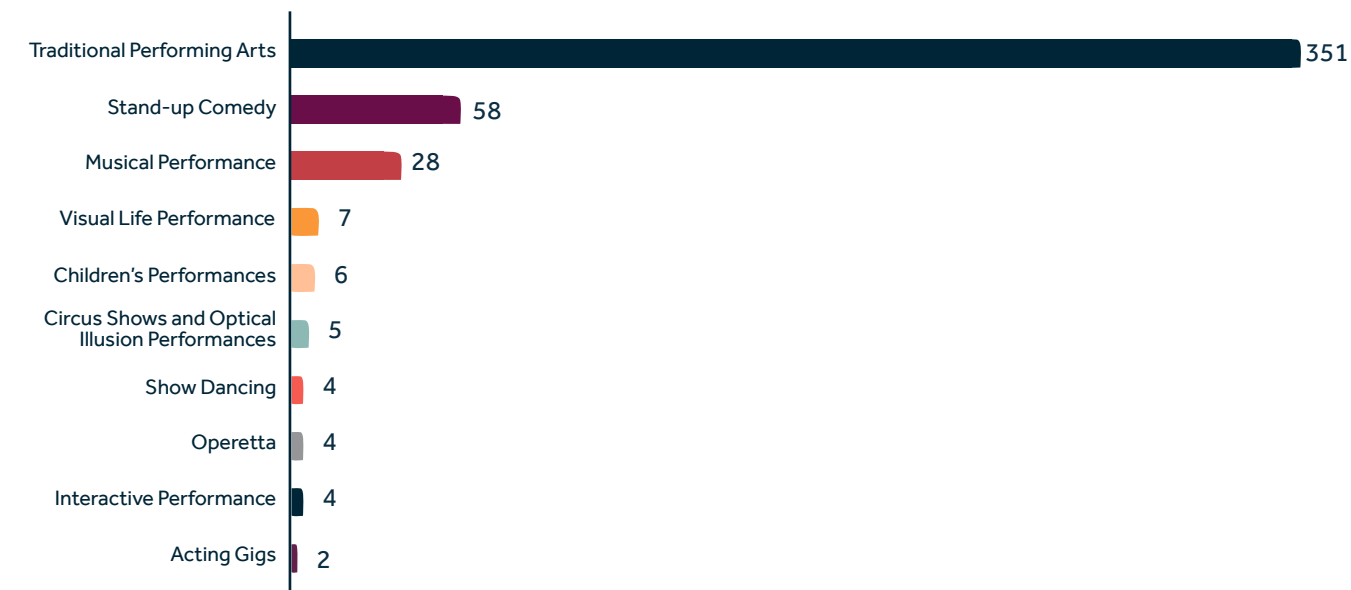


Figure 20: Number of Live Performances held in 2023 and their distribution by Performance Type⁽⁷⁰⁾

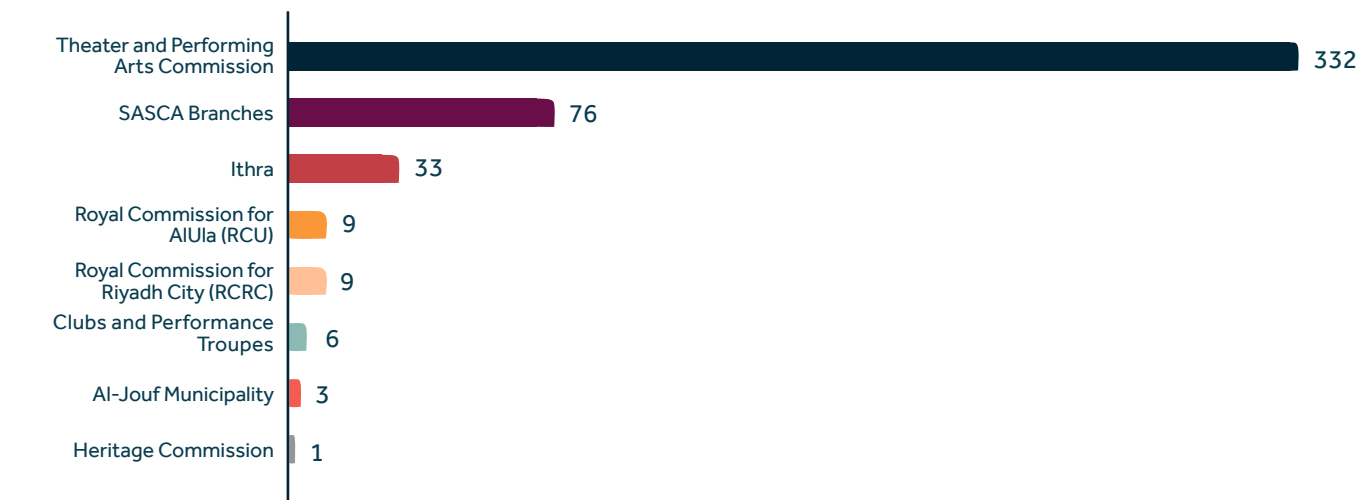


Figure 21: Number of Live Performances held in 2023 and their Distribution by Organizer⁽⁷¹⁾



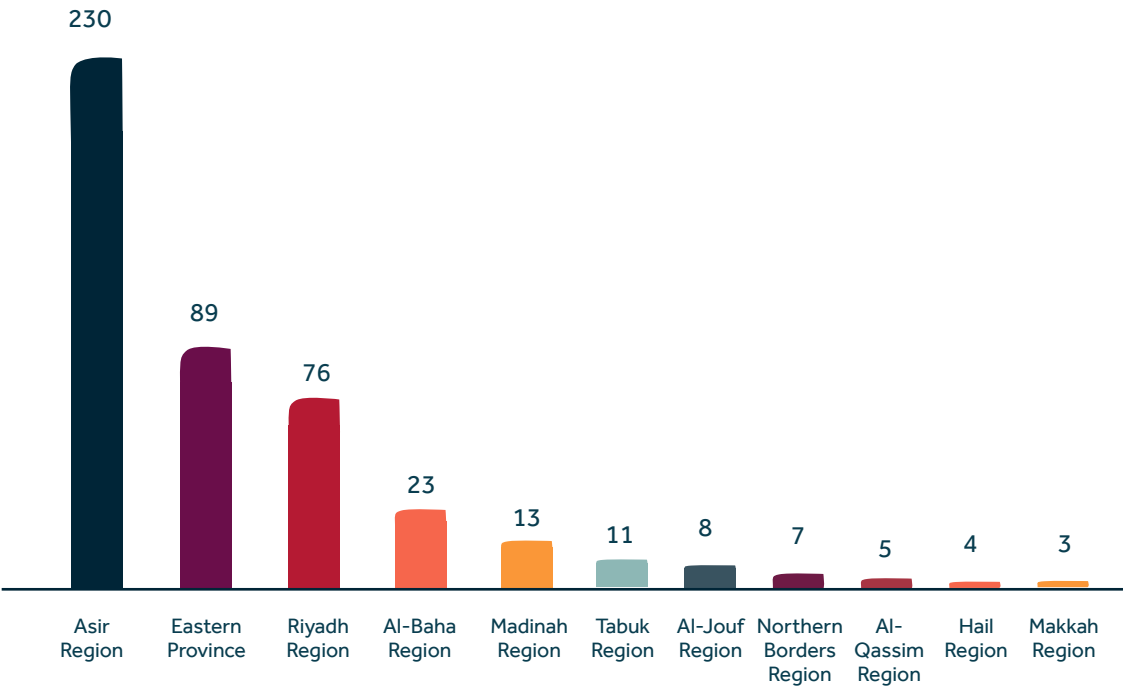


Figure 22: Distribution of Live Performances held in 2023 by Region



Arts, Designs and Cultural Handicrafts Production

Visual Arts

This indicator measures the production level in the visual arts sector by monitoring art exhibitions organized by government agencies, universities, and non-commercial art institutions during 2023, and the number of artworks displayed therein. The indicator defines an art exhibition as “a collection of artworks displayed in art or commercial galleries, open areas, or other exhibition spaces, whether for a single artist or a group of artists, and is typically temporary in nature.”⁽⁷²⁾ Despite the promising activity in art exhibitions presented by amateur clubs and specialized associations in the sector, the report monitored that only 283 art exhibitions were organized by non-commercial art institutions in 2023. This is in addition to university exhibitions, a relative decline from 2022, in which 304 exhibitions were held.⁽⁷³⁾ This decline can be partly attributed to organizational transformations within the visual arts sector, including the non-profit cultural sector, such as the reorganization of the Saudi Arabian Society for Culture and Arts (SASCA) under the umbrella of the National Center for the Non-Profit Sector (NCNPS).⁽⁷⁴⁾ It should be noted that SASCA experienced a decline in hosting art exhibitions this year – contrary to what was monitored in Theater and Performing Arts Production Indicator – with 96 art exhibitions held in 2023 compared to 209 exhibitions in 2022, marking a decline of 54%.⁽⁷⁵⁾

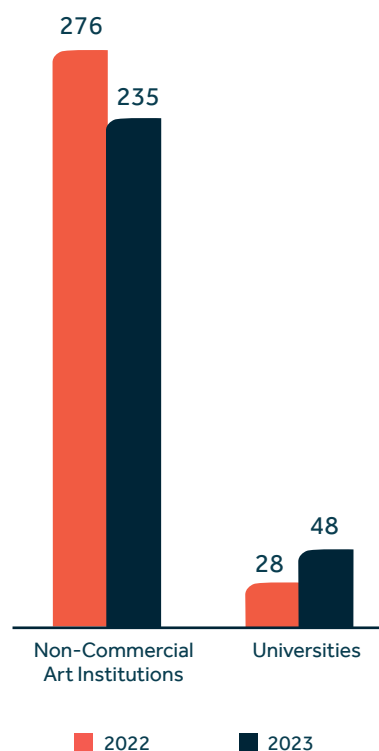


Figure 23: Number of Art Exhibitions Between 2022 and 2023 by Organizer⁽⁷⁶⁾

However, several qualitative exhibitions emerged this year, exploring new artistic genres that align with the sector's technological and artistic developments, such as light arts, digital arts, industrial arts, and others. For example, the Ministry of Culture, in collaboration with the Visual Arts Commission, launched the "Parallel" Exhibition, a leading Augmented Reality (AR) exhibition in the Kingdom. The Exhibition was held in 20 locations across Riyadh, Jeddah, Al-Khobar, and Dammam, featuring ten artists specialized in employing AR technologies in visual arts, 60% of whom were Saudi nationals. The Exhibition represented artists' visions of what nature might look like in the future, blending the digital and real worlds with artistic imagination.⁽⁷⁷⁾ Another notable exhibition was the Industrial Art Exhibition organized by the Ministry of Culture in Dhahran, involving 35 Saudi and global artists. The displayed works explored the links between industrial and aesthetic aspects, as industrial materials were recycled and converted into works of art.⁽⁷⁸⁾

Furthermore, the Riyadh Art Foundation organized the third edition of the Noor Riyadh Festival, being the world's largest celebration of light arts, featuring 109 artists and 124 artworks. The Foundation also organized the fourth edition of the Tuwaiq Sculpture Symposium under the theme "Extent of Harmony," an experience offering everyone a chance to witness the artistic journey of 30 Saudi and global artists in creating public sculptures from granite and Riyadh stone in a living sculpture environment over 26 days.⁽⁷⁹⁾ In addition, the Rsh Street Art Festival – organized by the Visual Arts Commission in Riyadh – brought together 44 artworks distinguished by their remarkable diversity, predominated by murals with 26 pieces, while the rest of the works included sculptures, short films, motion picture, archival photos, sound installations, light installations, virtual reality (VR),

and more. The works were created by 35 artists from diverse cultural and social backgrounds, including 25 male and 10 female artists.⁽⁸⁰⁾ Another notable exhibition was the Islamic Arts Biennale, where this year's edition was entitled "Awwal Bait" held at the Hajj Terminal of King Abdulaziz International Airport in Jeddah. The Exhibition featured 48 artists, 57% of whom were females, while displaying over 500 contemporary artworks, in addition to artifacts representing the history of Hajj. The Exhibition centered around two main themes: Qibla and Hijra.⁽⁸¹⁾

Among the highlights of this year's report was the promising activity in hosting art exhibitions presented by amateur clubs and specialized associations in the visual arts sector, as detailed in the Cultural Participation chapter in the Non-Profit Organizations Indicator,⁽⁸²⁾ since a total of 39 exhibitions were organized, topped by the visual arts, photography, and mixed exhibitions.⁽⁸³⁾ The predominance of geographical centralization was observed in the distribution of these exhibitions, with over half of them concentrated in Riyadh and Mecca regions.

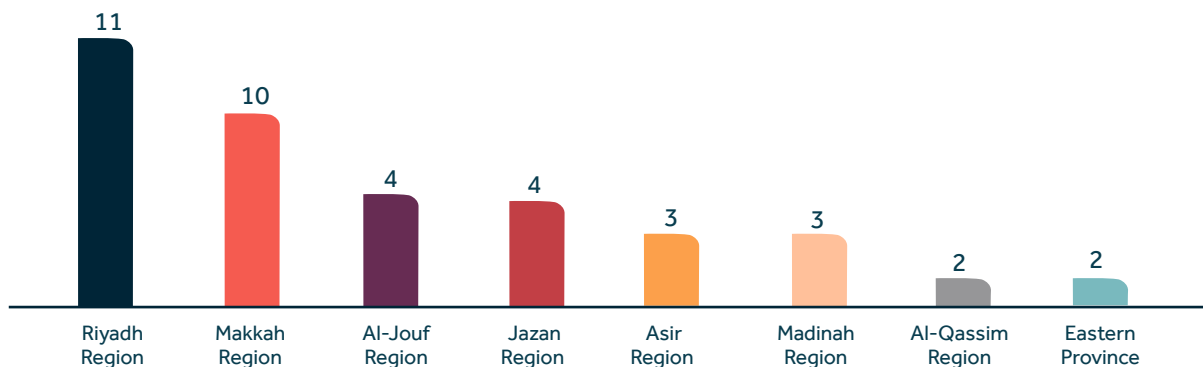


Figure 24: Number of Art Exhibitions by Non-Profit Cultural Organizations in 2023 by Region⁽⁸⁴⁾

Architecture and Design

The year saw significant developments in the design sector, marked by the launch of the “Designed in Saudi” seal, a national initiative by the Architecture and Design Commission aimed at developing the Kingdom’s industrial design sector and promoting local production in the field. The seal serves as a quality mark, subject to several assessment criteria, starting with the design concept and ending with implementation. Seven products were awarded the “Designed in Saudi” seal in 2023 (Figure 25). As for exhibitions and festivals, the Architecture and Design Commission organized the second edition of the Saudi Design Festival in Riyadh, featuring 120 artists across various tracks, including: architectural design, interior design, graphic design, furniture design, jewelry design, interactive design, and more. The Festival’s previous edition was the Saudi Design Week, which ran for seven years since its inception in 2014 before the Architecture and Design Commission turned it into a festival in 2022, aiming to

establish Riyadh as a city of interactive designs. The Festival’s second edition saw an increase in the number of sites in which exhibitions were held. They were spread across four different areas in Riyadh, compared to a single site in the inaugural edition.⁽⁸⁵⁾ Among the examples of exhibitions held by other authorities was the “Saudi International Exhibition for Contemporary Decoration and Construction” held for the first time at the Jeddah Chamber of Commerce, serving as a regional platform for local and international companies to capitalize on the great opportunities in the Kingdom’s building and interior design market.⁽⁸⁶⁾ Universities were also active in hosting exhibitions. The report recorded ten exhibitions organized by design departments, most of which were interior design, graphic design, and product design exhibitions as shown in (Table 7), while architectural heritage exhibitions were absent, despite topping the architecture and design exhibitions in 2022.⁽⁸⁷⁾



Figure 25: Products Awarded with the “Designed in Saudi” Seal in 2023⁽⁸⁸⁾

Table 7: Examples of Exhibitions in Architecture and Design Held in 2023⁽⁸⁹⁾

Exhibition Name	Exhibition Type	Organization	City
Saudi International Exhibition for Contemporary Decoration and Construction ⁽⁹⁰⁾	Interior Design	Jeddah Chamber of Commerce	Jeddah
Designed in Saudi Products Exhibition	Product Design	Architecture and Design Commission ⁽⁹¹⁾	Riyadh
Designathon (First Edition)	Design		Riyadh
Saudi Design Festival (Second Edition)	Design		Riyadh
Accommodations Exhibition ⁽⁹²⁾	Architecture	Hayy Jameel in collaboration with Architecture and Design Commission	Jeddah
Tawal Exhibition (Third Edition) ⁽⁹³⁾	Interior Design	King Abdulaziz University in collaboration with Hayy Jameel	Jeddah
Tabadda 2023 Exhibition	Graphic Design	Princess Nourah bint Abdulrahman University ⁽⁹⁴⁾	Riyadh
Fikr Exhibition (Third Edition)	Product Design		
Bu'd Exhibition	Graphic Design		
Zawaya Exhibition	Interior Design		
Murtakab Exhibition	Interior Design	University of Jeddah ⁽⁹⁵⁾	Jeddah
Ibtikarat Exhibition	Interior Design		
Interior Design Department Exhibition	Interior Design	Al-Jouf University ⁽⁹⁶⁾	Al-Jouf
Kayan Design Exhibition	Interior Design	Al-Baha University ⁽⁹⁷⁾	Al-Baha
Spirit of Design Exhibition	Interior Design		



Fashion

The Report recorded 29 fashion exhibitions held in 2023, most of which were held by universities amounting to 22 exhibitions, topped by the University of Jeddah with 9, followed by King Faisal University and Princess Nourah Bint Abdulrahman University (Figure 26). The exhibitions covered a range of themes, including traditional fashion, contemporary fashion, and digital design, along with enhancing sustainable consumption in the fashion field.⁽⁹⁸⁾ Among these were five notable exhibitions under the organization or participation of the Fashion Commission, most of which were concentrated in Riyadh. The first of these was the first edition of the Riyadh Fashion Week (RFW), a platform designed to support Saudi designers and enable Saudi brand owners to establish connections with local and international buyers through 16 exhibitions featuring modern and traditional men's and women's fashion and couture designs. Thirty Saudi brands participated including designer Mohammed Ashi, one of the first Saudi designers to participate in the Haute Couture Week in Paris and a member of the Haute Couture Federation. He held his first fashion exhibition in Riyadh during Fashion Week.⁽⁹⁹⁾ Furthermore, the Commission organized the "Ramadan Pop-Up" Exhibition, featuring over 160 male and female fashion designers from the "Saudi 100 Brands" Program, while showcasing designs and pieces related to the month of Ramadan.⁽¹⁰⁰⁾ In addition, designers from the "Saudi 100 Brands" Program participated in designing fashion for the 2023 Saudi Cup, and the Commission issued the third edition of the Saudi Cup's Dress Code Guide in order to encourage visitors to draw inspiration for their fashion from Saudi traditions and heritage.

Interest in fashion products is not limited to technical or commercial considerations, but also their environmental and social impacts. In this context, the fourth edition of the Fashion Forum - organized by the Fashion Commission - was distinct this year compared to its predecessors. It was held in partnership with the third edition of the "Hia Hub" Conference. This significant expansion of both events featured prominent figures and leading brands in fashion, art, and culture fields from around the world. The event included dialogue and educational sessions, virtual platform workshops, interactive exhibitions, as well as live art and music

performances.⁽¹⁰¹⁾ It should be noted that the Fashion Forum - first launched in 2019 - was a unique event in the Kingdom's fashion sector, featuring conversations with fashion specialists from around the world in order to share experiences on the fashion sector's global trends, as well as topics including sustainability, innovation, diversity, and entrepreneurship.⁽¹⁰²⁾ In the same context, the Commission organized the fourth edition of the "Swap Shop" Initiative, to be held this year for the first time in Jeddah. Previous editions of the initiative were organized in Riyadh, since its inception in 2021, aiming to enhance a culture of sustainability by exchanging and recycling used clothes and accessories in order to raise awareness of sustainability among exhibition visitors in a practical manner, and through the accompanying activities and programs.⁽¹⁰³⁾



Another notable exhibition was the "Van Cleef & Arpels" Exhibition at the National Museum of Saudi Arabia in Riyadh, entitled "Time, Nature, and Love," organized by the Museums Commission. The Exhibition showcased a collection of pieces created by the "Van Cleef House," including 280 pieces of jewelry and watches, along with over 90 pieces from the House's original archives.⁽¹⁰⁴⁾ The General Entertainment Authority (GEA) also organized the fourth edition of the "Ana Arabia" Exhibition, with the participation of 275 female designers, whose designs reflected contemporary global fashion trends in the fashion, jewelry, perfumes, and decoration fields.⁽¹⁰⁵⁾

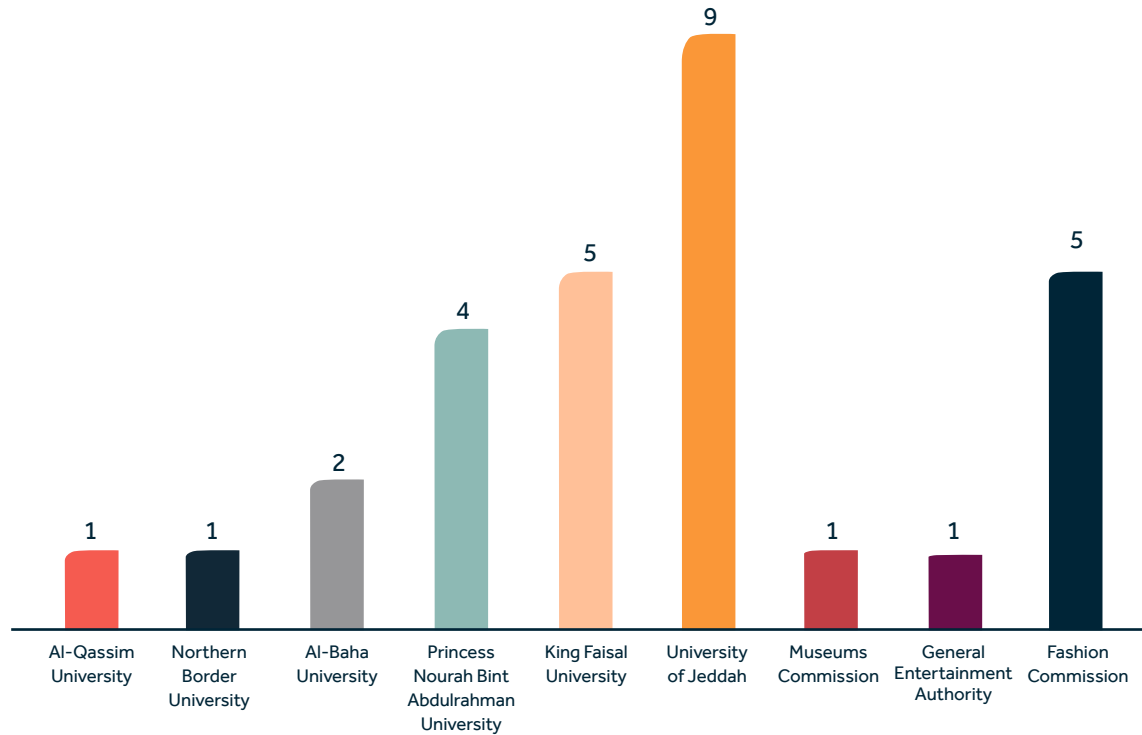


Figure 26: Number of Fashion Exhibitions Held in 2023 by Organizer⁽¹⁰⁶⁾

Cultural Handicrafts Exhibitions⁽¹⁰⁷⁾

The Report documented promising activity in cultural handicrafts exhibitions, with ten held in 2023, while highlighting the Heritage Commission's role in organizing eight of them (Table 8). Riyadh hosted the highest number of exhibitions, three, followed by two exhibitions in each of the Eastern province and Madinah, and a single exhibition in Al-Qassim, indicating a degree of diversity, but still requiring further development and inclusion to cover the entire heritage in various regions of the Kingdom. Despite the abundance of institutions concerned with the conservation and development of the cultural handicrafts sector in the Kingdom, these institutions were notably absent from activating the role of exhibitions and events, underscoring the importance of the complementary role of the private and non-profit sectors in filling this gap.

Among the most prominent exhibitions was the first edition of the Saudi International Handicrafts Week (Banan) in Riyadh, aimed at showcasing the creative work of male and female cultural handicrafts practitioners, introducing the Kingdom's rich heritage, and providing a platform to display skills and innovations in 11 sections reflecting various cultural handicrafts fields: metallic, textile, palm, leather, wooden, and pottery works, binding and gilding, trinkets and jewelry, needlework, and supporting cultural handicrafts.⁽¹⁰⁸⁾ The Heritage Commission also participated in the second



edition of the "Made in Saudi" Exhibition, a national initiative launched by the Saudi Export Development Authority within the National Industrial Development Program. The Commission participated with a collection of traditional handicrafts to promote them as an integral part of the Kingdom's industry.⁽¹⁰⁹⁾ The Commission also participated in the Crafts Market as part of Misk Art Week, since participating traditional arts products and cultural handicrafts reflected the relationship between heritage and art and the creative heritage of the Kingdom's artists.⁽¹¹⁰⁾

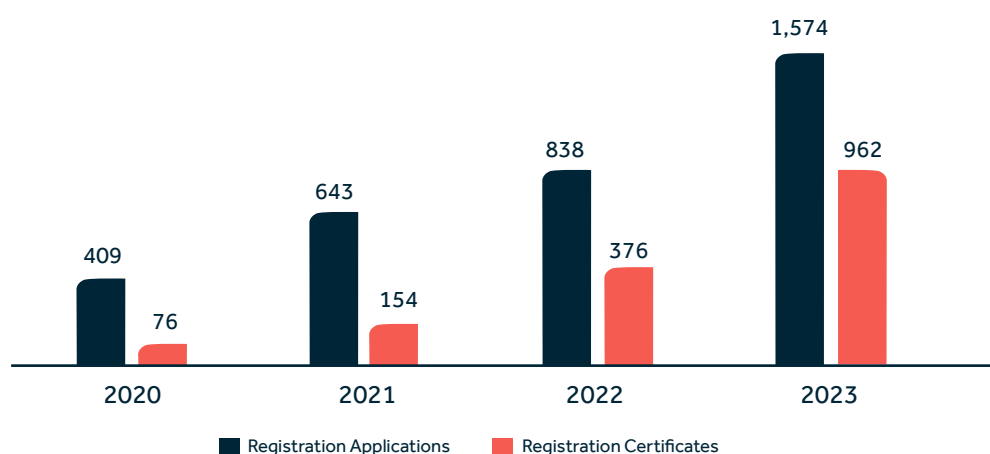
Table 8: List of Exhibitions Organized by the Heritage Commission in 2023⁽¹¹¹⁾

Exhibition Name	City
Saudi International Handicrafts Week (Banan)	Riyadh
Al-Bisht Al-Hasawi Festival	Al-Hofuf
Clay Exhibition and Crafts & Handicrafts Exhibition as part of the 20th Anniversary of the 2003 Convention of the Safeguarding of the Intangible Cultural Heritage	Riyadh
Craftsmen Market on World Heritage Day 2023 ⁽¹¹²⁾	Riyadh
National Day Exhibition in Craft Houses	Madinah
	Buraidah
	Yanbu
	Al-Ahsa

Copyright Works

Following efforts made to preserve intellectual property rights resulting from developments in the Kingdom's Intellectual Property (IP) System as noted in the previous edition,⁽¹¹³⁾ represented in the issuance of the National IP Strategy and the Copyright Regulation in 2022, along with the efforts to raise awareness of various authorities on IP rights, such as the National Workshop on Intellectual Property Rights conducted by the Saudi Authority for Intellectual Property (SAIP)⁽¹¹⁴⁾

, 2023 witnessed a significant rise in the number of applications for optional registration in copyright works, with a growth rate of 88% compared to the previous year. A total of 962 certificates were registered, representing 61% of the total applications, compared to 376 certificates in 2022, which accounted for 45% of total registration applications (Figure 23).⁽¹¹⁵⁾

Figure 27: Growth in the Number of Optional Registration Applications and Certificates for Copyright Works in the 2020 - 2023 Period⁽¹¹⁶⁾

This year, a total of 790 certificates were issued out of 1,221 submitted applications. Written works continued to lead certificates with a total of 582, significantly outnumbering remaining works, followed by artistic and applied arts works, then architectural works, and photographs. However, for the second consecutive year, no certificates were issued for stereoscopic topographical works, despite seven applications being submitted this year and three last year (Figure 28).

The number of certificates issued to individuals in the artistic and applied arts works was higher than those issued to government agencies. The government sector focuses almost exclusively on written works. The registration certificates issued to companies varied, representing 11% of total issued certificates, with a single planning work certificate received by the private sector, the only sector awarded among applicants in 2023. The percentage of female recipients of written works certificates accounted for 30% of total certificates, which included individuals, government agencies, and companies, while male individuals represented the highest percentage of total applicants at 55%, reflecting the size of the gender gap in the literary publishing sector.

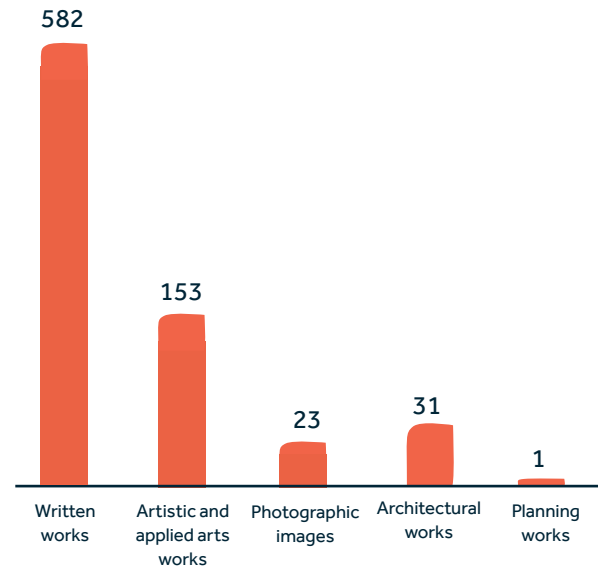


Figure 28: Registration Certificates for Copyright Works in Fields Related to the Cultural Sector in 2023⁽¹¹⁷⁾

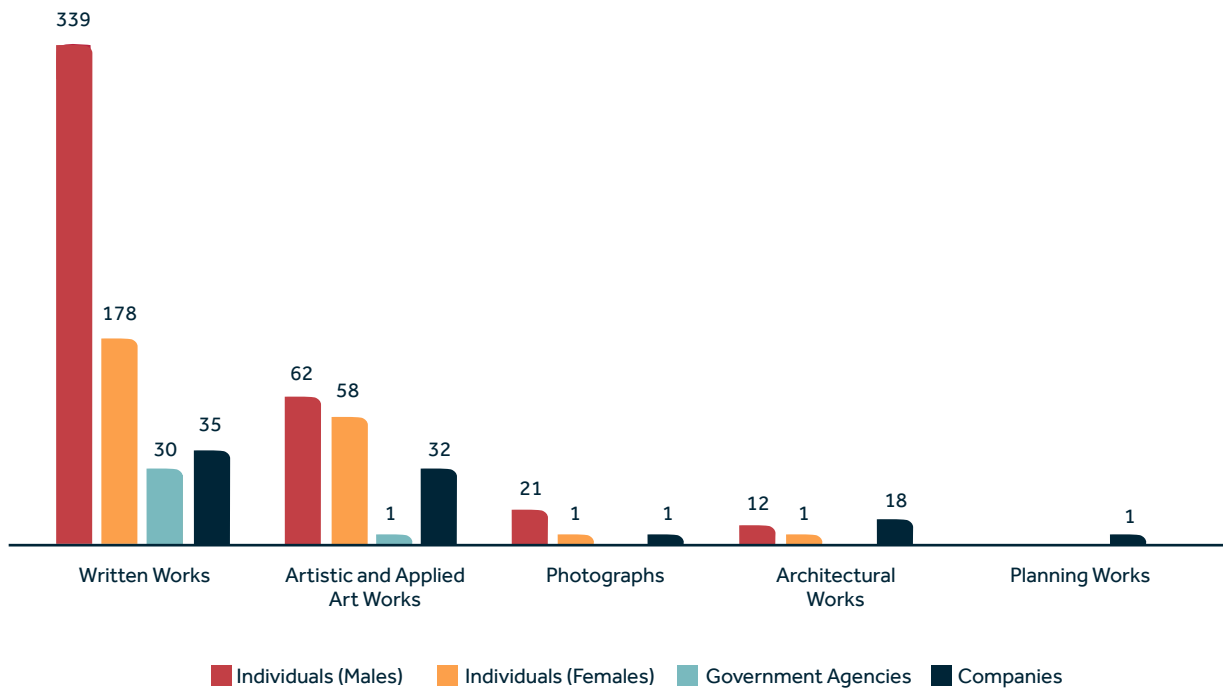


Figure 29: Number of Registration Certificates Issued for Copyright Works in Fields Related to the Cultural Sector and their Distribution by Applicant.⁽¹¹⁸⁾



Creativity

This section of the Chapter focuses on creativity within the cultural scene by tracking the main local, regional, and global cultural awards won by Saudi figures or authorities. While the Management and Conservation Chapter addresses the value of these awards, this section provides an objective perspective of the artistic and cultural trends identified by these awards as general indicators of the creative state in cultural sectors. The Report identified 17 National cultural awards, 176 local awards, and 28 regional and international awards. As for local awards, the film sector received the highest number, thereby reflecting the increasing number of competition tracks at film festivals held in the Kingdom. Furthermore, the activity monitored by the Production Indicator in the theater and performing arts sector was reflected in the number of the sector's awards this year, while extending to the sector's regional submissions that received several awards. New tracks were introduced in the visual arts sector, with some of the sector's works winning regional and global awards, as opposed to last year. The architecture and design sector also excelled in winning local awards.

National Cultural Awards

The third edition of the National Cultural Awards Initiative in 2023 presented awards covering 11 cultural sectors. The number of award tracks increased to 16 tracks with the introduction of two new tracks: the International Cultural Excellence Track,⁽¹¹⁹⁾ to honor international cultural individuals and institutions that have enriched the contemporary international cultural scene, which was awarded to the International Alliance for the Protection of Heritage in Conflict Areas "ALIPH," and the Businessmen and Businesswomen Track, to honor supporters of cultural activity in all cultural sectors, which was awarded to the businessman Abdulrahman bin Mahfouz. The introduction of these two tracks reflects the initiative's keenness on developing the knowledge exchange level and expanding the Initiative's scope beyond the local cultural scene. The "Cultural Personality of the Year" Award was presented to the author Abu

Abdulrahman Ibn Aqeel Al-Zahiri in recognition of his decades of literary and cultural contributions in the language, literature, philosophy, art, Shariah sciences, and history fields, while the "Youth Cultural" Award went to Lubna Al-Khamis, in recognition of her activism in the media field, particularly podcasting.

It should be noted that this year's initiative showed interest in production inspired by Saudi cultural heritage. In the culinary arts sector, Bateel Company Ltd., one of the first companies to introduce chocolate dates to a global audience, won the Saudi Excellence Award 2022. While in the Fashion Track, Charmaleena Jewelry, founded by sisters Hala and Lina El-Khereiji, was awarded, being a luxury Saudi jewelry design house that has launched over 20 collections featuring many pieces inspired by local culture and architecture.

	Abu Abdulrahman Ibn Aqeel Al-Zahiri	
Cultural Pioneer Award		
	Kholoud Attar	
Architecture and Design Award		Youth Cultural Award
	Saudi Research and Media Group "SRMG" (Private Sector Track)	
Cultural Institutions Award (For-profit)		Culinary Arts Award
	Abdulrahman Al-Sudairy Cultural Center (Non-Profit Sector Track)	
Cultural Institutions Award (Non-profit)		Film Award
	Mohammad Ibrahim Yaqub	
Literature Award		Publishing Award
	Maha Al-Faleh	
Translation Award		Fashion Award
	Abdulrahman Mohammed	
Music Award		National Heritage Award
	Manal Al-Dowayan	
Visual Arts Award		Theater and Performing Arts Award
	International Alliance for the Protection of Heritage in Conflict Areas "ALIPH"	
International Cultural Excellence Award		Business Owners Award
		Abdulrahman bin Mahfouz

Figure 30: Winners of the National Cultural Awards in 2023 ⁽¹²⁰⁾

Local Awards

Based on the Report, 21 local awards were presented in 90 tracks, distributed across ten cultural sectors, with the total number of recipients amounting to 177 creators and creative works (Figure 33). The film sector received the highest number of awards, totaling 70, in line with the expansion of the award tracks in film festivals, as stated in the previous chapter. In addition to the competition awards at these two festivals, as detailed in Figures 31 and 32, the Production Market at the ninth edition of the Saudi Film Festival presented 39 awards distributed between financial and service awards, as well as six awards for unexecuted scripts.⁽¹²¹⁾ The Red Sea International Film Festival Souk presented awards via the Red Sea Fund, including the Work-In-Progress Awards, the Red Sea Lodge Awards, and the Project Market. The Souk also offered cash and in-kind awards provided by production and distribution companies for several projects from Asia and Africa.⁽¹²²⁾



Figure 31: The Awards of the Ninth Edition of the Saudi Film Festival 2023⁽¹²³⁾



Figure 32: Winners of the Third Edition of the Red Sea International Film Festival Competition 2023⁽¹²⁴⁾



In the second edition of the Literary Partner Initiative, eight cafes won the title of Best Literary Partner in the competition held by the Literature, Publishing and Translation Commission for literary partners, in accordance with three categories based on the cafes' size, operational, and absorptive capacities. The competition differentiates between cafes' activities and their quality and suitability for visitors (Table 9).⁽¹²⁵⁾ At the Riyadh International Book Fair, the Commission presented two awards to Saudi publishing houses: the International Encyclopedia of Arabic Literature (Adab) won the Excellence in Publishing Award for the Saudi content in its One Hundred Saudi Books Initiative, while the Tkween United Group for Publishing and Distribution won the Excellence in Digital Publishing Award for the digital platforms.⁽¹²⁶⁾ Similarly, in the digital publishing field, the Al-Haramain Electronic Quran Initiative for the Blind won second place in the King Khalid Award in the Development Partners category, presented by the King Khalid Foundation. This Initiative provided a smart device to help the blind memorize the Quran and perform religious rites.⁽¹²⁷⁾

Table 9: The Best Literary Partner Winners in the Second Edition of the 2023 Literary Partner Initiative

Category	Rank	Winning Literary Partner
A	First	Growth Cafe
	Second	Book Club Cafe
	Third	Tone Cafe
B	First	N Cafe
	Second	Paradigm Cafe
	Third	Comma Cafe
C	First	Fox Cafe
	Second	Sharik Cafe
Honorary Awards	Nawat Cafe, Qafeah Cafe, Tawlefah Cafe	

In the language sector, KSGAAL held the second edition of its competition, with Prof. Dr. Suleiman bin Abdulaziz Al-Ayouni winning in the Individuals category within the "Raising Linguistic Awareness and Creating Community Linguistic Initiatives" Track. In the Institutions category, two Saudi institutions won: the Institute of Teaching Arabic to Non-Native Speakers at Umm Al-Qura University in the "Teaching and Learning the Arabic Language" Track, and the Imam Muhammad Ibn Saud Islamic University (IMSIU) in the "Arabic Language Research and Scientific Studies" Track.⁽¹²⁸⁾ The KSGAAL also held the third edition of the Children's Recitation Prize, aiming to raise awareness among younger generations regarding the importance of the Arabic language and develop their linguistic and performance skills. The winners included 19 children from the Kingdom.⁽¹²⁹⁾

In the music sector, the Saudis platform won the Media Excellence Award in the National Song Track for the song "Saheroon," one of the initiatives of the Riyadh Center for Research and Studies.⁽¹³⁰⁾ The Music Commission was awarded a Special Honor Award in the same competition for presenting the Saudi Orchestra and its contribution in bringing Saudi musical heritage to the world.⁽¹³¹⁾ In the Hotel and Hospitality Sector, the 2023 Saudi Hospitality Talent Awards presented two awards celebrating innovation in the field, awarded to Deema Al-Sehli of the Contemporary Foods Company Ltd., who won the Talent Award in the Restaurateur Track, and Murad Al-Johani in the Emerging Chef Track for 2023.⁽¹³²⁾



In the architecture and design sector, several awards and competitions were introduced, most notably the Creative Essay Competition organized by the Architecture Commission, which mainly targets architects and designers and focuses on topics pertaining to national transformations and their impact on cities, the future of design and technology, an introduction to the architecture and design sector, and the sector's critical aspect.⁽¹³³⁾ The winning essays were published in the Ithraayat Magazine issued by the Ithra Center, with the top three places won respectively by: Abdulaziz Mohammed Al-Khalif for "Taught by a Child," Nahar Abdul Fattah for "Artificial Intelligence: Friend

or Foe to the Designer," and Saud Al-Sheikh for "Mega Projects and Globalization".⁽¹³⁴⁾ Riyadh Municipality also launched the "Municipality Award for Architectural and Urban Creativity," aimed at contributing to the enhancement of architectural quality in Riyadh, with two tracks: Architecture Category and Environment and Urban Design Category (Table 10).⁽¹³⁵⁾ Finally, the Arts AIUla Foundation presented the second edition of the AIUla Design Award, awarded to two Saudi institutions: Shaddah Studio for the "Tawa" relaxation chair design, and the Taeab Company for the "AIUla Terrain: Dates Serving Sets" design.⁽¹³⁶⁾

Table 10: Winners of the First Edition of the Riyadh Municipality Award for Architectural and Urban Creativity in 2023

Award Category	Winner
Environment and Urban Design	Urban Improvement Project for the Qasr Al-Hukm
Environment and Urban Design	Bujairi Terrace
Architecture	Public Investment Fund Tower at King Abdullah Financial
Architecture	Shamalat Cultural Center
Architecture	Abdulaziz bin Abdulrahman Al-Fares Mosque

Table 11: Examples of Local Awards Presented in 2023 in the Visual Arts Sector

Organizer	Award	Track	Rank	Winner
Saudi Arabian Society for Culture and Arts (SASCA) in Jeddah	Dia Aziz Portrait Award for Portraiture - Seventh Edition ⁽¹³⁷⁾	-	First	Mansour Alotaibi
			Second	Elaf Siraj
			Third	Zahra Al-Matruk
Ministry of Media	Media Excellence Award ⁽¹³⁸⁾	Photography	First	Saudi Press Agency (SPA)
King Salman Bin Abdulaziz Royal Reserve Development Authority	Irth Award ⁽¹³⁹⁾	Wildlife and Landscapes Category	First	Abdullah bin Abdulaziz Al-Aidi
			Second	Ibrahim Yassin bin Abdulghani Sarhan
			Third	Mazen Luqman bin Ahmed Shafi'i
		Portfolio Category	First	Nader Fahad Radha Al-Shammari
			Second	Farhan Saud Farhan Al-Shammari
			Third	Rashid bin Saleh Albgiq
		Heritage, Archaeology, Wildlife, and Landscapes Category	First	Abdullah Fadl Abdullah Al-Najm
			Second	Faisal Saleh Al-Juraifani
			Third	Duhim Salem Duhim Al-Duhim

Table 12: Awards from the First Edition of the Riyadh Theater Festival in 2023⁽¹⁴⁰⁾

Award	Winner	Play
Best Theatrical Lighting	Abdullah Dawari	"Light" Play
Best Theatrical Costume	Houria Achour	"Taleat Hajir" Play
Best Theatrical Music	Issa Al-Rashed, Omar Al-Khamis, Ahmed Almwyjd	"Sea" Play
Best Theatrical Set Design	Badr Al-Hamidi	"Slap" Play
Best Scenography	Khalid Al-Ruwaie	"Last Shadow" Play
Best Actor	Shehab Al-Shehab	"Sea" Play
Best Actress	Adhwa Fahad	"The Stone" Play
Best Theatrical Script	Abdullah Balies	"Slap" Play
Best Theatrical Direction	Sultan Alnwah	"Sea" Play
Best Integrated Theatrical Presentation	SASCA Troupe in Al-Ahsa	"Sea" Play
Jury Award	Al-Watan Theater Troupe	"Last Shadow" Play



When considering local awards' distribution in the sectors in general, we recorded a rise in the number of awards presented in the theater and performing arts sector in 2023, consistent with the overall growth in the sector's performances and its increased activation through newly established festivals, as indicated by the Production Indicator. The report also observed a similar

number of awards presented in the visual arts sector and the language sector. The culinary arts sector received two awards after being absent from last year's awards, while the heritage sector and the museums sector did not record any local awards for the second consecutive year (Figure 33)

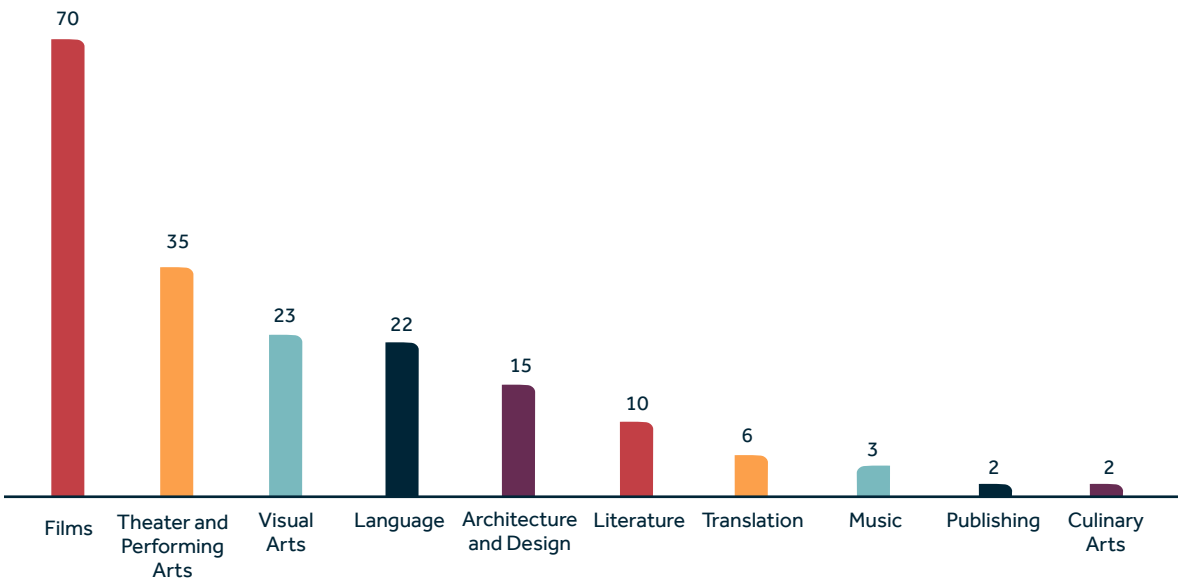


Figure 33: Total Number of Winners of Local Awards Presented in 2023 by Cultural Sector ⁽¹⁴¹⁾

Regional and Global Awards

The report recorded 13 regional and global awards from outside the Kingdom in 26 branches and tracks, in which 28 Saudi creators were honored across six cultural sectors (Figure 34). For the second consecutive year, the theater and performing arts sector topped the rest of the sectors by winning nine Gulf and Arab awards, indicating the expansion of the sector's activity this year beyond the Kingdom (Table 13).

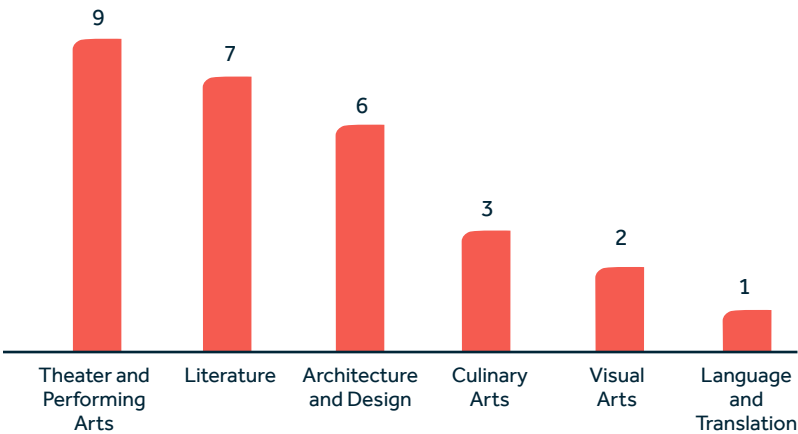


Figure 34: Total Number of Saudis who Received Global Awards in Cultural Sectors during 2023

Table 13: Examples of Regional Award-Winning Theater Productions in 2023⁽¹⁴²⁾

Award	Winner	Play	Festival	Country	Author	Director
Best Integrated Theatrical Work	King Saud University, supported by the Theater and Performing Arts Commission	"Autumn Flower" Play	International Festival of University Theater	Morocco	Michel Mounir	Turki Ba'issa
Best Integrated Theatrical Presentation	SASCA, Dammam	"Let's Drink Then" Play	Zarqa Summer Theater Festival	Jordan	Qasim Matroud	Fahad Aldossary
Best Actress in a Leading Role	Amal Al-Ramadan	"Let's Drink Then" Play	Zarqa Summer Theater Festival	Jordan	Qasim Matroud	Fahad Aldossary
Best Lighting	"Let's Drink Then" Play	"Let's Drink Then" Play	Zarqa Summer Theater Festival	Jordan	Qasim Matroud	Fahad Aldossary
Best Theatrical Set Design	"Let's Drink Then" Play	"Let's Drink Then" Play	Zarqa Summer Theater Festival	Jordan	Qasim Matroud	Fahad Aldossary
Best Director	Youssef Al-Harbi	"Let's Drink Then" Play	Zarqa Summer Theater Festival	Jordan	Qasim Matroud	Fahad Aldossary
Best Theatrical Script	"Let's Drink Then" Play	"Let's Drink Then" Play	Zarqa Summer Theater Festival	Jordan	Qasim Matroud	Fahad Aldossary
Best Theatrical Scripts for Adults	Author Ahmed Mousa Youssef	"Shahryar Tells a Story" Play	Sharjah Award for Theater Composition	UAE	Ahmed Mousa	N/A
Shared Best Actor	FUN BOX Troupe	"The Stranger and the Captain" Play	Sharm El-Sheikh International Theater Festival for Youth (SITFY)	Egypt	Osama Zayed	Fahad Aldossary

Table 14: Saudi Winners of the Rashid Bin Humaid Award for Culture and Science in 2023⁽¹⁴³⁾

Award	Rank	Winner	Track
Literary Criticism	First	Prof. Dr. Fawzi Ali Ali Sweileh	Applied Scientific Research and Pure Sciences Category
Literary Creativity	Second	Jubran bin Mohammed bin Ali Quhal	Vertical Eloquent Poetry
	First	Siham bint Ahmed bin Yahya Arishi	Modern Eloquent Poetry
	First	Abdullah bin Shafi bin Awwad Alanazi	Nabati Poetry
	First	Mohammed bin Saeed bin Ali Al-Rashidi	Short Story
	Second	Tareq bin Hani bin Ashour Bayt Habras	Short Story
Children's Literature	First	Yasser bin Abdullah bin Ali Al-Ghareeb	Poetry



The visual arts sector won two awards within the Hamdan Bin Mohammed Bin Rashid Al Maktoum International Photography Awards (HIPA), one in the Digital Art category, awarded to Jawhara Saeed Al-Zahrani, and another in the General category and the "Portfolio" category, awarded to Talib Abdullah Al-Marri.⁽¹⁴⁴⁾ As for the architecture and design sector, Sheraton Taiba Hotel in Madinah won the "Best Hotel Engineering Design" Award from the International Property Awards Organization in the United Kingdom,⁽¹⁴⁵⁾ while the Kingdom won three different awards at the Design Middle East Awards for projects in Riyadh, Diriyah, and the Red Sea. Among the world's most notable achievements was the awarding of the "Banyan Tree" Resort in AlUla with the Prix Versailles Award, a UNESCO award established in 2015 and dedicated to commercial architecture.⁽¹⁴⁶⁾

As for the culinary arts sector, the Culinary Arts Commission in the Asir Region won the 2023 World Food Gift Challenge organized by the International Center for Advanced Mediterranean Agronomic Studies (CIHEAM) with the Best Taste Award for the "Mathaq Asir" product, a Sidr honey from the Rijal Almaa Village made by Abdullah Al-Jarshi.⁽¹⁴⁷⁾ The "Sofra" book by the Saudi author Anisa Al-Halou won two awards at the Gourmand World Cookbook Awards in two categories: the Best Hospitality Book in the World and the Best Arabic Cookbook in the World. The Food Culture Gourmand Awards is an annual event that encompasses 71 countries and honors the best food culture books, whether printed or digital, as well as food television.⁽¹⁴⁸⁾

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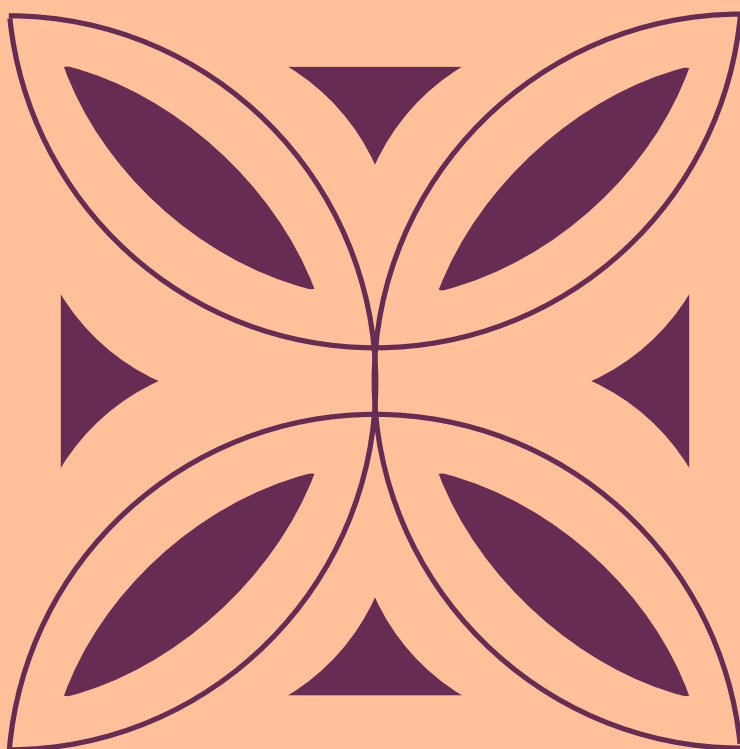
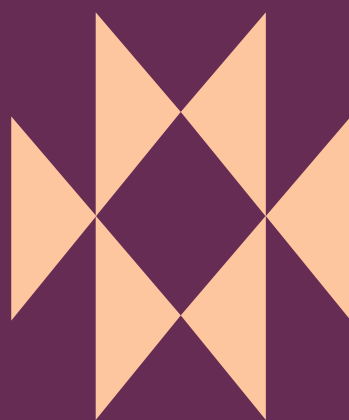
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Chapter Three

Knowledge and Skills

- Culture and Education
- Cultural and Artistic Training





Cultural education and training are among the most effective means of transferring cultural knowledge and skills between generations. This chapter documents the state of cultural and artistic education and training in Saudi Arabia in two main sections. The first section evaluates the presence of culture and the arts in various stages of education, including their integration into extracurricular activities and efforts to discover and support talent. It also provides an overview of higher education, focusing on cultural scholarship programs. The chapter's second section focuses on cultural and artistic training, highlighting specialized and informal cultural training programs, and presenting their key features and trends.

2023 witnessed a continuation of efforts to train and qualify teachers for subjects related to culture and the arts in general education. At the higher education level, the cultural scholarship program continued to supply cultural sectors with qualified talents, with 185 students sent abroad and 45 graduates in various fields of culture and the arts. In terms of cultural and artistic training, there was a promising growth in training programs offered by cultural institutions, with an increase of 64.81% compared to 2021. Additionally, the number of beneficiaries of these programs rose significantly to 26,448, more than three times the number of beneficiaries in 2021. Conversely, institutes overseen by the Technical and Vocational Training Corporation offered a total of 136 training programs in 2023, an increase of nearly 7% compared to 2021. Public, private, and non-profit cultural institutions provided a total of 836 training programs, indicating growth in the overall offering of cultural training programs, which are preferred by those seeking to acquire cultural skills. These findings were revealed by the results of the fifth round of the Cultural Participation Survey.

Culture and Education

Educational institutions contribute to the dissemination and development of cultural knowledge and skills by providing a nurturing environment for discovering and honing talents, and promoting the practice of cultural hobbies and activities for young generations, whereas the higher education institutions provide the cultural sector with specialists and creators in cultural and creative fields. This section reviews efforts seeking to promote the presence of culture in general and higher education institutions, including efforts to incorporate artistic and cultural curricula, and what they require from training and qualification of teachers. It also sheds light on culture-related extracurricular activities and monitors talent discovery and support efforts through an indicator developed in this 2023 report in order to monitor the initiatives and programs specifically targeted at general and higher education students.

General Education

In 2023, efforts continued to promote cultural and artistic education at the general education level, based on a partnership between the Ministry of Culture and the Ministry of Education represented in the "Cultural Capacity Development Strategy."⁽¹⁾ This year's efforts and initiatives have varied between those seeking to complete plans to incorporate cultural and artistic subjects in general education, and all that they require from training teachers and developing school facilities, as well as promoting cultural extracurricular activities. Efforts aimed at establishing a national culture and arts education framework, which was monitored in the 2022 report, resulted in the Education and Training Evaluation Commission's adoption of nine cultural fields, including:

Visual Arts, Performing Arts, Music, Language and Literature, Design Technology, Media Arts, Heritage, Fashion Arts and Culinary Arts.⁽²⁾ Efforts continued in 2023 to establish and adopt criteria for these curricula and their teachers, and a plan was designed to effectively incorporate them into school curricula. In addition, theaters were also developed in several schools and special education institutes, along with building music education content for the kindergarten level, and activating music curricula at this level, thereby enhancing the early learning experience and contributing to the development of the children's cultural skills from a young age.⁽³⁾



Training of Teachers in the Delivery of School Subjects related to the Cultural Sector

The training program aimed at promoting the teachers' capacities continues to teach new cultural curricula, which was first implemented in 2022. As pointed out in the previous version of the report, it is necessary to qualify teachers to teach the latest culture and arts-related subjects given that many teachers have qualifications that differ from the subjects and skills they must teach for the first time.⁽⁴⁾ These programs continued through 2023, with more than 9,086 kindergarten teachers trained in the musical arts field. The training program also included the qualification of 840 teachers in the performing arts and drama field as part of a program aimed at incorporating arts into the basic education. In addition, 32 teachers were trained under a specialized culture and arts education program directed at the students with disabilities, a promising sign of the commitment to provide education opportunities to all categories of students.⁽⁵⁾

As part of its efforts to train teachers in the performing arts field, the "School Theater" Initiative entered its second phase, which was launched by the Theater and Performing Arts Commission in partnership with the Ministry of Education and the Australian Monash University in October 2022, where it saw significant progress during the year, resulting in the training of the first cohort of teachers, in addition to reviewing and evaluating the training content. The Initiative also completed its third phase, which extended from April to November 2023, during which two more cohorts of teachers were trained. This year, the total number of teachers participating in the Initiative's programs reached 3081 participants, of whom 55% were males, and 45% were females as shown in (Figure 1). The Initiative is scheduled to conduct two more phases till the end of 2024. With their completion, nearly 25,540 teachers will be trained across the Kingdom. The Initiative will conclude with the launch of a competition for school plays, with awards reaching SAR 3 million for winning plays, distributed over the best 1,000 plays.⁽⁶⁾

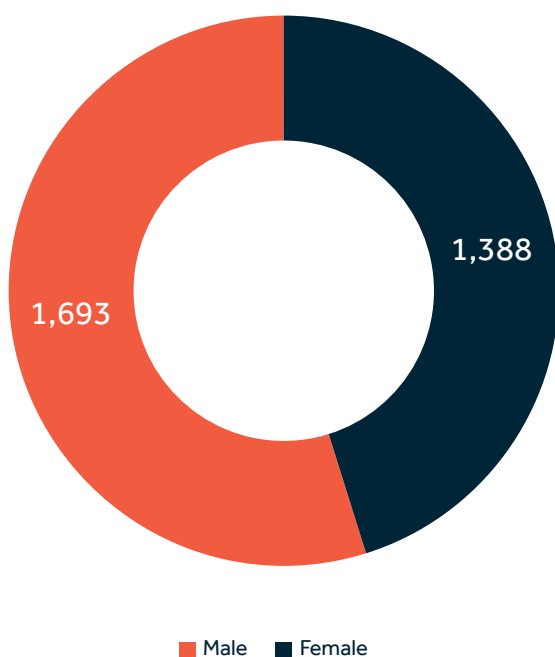


Figure 1: Number of Participants in the School Theater Initiative in 2023⁽⁷⁾



Cultural Extracurricular Activities

Extracurricular school activities are considered one of the key elements of the educational process. They provide practical opportunities to refine cultural and artistic skills, through their integration with the theoretical knowledge provided by the curriculum. The active penetration of culture in these activities was noted in 2023 represented in the existing partnership between the Ministry of Culture and the Ministry of Education. The Madrasati platform added - among its virtual activities - the Oriental Maqams Activity, which is dedicated for the preparatory and secondary general education students in the public and private schools, under the supervision of the Music Commission. The activity contains several educational videos to introduce the maqams linked to the Kingdom's musical heritage and Arabic chanting. These educational materials had received about 350 views by the end of 2023.⁽⁸⁾

As for the Madrasati platform, views on comic activities entitled "Manga Education" have doubled, reaching more than 1150 views till the end of 2023.⁽⁹⁾ Designed under the supervision of specialists from Japan's most prestigious universities, this activity aims to provide students with the basics for drawing comics following the Japanese "manga" style, and write their scripts, in order to encourage students to become creative and write comics reflecting the Kingdom's culture.⁽¹⁰⁾ In the same context, the virtual "Visual Arts and Heritage Appreciation" activity was included, which received more than 33,000 views.⁽¹¹⁾ The virtual "Musical Culture" activity, which was added on the Madrasati platform in 2022, has also received remarkable interaction,⁽¹²⁾ reaching more than 61,000 views by the end of 2023.



Knowledge and Skills

Similar to the efforts monitored in the 2022 report, international and national days that help raise the students' cultural awareness continue to be celebrated. General education schools celebrated the World Heritage Day, with over 1.8 million students participating in activities aimed at promoting the preservation of national heritage. Moreover, many schools activated national activities and celebrated cultural days interspersed with many cultural and artistic activities, with more than 43,000 schools celebrating the Founding Day. In 2023, the Year of Saudi Coffee activity was culminated as the highest extracurricular activity in the number of participations, as the number of participating students was estimated at more than three million and five hundred students.⁽¹³⁾ Furthermore, extracurricular activities during 2023 included school visits and trips to the Islamic Arts Biennale Exhibition in Jeddah in order to introduce students to Islamic culture and civilization, and the Bienalsur Exhibition in Riyadh for visual arts.⁽¹⁴⁾

As part of raising awareness about the importance of heritage and antiquities, the Little Explorer Initiative, which was launched in 2022 with the aim of introducing students to key archeological sites in the Kingdom, organized 12 school excursions throughout 2023, in which 360 students participated in visiting six different archeological sites.⁽¹⁵⁾ Each visit featured archaeologists giving presentations to students about the site's history and the notable events that occurred therein. In the same context, the Culinary Arts Commission organized a Mobile Culinary Exhibition between schools in 2023, aimed at introducing students to the national cultural dishes, such as jareesh and maqshush. The Exhibition began its journey from the Riyadh at the end of November 2023, and moved to various Kingdom regions on a seven-month journey, which concluded in the Al-Baha Region.⁽¹⁶⁾



Talent Discovery and Support

Cultural skills and knowledge development efforts are not only limited to education and training, but also include the discovery, refinement, and celebration of young talent. The discovery of cultural and creative talents at early stages empowers creators and hones their skills and knowledge, making it closely linked to the cultural education and capacity-building goals on which the Chapter builds its indicators.



Realizing the importance of these efforts, the Chapter introduced the Talent Discovery and Support Indicator, which monitors the programs and initiatives directed at students in the general and university education stages, whereas the Management and Conservation Chapter monitored all the efforts made to support and honor the cultural and artistic creativity.

2023 saw the emergence of several competitive programs and competitions to discover talents in cultural and artistic fields, the most important of which was the launch of the Cultural Skills Competition in its first edition in January 2023 by the Ministry of Culture, in cooperation with the Ministry of Education, for the purpose of discovering and developing the talents of general education students in the cultural and artistic fields. This Competition covers a wide range of fields, such as short films, Arabic calligraphy, visual arts, playing instruments and singing, theater, short stories, and manga, as well as traditional dances. This Competition consists of seven main phases aimed at discovering and developing students' talents at the national level. The first phase focuses on discovering emerging talents among male and female general education students in various cultural fields, followed by the training phase, then participation in the competition at the Kingdom's regional level, in which creators are honored in each region separately. This is followed by talent development via intensive training camps, then voting, and finally ending with the final performances presented at the closing ceremony at the national level.⁽¹⁷⁾

In the same context, the King Abdulaziz and his Companions Foundation for Giftedness and Creativity "Mawhiba" launched the "Talented Architects and Designers" Program in July 2023 in cooperation with the Ministry of Culture, represented by the Architecture and Design Commission. This Program aims to discover and nurture talented and creative people in the architecture and design fields among the secondary general education students. Around 130 students – both male and female – have benefited from this Program, as they were in the form of groups distributed over the Riyadh Region, the Eastern Region, and the Makkah Region, in a journey to develop innovative design skills and creative thinking.⁽¹⁸⁾ The initiative is one of the fruits of the cooperation between the Ministry of Culture and the Mawhiba Foundation based on the memorandum of understanding signed in December 2022.⁽¹⁹⁾

In May 2023, the Publishing, Literature and Translation Commission launched the "Literary Creativity" Competition, which is directed at the university students in the Kingdom; in order to discover and honor the outstanding talents in the creative writing field. This Competition includes four main categories: Short Story, Novel, Eloquent Poetry, and Nabati Poetry, which seeks to stimulate the youth energies, and foster the positive competition spirit in the literary field, with the Competition's total awards reaching SAR 1.2 million.⁽²⁰⁾

Higher Education

The higher education’s link with the culture and creativity fields is evident in the development of the students’ knowledge and their acquisition of skills that enable them to enter the labor market, thus forming an important tributary to various cultural sectors. Cultural clubs in the universities represent an enhanced space for learning and cultural participation. This indicator aims to measure the extent of the culture’s presence in higher education by reviewing the latest developments in scholarship programs in terms of culture and

creativity-related specializations, including the Cultural Scholarship Program and the 2023 AIUla Scholarship Program, in addition to providing a glimpse of the state of cultural student clubs in universities and their role in refining cultural knowledge and skills. The section also provides an analytical perspective for general trends towards studying culture and creativity-related specializations, based on the results of the 2023 Cultural Participation Survey.

Scholarships in Culture and Arts-related Specializations

The Cultural Scholarship Program emerges as one of the main efforts seeking to provide the cultural field with a group of creators and workers in various culture and creativity fields. The Program - in its third year – witnessed the awarding of scholarships to 185 students, bringing the total number of scholarship students since the Program’s launch to nearly 1,000

scholarship students. Taking a comprehensive look at the number of scholarship students from both genders, the data shows the number of female scholarship students continues to rise as was the case last year; as the year 2023 recorded 118 female scholarship students compared to 67 male scholarship students, as shown in (Figure 2).

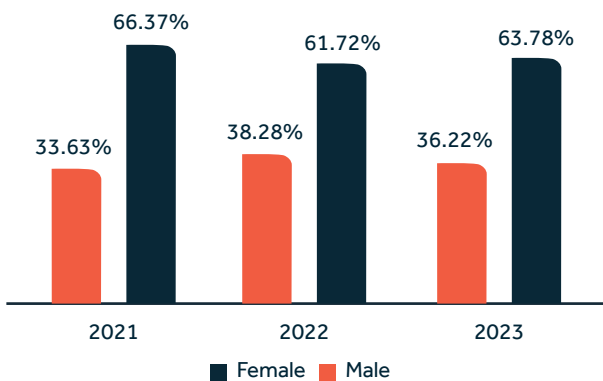


Figure 2: Distribution of the Scholarship Students by Gender in the Cultural Scholarship Program in the 2021-2023 Period

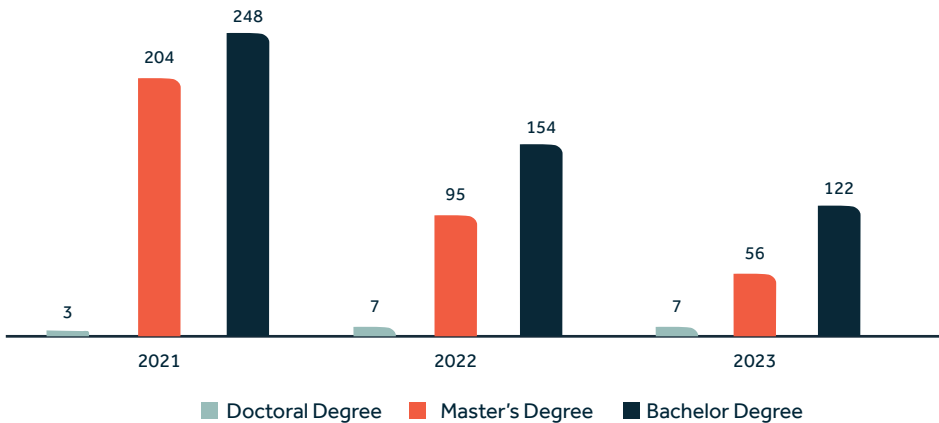


Figure 3: Number of the Scholarship Students by Degree in the Cultural Scholarship Program during the 2021-2023 Period ⁽²¹⁾



As in previous years, most of the scholarship students targeted the bachelor's degree, as the number of bachelor's degree scholarship students in 2023 reached 122 scholarship students, representing 66% of the total scholarship students, while the percentage of master's degree scholarship students reached 30%, and doctoral degree scholarships students amounted to 4%, as shown in (Figure 7). The largest percentage of scholarship students in the bachelor's degree is consistent with the Cultural Scholarship Program's objectives in providing the cultural sector with the

working competencies required by its steady growth. As shown in (Figure 4), the scholarship student's specializations data for the year 2023 does not show any significant changes from the previous year, except for the limited increase in the number of scholarship students in the culinary arts specialization, which was offset by a decline in the number of scholarship students in other specializations. This may be attributed to the decline in the total number of scholarship students in 2023.

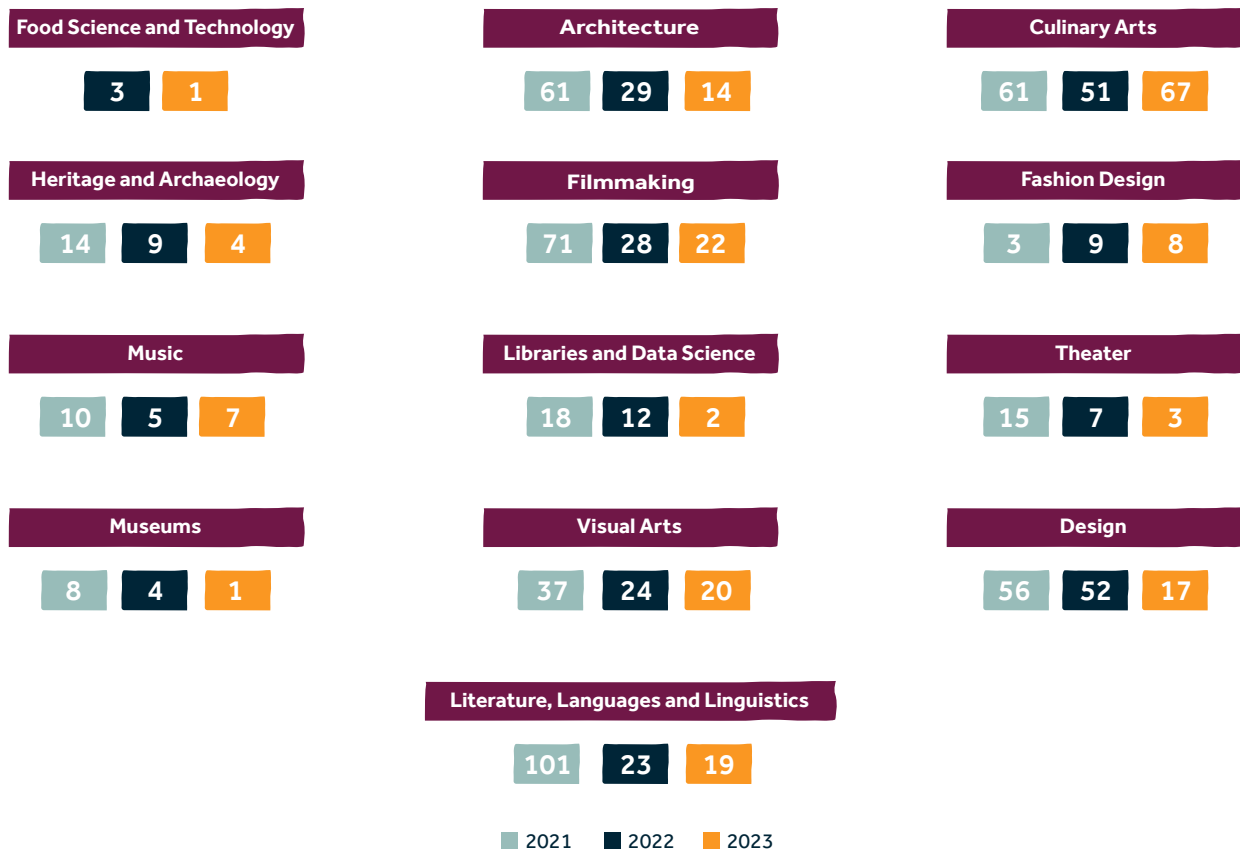


Figure 4: Number of the Scholarship Students by General Specializations in the Cultural Scholarship Program in the 2021-2023 Period ⁽²²⁾

Knowledge and Skills

The Scholarship Program's students are distributed among the top 100 universities worldwide, with the vast majority concentrated in the United States, the United Kingdom, and Switzerland, accounting for 89%. As shown in (Figure 5), the number of scholarship students in the UK and the US has declined in the past two years, partly due to the decline in the total number of scholarship students. This decline is offset by an increase in the number of scholarship students in Switzerland in 2023 by more than double compared to 2022, in addition to the increase in the number of scholarship students in the Arab Republic of Egypt, in

which 18 scholarship students study in its universities in the theater and music fields.

Cohorts of the scholarship students in previous years have reaped their fruits in light of the launch of the Cultural Scholarship Program for its third year in 2023. This year witnessed the graduation of 59 students, most of whom studied in the specializations of Literature, Languages, Design, Culinary Arts and Visual Arts.⁽²³⁾ The Program is expected to continue providing the cultural sector with a group of specialists and creators in the coming years.

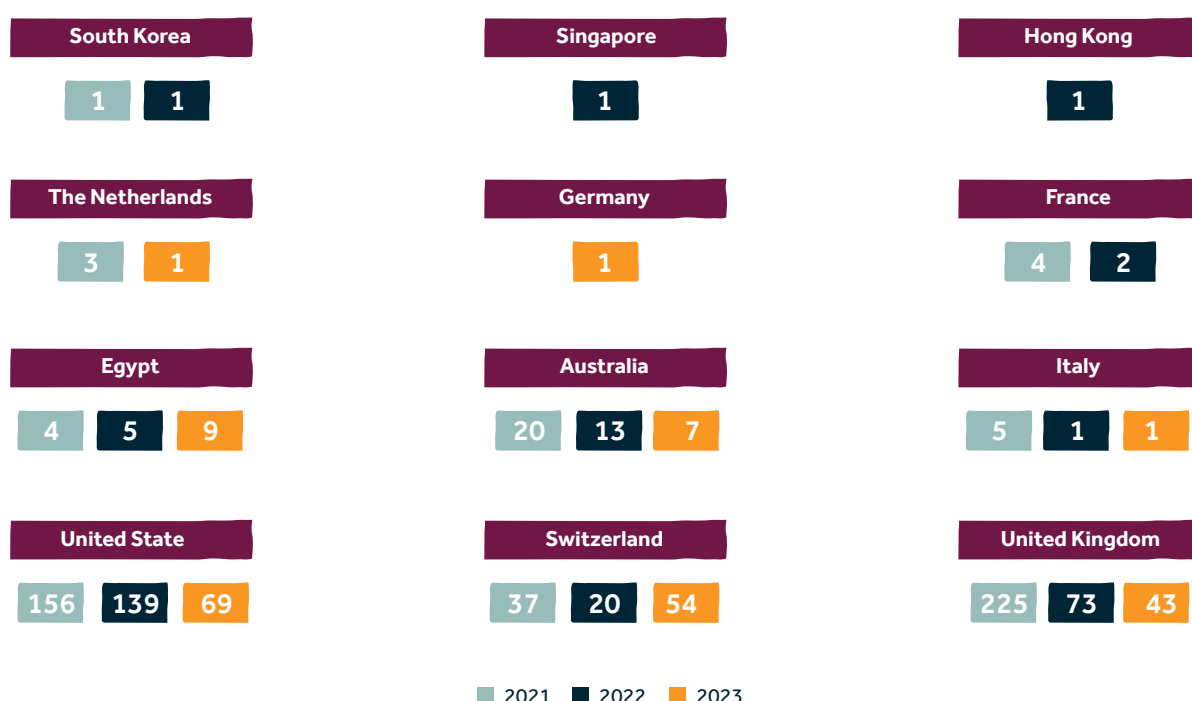


Figure 5: Distribution of the Cultural Scholarship Program's Students by Country of Scholarship in the 2021-2023 Period

The AIUla Scholarship Program, sponsored by the Royal Commission for AIUla (RCU), also contributes in providing the cultural sector with specialists in several culture and arts-related fields. The Program was launched in 2018, providing the children of AIUla with study opportunities in various fields dedicated to the development of a sustainable and attractive cultural environment in the AIUla Governorate. The Program currently supervises 248 scholarship students, whose specializations vary between hospitality, tourism, urban design, arts, history, museums, archaeology, and other specializations that meet the growing need to enhance AIUla's position as a world cultural, tourist and archaeological destination.⁽²⁴⁾



Cultural Student Activities in Universities and Colleges

Student Activities are an indicator of the culture's presence in higher education institutions, where students are given opportunities to engage in cultural activities and hobbies, acquire knowledge and hone skills outside the classrooms and academic specializations. This indicator aims to provide a general overview for these activities by monitoring the number of student clubs in the cultural field or its relevant fields in several Saudi universities, in addition to a descriptive presentation of the prominent cultural clubs in the Kingdom's universities, including the roles played by these clubs in promoting the students' cultural and artistic talents and capacities, as well as the challenges facing them that limit their role in enriching the students' cultural activities. Several cultural student

clubs are active in most Saudi universities. However, comprehensive data on their numbers and members is not available. From the perspective of its members, cultural clubs in universities are considered hubs for refining talents, capacities, and mental skills, and developing soft skills, and may even pave the way for discovering students' career paths through club activities and experiences, which are regarded as live labs for discovering the students' strengths and weaknesses, especially during the transition from the education phase to the career phase. Some student clubs actively participate in the cultural activities held in the Kingdom, such as festivals, exhibitions, and other events.⁽²⁵⁾

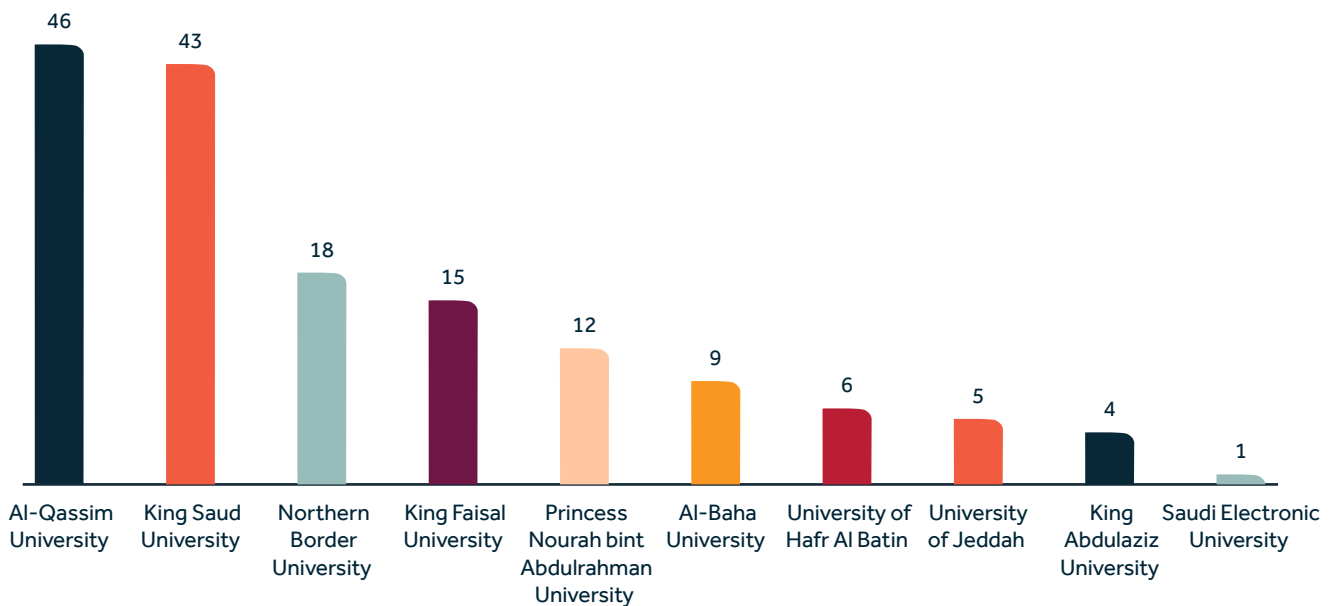


Figure 6: Number of the Culture and Arts-Related Student Clubs in a Sample of Saudi Universities⁽²⁶⁾

On the other hand, cultural clubs in some universities face obstacles represented in the lack of clarity in their regulations regarding the partnerships made with authorities and organizations and the establishment of clubs. Furthermore, several active members of student clubs have noted the difficulty in attracting students, especially new ones, either due to a lack of personal interest and passion for the cultural field, or due to a lack of promotion and innovative methods to attract students. On an optimistic note, these challenges may be overcome by appointing a representative voice for student clubs in the university council in order to express the club's needs and develop its infrastructure, which includes the provision of technical equipment for design and writing, for example, in addition to strengthening partnerships between the clubs and various external authorities through the enactment of flexible and accessible procedures, ensuring the attraction and engagement of various experts and guests from outside the university.⁽²⁷⁾



Trends towards the Study of the Culture and Arts-Related Specializations

The 2023 Cultural Participation Survey in its fifth edition provides a view on general trends towards culture and arts specializations, by monitoring the percentage of those holding culture and arts-related degrees, while giving an overall picture of their perceptions on cultural and artistic specializations and programs, and their motivations for studying them. For starters, the survey results showed a significant decline in the percentage of students studying culture and arts-related specializations, as shown in (Figure 8), since the percentage of students studying or holding a degree in one of these specializations accounted for

5% of males in the survey sample, and about 6% of females in the sample. However, the percentage of those wishing to study a cultural specialization represented nearly half of the sample, surpassing the results of the 2022 Cultural Participation Survey in its previous edition. The percentage of those wishing to study a cultural specialization accounted for 32%, which may indicate a growing desire to study culture and arts-related specializations, while reflecting an optimistic attitude towards the job opportunities provided by the sector.⁽²⁸⁾

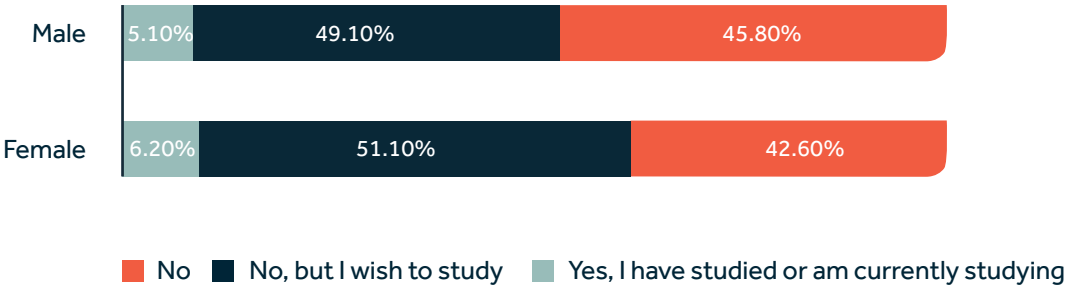


Figure 7: Proportional Distribution of the Sample's Answer to the Question "Have You Ever Obtained a Degree in One of the Culture-Related Specializations?" in the 2023 Cultural Participation Survey.⁽²⁹⁾

As for the motivations of those who are studying or wishing to study culture and arts-related specializations, the survey results showed that passion and personal interest are the main motivation for the majority of this group of males and females, at a rate of 64%, followed by the individuals' perceptions on current and future job opportunities at 24%, as shown in (Figure 9). These results confirm what the 2021 Cultural Participation Survey in its third edition have showed regarding the central role of passion, personal interest, and perceptions of job opportunities as motivations for studying these specializations.⁽³⁰⁾

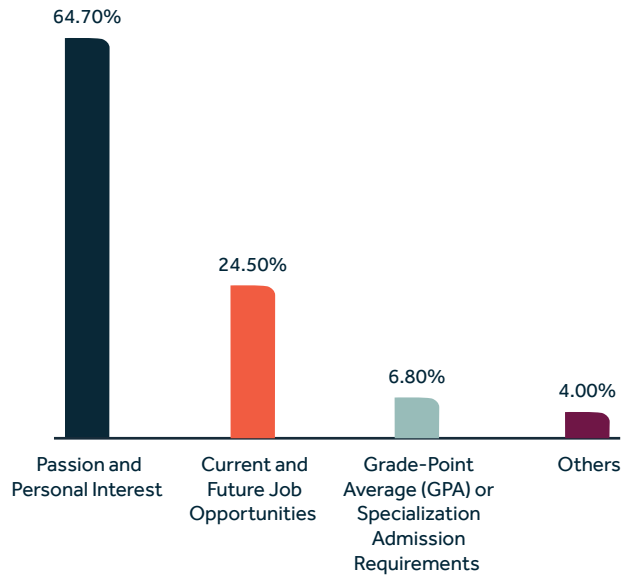
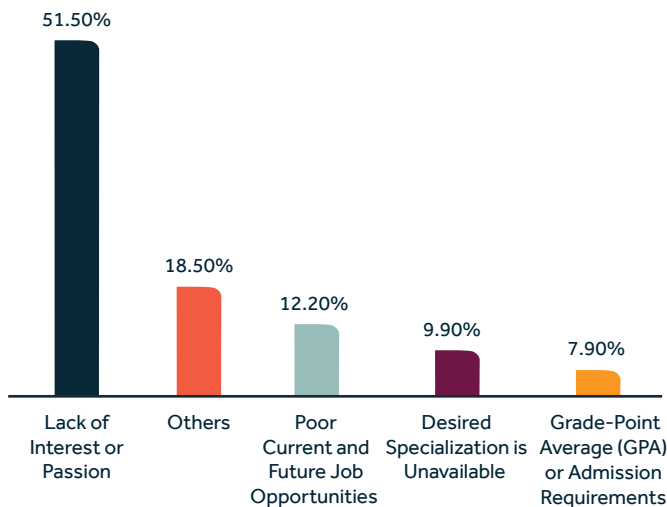


Figure 8: Proportional Distribution of the Motivations for Studying the Culture and Arts-Related Specializations among those who Studied or Wish to Study a Cultural Specialization from the Sample in the 2023 Cultural Participation Survey in its Fifth Edition⁽³¹⁾



The same motivations prevail among those who did not study, or do not wish to study culture and arts-related specializations. The survey results showed that the absence of passion and personal interest were the main motivation for this group, at a rate of 51.5% as shown in (Figure 10). In contrast, poor current and future job opportunities came in third place with only 12.2% of the survey sample, thus reflecting a positive image for job opportunities in the cultural specializations, especially when compared with those who selected the answer "Abundance of Job Opportunities" in the previous question see (Figure 9).

Figure 9: Proportional Distribution of the Reasons for not Studying Culture and Arts-Related Specializations in the Sample of the 2023 Cultural Participation Survey⁽³²⁾

However, it should be noted that the general perception on the future of culture and arts-related specializations was positive for most of the sample population. 73% of them agreed with the phrase "cultural specializations have a promising future in the labor market." This positive view seems inconsistent with the low percentage of those studying culture and arts-related specializations in the sample, but it may indicate a change in perceptions regarding the feasibility of studying them given the growth of the cultural sector and the increasing job opportunities it provides.⁽³³⁾

Cultural and Artistic Training

Cultural and artistic training institutions and programs contribute to providing ongoing and flexible education opportunities to the various segments of society outside the formal education framework, while also playing an integral role in the academic programs by focusing on the applied and practical aspects of the cultural and artistic skills and knowledge. The Cultural and Artistic Training Indicator seeks to measure the extent to which the cultural knowledge and skills are

present in the training, qualification and vocational programs provided by cultural commissions, public cultural institutions, private centers and institutes, and the extent of their diversity and availability in the various regions. This section also highlights the levels and motivations of participation in cultural training programs, and individuals' trends towards training opportunities and programs.



Cultural Training Activities at the Cultural Commissions

Since their inception in 2020 with the aim of supporting and encouraging practitioners in this field, cultural commissions have taken the initiative to provide training programs and opportunities in order to develop cultural and artistic capacities in their various sectors,⁽³⁴⁾ along with the public, private and civil cultural centers and institutes that independently assumed this role. In 2023, cultural commissions have significantly

accelerated their efforts in organizing training programs and events. The sector witnessed a growth in the number of training programs at rate of 46.81%, reaching a total of 345 programs and events, and also a growth rate of 215.53% in the number of beneficiaries, which reached 26,448 beneficiaries, more than triple the beneficiaries of the programs provided by cultural commissions in 2021, as shown in (Figure 10).⁽³⁵⁾

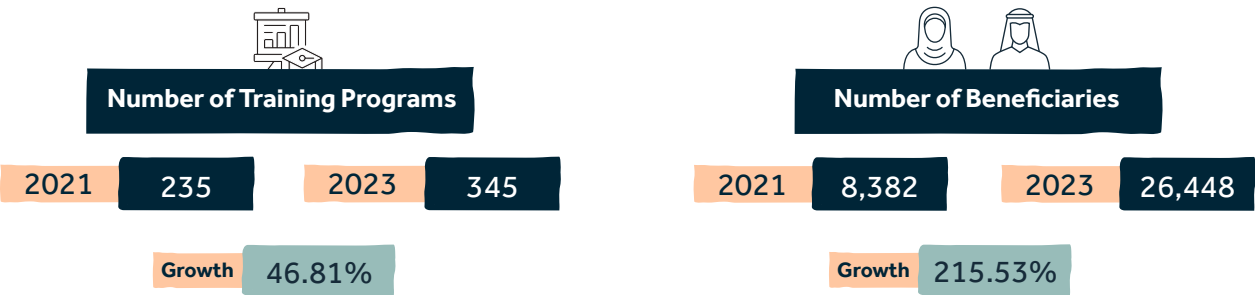


Figure 10: Growth Rate in the Number of Training Programs provided by the Cultural Commissions and their Beneficiaries in 2021 and 2023

This year, the provided training opportunities varied to include workshops, development and qualification courses, and other capacity development programs, with a significant increase in the number of workshops and development courses for other types of long-term training, as shown in (Figure 11). Considering the distribution of these programs among the various cultural sectors, it is noted that the Literature, Publishing and Translation Sectors have the highest number of programs, which constitute 43% of the programs provided this year, where most of them concentrated in workshops, as shown in (Figure 11)

followed by the Music Sector at 16%, as it holds 39 specialized courses and 13 informal courses provided by the Music Commission to all categories of beneficiaries, regardless of their specialization. Furthermore, the Culinary Arts Commission provided 27 cultural residencies out of the 28 ones held during the year, and directed them to specialists in order to preserve the culinary heritage; including, for example, several residencies dedicated to learning about the culinary features of some wild plants suitable for human consumption.

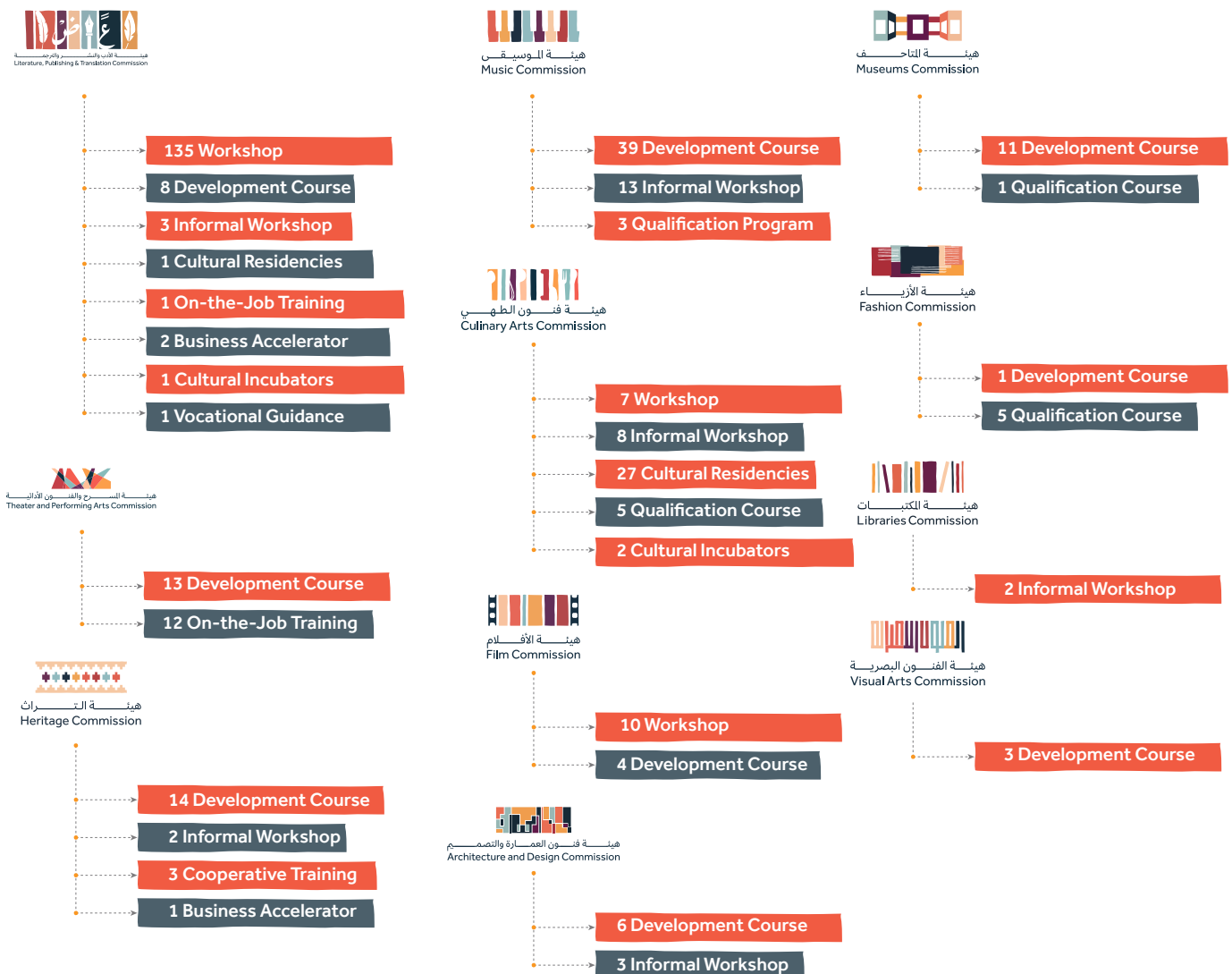


Figure 11: Number of Training Programs provided by the Cultural Commissions in 2023 and their Proportional Distribution by Program Classification⁽³⁶⁾

Knowledge and Skills

Similarly, the increase in the number of training programs reflected positively on the number of its beneficiaries, especially in workshops, whose attendance rate was estimated at about 13,000 beneficiaries, followed by informal workshops and short Accreditation of Uncompleted Development Training Programs, as shown in (Figure 12).⁽³⁷⁾

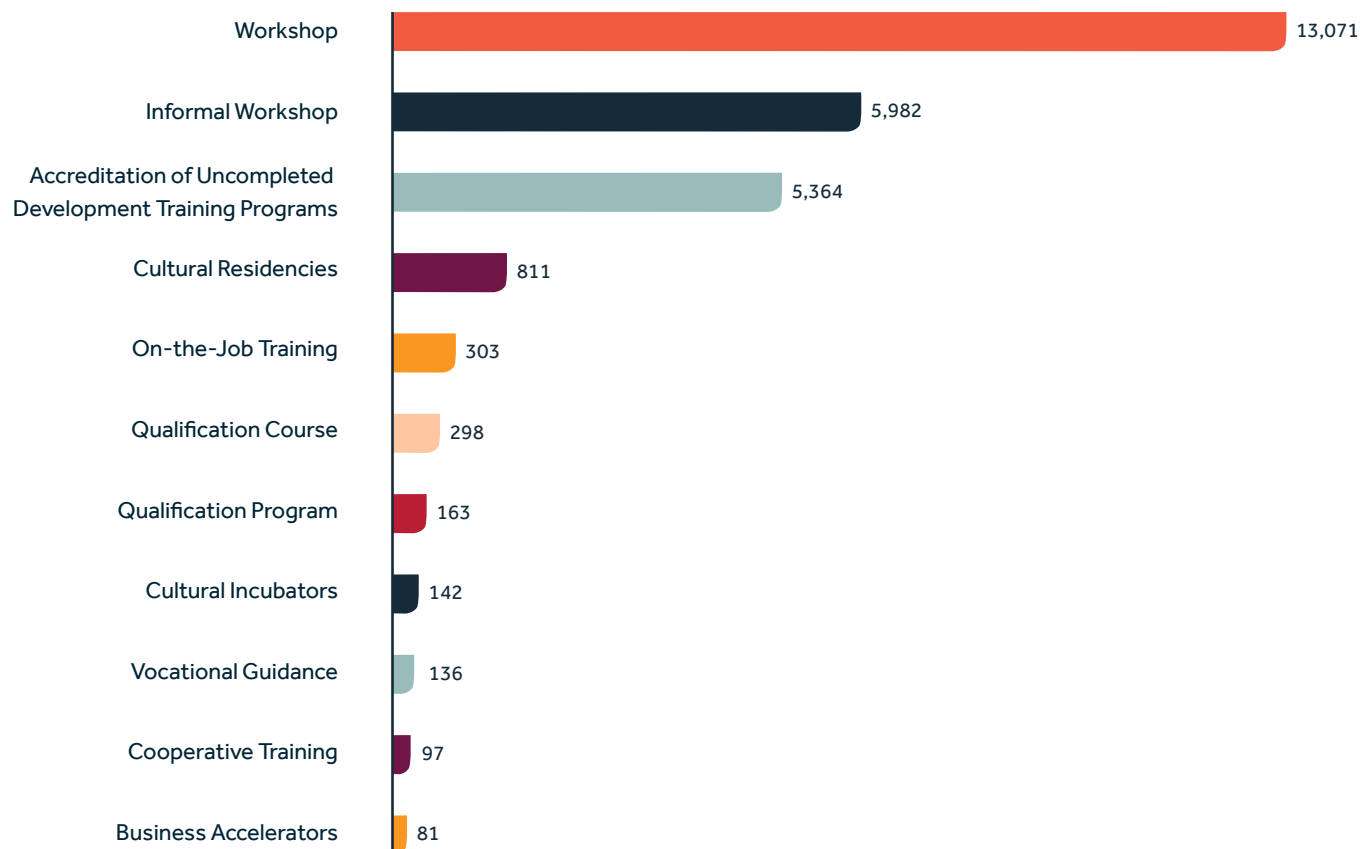


Figure 12: Number of Beneficiaries from the Capacity Development Programs Provided by the Cultural Commissions, by Program Classification⁽³⁸⁾



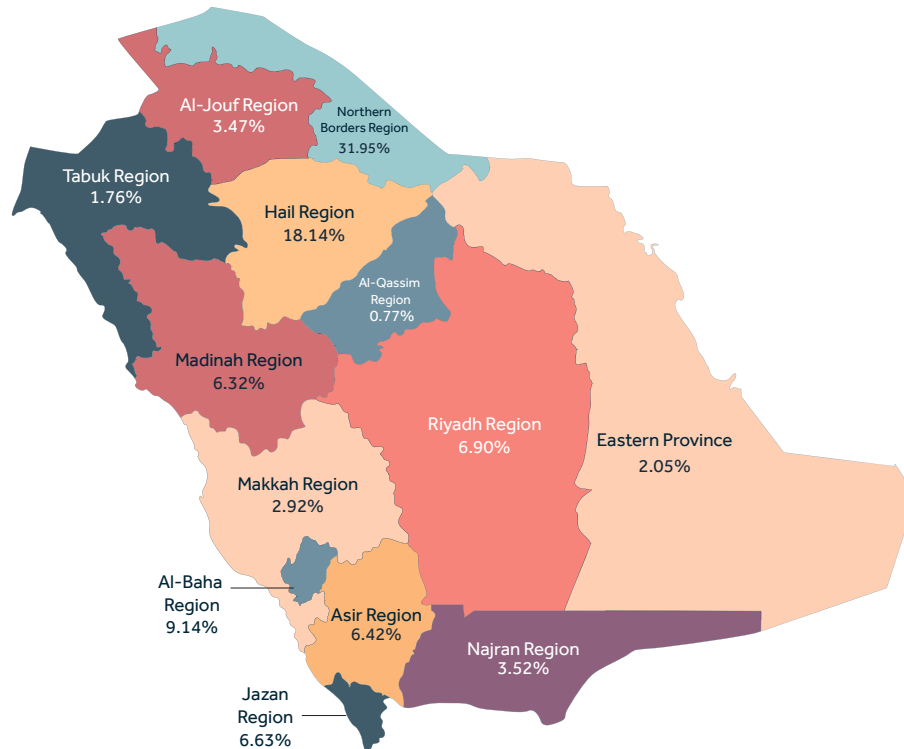


Figure 13: Geographical Distribution of the Capacity Development Programs Provided by Cultural Commissions per 10,000 Inhabitants by Region⁽³⁹⁾

Considering the geographical distribution of the training programs provided by cultural commissions within the Capacity Development Program, the percentage of training programs in the Northern Border Region and the Hail Region increased by 32% and 18%, respectively, as shown in (Figure 13). This increase is attributed to the frequent workshops that were held during the 7-day Children's Literary Week event. It should be noted that the Al-Qassim Region recorded the lowest number of training programs, with only two training programs, followed by the Tabuk Region with six training programs. Despite this disparity, the situation seems more balanced compared to the training programs of the institutions supervised by the Technical and Vocational Training Corporation (TVTC); which show significant disparity between the various regions. This year, in-person programs accounted for 93.62%, compared to virtual participation programs, whose figures seemed to be declining little by little after the recovery from the coronavirus pandemic, as shown in (Figure 14). Despite the importance of in-person programs in promoting the culture's role and presence in public spaces, the embedded and virtual programs may contribute in reducing the impact of the geographical disparity, as it enables residents in regions with fewer opportunities and training programs to attend remotely.

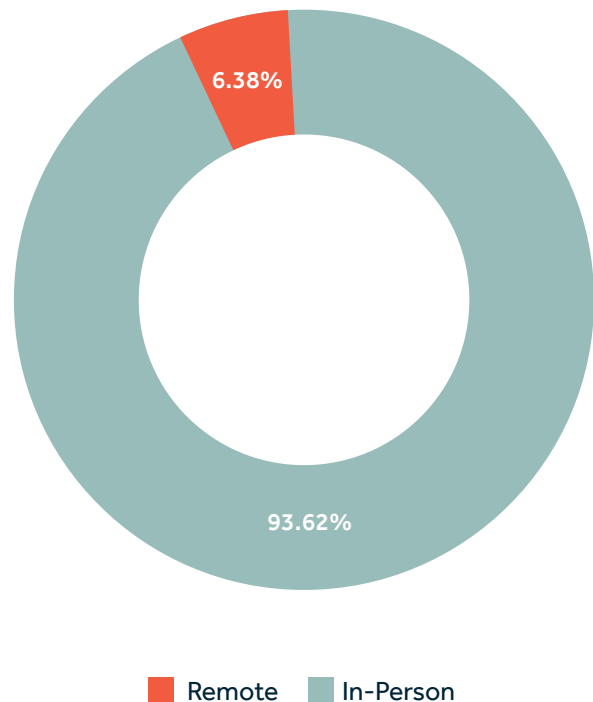


Figure 14: Proportional Distribution of the Training Programs Provided by the Cultural Commissions in 2023 by Nature of Participation⁽⁴⁰⁾

Cultural Training in Institutes and Institutions Supervised by the Technical and Vocational Training Corporation (TVTC)

This section of the Cultural and Artistic Training Indicator examines the relevant training programs provided by the institutes and institutions under the umbrella of the TVTC by monitoring the number of provided programs and their cultural diversity, and presenting a quantitative description of the number of trainees therein, while shedding light on the demographic characteristics of these beneficiaries in order to understand the current state of the cultural training and its developments, and the efforts of these institutes and institutions in providing the cultural sector with trained competencies. Additionally, this section explores the complementary role played by these programs in conjunction with cultural and artistic training efforts provided by the cultural commissions.



In 2023, TVTC-supervised institutes provided a total of 136 training programs,⁽⁴¹⁾ compared to 127 programs in 2021,⁽⁴²⁾ marking an increase of 7.09% (Figure 15), which is a slight increase when compared to the growth rate of 46.81% recorded by cultural commissions' programs, as previously shown in Figure 10. This difference can be attributed to the pace of the rapid regulatory and institutional changes in the cultural sector, and the growing role of these commissions in providing training programs across various cultural fields, in contrast to the focus of the TVTC-supervised institutes on the specific vocational sectors in which they are active, such as Fashion and Culinary Arts (Figure 16), as consistently monitored in the report over the past few years.⁽⁴³⁾

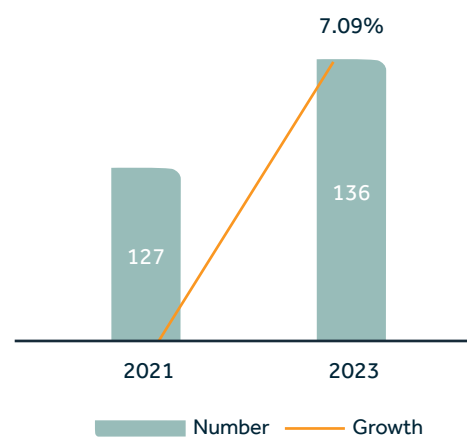


Figure 15: Growth Rate in the Number of the Training Programs Provided by the TVTC-Supervised Institutes and Institutions in 2021 and 2023⁽⁴⁴⁾



In 2023, the Fashion Sector accounted for 36% of total training programs, with 49 programs, representing 42% of the total beneficiaries; followed by the Culinary Arts Sector, with its programs comprising 21% of the total provided programs, as shown in (Figure 16).⁽⁴⁵⁾

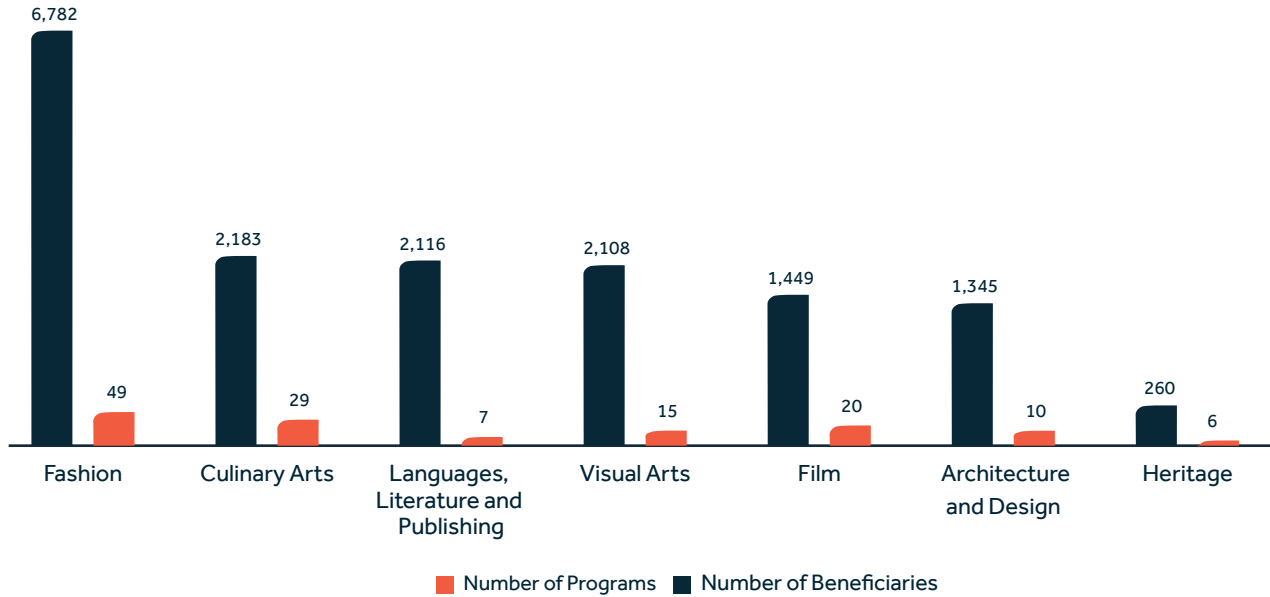


Figure 16: Number of the Cultural Sector-Related Training Programs Provided by TVTC-Supervised Institutes and the Number of Beneficiaries in 2023⁽⁴⁶⁾

As monitored in the 2022 report, the programs provided by TVTC-supervised training institutes mainly focused on development courses, which constituted 88% of the total programs, with 119 development courses out of 136 training programs. In contrast, qualification courses and programs and the diplomas collectively accounted for only 12% of the total, as shown in (Figure 17).⁽⁴⁷⁾

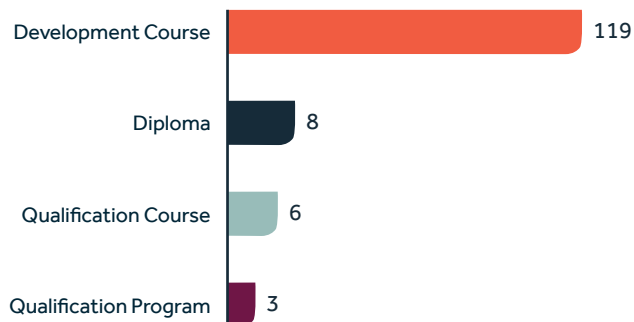


Figure 17: Number of the Cultural Sector-Related Training Programs Provided by TVTC-Supervised Institutes in 2023, Classified by Program Category⁽⁴⁸⁾



Considering the demographics of the beneficiaries, (Figure 18) shows the gender distribution of beneficiaries, while generally indicating the predominance of females in most training fields, especially Heritage, Visual Arts, and Culinary Arts. On the other hand, the percentage of male beneficiaries is higher in the Languages, Literature, and Publishing, and Film fields, while the percentages are converging between the two genders in the Architecture and Design, and Fashion fields. The data shows that the percentage of female graduates from TVTC-supervised training programs is close to that of males, with the females leading by a small margin. However, this difference is not substantially significant considering that 75% of these training programs are specifically conducted in women's institutes and centers.⁽⁴⁹⁾

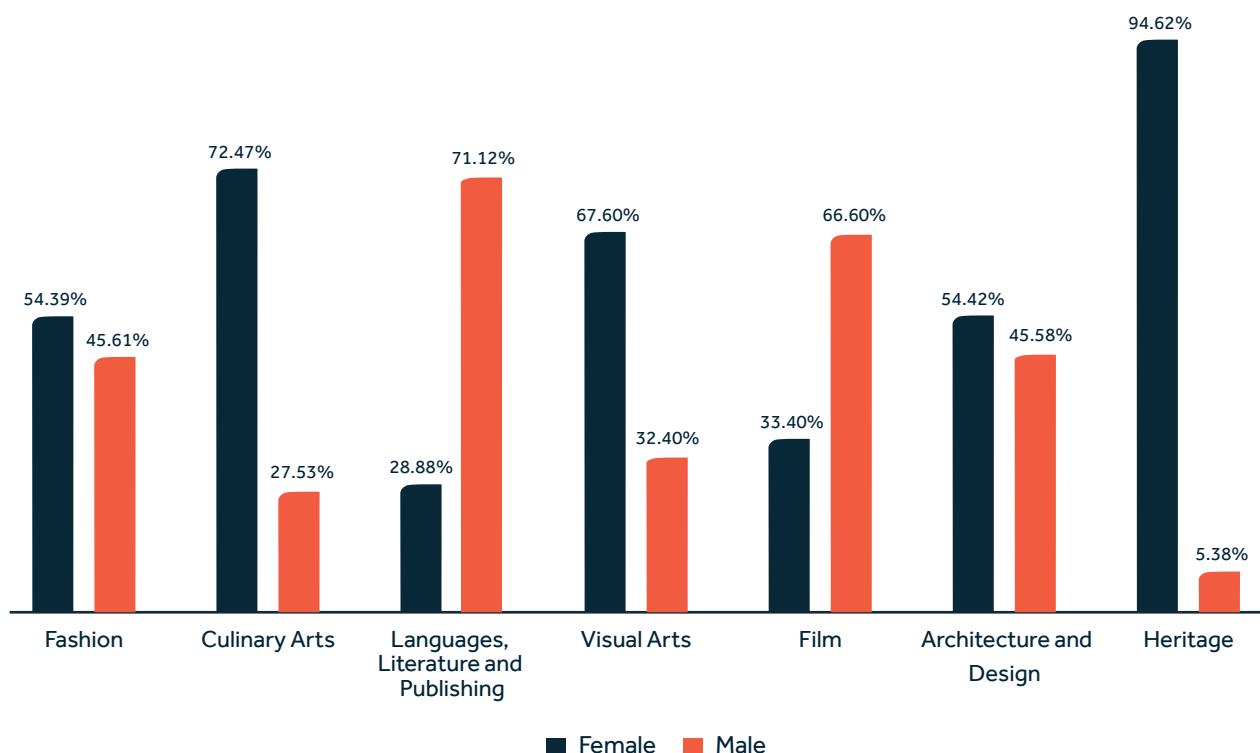


Figure 18: Proportional Distribution of Beneficiaries from the Cultural Training Programs Provided by the TVTC-Supervised Institutes in 2023 by Gender per 10,000 Inhabitants by Region⁽⁵⁰⁾





Focusing on the geographical distribution of the cultural training programs provided by the TVTC-supervised institutes in 2023, it is evident that these programs are concentrated in three main regions: Makkah, Riyadh, and Eastern Province (Figure 19); noting that there were no programs in the Al-Jouf, Asir, Najran, and Northern Borders Regions this year.⁽⁵¹⁾

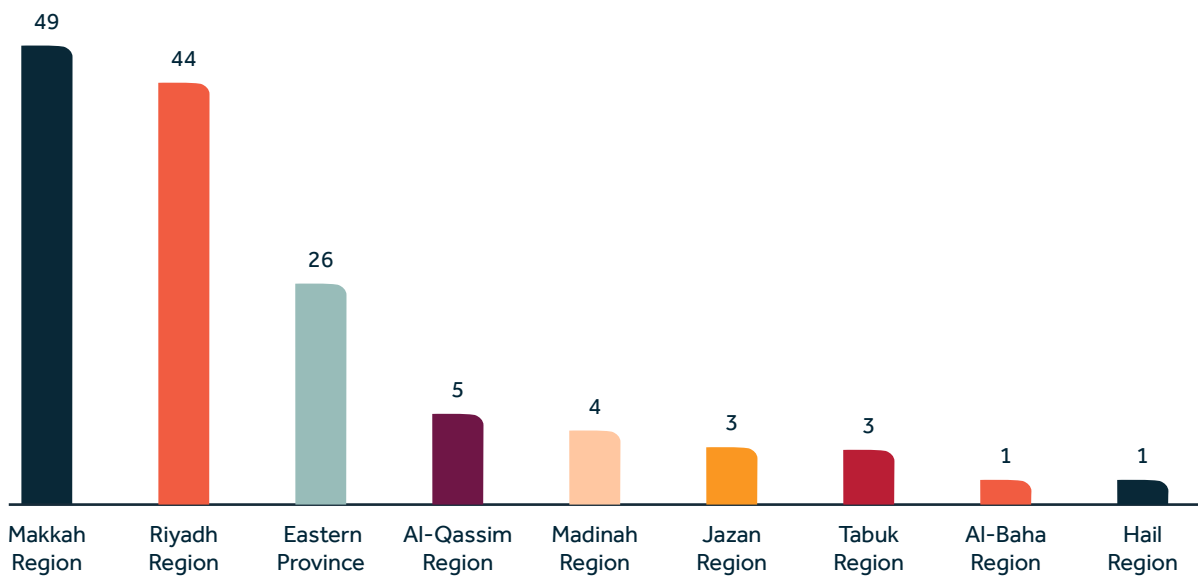


Figure 19: Number of the Cultural Training Programs Provided by the TVTC-Supervised Institutes in 2023 by Region⁽⁵²⁾

When considering the population size of each region, the proportional distribution of programs provided by administrative region seems more balanced, as shown in (Figure 20).⁽⁵³⁾ Similar to last year's report, Makkah topped the list in terms of the number of programs this year,⁽⁵⁴⁾ accounting for 19% of the total programs provided by these institutes and institutions; followed by Riyadh and the Eastern Province, each with 16%.

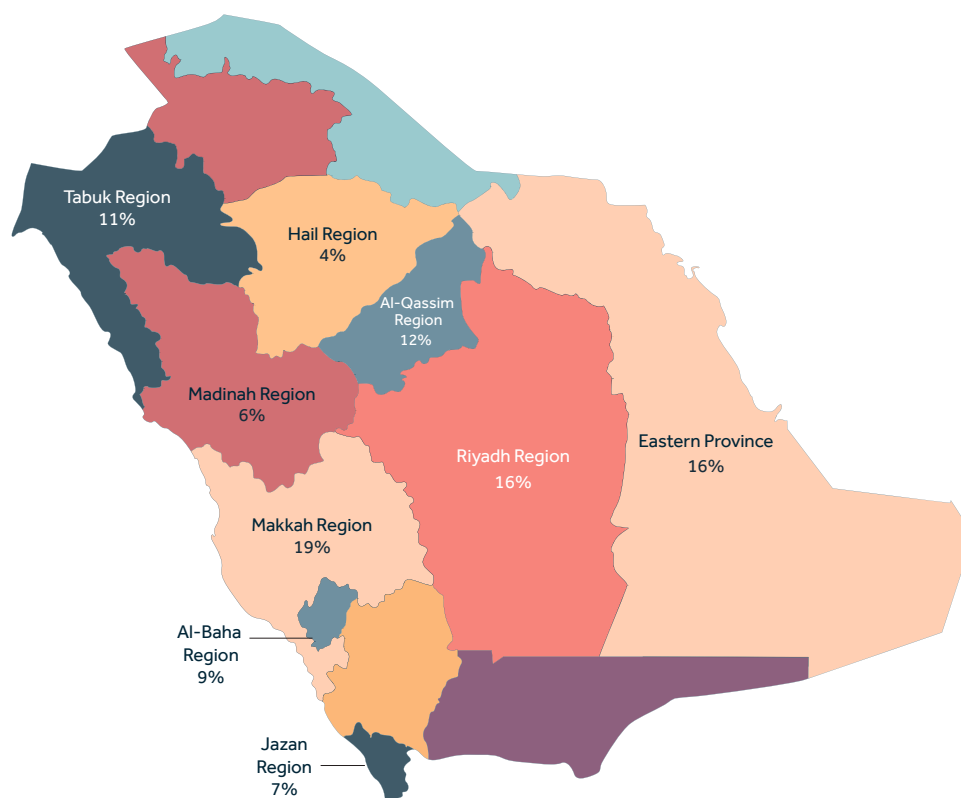


Figure 20: Proportional Distribution of the Cultural Training Programs Provided by the TVTC-Supervised Institutes in 2023 per 10,000 Inhabitants by Region

It is worth noting that the complementary role between the cultural commissions and the TVTC is evident through the significant varying increase in certain training sectors between the fields of the TVTC's programs and that of the cultural commissions' training programs in 2023. There has been a notable increase in the programs provided by the Literature, Publishing, and Translation Commission, as well as the Music Commission, whereas an increase was observed in the fashion design field within the TVTC programs. At the same time, both authorities were consistent in the remarkable growth in the Culinary Arts Sector this year, in addition to the complementarity between the two

authorities in regards to the geographical distribution of their programs, with TVTC's training programs focusing on Riyadh, Makkah, and the Eastern Province, as shown in (Figure 19), while the cultural commissions' trainings extend to most Kingdom regions, as shown in (Figure 13). However, the absence of the music, theater, museum, and library sectors in TVTC-supervised training programs limits the complementary role between the two authorities, while highlighting the importance of addressing the geographical disparity in order to provide cultural training opportunities for different segments of society.

Overview of the Activities of the Specialized Public, Civil, and Non-Profit Cultural Institutes and Institutions

In addition to the efforts of the cultural commissions and the TVTC-supervised private institutes, the cultural training sector receives attention from several nationally leading public, civil, and non-profit institutions in the culture and arts fields. They annually contribute to the development and growth of the cultural skills through specialized training programs provided to the creators and practitioners in various cultural fields, alongside their other activities, creating a vital integration between the public, civil, and non-profit sectors.

This section provides an overview regarding the state of training through reviewing the efforts made by a sample of these active institutions in 2023. Several non-profit institutions, such as the Misk Art Institute, the Saudi Arabian Society for Culture and Arts (SASCA), and the Institute of Culture and Arts for Training "Thaqqif", provided a variety of training programs totaling 428 out of 836 programs monitored in the

report, as shown in (Figure 21).⁽⁵⁵⁾ While the programs of the Misk Institute and Thaqqif Institute were concentrated within Riyadh, being the headquarters of the two institutes, the SASCA programs were distributed across various regions, due to the widespread presence of its branches in 16 cities across the Kingdom's regions. Furthermore, the specialized public cultural institutions played a prominent role, as the King Salman Global Academy for Arabic Language (KSGAAL), which is aimed at promoting the role of the Arabic language globally and regionally, provided specialized language courses within and outside the Kingdom, whereas the Royal Institute of Traditional Arts (Wrth) sought to safeguard the traditional arts in the Kingdom across various traditional art fields, including calligraphy, embroidery, textile, and jewelry making; in addition to visual, performing and musical arts.⁽⁵⁶⁾

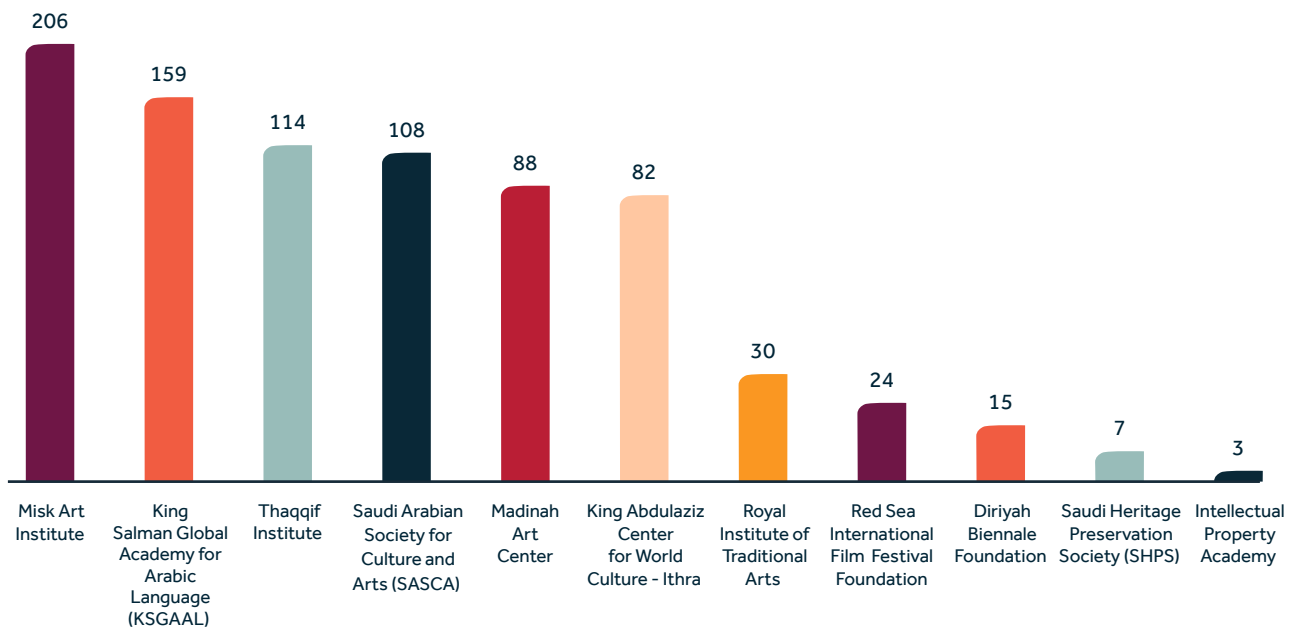


Figure 21: Number of the Cultural Training Programs Provided by a Sample of the Public, Civil, and Non-Profit Cultural Institutions in 2023⁽⁵⁷⁾

Considering the diversity of cultural sectors in the programs provided by these institutions, (Figure 22) shows that 46% of these programs are concentrated in the Visual Arts Sector, representing the specialized orientation of some institutions like the Misk Art Institute and the Madinah Arts Center, followed by the Language Sector, where the KSGAAL's efforts contributed to providing 19% of the total training programs.⁽⁵⁸⁾ Most programs held within the Kingdom, whether through in-person or embedded participation, were concentrated in the Riyadh region. This can be explained by the fact that Riyadh is the headquarters to

seven out of eleven institutions whose data was monitored in the report. It should be noted that the activities of these institutions extended beyond the Kingdom's geographical borders, with 28 training programs held abroad in more than 20 countries.⁽⁵⁹⁾ However, when considering the distribution of in-person programs relative to the population of each region, the Riyadh region came in second place with 18 programs per 10,000 inhabitants, at a level similar to Madinah region; while the Makkah region preceded both of them with 30.48 programs per 10,000 inhabitants as shown in (Figure 23).

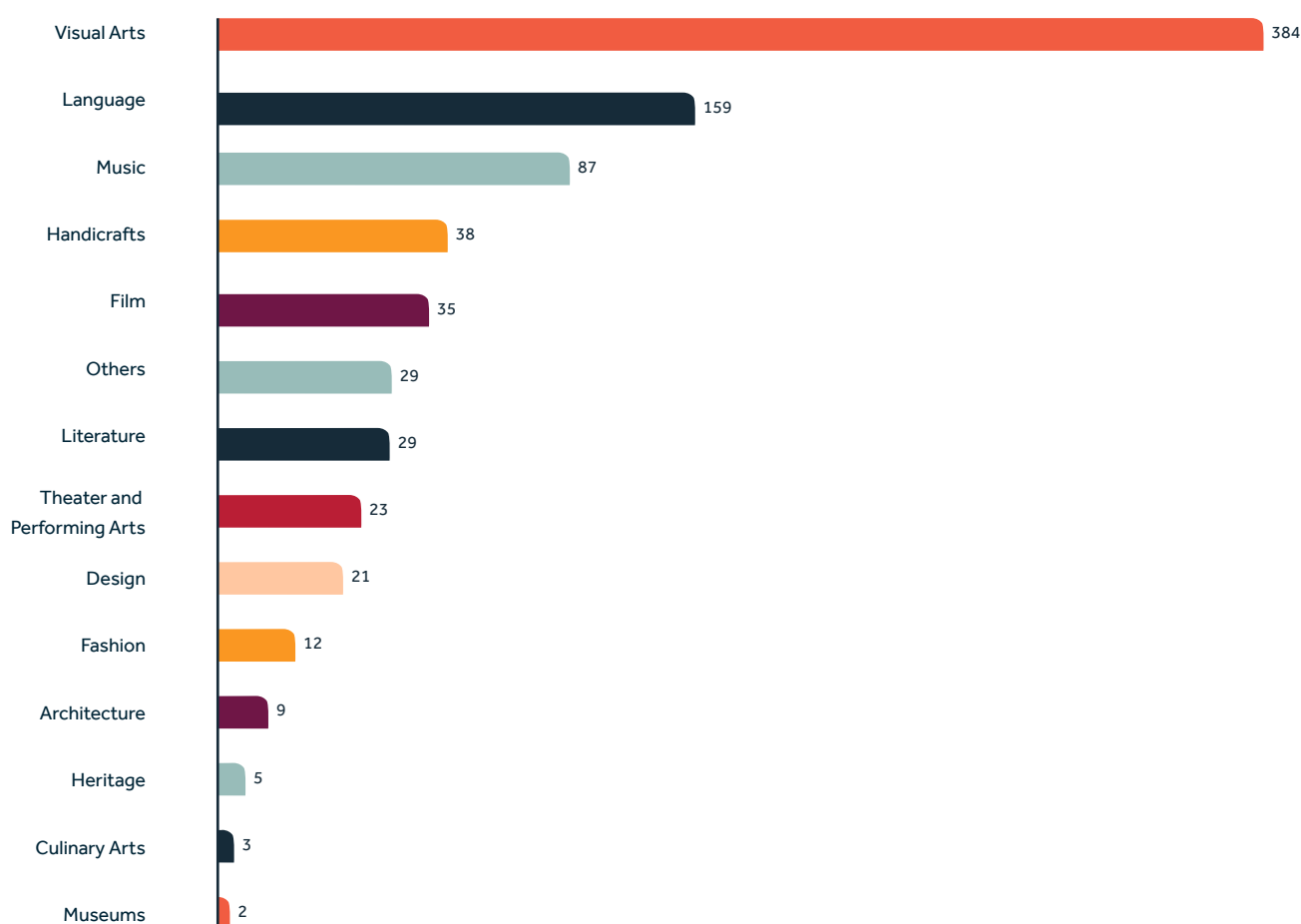


Figure 22: Number of the Training Programs Provided in 2023 by Several Public, Civil, and Non-Profit Cultural Institutions⁽⁶⁰⁾

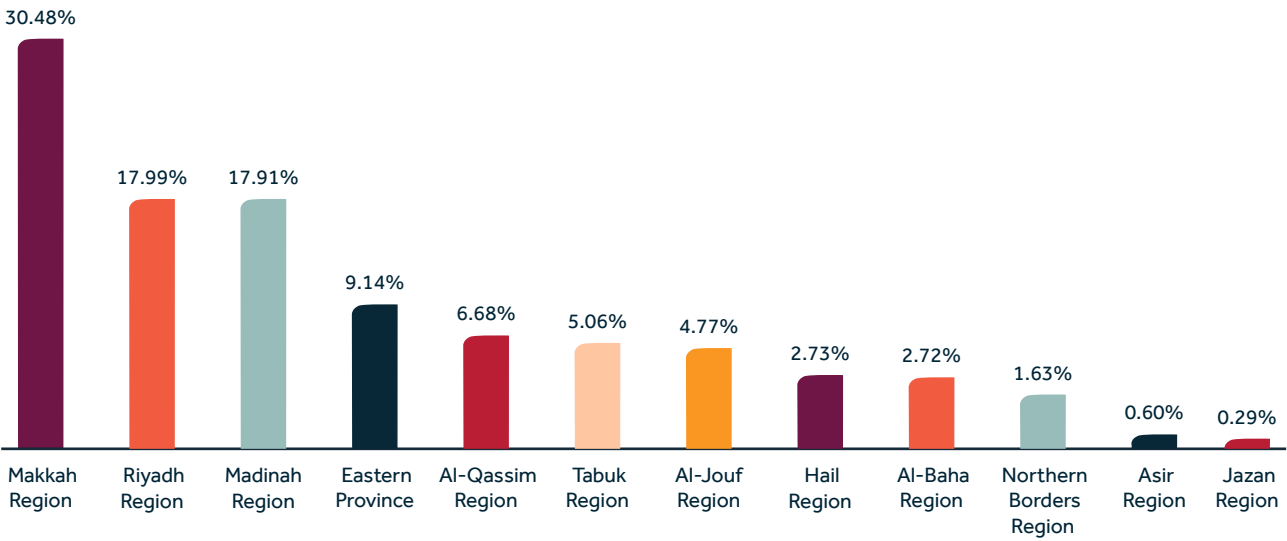


Figure 23: Number of the In-Person Training Programs Held within the Kingdom by Several Public, Civil, and Non-Profit Cultural Institutions in 2023 per 10,000 Inhabitants by Region



General Trends Towards Cultural and Artistic Training

The 2023 Cultural Participation Survey presents an overview of general trends towards enrollment in cultural and artistic training programs, aiming to study the motivations of the sample population, and monitor their preferences for learning various skills associated with these fields.

This year’s survey results indicate that 22% of individuals who received training enrolled in creative writing workshops and programs, as shown in (Figure 24). It ranked as the highest cultural field in which the sample participated, compared to other cultural fields such as the Arts, Painting, Photography, and Film fields. This is consistent with what the report monitored regarding the Literature, Publishing, and Translation Commission’s efforts in providing capacity-building events and workshops on the Cultural Training Indicator. The Commission targeted the creative writing skill through several programs, notably the “Ant” training program, which focused on the creative writing techniques across different literary genres.⁽⁶¹⁾

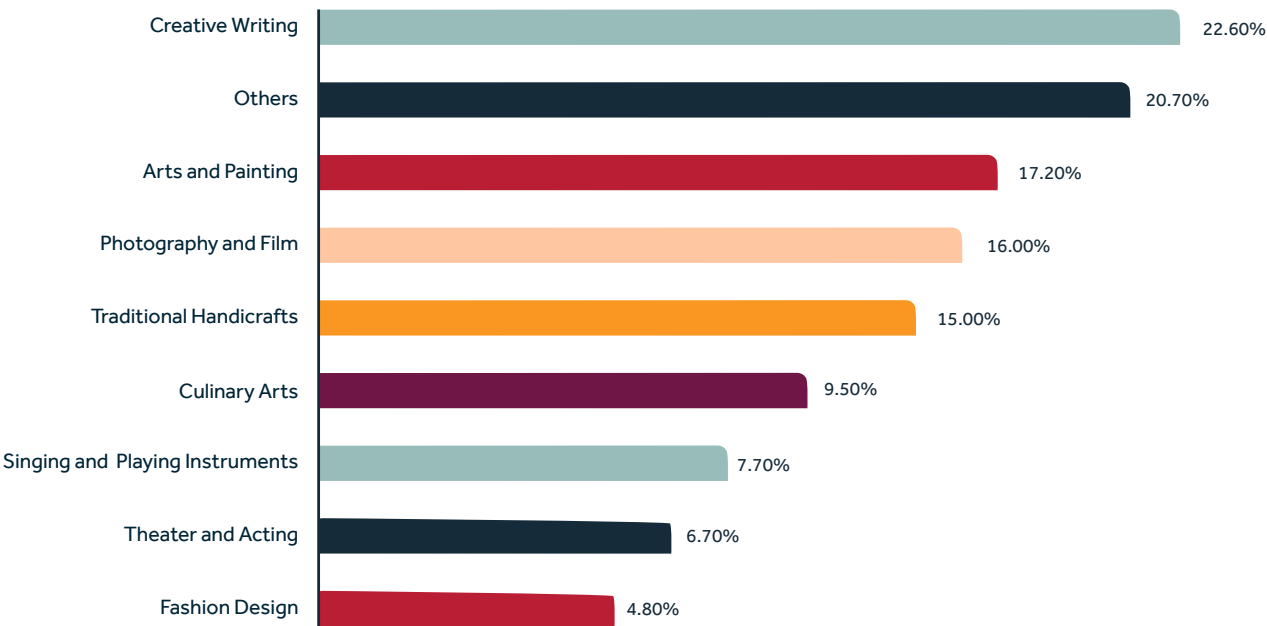


Figure 24: Proportional Distribution of the Cultural and Artistic Training Programs Attended by the Survey Sample in 2023⁽⁶²⁾

By highlighting gender differences in the enrollment rates in the cultural training fields, females showed higher inclination towards the Arts, Painting, and Culinary Arts fields, in contrast to males exhibiting a greater interest in the Theater and Acting, and the Singing, and Playing Instruments fields, as shown in (Figure 25).

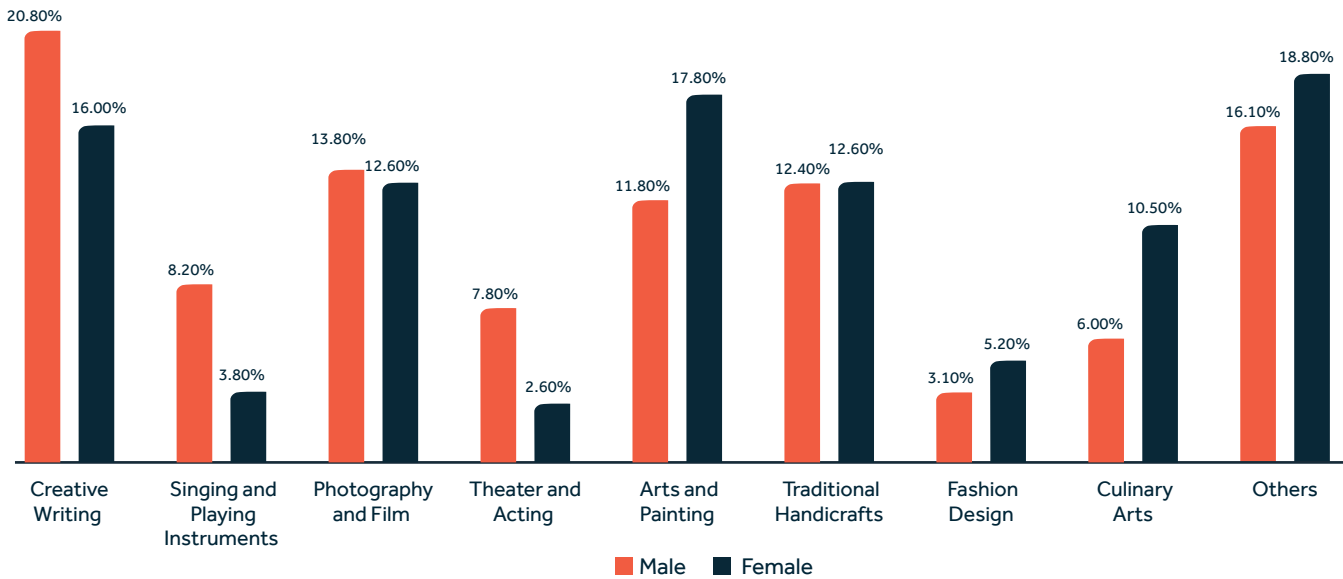
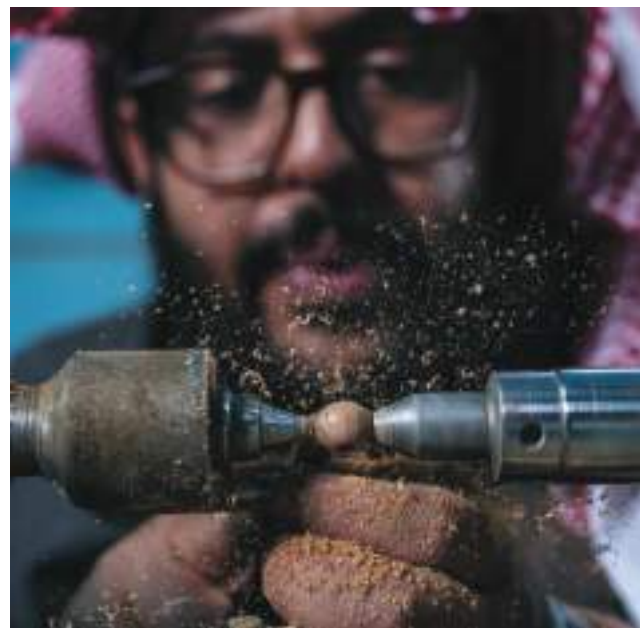


Figure 25: Proportional Distribution of the Cultural and Artistic Training Programs Attended by the Survey Sample in 2023 by Gender ⁽⁶³⁾

The Cultural Participation Survey also revealed the reasons hindering enrollment in cultural training programs among the survey sample. The results underscored the importance of personal motivations as the main driver in determining individuals' direction towards their enrollment in these programs. The absence of this motivation caused 31.7% of the survey sample to refrain from enrolling in cultural training programs, making it the leading factor. The second factor lied in the lack of implementation of these programs in the respondents' place of residence, accounting for 23.3% as shown in (Figure 26). When examining the regions where these respondents reside, they seemed to be concentrated in the peripheral regions in the Kingdom's southern and northern areas, such as the Al-Baha, Hail, Asir, Al-Jouf, and Northern Borders regions. This provides a relative picture for the regions with limited spread in terms of organizing cultural training program from the survey sample's perspective. Other reasons included preoccupation and time constraints, as expressed by 22.6% of the survey sample, followed by poor advertisement for these training opportunities as

shown in (Figure 26). Overall, these results highlight the development opportunities that the cultural sector can initiate if combined efforts are made to raise awareness of the training programs, while reflecting the quest to distribute them among various geographical regions in a more balanced manner.



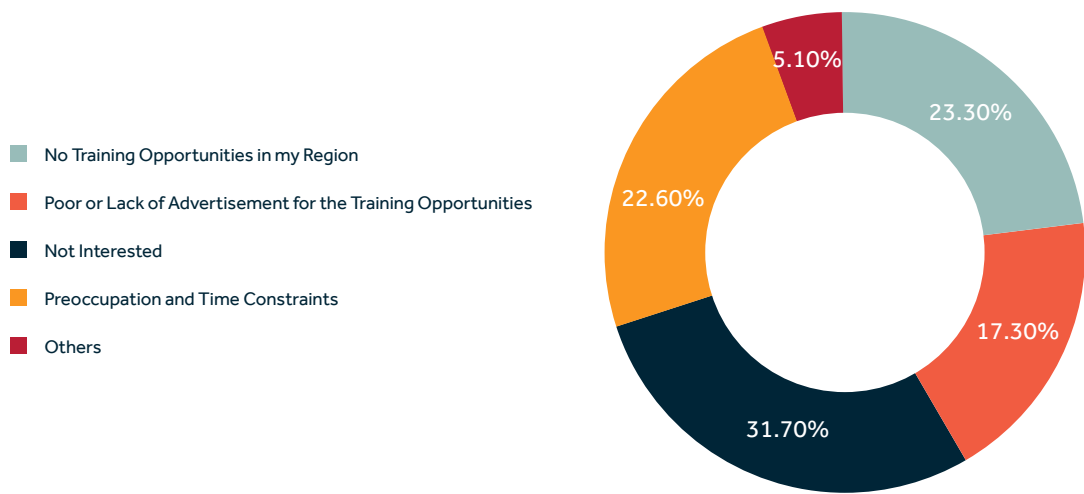


Figure 26: Proportional Distribution of the Reasons for Not Enrolling in the Cultural Training Programs Among the Survey Sample ⁽⁶⁴⁾

In addition, the survey explores beneficiaries’ motivations by providing an analysis for the surveyed sample’s preferred method for learning the cultural skills. The majority expressed a preference for in-person participation in the training courses or programs. As shown in (Figure 27), 36% of individuals favored interaction through in-person participation, whereas the self or free learning method ranked second among the sample’s preferences, while enrollment in university or specialized institute programs ranked last with only 17%.

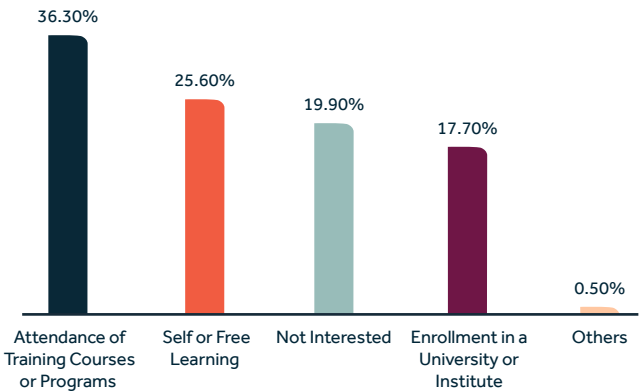


Figure 27: Proportional Distribution of the Survey Sample’s Preferred Method for Cultural Skills Learning ⁽⁶⁵⁾



In a positive view of beneficiaries' perceptions regarding the cultural training program, the survey conducted a poll on the satisfaction rate with the availability of these programs, and it reflected optimistic results from the sample's experience, as shown in (Figure 28), with approximately 87% of the beneficiaries expressing their satisfaction. These results are consistent with the notable increase in cultural training programs, especially those provided by cultural commissions in 2023 compared to previous years. However, the high satisfaction rate may not necessarily reflect the availability or accessibility of cultural training programs, especially in view of the previously mentioned geographical disparities in the distribution of such training programs and the low attendance rates among the survey sample.

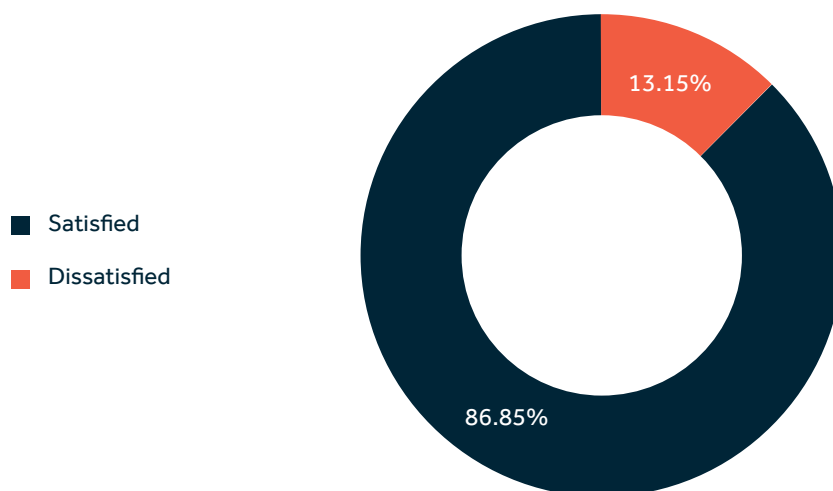


Figure 28: Satisfaction Rate with the Availability of the Cultural Training Programs Among the Survey Sample in the 2023 Cultural Participation Survey ⁽⁶⁶⁾

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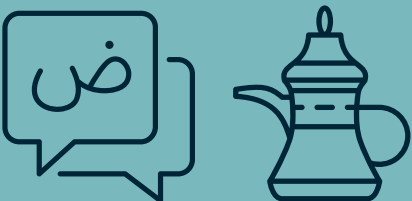
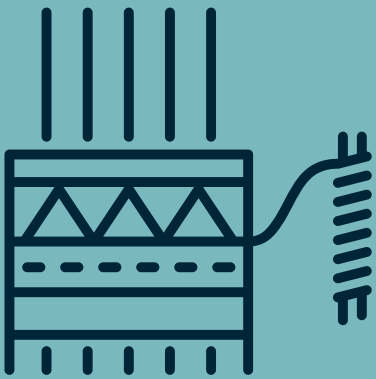
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66. **The 2023 Cultural Participation Survey – Fifth Edition**; for details, see: **Methodology Appendix**.

Chapter Four



Cultural Participation

- Attendance and Diversity
- Cultural Tourism
- Social Integration





The Chapter provides a perspective on the state of cultural participation through the dimensions of the United Nations Educational, Scientific and Cultural Organization (UNESCO) model, as follows: The First Dimension is Outdoor Culture, which is expressed through participation in various cultural activities, such as attendance of events, concerts, plays, and visiting cultural facilities. This chapter assesses the extent of the cultural field's capacity to involve all segments of the community and the extent of their equality in receiving cultural opportunities. The Second Dimension focused upon in this chapter is the Establishment of Cultural Identity, represented by the social dimension of cultural participation, which includes non-profit cultural organizations and amateur cultural clubs. Its indicators monitor the growth and expansion in the establishment of new amateur organizations and clubs, as well as the diversity of their fields, while also monitoring the effectiveness of the provided activities. This chapter has also added a third dimension, which is Culture outside Residential Cities, i.e. participating in cultural activities during tourist trips, aiming to provide a more comprehensive vision for cultural participation in the Kingdom of Saudi Arabia.

The results provided in the chapter reflect the continuous growth in cultural participation, albeit at a lower rate than last year. This year, the participation rate in all cultural activities has reached 69% of the total cultural participation survey sample, which may indicate that the attendance indicators for cultural activities has remained stable after the exceptional circumstances of the COVID-19 pandemic and the remarkable recovery that followed. This growth spread was particularly evident in the cultural tourism indicators, non-profit sector organizations, and amateur cultural clubs. The data also showed that the number of people participating in cultural activities has increased, while the gap between the various age groups or genders is narrowing due to the increase in the female participation rate. In addition, more diversity and inclusion has been observed in tourism activities included in tourism trips, bringing its numbers closer to those of domestic tourist trips, which involved cultural activities and festivals, along with visiting heritage and historical sites, resorts, and mountainous regions. The same was evident in the sectoral distribution of non-profit organizations and cultural amateur clubs that were established this year, and in the diversity of the provided cultural displays. These positive indicators are bounded by the growth disparities between sectors, and the centralization in the geographic distribution or coverage relative to the regions' populations, which drive efforts to bridge these gaps and provide equal opportunities for all groups to actively participate in the cultural field.



Attendance and Diversity

The Cultural State Report continues to conduct the cultural participation survey in order to provide comparable statistical data, and monitor trends and growth characteristics of cultural participation rates in the Kingdom. The survey's fifth edition was conducted in Q1 2024, and included a representative sample consisting of 3,104 citizens and residents in all the Kingdom's regions. In most variables, the survey relied on identifying the time period "during the past twelve months" based on the UNESCO's recommended framework and approach in "measuring the community participation," which are also applicable in other models to measure cultural participation. The survey mainly measures visitation and attendance rates and the frequency of participation in nine cultural activities as follows: visiting museums, public libraries, art exhibitions; visiting heritage and historical sites, natural reserves and parks; attending plays and live performances, concerts, poetry and literary evenings; and attending cultural festivals and events; in addition to measuring satisfaction levels, determinants of cultural product demands, and cultural training trends.

The survey results mainly featured the continued growth in the cultural participation level. However, contrary to what was observed in the survey's last edition regarding the growth's spread to all cultural activities, this year, participation trends in each activity ranged between the presence of a clear growth and a decline. Overall, the composite participation indicator in at least one of the nine cultural activities during the past twelve months stood at 69%, registering a growth rate of 5% compared to last year. As shown in (Figure 1), the growth rate of this indicator had reached 22.2% between 2021-2022, which is higher compared to 2022 - 2023. This can be viewed from the perspective of its recovery from the pandemic's exceptional impact on the cultural sector. However, it is still too early to determine whether cultural participation levels have stabilized, as the data still shows steady annual growth, with not only an increase in the overall number of cultural participations, but also in the frequent demand for cultural activities. Considering the participation frequency levels – represented in the percentage of people who participated in any cultural activity more than six times – it was noted that they increased from 21% in 2021⁽¹⁾ to 25%; i.e. one in four people in the survey sample participated at least six times or more in at least one cultural activity, regardless of its type as in (Figure 2).

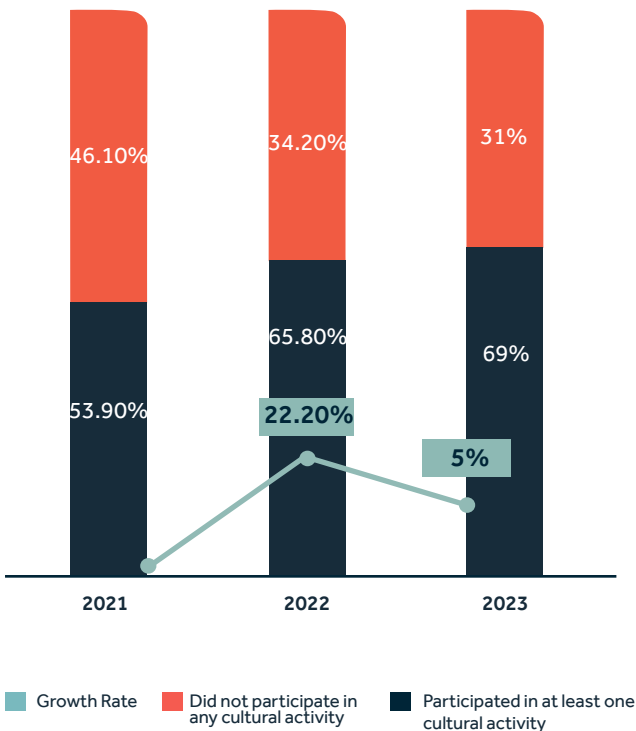


Figure 1: Participation Rate in Any Cultural Activity during the Past Twelve Months and its growth in the 2021 - 2023 Period⁽²⁾

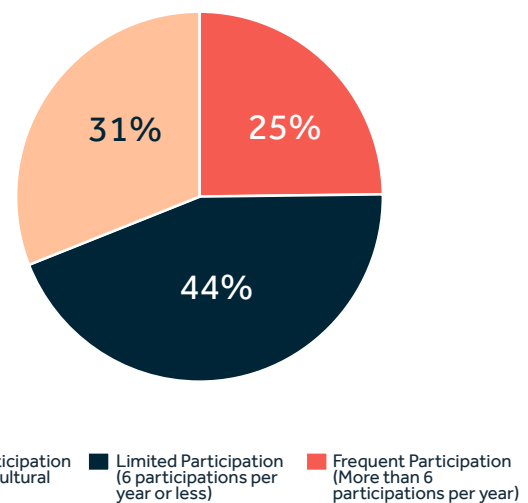


Figure 2: Proportional Distribution of Participation in any Cultural Activity during the Past 12 Months by Frequency of Participation⁽³⁾

Growth in the Participation Rates in the Cultural Activities

This indicator focuses on providing a different perspective, aiming to track the trends of change and the growth characteristics of cultural participation levels, rather than comparing activities with each other as in previous versions of the report. Overall, the survey results reflected a relative increase or stability in participation rates for most activities, except for visiting natural reserves and parks, and art exhibitions, which have witnessed a slight decline compared to last year. Although the 2022 report mentioned that attending plays and live performances was considered one of the least attractive activities,⁽⁴⁾ the 2023 survey results showed a high growth in the percentage of those who attended plays or live performance from the survey sample, amounting to 46% in the 2022 – 2023 period (as shown in Figure 3). This percentage can be attributed to the significant growth in the number of plays and live performances, as noted in the Creativity and Cultural Production Chapter.⁽⁵⁾ Visiting museums ranked second in terms of growth rate, as it reached

18.5%, which is a promising increase, especially considering the challenges faced by the museum sector during the pandemic. This is also consistent with the previous version of the report, which indicated that the percentage of people wishing to visit museums in the future was the highest among other activities, reflecting the sector's potential growth opportunities.⁽⁶⁾ The survey results also showed growth in attending concerts and poetry and literary readings, reaching 10.5% and 7.2%, respectively.

On the other hand, activities such as visiting public libraries and heritage sites recorded levels similar to last year, with a growth rate of no more than about 2%. As for visiting natural reserves and parks, it is worth noting that it has experienced a decline of 4.5% compared to the growth rate recorded by the same activity within domestic tourism trips (as shown in the Cultural Tourism Indicator). This reflects the disparity between individuals' participation level in their cities of residence and their participation level during touristic trips.



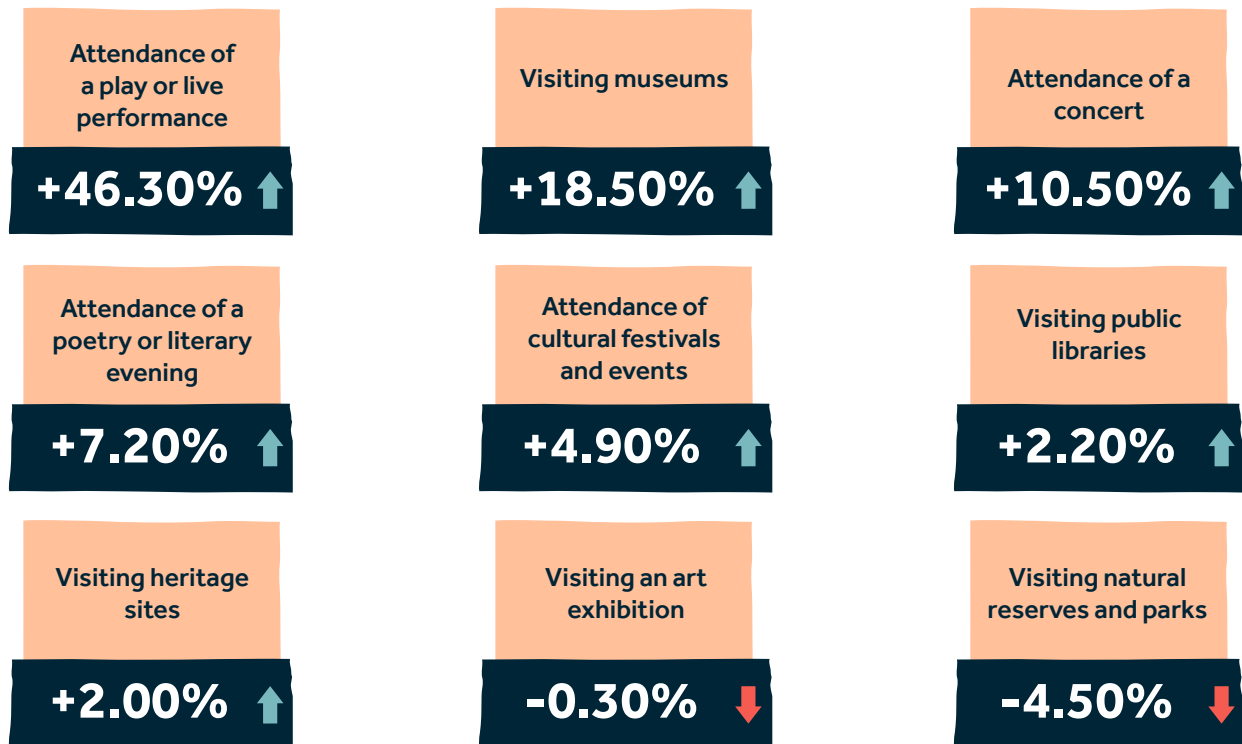


Figure 3: Growth Percentages in the Participation Rates in at Least One Activity during the Past Twelve Months by Cultural Activities⁽⁷⁾

Social Diversity

This indicator is concerned with shedding light on the characteristics of equality or disparity between the various social groups, while providing a more accurate depiction for the state of cultural participation in the Kingdom, and that is by answering the question: Who participates in cultural activities? What are the factors influencing this participation? Generally speaking, both age and income level remain the main factors influencing participation levels in cultural activities, in a pattern consistent with what has been observed in previous editions of the report. Looking at the age factor in particular, the convergence between the different age groups continued - as noted in the 2022 survey - as a result of the growth in the participation rate in the older

age group more than in the younger age group. This convergence was not limited to the participation level, but rather extended to the frequency of participation, in which the gap between the two groups had widened in 2021, as the percentages of people aged 18 - 25 years old who frequently participated in the cultural activities compared with those over 55 years old were 26% compared to 13%, respectively. In 2023, the attendance frequency level between the two groups is almost equal (as shown in Figure 4), which may indicate that the impact of age differences is diminishing in interested segments that are actively participating in the cultural activity.

Cultural Participation

This does not apply to the impact of income level, as the gap between the highest-income and lowest-income segments widens more in frequent participation than in limited participation. In the highest-income sample, the percentage of those who participate in a cultural activity more than six times reached 38.3%, compared to 15.91% in the low-income sample (as shown in Figure 5). This has drawn the attention of the institutions concerned with providing and organizing cultural content to the importance of targeting all social segments. This observation was confirmed when studying the motivations for not participating in cultural festivals and activities in the survey sample, as nearly 20% of the sample attributed their non-participation in cultural festivals and activities to the expensive tickets.

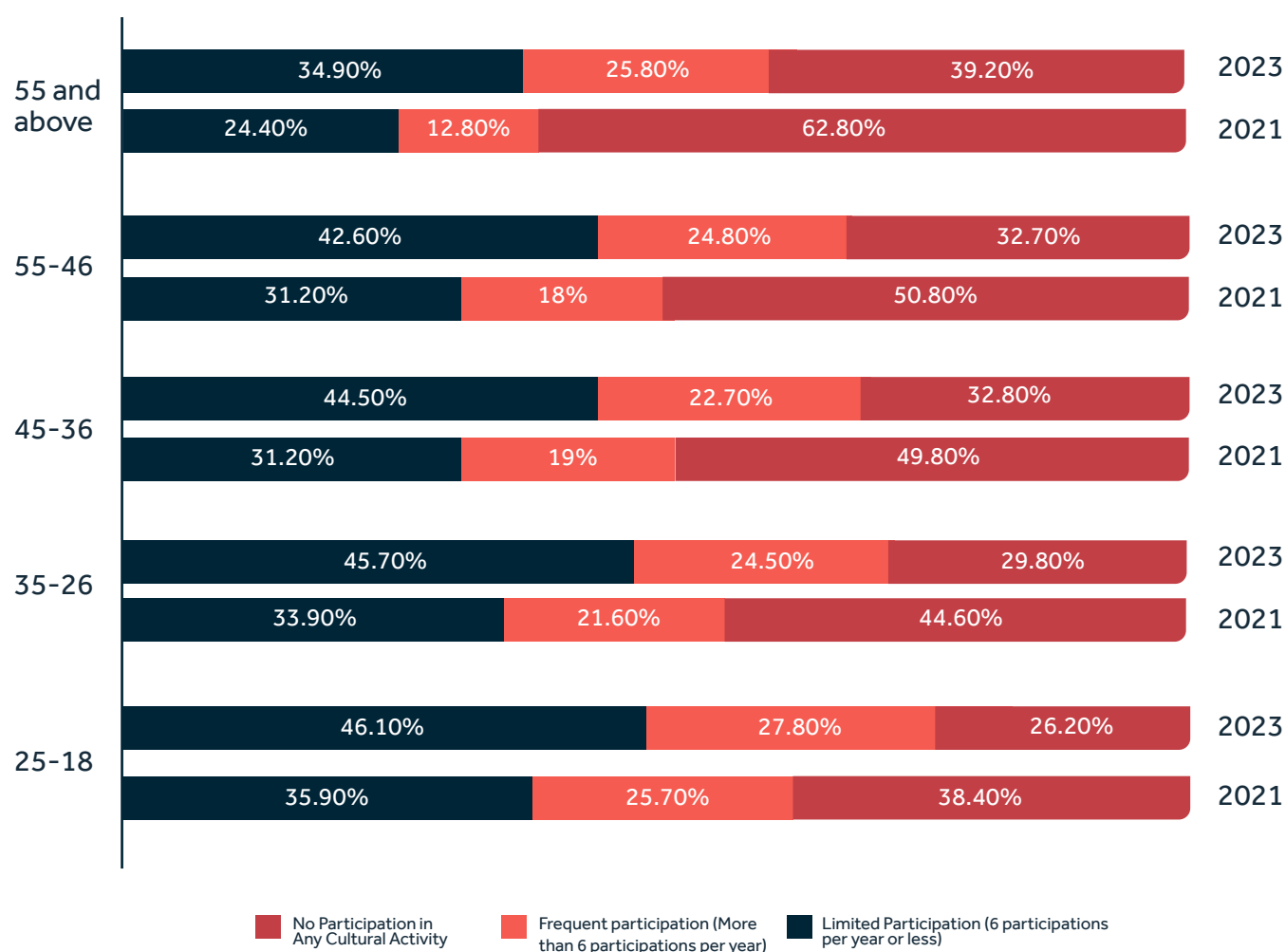


Figure 4: Proportional Distribution of those who Participated in Any Cultural Activity during the Past Twelve Months by Age Group in 2021 and 2023⁽⁸⁾

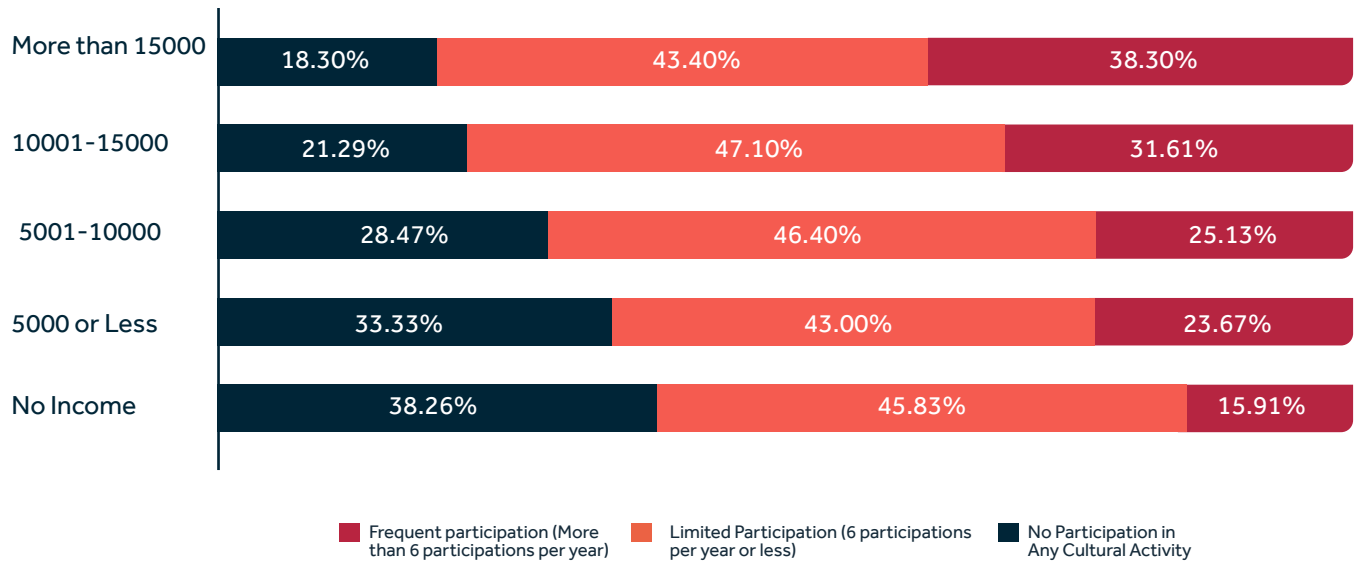


Figure 5: Proportional Distribution of those who Participated in Any Cultural Activity during the Past Twelve Months by Income Level ⁽⁹⁾

On the other hand, the survey results indicate that gender has limited impact on the cultural participation level in the sample. The percentage of male and female participants in any cultural activity during the past twelve months was 69.5% and 67.65%, respectively, but there were differences in the likelihood of repeated attendance (see Figure 6). Another significant gender difference lies in the types of cultural activities they prefer, as data shows that female participation in many activities has significantly increased compared to others, most notably in visiting art exhibitions, with a growth rate of 248% compared to last year (as shown in Figure 7), although the overall participation rate in this activity has witnessed a slight decline (Figure 3). Next is attendance of plays and live performance, followed by attendance of cultural festivals and activities, as the growth rate of female participation in these activities had reached 60% and 14.9% respectively. Due to this growth, the difference in gender participation levels tends to favor women's participation in these three activities, which is contrary to the results of the previous survey. ⁽¹⁰⁾



Cultural Participation

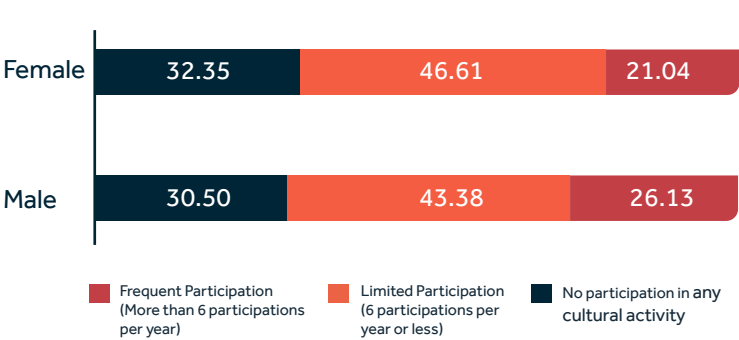


Figure 6: Proportional Distribution of those who Participated in Any Cultural Activity during the Past Twelve Months by Gender⁽¹¹⁾

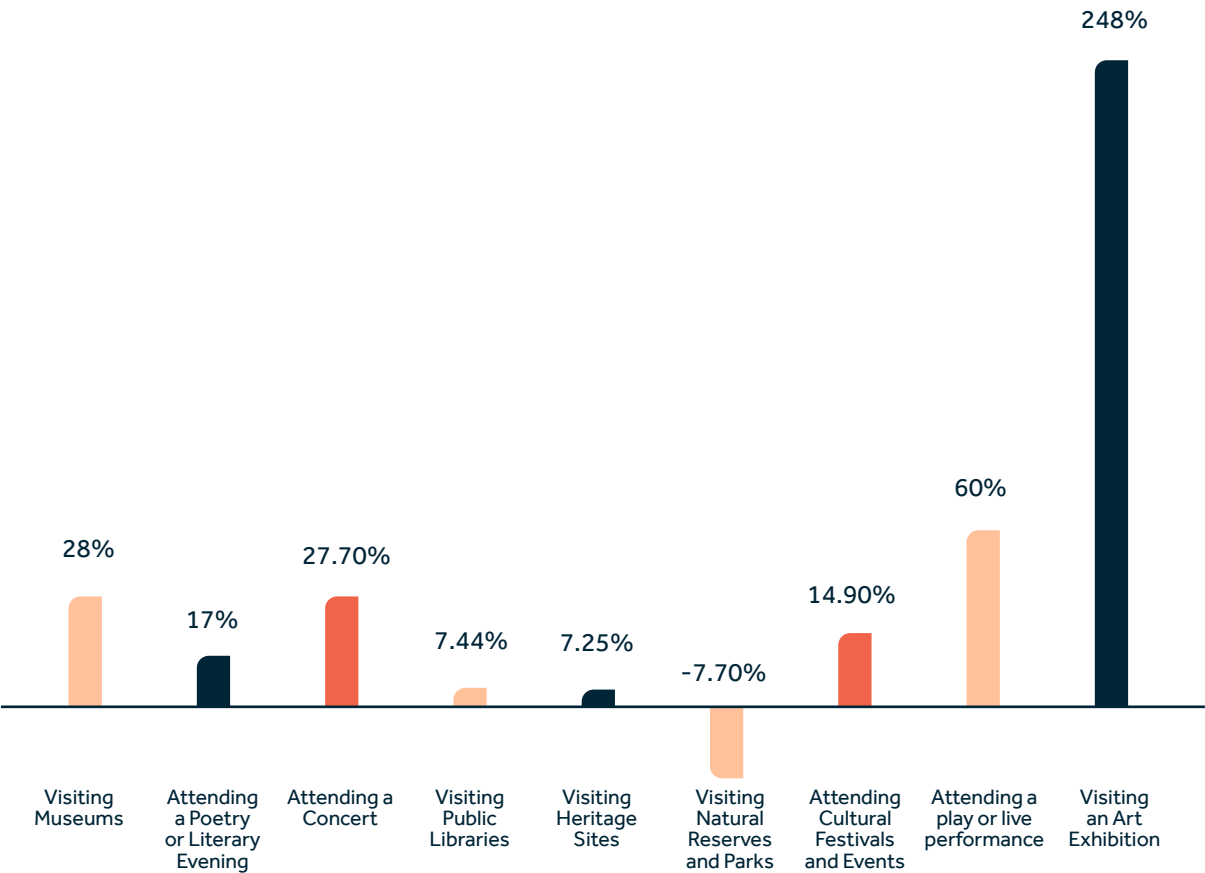


Figure 7: Growth Rates in Female Participation in at Least One Cultural Activity during the Past Twelve Months by Cultural Activities⁽¹²⁾

Visiting Cultural Facilities

Complementary to the survey results, the indicator is concerned with reviewing data on actual visits to cultural facilities, particularly to museums and libraries. Given the regulatory developments in the two sectors, and the requalification of existing assets, including the definition of standards and specifications - as indicated in the Management and Conservation Chapter - the challenge emerged from the absence of gross and controlled figures, so the indicator in this version of the report sufficed with reviewing estimated data from a sample of libraries. Although the growth rate in the number of visitors to public libraries from the survey sample did not increase by more than 2.2%, the recorded data reflected a significant growth in the actual number of visits to some of the most prominent public and academic libraries between 2021⁽¹³⁾ and 2023. In the King Fahad National Library alone, the number of visitors increased from 82,503 in 2022 to 96,585 visitors in 2023; i.e. a growth rate of 17.4% (as shown in Figure 8).

This growth in library visits coincides with the redefinition of libraries and their role to extend beyond the availability of knowledge sources.

Libraries now play an important role in enriching cultural content, thereby changing the purpose of visiting libraries. For example, work had begun on transforming public libraries in Dammam and Ahad Rafidah⁽¹⁴⁾ into cultural houses, an initiative launched by the Library Commissions in 2020 aimed at opening 153 cultural houses in the coming years. Cultural houses contain a public library, which is the main facility, as well as other educational, social, and creative spaces. The report monitored an estimate of 523 cultural activities provided by six libraries in 2023 (as shown in Figure 9), which varied between holding conferences, seminars, literary and reading forums, organizing training programs, and hosting exhibitions. Although this list of libraries does not cover all regions, the results of the Cultural Participation Survey showcased the sample population's satisfaction with the effectiveness of activities provided by the cultural facilities during the past twelve months - including libraries, museums, and theaters - (as shown in Figure 10). Satisfaction levels were relatively similar across regions, with the sample population in the Riyadh region scoring the highest satisfaction levels; whereas the sample in the Najran and Tabuk regions scored the lowest satisfaction levels.



Cultural Participation

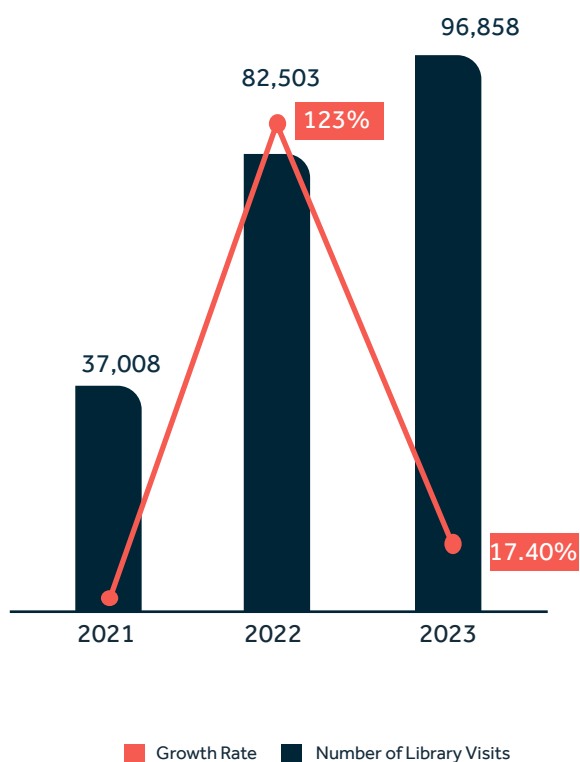


Figure 8: Number of Visits to King Fahad National Library and their Growth Rates during the 2021 - 2023 Period ⁽¹⁵⁾

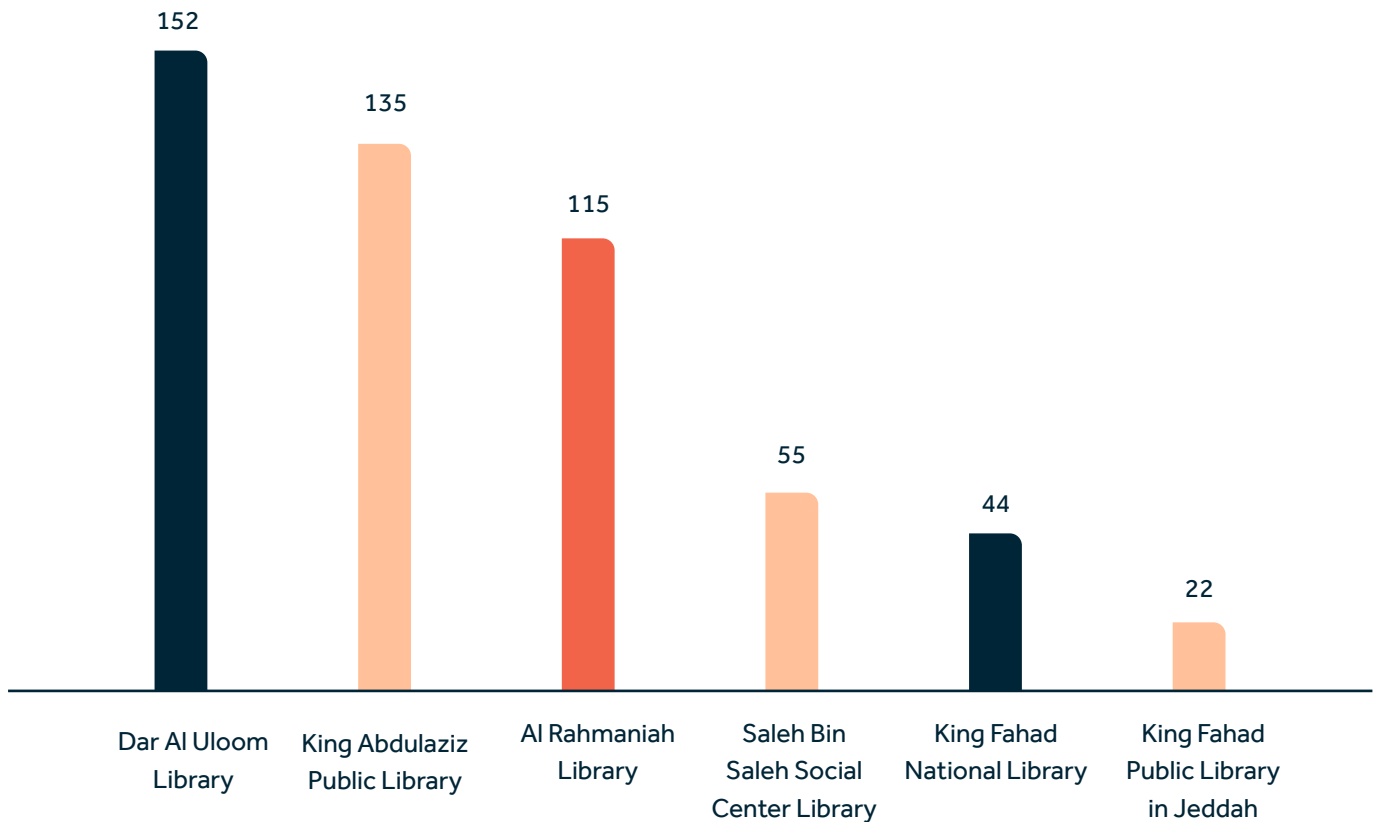


Table 1: Number of Visits to Several Public Libraries in the Kingdom in 2023 ⁽¹⁶⁾

Library	City	Number of Visits
King Abdulaziz Public Library ⁽¹⁷⁾	Riyadh	72,458
King Abdulaziz Center for World Culture Library (Ithra) ⁽¹⁸⁾	Dhahran	776,295
King Fahad Public Library in Jeddah	Jeddah	55,351
Al-Rahmaniya Library - Abdulrahman Al-Sudairy Cultural Center	Al-Ghat	4,752
Dar Al Uloom Public Library - Abdulrahman Al-Sudairy Cultural Center	Al-Jouf	17,626
Saleh Bin Saleh Social Center Library	Unaizah	2,722
Ibn Al-Qayyim Public Library	Riyadh	450

Table 2: Number of Visits to Several Academic Libraries in the Kingdom in 2023

Library Name	Number of Visits
King Salman Central Library at King Saud University ⁽¹⁹⁾	500,008
Central Library at Princess Nourah bint Abdulrahman University ⁽²⁰⁾	181,401
Prince Sultan Library for Science and Knowledge at Al-Imam Muhammad Ibn Saud Islamic University ⁽²¹⁾	145,114
Northern Border University Library ⁽²²⁾	40,114
University of Jeddah Library ⁽²³⁾	21,340
University of Hafr Al-Batin Library ⁽²⁴⁾	82,791

Figure 9: Number of Cultural Activities Provided in 2023 to a Sample of Libraries ⁽²⁵⁾

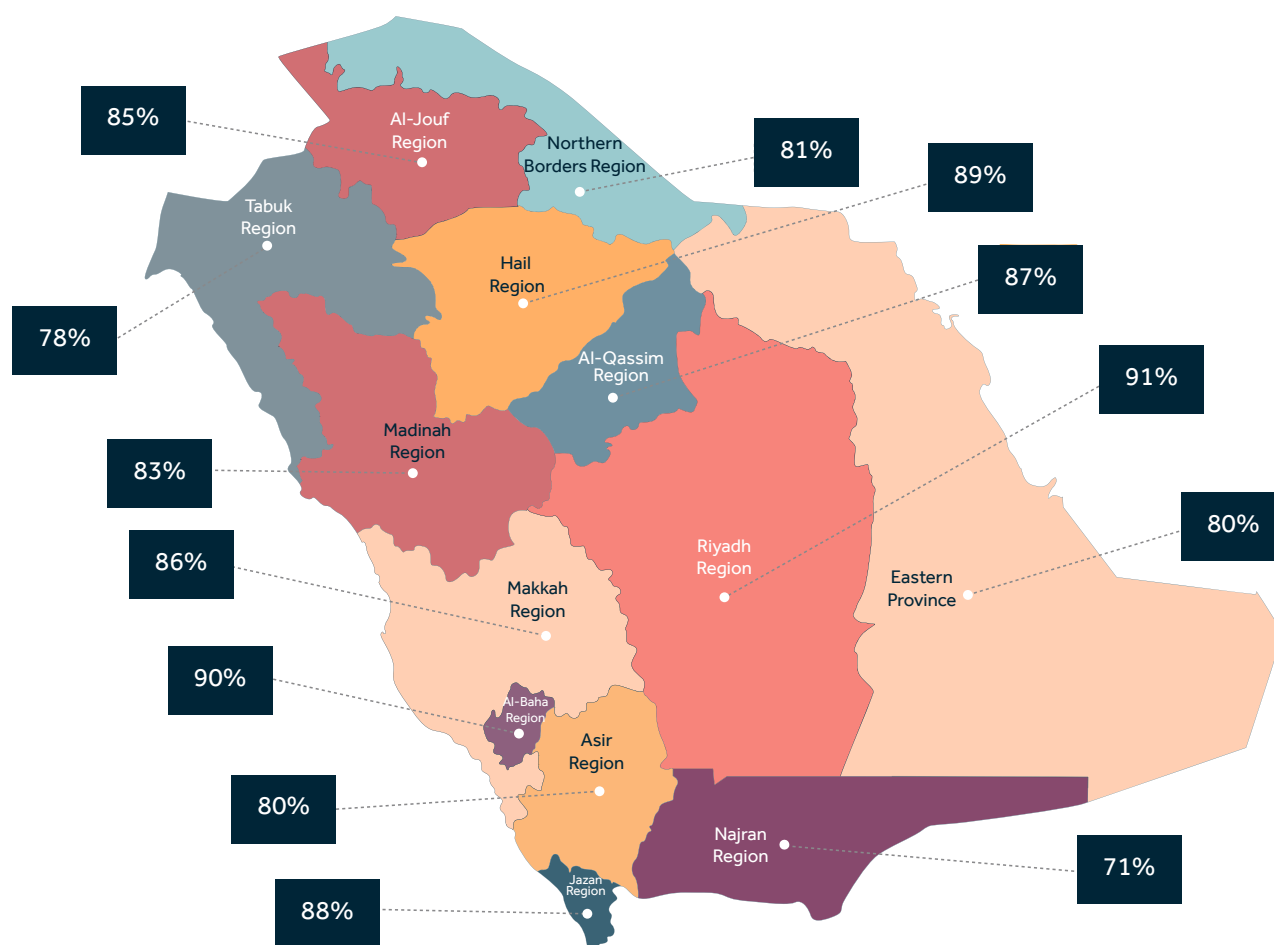


Figure 10: Satisfaction Rate with the Effectiveness of the Activity Provided in the Cultural Facilities by Region in 2023⁽²⁶⁾

Notable Cultural Festivals and Exhibitions

Although the growth rate in attendance of cultural festivals and events – as stipulated in the survey results – did not exceed 5% between 2022 and 2023,⁽²⁷⁾ this activity remains one of the most demanded and popular activities, which is consistent with the continuous growth in the number of festivals and its attendees, as well as the geographical and sectoral expansion reflected in this year's data. The demand for attending such cultural festivals can be attributed to their close connection with the social dimension of participation, and the survey results confirmed this point, since the purpose of accompanying family and friends came at the

forefront of motivations for attending cultural festivals and activities. Among the other factors that serve this demand is cultural festivals' ability to attract various groups, due to the diversity of the cultural displays provided therein. While the Creativity and Cultural Production Chapter views the trends of the exhibitions and events that reflect artistic production, such as art exhibitions and fashion shows, or plays and live performances, this indicator focuses more on events that are inherently associated with participation and attendance, such as festivals, book fairs and exhibitions in the museum and culinary sectors, to name a few.



Cultural Festivals

The Culinary Arts Sector is particularly distinguished as one of the most active sectors in holding festivals, due to the sector's nature, which is linked to social and recreational practices, as well as its distance from elitist fields that may be observed in other sectors. As shown in (Table 3), the report provided a list of prominent festivals under the Culinary Arts Sector, including the Annual Buraidah Date Festival – first launched in 2005 – one of the largest date festivals in the Kingdom, as it received nearly 400,000 visitors in 2023. On the other hand, earlier that year, the Ministry of Environment, Water and Agriculture also organized the 10th Edition of the Saudi Coffee Festival in Al-Dair

Bani Malik Governorate in the Jazan region, where more than 100 farmers participated in the festival with their coffee products. This edition of the festival received special acclaim, as it came a few months after listing the Saudi Khawlani Coffee Beans in the UNESCO's Representative List of Intangible Cultural Heritage. In addition, the Culinary Arts Commission continued to organize a number of festivals, such as the Truffle Festival in Riyadh, the Second Edition of the Seafood Festival in Al-Khobar, and the Third Edition of the Saudi Food Festival, which recorded an increase in the number of visitors from 100,000 visitors in 2022 to 140,777 visitors in 2023.⁽²⁸⁾

Table 3: Sample of Festivals in the Culinary Arts Sector in 2023 and the Number of Attendees⁽²⁹⁾

Organizer / Supervisor	Festival Title	Festival Duration	Region	Number of Attendees
Culinary Arts Commission	Second Edition of the Truffle Festival ⁽³⁰⁾	4 Days	Riyadh	5,520
	Ramen and Anime Festival	5 Days	Makkah	12,080
	Second Edition of the Seafood Festival	5 Days	Eastern Province	14,862
	Third Edition of the Saudi Feast Food Festival	14 Days	Riyadh	140,777
	Food Culture	5 Days	Riyadh	35,552
	Shetana Event	24 Days	Riyadh	8,850
	Saudi Coffee Festival	5 Days	Riyadh	44,963
Ministry of Environment, Water and Agriculture ⁽³¹⁾	10th Saudi Coffee Festival	10 Days	Jazan	120,000
	Buraidah Date Festival	3 Months	Al-Qassim	400,000
General Entertainment Authority ⁽³²⁾	Food Truck Park	10 Days	Riyadh	35,295

Cultural Participation

As for the Film Sector, despite its novelty, the active production movement has made film festivals an important incubator for filmmakers, producers, investors, and audiences. While the Creativity and Cultural Production Chapter reviews the number and trends of films screened at these festivals, this indicator focuses on the number of attendees and growth. The year saw a remarkable growth in the number of attendees to the Saudi Film Festival in particular, as the number

of attendees jumped from 16,245 visitors in 2022 to 38,186 visitors in 2023 (as shown in Figure 11), probably due to the expansion of the 9th Edition of the Festival to include the participation of Arab and international films. Furthermore, the number of visitors to the Red Sea International Film Festival increased – albeit by a smaller percentage – with a growth rate of 44.6% between 2021 – the first year the festival was held – and 2023.

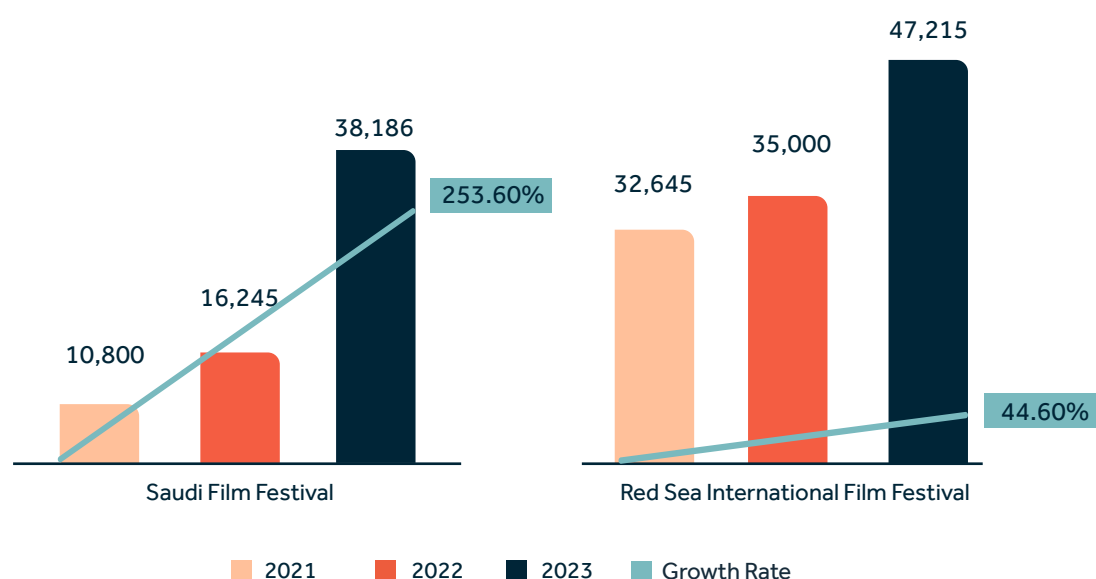


Figure 11: Growth in the Number of Attendees to the Saudi Film Festival and the Red Sea International Film Festival during the 2021 - 2023 Period⁽³³⁾

In the Music Sector, several festivals were held, varying between Arab and international arts as shown in (Table 4), the most prominent of which was the International Opera Festival - an annual festival organized by the Music Commission for the first time in 2022 - in which global opera performers and the International Philharmonic Orchestra participated. As part of the Festival's events, the Franco Zeffirelli Exhibition was held for the operatic pieces and collectibles and its relevant arts, such as costumes and the history of musical instruments.⁽³⁴⁾ The Festival aims to introduce the local audience to this international art in order to enhance cultural communication, and contribute to enriching

and diversifying artistic display in the Kingdom. The Commission also organized the KCON – a K-Pop Festival – with the participation of 14 Korean bands, and the attendance of 11,197 visitors. Furthermore, the Ministry of Culture held the Third Edition of the Singing in Fusha Festival, in which several Arab artists and emerging Saudi talents participated in singing masterpieces of Arabic poetry, with an audience of 11,928 visitors. It is noted that the concerts and music festivals held in 2023 were dominated by the centralization in their geographical distribution, as all four festivals monitored by the report were held in Riyadh.

On the occasion of the Year of Arabic Poetry 2023, the Ministry of Culture organized a number of prominent poetry festivals, celebrating the Arabian Peninsula poets from the Mu'allaqat poets by regarding their poems as a model of poetic art and Arabic rhetoric. These festivals include the Imru Al-Qays Poet of Ghazal Festival in Diriyah, and the Tarafa Ibn Al-Abd Festival held in the Al-Ahsa. The two cities are linked to the birth places of the two poets. The two festivals included a series of poetry evenings, live

performances and plays, in addition to spaces dedicated to the culinary arts, traditional industries, child-oriented events, and others. The number of visitors to the Imru Al-Qays and Tarafa Ibn Al-Abd Festivals reached 8,810 and 7,194 visitors, respectively. Among the poetry festivals held during the year was the Nabati Poetry Festival in the City of Buraidah, with the participation of more than twenty poets from Saudi Arabia and the Gulf States.⁽³⁵⁾

Table 4: Examples of the Most Prominent Cultural Festivals held in 2023 and the Number of Attendees⁽³⁶⁾

Organizer	Festival Title	Festival Duration	Region	Number of Attendees
Ministry of Culture ⁽³⁷⁾	Imru Al-Qays Poet of Ghazal Festival	7 Days	Riyadh	8,810
	Tarafa Ibn Al-Abd Festival	7 Days	Eastern Province	7,194
	Second Edition of the Aja and Salma Festival	10 Days	Hail	32,453
	Nabati Poetry Festival	3 Days	Al-Qassim	1,645
	Third Edition of the Taif Rose Festival	15 Days	Makkah	328,766
	Third Edition of the Singing in Fusha Festival	4 Days	Riyadh	11,928
Theater and Performing Arts Commission ⁽³⁸⁾	The Second Qemam International Festival for Mountain Performing Arts	8 Days	Asir	215,977
	Annaham Festival	7 Days	Eastern Province	21,281
	Riyadh Theater Festival	11 Days	Riyadh	14,203
Literature, Publishing and Translation Commission ⁽³⁹⁾	Writers and Readers Festival	7 Days	Eastern Province	153,000
Visual Arts Commission ⁽⁴⁰⁾	RSH Street Art Festival	22 Days	Riyadh	19,390
Libraries Commission	Libraries Nights	9 Days	Riyadh	137,326
Music Commission ⁽⁴¹⁾	Second Edition of KCON Festival	2 Days	Riyadh	11,197
	Second Edition of International Opera Festival	4 Days	Riyadh	5000
Royal Commission for AlUla ⁽⁴²⁾	Winter at Tantora Festival	10 Days	Al-Ula	1,933

Cultural Exhibitions

In 2023, four book fairs were held in Riyadh - the oldest and largest international fair in the Kingdom - and in Jeddah and Madinah, in addition to the first fair organized by the Literature, Publishing and Translation Commission in the Eastern Province. It was noted that the numbers of

attendees at the Riyadh and Jeddah fairs showed relative stability, as opposed to the growth in the attendance rate at the Madinah Book Fair as shown in (Table 5). The total number of visitors to the four fairs exceeded 2.2 million visitors, of whom the Riyadh fair's share was close to half.

Table 5: Number of Visitors to the Book Fairs held in 2022 and 2023⁽⁴³⁾

Fair	City	Number of Visitors in 2022	Number of Visitors in 2023
Riyadh International Book Fair	Riyadh	1,051,054	1,007,726
Eastern Province Book Fair	Dhahran	---	304,424
Madinah Book Fair	Madinah	165,081	275,988
Jeddah Book Fair	Jeddah	598,895	620,907
Total		1,815,030	2,209,045



Among the prominent cultural exhibitions held in 2023 was the "Between Two Cultures" Exhibition in Diriyah, organized by the Ministry of Culture. It is planned to become an annual exhibition aimed at showcasing a different culture each year, while demonstrating its similarities and ties with Saudi culture. Yemen's culture was selected in the first edition of the exhibition, which included multiple sections; such as cultural and natural heritage, the "Art Bridge" section with the participation of artists from both countries, the "Between Clay and Architecture" section, the "Between Outfits and Jewelries" section, and two sections related to culinary arts and hospitality in both cultures, namely the "Between Generosity and Munificence" section and the "Between Crops and Fruits" section.⁽⁴⁴⁾ Other institutions, such as the King Abdulaziz Public Library, have also been active in holding cultural exhibitions that varied in their content and fields as shown in (Table 6). For example, the Library held a Hajj exhibition at its head office in Riyadh, which contained various collections of manuscripts, photographs and coins about Hajj rites, sites and history. Furthermore, the Library also collaborated with the "Color Dot" Studio to organize the Children's Imagination Exhibition, which is the first exhibition under the Art Studio initiative, aiming to enrich artistic and cultural content directed at children.⁽⁴⁵⁾

In the Culinary Arts Sector, a number of exhibitions emerged, such as the International Culinary Exhibition (InFlavour) in Riyadh, which was attended by 40,000 visitors, as well as the Mobile Culinary Exhibition, organized by the Culinary Arts Commission in three cities: Madinah, Jeddah and Al-Ula, showcasing the styles of the national dishes and the regions' dishes – an initiative launched by the Commission to preserve and document the elements of the intangible cultural heritage associated with culinary arts in the Kingdom⁽⁴⁶⁾ – and these three exhibition stations were attended by about 4,513 visitors.



As for the Museums Sector, one of the most prominent exhibitions held in 2023 was the “Scripts and Calligraphy: Path to the Soul” Exhibition at the Madinah Arts Center in Madinah, and then at the Irqah Hospital in Riyadh, where a collection of Arabic manuscripts were displayed, in addition to Arabic calligraphy works, with the participation of 34 calligraphers and a number of artists, in four sections: Light, Letter, Space, and Poetry.⁽⁴⁷⁾ The number of visits to the exhibition in its two editions reached 12,374 and 5,300 respectively as shown in (Table 6).

Table 6: Sample of Cultural Exhibitions held in 2023 and the Numbers of Attendees⁽⁴⁸⁾

Organizer	Exhibition	Exhibition Duration	City	Number of Attendees
Ministry of Culture	Bienalsur Exhibition	2 Months	Riyadh	37,130
Ministry of Culture	Between Two Cultures	12 Days	Diriyah	17,775
Ministry of Environment, Water and Agriculture in co-operation with “Tahaluf” ⁽⁴⁹⁾	International Culinary Exhibition (InFlavour)	3 Days	Riyadh	40,000
Culinary Arts Commission ⁽⁵⁰⁾	Mobile Culinary Exhibition	7 Days	Riyadh	4,513
		7 Days	Jeddah	
		7 Days	Al-Ula	
Museums Commission ⁽⁵¹⁾	Scripts and Calligraphy: Path to the Soul Exhibition	3 Months	Madinah	12,374
		3 Months	Riyadh	5,300
King Abdulaziz Public Library ⁽⁵²⁾	Rare Coins and Currencies Exhibition	One year	Riyadh	12,750
	Arabic Poetry Exhibition	Two Months	Riyadh	17,000
	Children's Imagination Exhibition	3 Days	Riyadh	4000
	The Camel Through the Ages Exhibition	4 Months	Riyadh	3,710
	Hajj Exhibition	One Month	Riyadh	500

Satisfaction Rates and Attendance Motivations

The Cultural Participation Survey not only measures the levels of engagement and reception of cultural activities - in the form of attendance and hobbies engagement indicators - but also aims to provide a deeper understanding of the Kingdom's cultural participation state, as it also monitors the motivation for attendance or non-attendance, while measuring the satisfaction rate

with the provided events, and the availability of cultural facilities and the activity held therein. In the satisfaction questions, the indicator focuses on analyzing the results based on geographic and social factors, in an effort to evaluate the accessibility or the level of benefit from the world of culture.



Overall, the Cultural Participation Survey yielded similar results to its previous round, as the purpose of accompanying family and friends is still - by a noticeable margin - the first motivation for the sample to attend cultural festivals and events, which emphasizes the social dimension of these activities, followed by the suitability of times by 16.8%, and the suitability of prices by 12.4%. As shown in Figure 12, the motivations of organization, accessibility, and suitability of time are higher than last year, which may indicate an improvement in organizers' planning of such events. From the perspective of gender distribution, the results reflected a relative convergence between males and females in all the reasons for attendance. However, the difference between them is particularly evident in regards to the suitability of prices, as 16.4% of females in the survey sample chose this motivation compared to 10% of males. In terms of organization and accessibility, 9.7% of females in the

sample have chosen these motivations compared to 5.9% of males. As for the non-attendance motivations, as shown in Figure 13, nearly half of the sample reported that their main reason for not attending cultural festivals and events was due to their preoccupation or work engagements, while one third of the sample chose time constraints. In contrast, only 6.8% of the sample reported that their motivation was due to their interest in other activities and fields outside cultural activities, meaning that these results indicate that non-attendance does not necessarily reflect a lack of desire and interest. It is also worth noting that the percentage of the sample that chose high prices as a main motivation had declined from 26.5% in 2022⁽⁵³⁾ to 19.9% in 2023, although the suitability of ticket prices within attendance motivations remained at a comparable level during the two years (Figure 12).

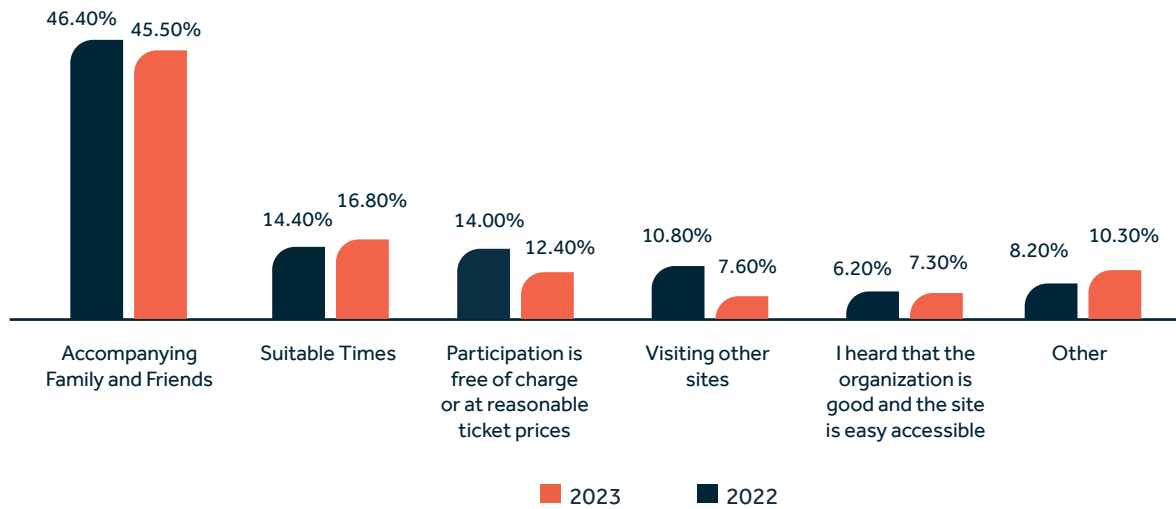


Figure 12: Main Motivation for attending Cultural Festivals and Events in 2022 and 2023 ⁽⁵⁴⁾

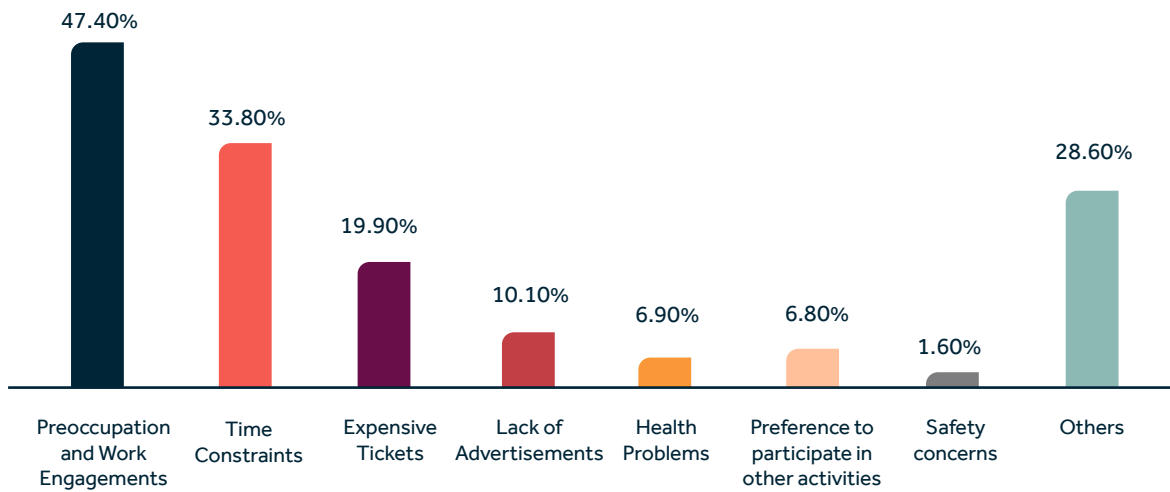


Figure 13: Main Motivations for not attending Cultural Festivals and Events in 2022 and 2023 ⁽⁵⁵⁾

The survey results also revealed an increase in satisfaction levels with the availability of cultural festivals and activities, which is consistent with growth levels in the attendance rates. This increase was reflected in different age groups (as shown in Figure 14). The age group representing people aged 50 years old and above remained the highest in the satisfaction range, despite being the group with the least attendance, as observed

in the previous version of the report. The situation is different when considering gender distribution (see Figure 15) It is noticeable that the satisfaction rate among females in the sample increased from 68% in 2022 to 78% in 2023, thus reducing the disparity in satisfaction level between genders. This increase is consistent with their attendance rate to cultural festivals and events, which is also slightly higher than males.

Cultural Participation

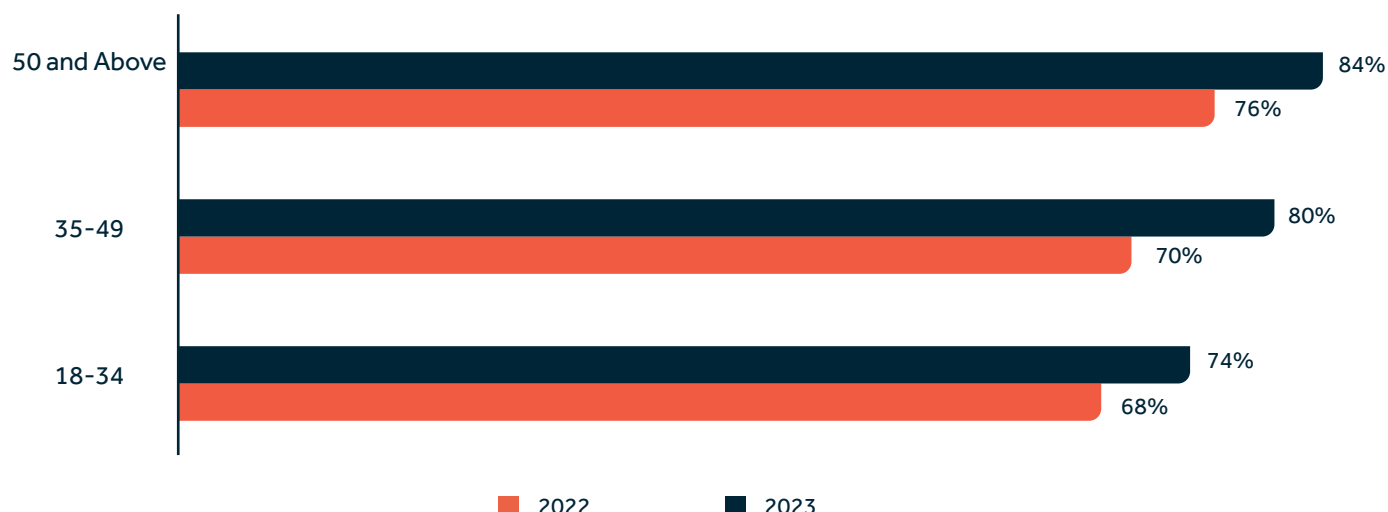


Figure 14: Satisfaction Rate with the Availability of the Cultural Festivals and Events in the City of Residence by Age Group in 2022 and 2023 ⁽⁵⁶⁾

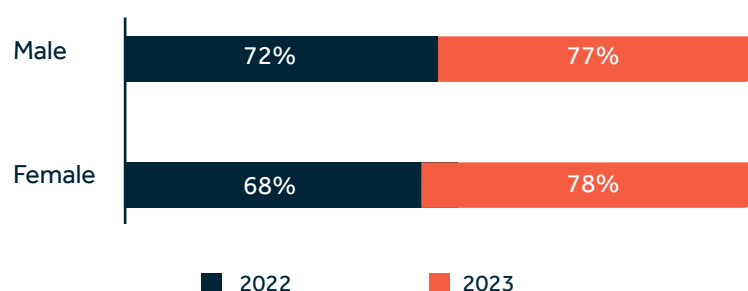


Figure 15: Satisfaction Rate with the Availability of the Cultural Festivals and Events in the City of Residence by Gender in 2022 and 2023 ⁽⁵⁷⁾

If we turn to the survey results at the geographical distribution level, we find that this year's results revealed a significant disparity between satisfaction rates with the availability of cultural festivals and events in the city of residence, and their availability near the district. Riyadh continues to lead with the highest satisfaction rate among regions, as 91% of its population in the survey sample reported their satisfaction with the availability of cultural festivals and events in the city of residence, while the Makkah region comes second with 76%, and 72% of Al-Qassim residents in the survey sample expressed their satisfaction, contrary to the results of the last survey round, in which the Al-Qassim region was the least satisfied region by no more than 50%.⁽⁵⁸⁾ Figure

16 shows that these rates decrease significantly when respondents are asked about their satisfaction with the availability of cultural festivals and events near the districts in which they live. This can be indicative of the cultural activity's concentration in the points of attraction within cities, and its isolation from residential districts and their urban and social environments, an observation highlighted by the data of the third round of the 2021 survey.⁽⁵⁹⁾ This observation emphasizes the crucial role played by cultural institutions in targeting residential districts' centers and their public spaces, as well as the necessity of involving these residents in organizing and hosting events.

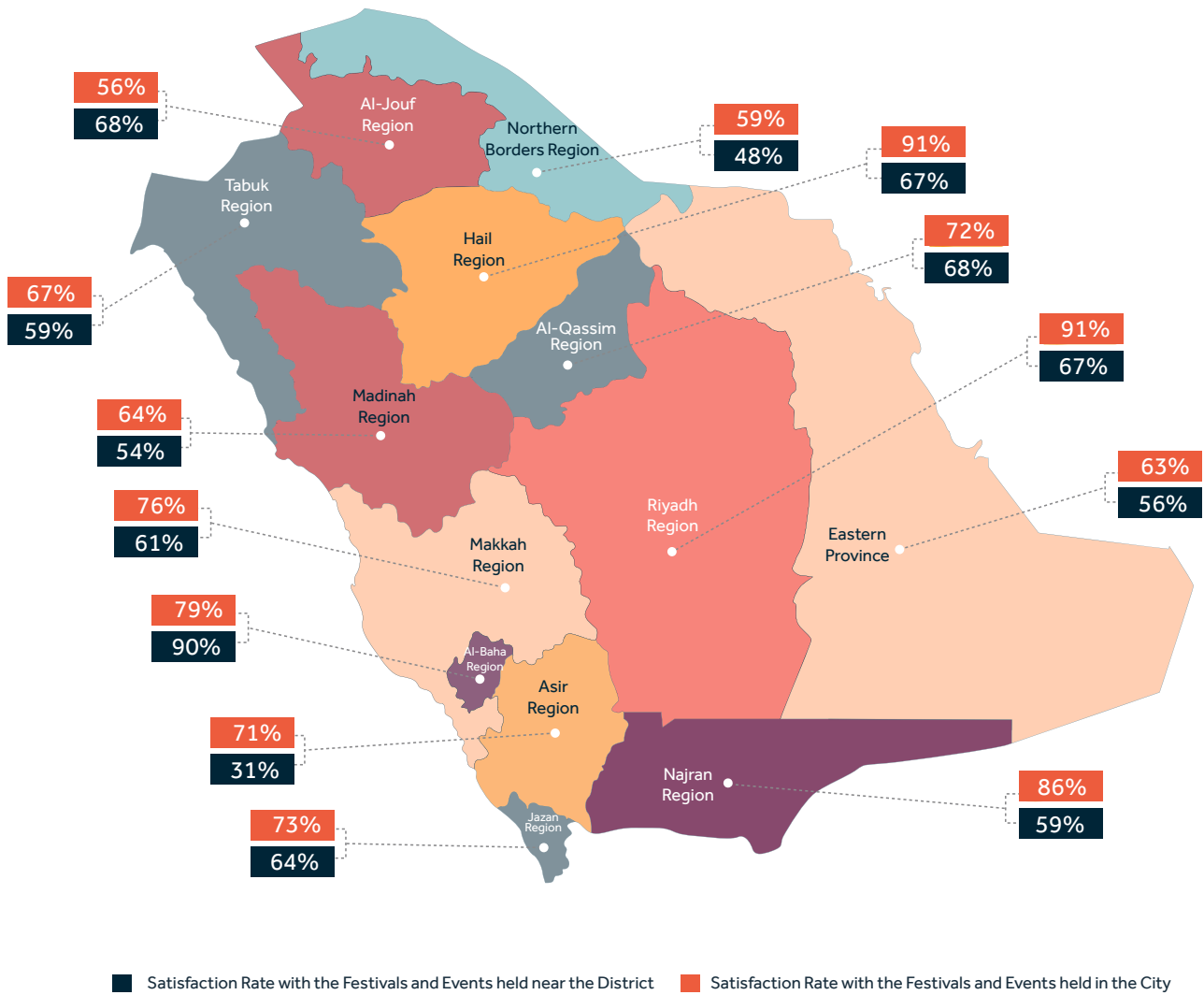


Figure 16: Satisfaction Rate with the Availability of the Cultural Festivals and Events in the City and District by Region in 2023⁽⁶⁰⁾





Cultural Tourism

While the Creative Economy Chapter focuses on the economic aspect represented by the market share of cultural tourism, it is also important to review cultural tourism activities in the Cultural Participation Chapter. This review reflects an implication that goes beyond the commercial concept of tourism, while adding another dimension in terms of residents' participation in cultural activities outside their places of residence, which supports other indicators in this chapter in mapping cultural participation and tracking its trends throughout the year. The continued growth in

cultural tourism, as observed in the previous report, remains the most prominent feature this year as well. The number of domestic tourism trips that included cultural activities increased from 17.3 million trips in 2022 to 21.4 million in 2023, representing 26% of total domestic tourism trips in the Kingdom during the year.⁽⁶¹⁾ This increase is also reflected in the average participation rate of a single tourist in the cultural activities, rising from 0.74% in 2022 to 1.53% in 2023.⁽⁶²⁾

Domestic Tourism Trips

Given the breakdown of cultural activities, the overall growth in domestic cultural tourism is reflected across all activities, with the exception of trips that involved visiting cultural festivals and events, as they recorded a slight decline compared to 2022 (as shown in Figure 17). This decline – compared to the growth rate in trips that included other cultural activities – reflects more diversity in cultural tourism. The highest growth rates were observed in domestic tourism trips that involved visiting resorts and mountainous regions for the second consecutive year, followed by trips to natural reserves and parks, which increased by 150.4% and 122.85%, respectively, between 2022 and 2023. This growth in the number of tourism trips to natural reserves and parks can be attributed to the Kingdom's focus on the natural heritage sector and the ecotourism. For example, the Council of Royal Reserves adopted strategic objectives for royal reserves in the middle of the year, including the development and encouragement of ecotourism within the reserves.⁽⁶³⁾

The number of tourism trips that involved visiting museums and art exhibitions – an activity that has been significantly affected over the past five years as noted in the 2022 report⁽⁶⁴⁾ – continued to recover, registering an increase of 9% compared to 2022. As shown in Figure 18, domestic tourism

trips that involved visiting cultural festivals and events and those that involved visiting historical and heritage sites ranked first with close percentages. They accounted for nearly half of the domestic tourism trips that included a cultural activity, with the former – i.e. the trips that involved visiting cultural festivals and events – alone constituting 10.5% of the total domestic tourism trips during the year.



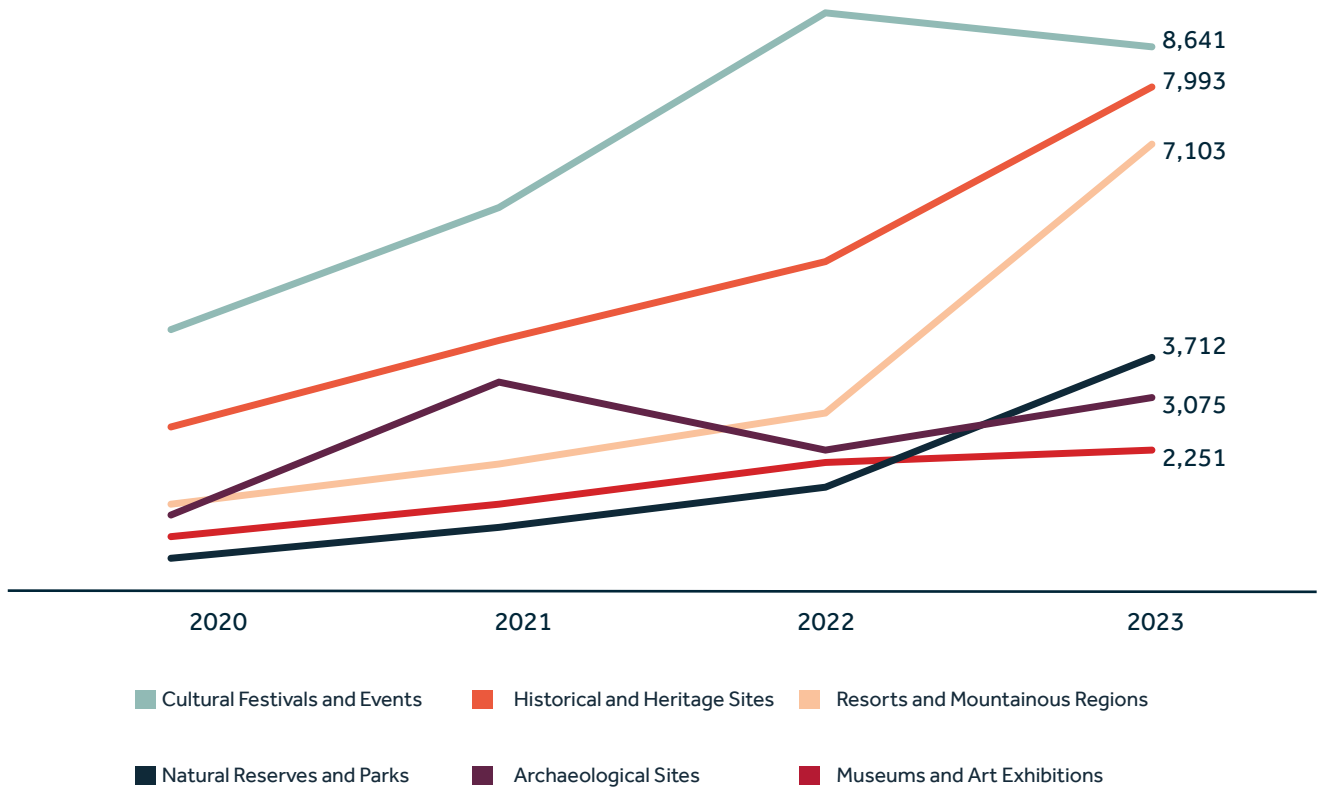


Figure 17: Number of Domestic Cultural Trips that included Cultural Activities in 2023 (in thousands) ⁽⁶⁵⁾

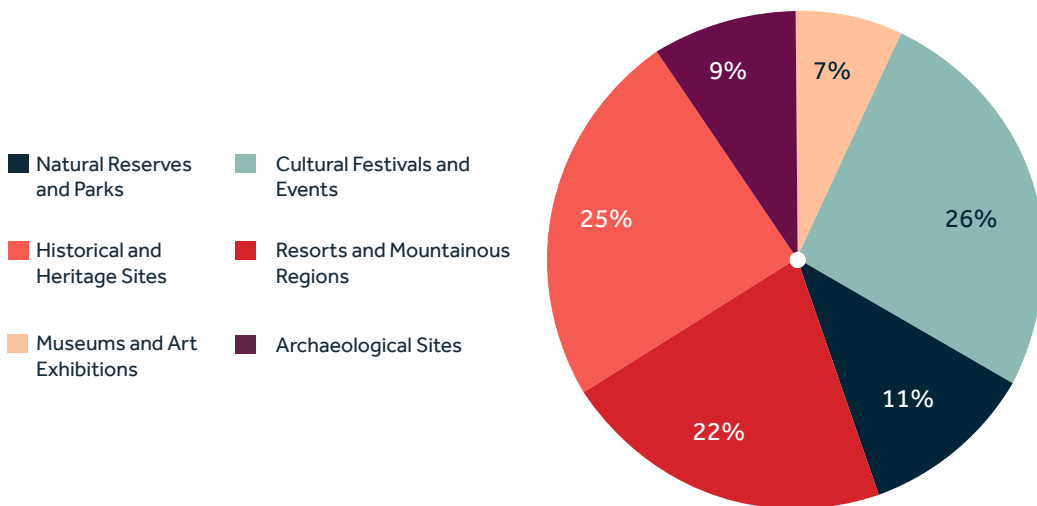


Figure 18: Proportional Distribution of Domestic Cultural Tourism Activities in 2023 ⁽⁶⁶⁾

Cultural Participation

This differentiation in the demand for cultural tourism activities is reflected in the geographic distribution of domestic tourism trips, indicating a variety and disparity in cultural attractions across different regions. For instance, while the Madinah region led in number of trips that involved visiting historical and heritage regions (as shown in Figure 20), or visiting archaeological regions, it was not present among the top five regions for other cultural activities. Similarly, the Al-Baha region stood out in the number of trips that involved visiting resorts and mountainous regions, but ranked among the lowest in terms of visiting museums and art exhibitions (Figure 21). In contrast, Riyadh, Makkah, the Eastern Province, and Asir led in the number of domestic cultural tourism trips that included any of these cultural

activities.⁽⁶⁷⁾ However, these regions also exhibited significant disparities. For example, 38% of domestic trips that involved visiting cultural festivals and events are concentrated in the Riyadh region, amounting to about 3.3 million trips, followed by the Makkah region and the Eastern Province with similar numbers (as shown in Figure 19). As for domestic trips that involved visiting museums and art exhibitions, it is noticeable that Asir region was in the lead (Figure 21), possibly due to the high number of private museums . As for Riyadh, it ranked third - preceded by the Eastern province - despite hosting the largest share of art exhibitions in 2023, as noted in the Creativity and Cultural Production Chapter.

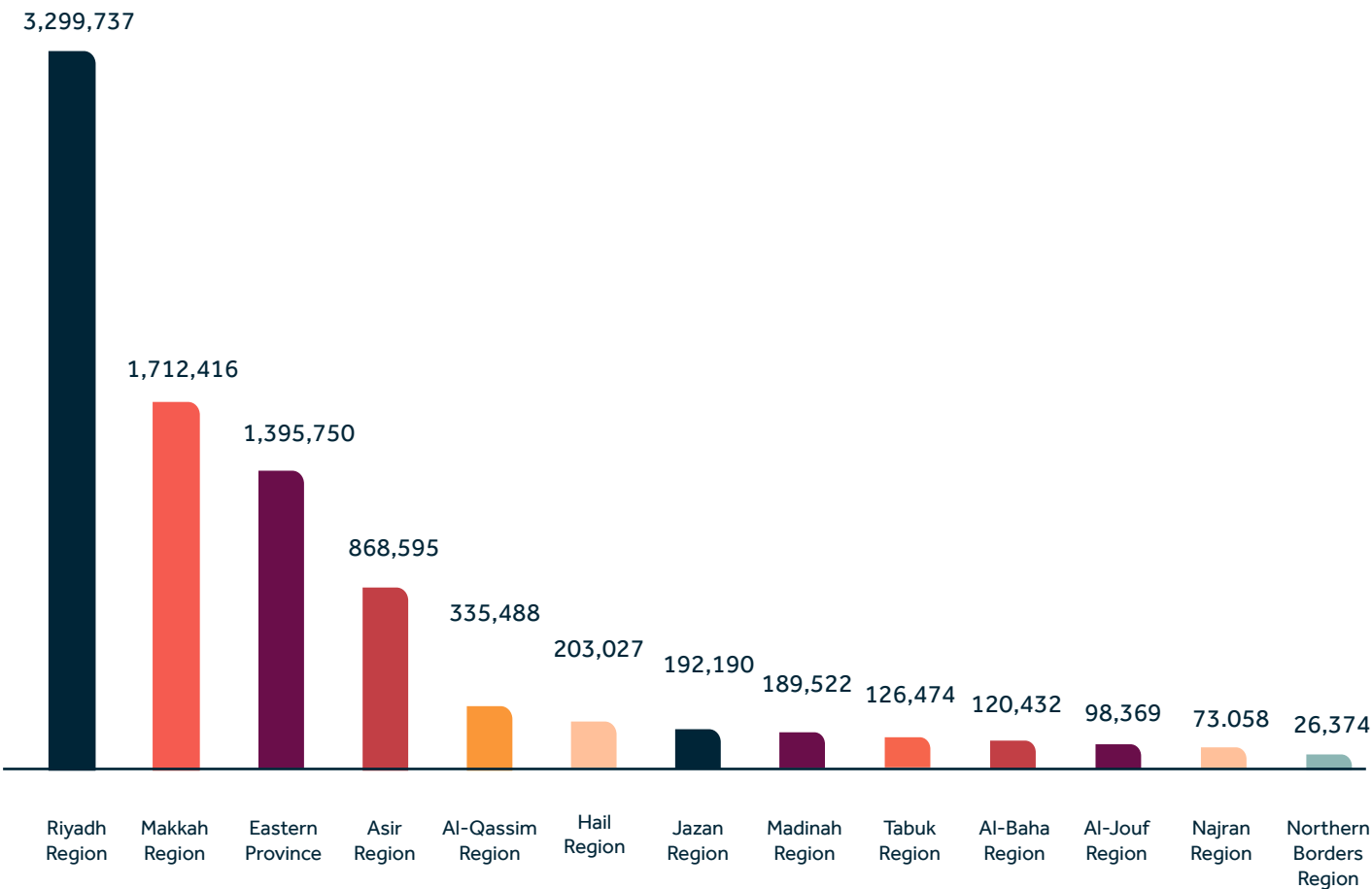


Figure 19: Geographic Distribution of Domestic Tourism Trips that involve Visiting Cultural Festivals and Events in 2023⁽⁶⁸⁾

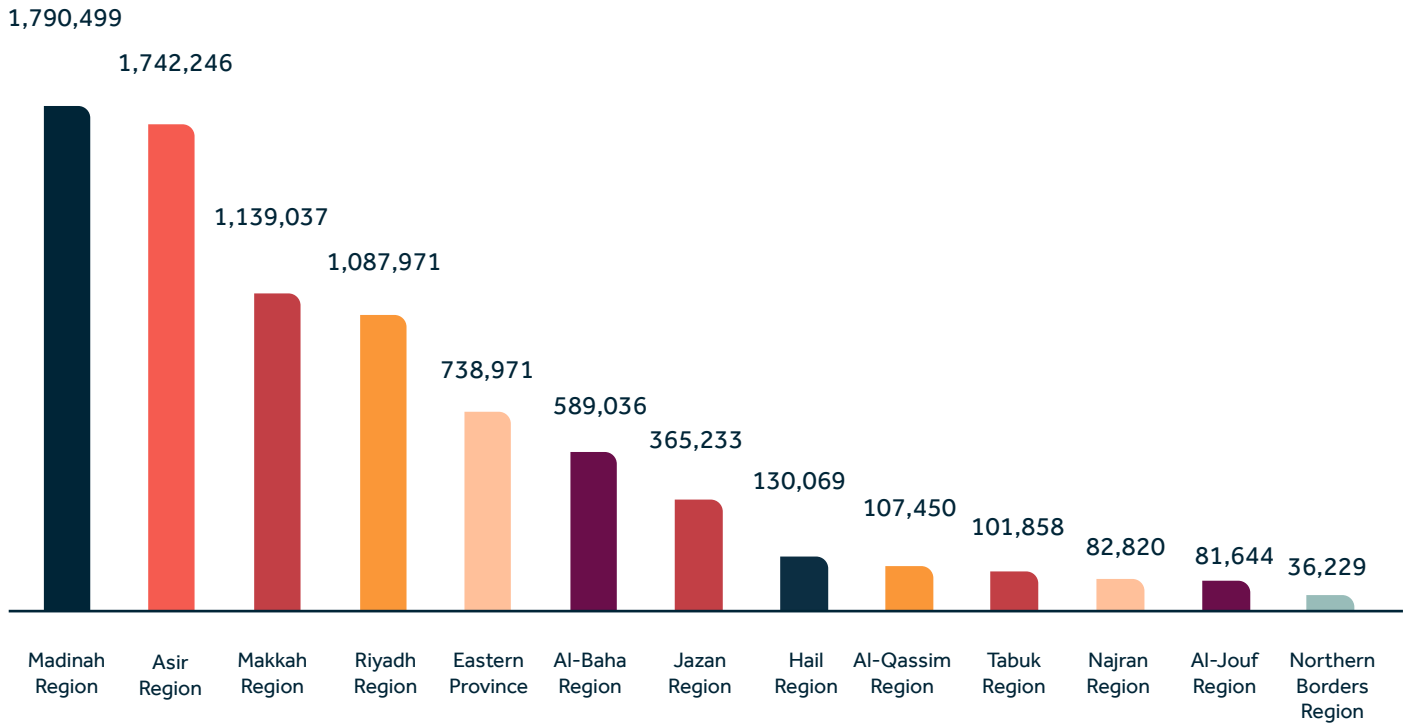


Figure 20: Geographic Distribution of Domestic Tourism Trips that involve Visiting Historical and Heritage Sites in 2023 ⁽⁶⁹⁾

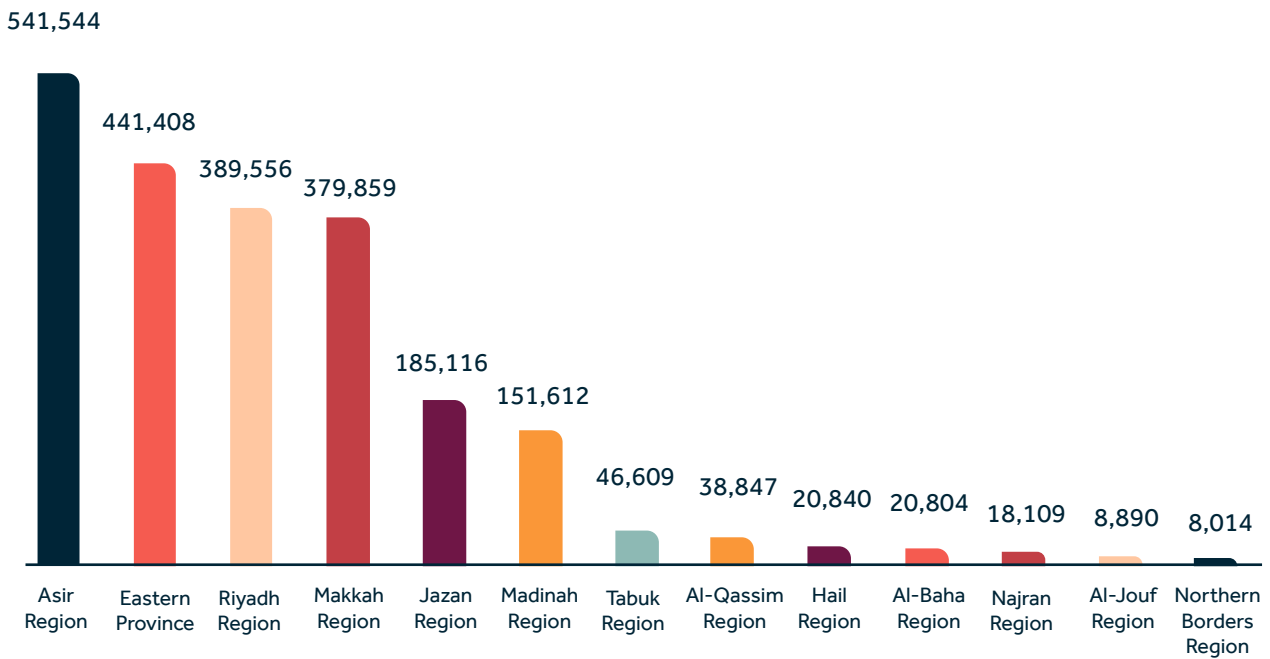


Figure 21: Geographic Distribution of Domestic Tourism Trips that involve Visiting Museums and Art Exhibitions in 2023 ⁽⁷⁰⁾

Social Integration

The Cultural Participation concept is closely linked to the social dimension, which is represented by non-profit sector associations and organizations, and amateur cultural clubs. It is monitored in this report through the practices pertaining to the establishment of cultural identity and the active participation in cultural work at the group level rather than the individual level. Accordingly, the indicator measures the number of non-profit cultural organizations and amateur clubs, while tracking their growth and sectoral and geographic distribution, in addition to monitoring their provided activities and events. The development in organizing the non-profit sector in general, and the cultural sector in particular, has continued since

Non-Profit Cultural Organizations

The impact of these organizational developments was reflected in the number of non-profit cultural organizations. They continued to grow with the establishment of 24 new cultural organizations in 2023, comparable to 2021 when the Ministry's strategy was launched, followed by a surge in the establishment of new organizations⁽⁷³⁾ (as shown in Figure 22). The growth rate in the number of non-profit cultural organizations between 2021 and 2023 reached 82.7%, bringing the total to 95 active organizations. This year also witnessed the reorganization of some non-profit cultural organizations with active cultural heritage in the sector over the past years, such as the Saudi Arabian Society for Culture and Arts and the Al-Ahsa Literary Club, which were registered as non-profit cultural organizations under the new organization, making their year of establishment in 2023⁽⁷⁴⁾. It should be noted that the Ministry of Culture encouraged literary club departments in the middle of the year to join the National Center for the Non-Profit Sector and activate the Ministry's strategy for the sector's development.⁽⁷⁵⁾ Contrary to previous reports' indication of an expansion in the distribution of the organizations' types following the establishment of five cooperative associations in 2022, this year's most notable growth was in the establishment of specialized associations, thus increasing their share from 56% to 64.2% of the total non-profit organizations in the cultural sector.⁽⁷⁶⁾

the organization of the National Center for the Non-Profit Sector (NCNPS) was approved and the launch of the Ministry of Culture's strategy for the non-profit sector in 2021. The year 2023 witnessed the issuance or update of several laws and regulations related to this field, such as the update of the executive regulations for the Civil Associations and Institutions Law - issued by the Center in 2022⁽⁷¹⁾ - and the issuance of the guiding regulations for the civil associations and institutions. In addition, this year saw the transfer of the organization of the National Volunteer Work Platform to the supervision of the National Center for the Non-Profit Sector.⁽⁷²⁾

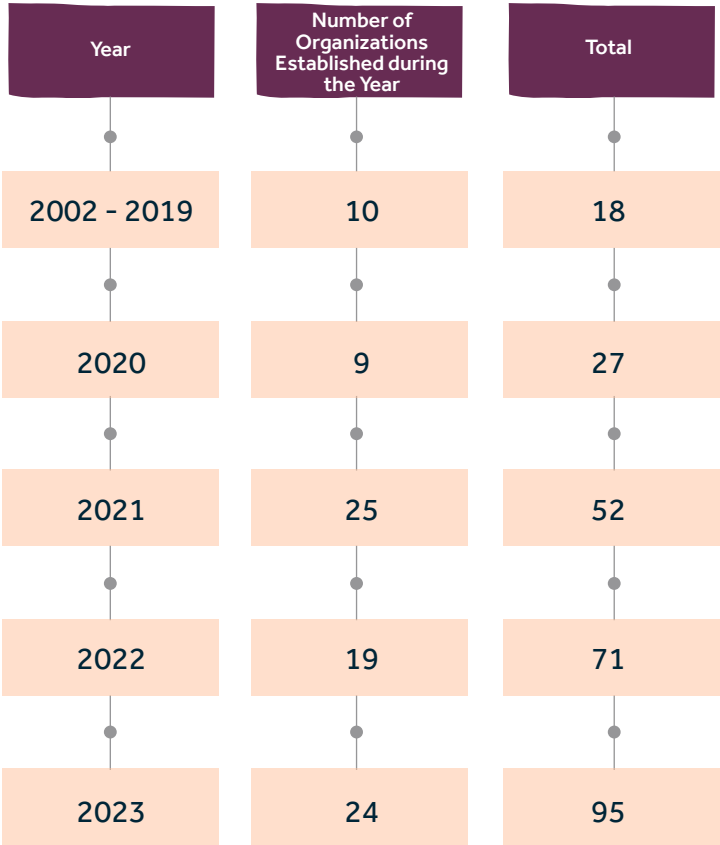


Figure 22: Number of Active Non-Profit Cultural Organizations by Year of Establishment till 2023 ⁽⁷⁷⁾

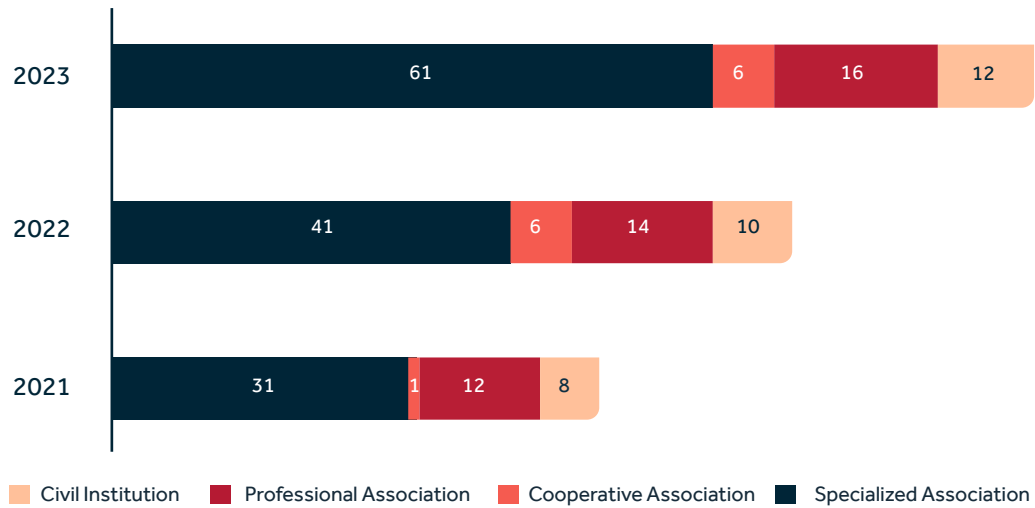


Figure 23: Number of Active Non-Profit Organizations by Type during the 2021 - 2023 Period ⁽⁷⁸⁾

Diversity in the Non-Profit Cultural Organizations' Fields

The Literature Sector stood out this year, recording a growth rate of 160% between 2022 and 2023, with one-third of the organizations established in 2023 belonging to this sector. Consequently, the percentage of organizations in the Literature Sector increased to 14% of the total non-profit cultural organizations, up from a maximum of 7.3% last year. The Heritage Sector continued to lead in the number of organizations, although its share dropped to 38.7% of all active non-profit cultural organizations by the

end of 2023. The Visual Arts Sector ranked third, followed by the Theater and Performing Arts Sector, with shares of 10% and 9%, respectively. This year also witnessed the establishment of the first professional association in the Music Sector and the first professional association and civil institution in the Museums Sector, following the absence of non-profit organizations in these two sectors in previous years. ⁽⁷⁹⁾

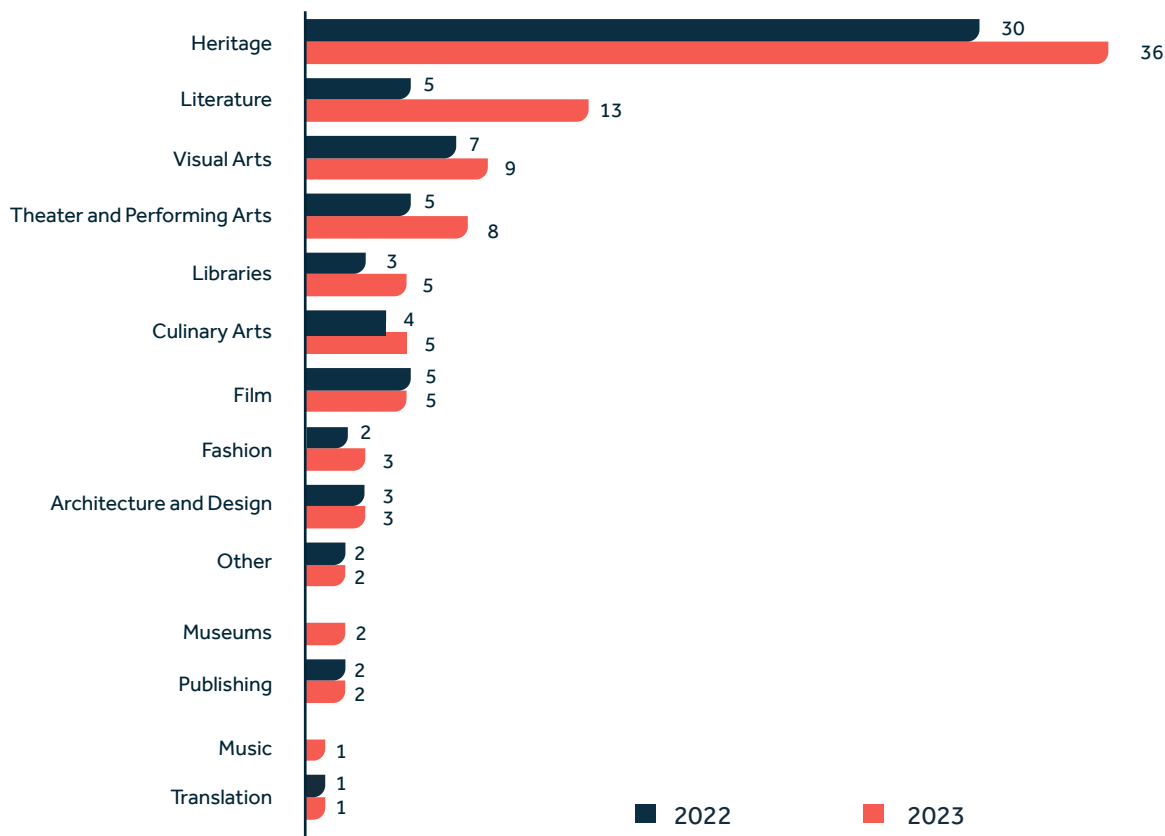


Figure 24: Sectoral Distribution of Active Non-Profit Cultural Organizations in 2022 and 2023 ⁽⁸⁰⁾

Cultural Participation

As noted in the previous report, centralization remained present in the geographic distribution of non-profit cultural organizations, with Riyadh alone hosting fifty organizations, representing more than half of its total number (Figure 25), or an average of six organizations per million inhabitants. Despite this, the data showed a geographic expansion - albeit limited - represented by the establishment of the first three non-profit cultural organizations in the Al-Baha region, thus surpassing the Riyadh region in the rate of organizations' availability

based on population. In contrast, the rate of non-profit cultural organizations in the Eastern province and the Makkah region - both densely populated areas - was only two organizations per million inhabitants in each region, i.e. below the average of three organizations per million inhabitants. Furthermore, the first non-profit cultural organization was established in the Hail region, while the Tabuk and Northern Borders regions still lack any non-profit cultural organizations (Figure 26).

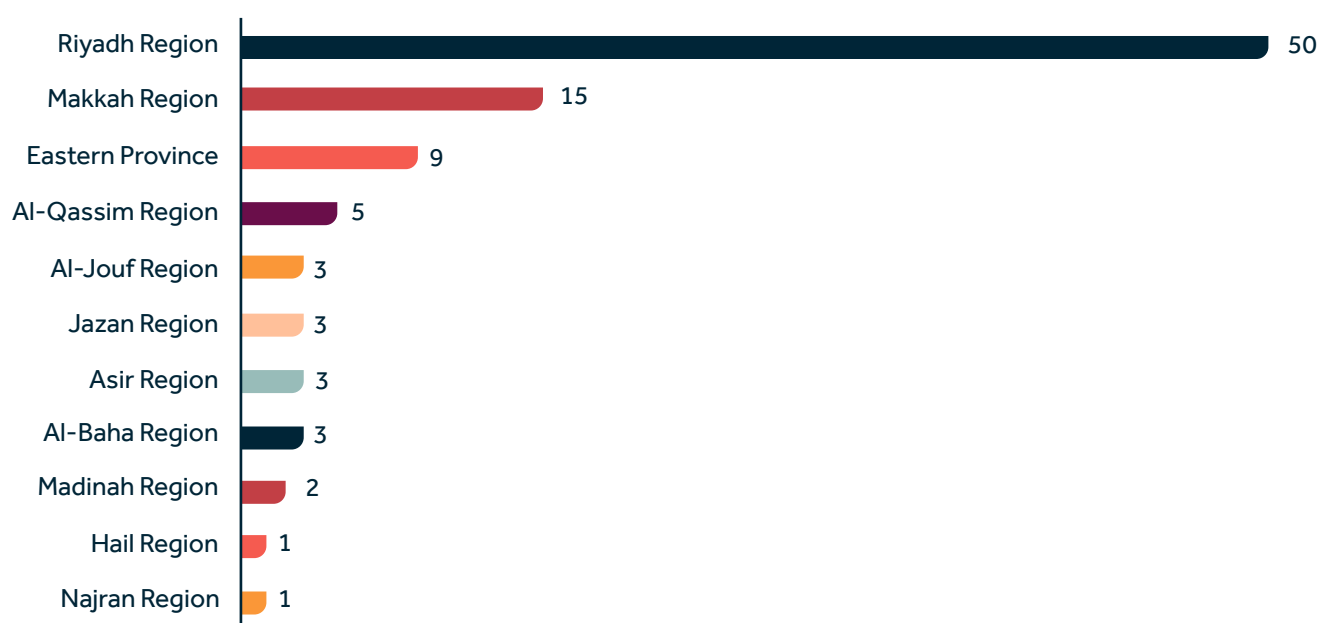


Figure 25: Number of Active Non-Profit Cultural Organizations by Region till the End of 2023⁽⁸¹⁾

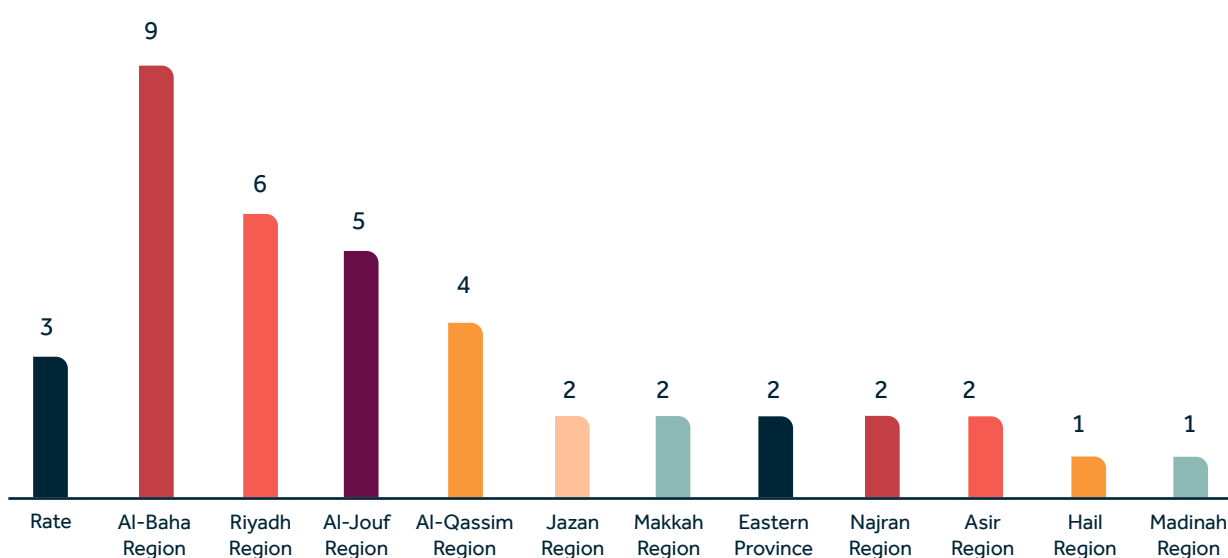


Figure 26: Distribution of Active Non-Profit Cultural Organizations by Region per Million People till 2023⁽⁸²⁾



Amateur Clubs

Since the launch of the “Hawi” platform in late 2020, there has been a significant increase in the number of the amateur cultural clubs, with 194 new clubs established in 2023 alone, bringing the total number of active clubs in the cultural sector to 321 clubs. The growth rate in the establishment of clubs was 153% between 2022 and 2023, which is lower than the growth rate of 285% between 2021 and 2022. It should be noted that amateur cultural clubs established in 2023 represent 28% of total clubs established via the Hawi platform in the same year.⁽⁸³⁾

The previous report highlighted several key factors contributing to this growth, including the flexible nature of amateur clubs and the spontaneity of their activities, which can also be attributed to the empowerment opportunities available to amateur activities in the Kingdom, such as tours conducted by the Hawi platform, in order to introduce amateur clubs in the various Kingdom regions and to support and encourage their activities, starting with the first tour in Madinah, Tabuk, and Riyadh.⁽⁸⁴⁾

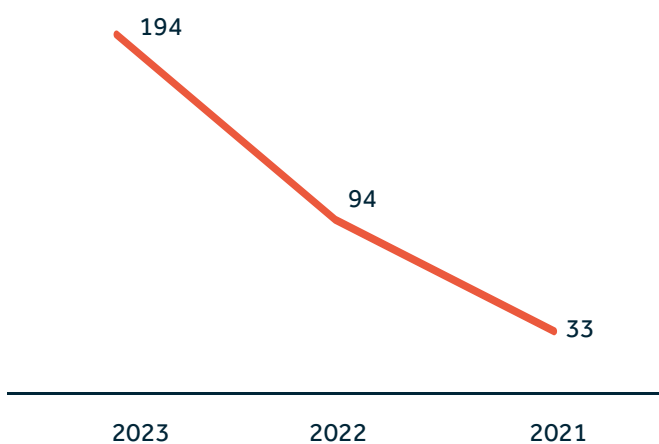


Figure 27: Number of Amateur Cultural Clubs Established by Year of Establishment during the 2021 - 2023 Period⁽⁸⁵⁾

Considering the sub-sectors of these clubs, the Theater and Performing Arts Sector accounted for about one-third of all amateur cultural clubs, or 30% of the clubs established in the year (as shown in Figure 28), thus maintaining the highest number of clubs for the second consecutive year,⁽⁸⁶⁾ followed by the Visual Arts Sector, with 39 new clubs established in 2023, bringing the total to 66 clubs, i.e. 20.6% of the total clubs. However, the highest growth rates were in the Heritage Sector, followed by the Libraries Sector, which reached 333.3% and 266.7% respectively, both exceeding the average growth rate of 144% for the amateur cultural clubs. The Museums Sector and the Architecture and Design Sector had the lowest number of clubs, with a single club for both sectors. The year witnessed the establishment of the first amateur club in Architecture and Design Sector, while no amateur club had been established in the Museums Sector since 2021.⁽⁸⁷⁾

Cultural Participation

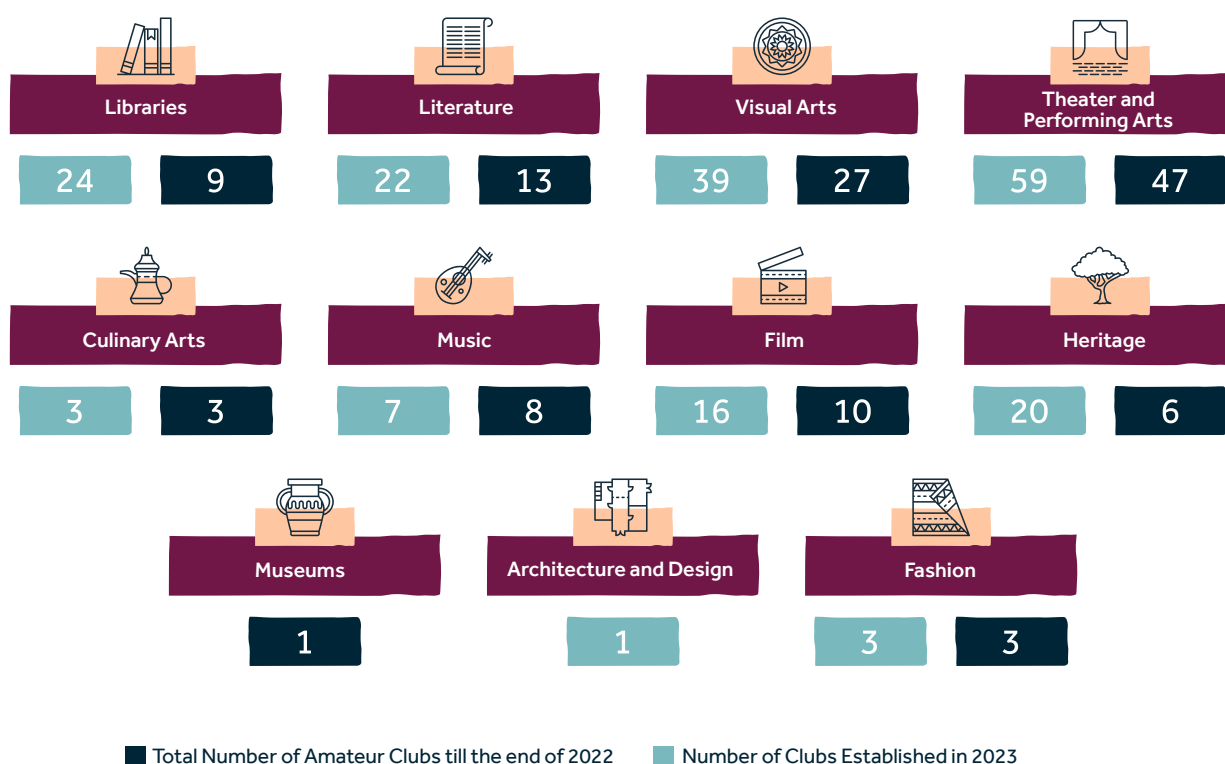


Figure 28: Number of Amateur Cultural Clubs Established by Sector in 2023⁽⁸⁸⁾



At the geographical distribution level, the Eastern Province, Riyadh, and Makkah continued to collectively lead in the total number of clubs, with each region having similar numbers, together accounting for 72% of the amateur cultural clubs in the Kingdom till 2023. This year witnessed a notable expansion in the geographic coverage, represented in an increase in the number of clubs in some regions, such as Al-Qassim, where the number of clubs increased from 2 clubs in 2022 to 12 clubs in 2023, a fivefold increase. Similarly, Tabuk witnessed a comparable leap, with the number of clubs quadrupling to 15 amateur clubs, while Asir saw its amateur clubs rise from 10 clubs in 2022 to 20 clubs in 2023. It is also noticeable that new clubs were established in Hail, Al-Jouf, and Al-Baha, where each had only one amateur club during 2021 and 2022. Conversely, amateur cultural clubs were still completely absent in the Northern Borders Region till the end of 2023 see(Figure 30).



Despite the promising expansion of the amateur cultural clubs, they required continuous growth to keep pace with the increasing population. Data indicates that the availability of amateur clubs in the densely populated regions of Riyadh and Makkah was below average – 11 amateur cultural clubs per million inhabitants – while the Tabuk Region led with the highest rate of clubs, amounting to 18 clubs per million inhabitants, followed by the Eastern Province with 16 clubs per million inhabitants, and then Al-Baha Region with 12 clubs per million inhabitants as shown in (Figure 30).

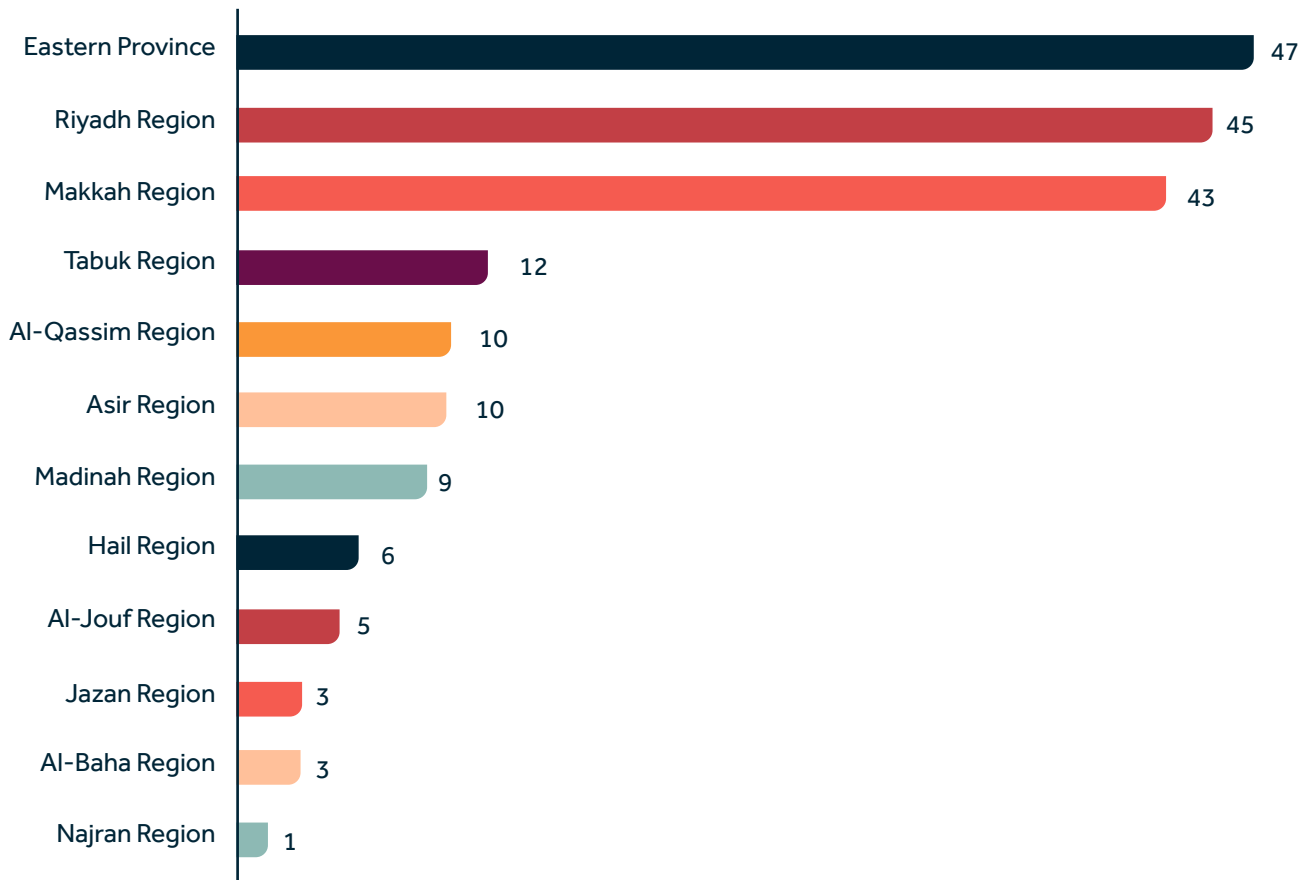


Figure 29: Number of Amateur Cultural Clubs Established by Region in 2023 ⁽⁸⁹⁾

Cultural Participation

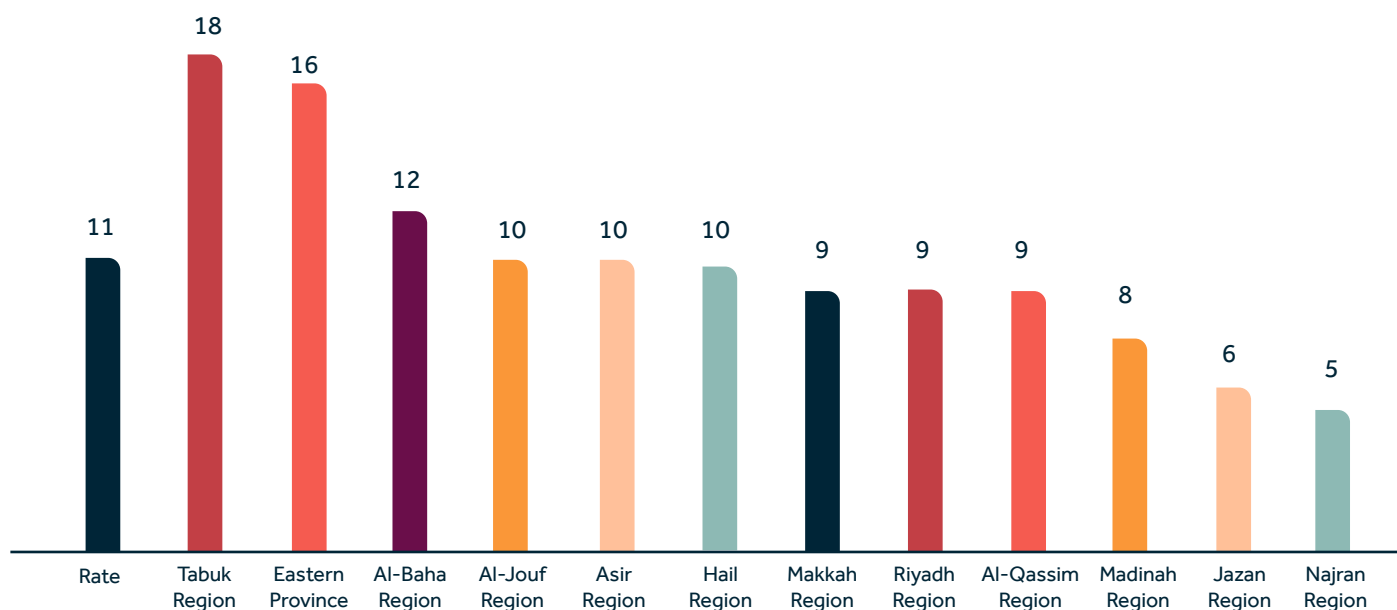


Figure 30: Distribution of Active Amateur Cultural Clubs per Million Inhabitants by Region till 2023 ⁽⁹⁰⁾

Activities of Non-Profit Cultural Organizations and Amateur Clubs

Despite the notable increase in the number of non-profit organizations and amateur clubs in the cultural sector, their activity levels remained relatively stable, which is the key criterion for reflecting these organizations' effectiveness and contribution to the sector and the engagement of their members in the cultural work. In 2023, the non-profit cultural organizations and amateur clubs held 398 events, compared to 70 events in 2021, meaning that the rate in both years was nearly one activity per each non-profit organization or amateur club ⁽⁹¹⁾ However, 2023 events showed more diversity in form and content compared to 2021. It included art and cultural exhibitions, poetry evenings, competitions, cultural festivals, and more. Overall, the amateur cultural clubs provided more events than non-profit organizations in most categories, while excelling by a long margin in holding art exhibitions, with the exception of poetry evenings, cultural festivals, initiatives and projects, and local and international participations, as the non-profit organizations prevailed in these four activities as shown in (Figure 31).



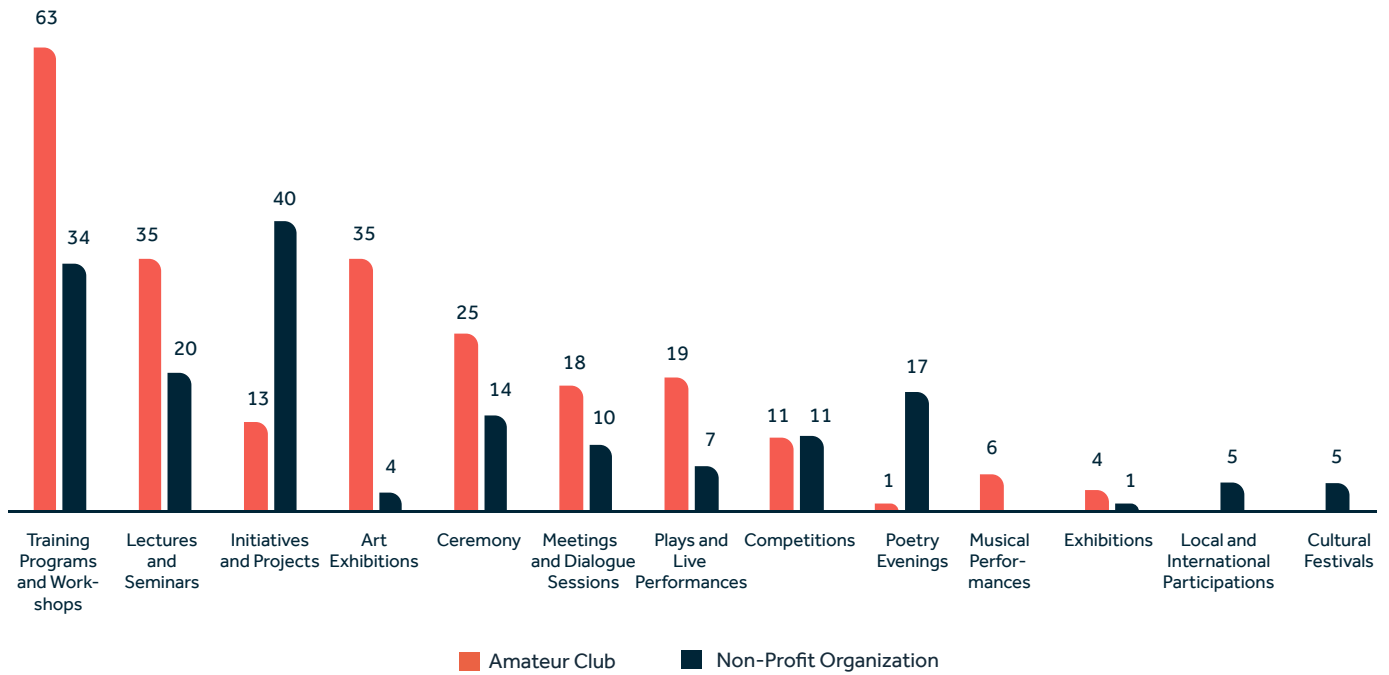


Figure 31: Number of Events and Activities Provided by the Non-Profit Cultural Organizations and the Amateur Cultural Clubs in 2023⁽⁹²⁾

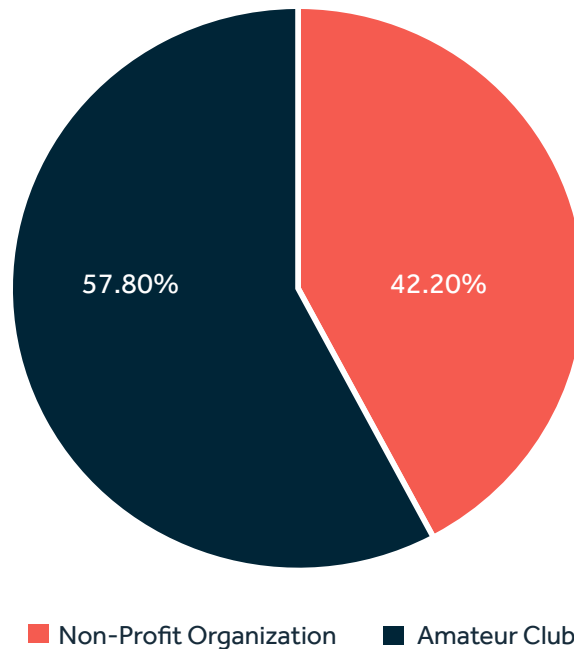


Figure 32: Proportional Distribution of Events and Activities Provided by the Non-Profit Cultural Organizations and the Amateur Cultural Clubs in 2023⁽⁹³⁾

Cultural Participation

On the other hand, the data indicates a significant disparity in the distribution based on the population of each region. The rate of events and activities provided by non-profit cultural organizations and amateur clubs had reached 13 events per million inhabitants (see Figure 34). This disparity was particularly evident in the peripheral regions. While Najran and Al-Jouf had the highest activity rates at 28 and 23 events per million inhabitants, respectively, the data reflected a stagnation in the Hail and Tabuk regions, where the

non-profit cultural sector had only one activity per million inhabitants. A similar disparity was observed in Riyadh, the Eastern Province, and Makkah- the regions with the highest number of non-profit organizations and amateur clubs - as the activity rate in Riyadh and the Eastern province was above average, but below average in Makkah (Figure 34). This drew the non-profit cultural sector's attention to intensify their provided activities in line with the population.

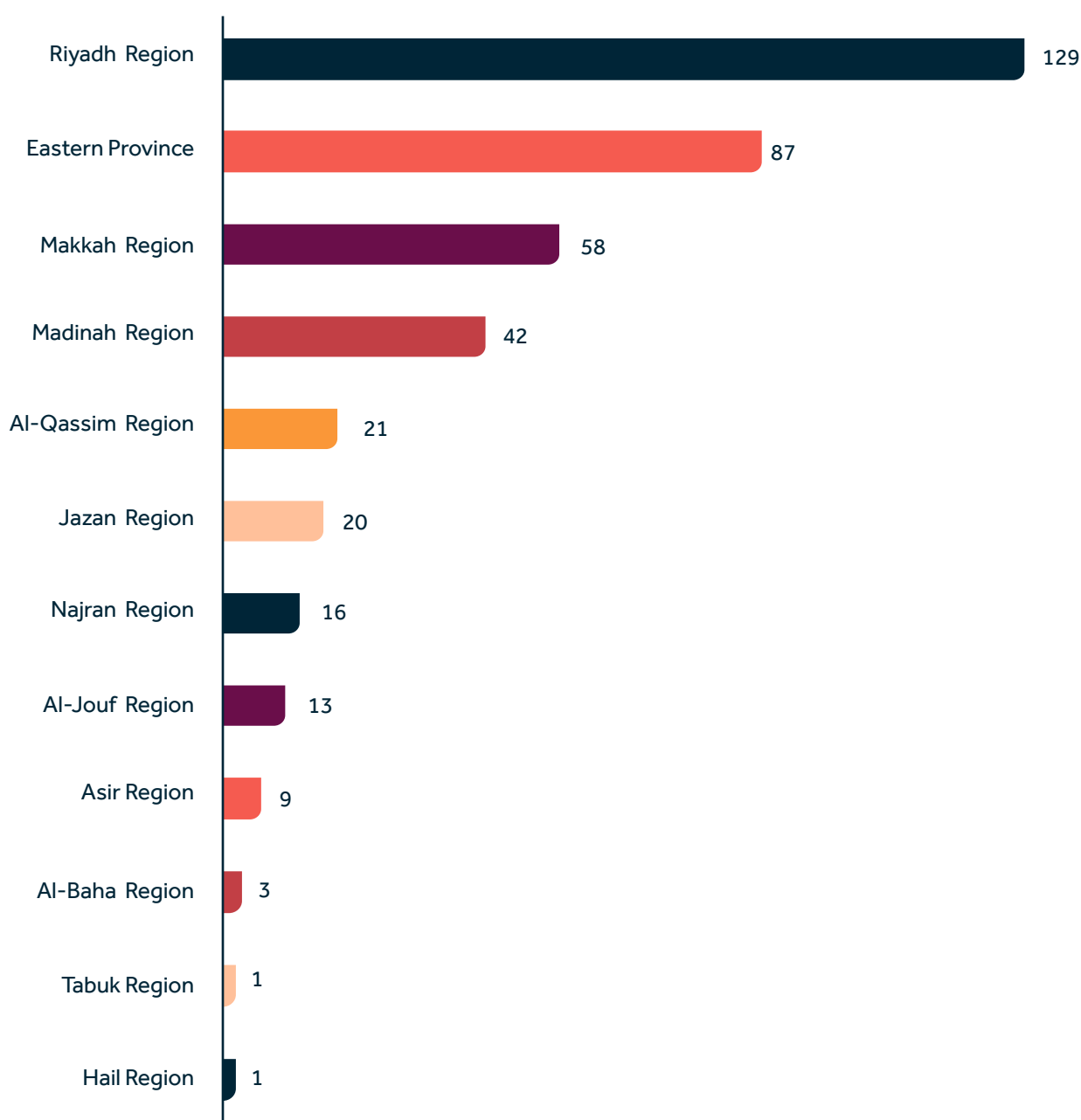


Figure 33: Geographic Distribution of Events and Activities Provided by the Non-Profit Cultural Organizations and the Amateur Cultural Clubs in 2023⁽⁹⁴⁾

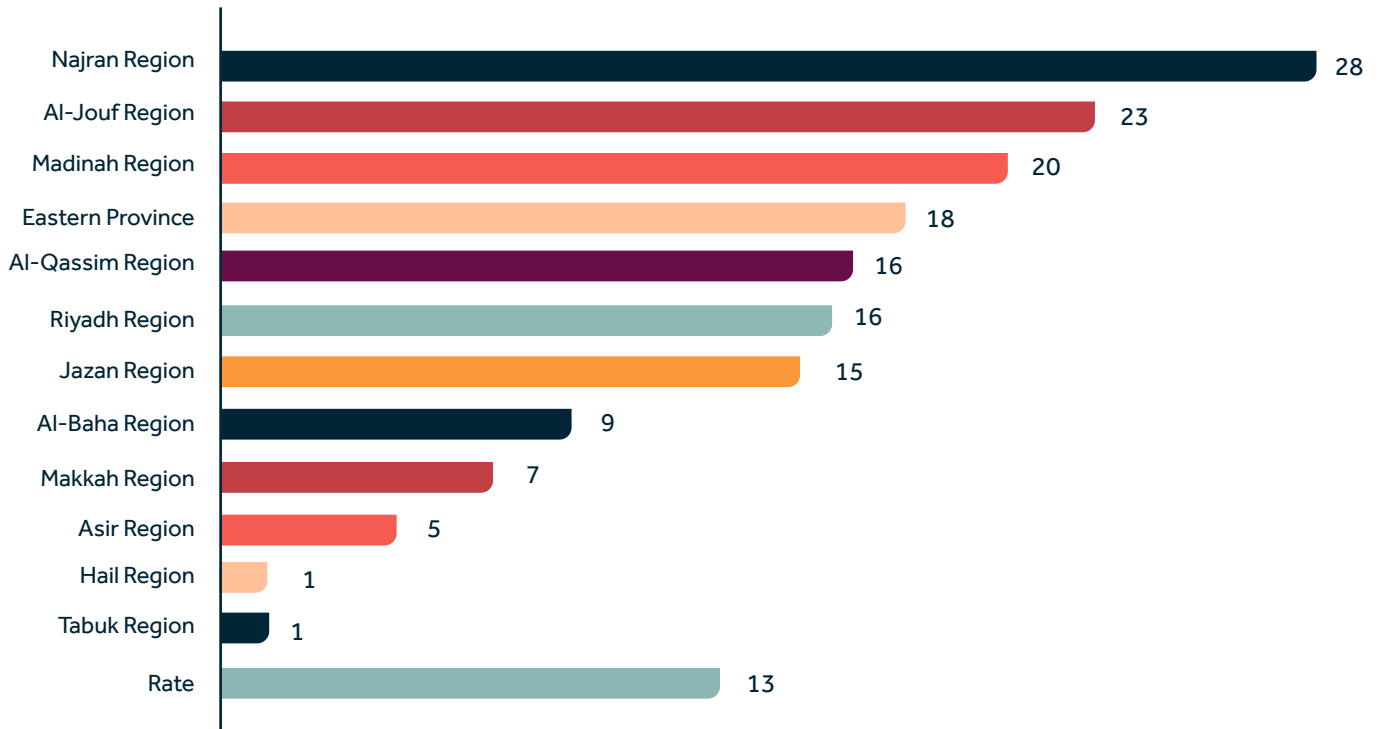


Figure 34: Geographic Distribution of the Events and Activities Provided by Non-Profit Cultural Organizations and the Amateur Cultural Clubs in 2023 per Million Inhabitants⁽⁹⁵⁾



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93. Data from the **Ministry of Culture**, (March 18, 2024).
94. Data from the **Ministry of Culture**, (March 18, 2024).
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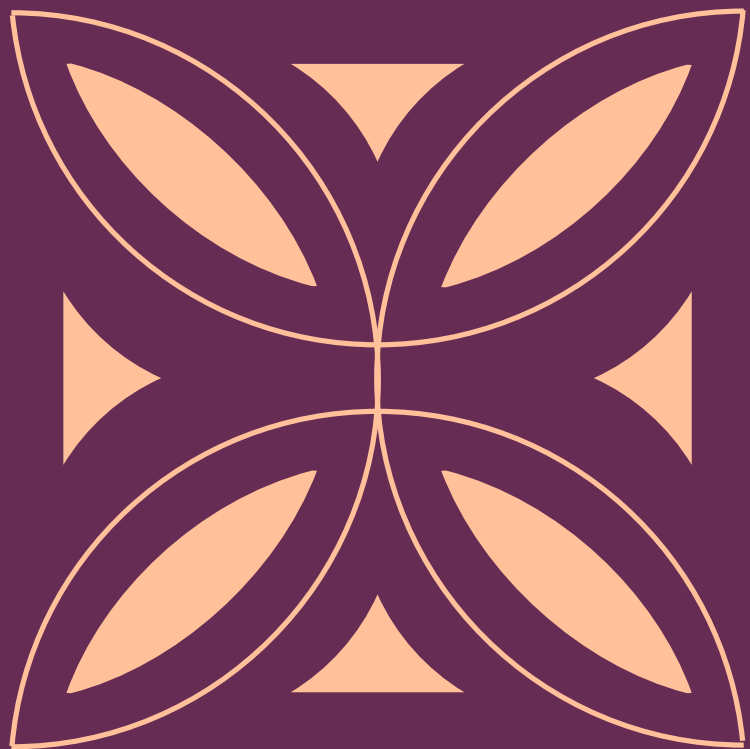
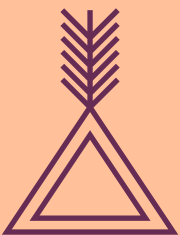
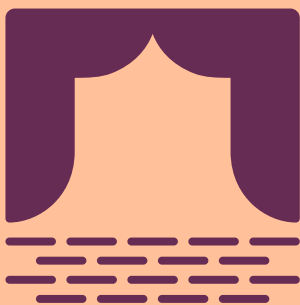
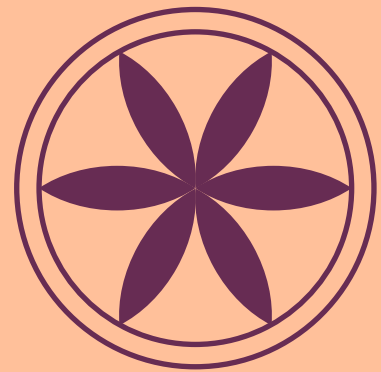
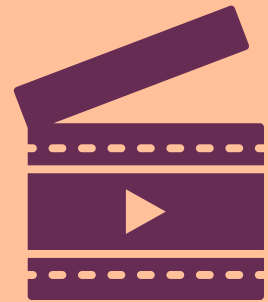


Chapter Five



Creative Economy

- Development in Measuring Culture's Economic Impact and its Limits
- The Cultural Sector's Contribution to the Economy
- Cultural Business Enterprises
- Expenditure On Culture Indicator
- Cultural Tourism
- Freelance Economy in the Culture Field





From 2020 to the end of 2022, the main question in any discussion about a sector's state correlated with the extent of the impact and exceptional changes following the COVID-19 pandemic. This applies whether it was a negative impact – like most economic activities – or a positive one. It is obvious that the impact was circumstantial, with conflicting predictions on the extent of the structural impact that it left behind. Hence, the data analyzed by the Creative Economy Chapter for the 2023 report provides an opportunity to find answers to this big question. This is for two reasons, the first of which lies in the fact that more than two years have passed since the direct impacts of this pandemic had dissipated, while the second reason lies in the availability of the culture sub-account data for the 2018-2021 period/ It is considered one of the most important measures for estimating the culture's economic impact, which the chapter analyzes along with other key indicators, such as cultural business enterprises, expenditure and sales statistics, and cultural tourism, in addition to the estimates in the number of freelancers working in the cultural sector.

In affirmation of the previous report's assessment of the cultural sector's state in the Kingdom of Saudi Arabia, the most recent data on the cultural sector's contribution to the GDP show the profound impact of the pandemic. After the sector had witnessed significant growth in the year before the pandemic, cultural activities suffered a sharp decline in their economic contribution, exceeding the impact rate on the entire economy, followed by a rapid recovery. The sector contributed positively in 2021 to the economic recovery, constituting 1.57% of the non-oil economy's size. Between 2021 and 2023, the statistics of the cultural business enterprises provided signs of continuous improvement, as shown by the rapid growth rate in the number of cultural business enterprises, which reached 24% between the two years. However, other indicators, such as tourism and cinema sales, provide signs of stable growth after rapid growth associated with the pandemic's exceptional circumstances.

Development in Measuring Culture's Economic Impact and its Limits

The realization that cultural practices can become a source of sustainable economic growth has been growing and gaining momentum globally, especially over the past two decades. This is in the context of rethinking transformations in development practices aimed at steering growth towards social and environmental sustainability. What makes culture a promising sector in this regard is the close connection between practices and social and environmental dimensions, with untapped potential to generate economic value.⁽¹⁾ Based on this global context, the Kingdom's cultural policy today is moving towards adopting a comprehensive perspective, which views culture as an economic sector that makes significant contributions to growth, while supporting its inherent functions, such as enriching public life, deepening identity, and strengthening global communication. The practical translation of this trend is reflected in the development of the Kingdom's National Strategy for

Culture covering its various fields, while utilizing the sector's novelty in regulatory aspects in order to establish its foundations on a multi-dimensional view. However, the sector's poor regulatory and institutional grounds pose several challenges, including the absence of initial data and definitions for the sector. It is difficult to talk about any economic impact, for example, without defining what is considered an economic and cultural activity, and then measuring it accordingly. In the past five years, the Kingdom's cultural sector has witnessed tangible organizational developments, starting with the establishment of the Ministry of Culture, the identification of 16 cultural sectors and 11 specialized authorities entrusted with their development. These fields represent the sector's main framework, which require further development of the classifications of the economic activities, companies and jobs that more accurately reflect the sector's features.





The development of preliminary statistical data and criteria to transform the cultural sector into a standalone economic sector is a challenge for all countries around the world, and the Kingdom is no exception. International criteria for cultural sectors⁽²⁾ are not as comprehensive and compatible as other sectors. The cultural action field is not one of the purely economic practices that can be easily detached from its context, but rather an integral part of the entire social life structure. Therefore, the accounting of the culture's economic value is always a complex and incomplete process. Expression, identity, and innovation have intrinsic values and indirect and complex connections with society and the economy. However, development of criteria and data frameworks – despite their shortcomings – can enhance the effectiveness of policy interventions, while directing investments and support towards achieving optimal results. This effort must take into consideration the national definition for the sector, which constantly expands and narrows based on the local regulatory environment. If we look at culinary arts activities, for example, we usually do not find these activities listed as cultural activities according to international criteria, but rather recognized in the Kingdom's national definitions as an integral part of the

culture, thereby confirming that chefs are part of the cultural sector, whose numbers appear within its statistics, while also benefiting from support, organization, and development plans.

Given the presence of more stable and detailed classifications for business, education and cultural professions, the 2023 report provides updated data on the size and composition of cultural companies first introduced in the 2021 report, providing deeper conclusions about growth and challenges. Most importantly, the report presents the Culture Sub-Account, which shows for the first time the cultural sector's contribution to the GDP in a systematic manner that does not rely on provided estimates. Accounting of the culture's economic value provides greater recognition of its role in providing prosperous livelihoods and enhancing economic development. However, the importance of these statistics should be balanced with the realization that they measure value within the formal economy, and necessarily ignore the broader value of culture in terms of its social aspects and role in giving meaning to public life, in addition to providing indirect support to other sectors.

The Cultural Sector's Contribution to the Economy

The Cultural Contribution to GDP Indicator is the most important indicator that measures the cultural sector's economic impact. It reflects the value that all the cultural activities add to the GDP, thereby reflecting the size of the sector as a component of the national economy. The contribution account is based on the definition of what is classified as cultural activities within national accounts in order to extract the culture sub-account. It showed in its first account that the cultural sector added over SAR 35 billion (Figure 1) to the Kingdom's economy in 2021, accounting for 1.49% of GDP, while moving towards reaching 3% by 2030, which is the percentage that the National Strategy for Culture has been striving to achieve since its launch in 2018.⁽³⁾

For accurate interpretation of this percentage, it is important to look at the global context, and compare the proportional size of the cultural sector within countries' economies, along with the culture's potentials and limitations today in economic value generation. The estimates of the cultural and creative economy's contribution to the global economy do not exceed an average of 3%⁽⁴⁾, even in countries commonly regarded as leaders in cultural and creative industries. The cultural sector's share in the economy of some countries may reach 4% or 5%⁽⁵⁾. At first glance, these figures

seem limited if we solely consider the impact of the cultural sector within the scope of direct and measurable contributions. Cultural activities conducted for economic purposes are often carried out outside the formal economy, such as the services of the independent designers, the work of the cultural handicraft practitioners, the artworks of the muralists, etc. The cultural and creative sector also has non-economic impacts in a measurable sense, such as the social value inherent in creating meaning for individuals, improving quality of life, enhancing identity, and developing capacities for innovation and creativity, whose economic value can be demonstrated in other sectors, such as tourism. Even when considering the direct economic value as shown in the Annual National Accounts, the sector's inherent potentials must be taken into account. The cultural sector is one of the fastest growing and dynamic sectors globally, which also makes the Kingdom's national targets easier to achieve if the sector can provide the conditions for success, such as supporting, organizing, and protecting the rights of creators. In addition, the novelty of this sector makes it an inventory of value that has not yet been exhausted, especially in some cultural sub-sectors, as will be presented later in the chapter.

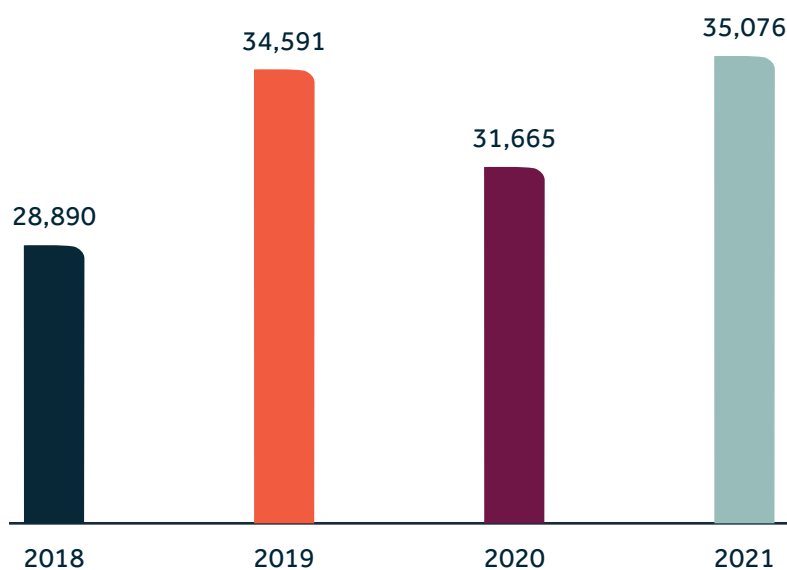


Figure 1: The Cultural Sector's Contribution Value to the Kingdom's GDP during the 2018-2021 Period (Millions of Saudi Riyals)⁽⁶⁾

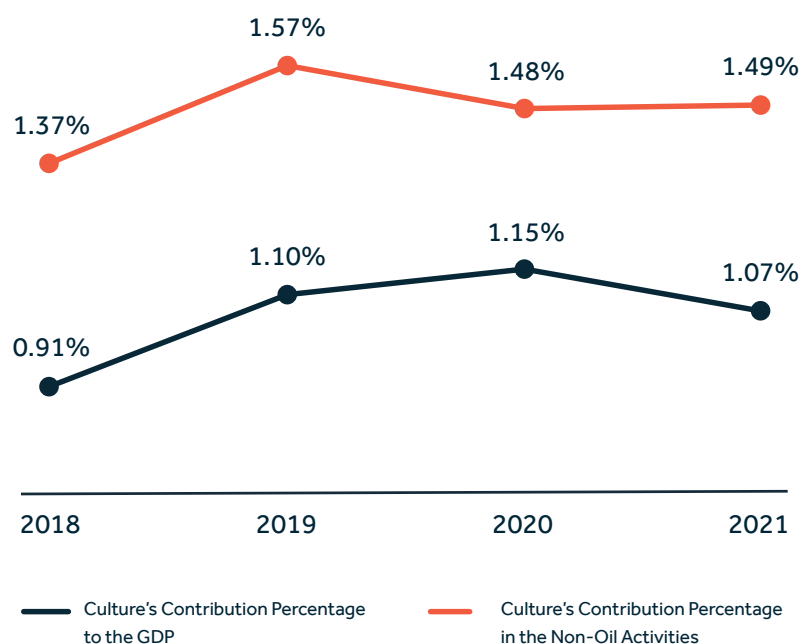


Figure 2: The Cultural Sector's Contribution Percentage to the Kingdom's GDP during the 2018-2021 Period .⁽⁷⁾

The growth promised by the Kingdom's cultural sector was not just a hypothesis. In 2019, the sector achieved a growth rate of 19.4%, far exceeding the non-oil sector's GDP growth (Figure 3). This can be explained by the exceptional circumstantial impulses of an emerging sector, which was likely supported and coincided with the launch of the Ministry of Culture's initiatives, the activity of other actors contributing to the sector through tourism and entertainment, and the role played by some non-profit institutions, as detailed in the Report on the State of Culture 2019.



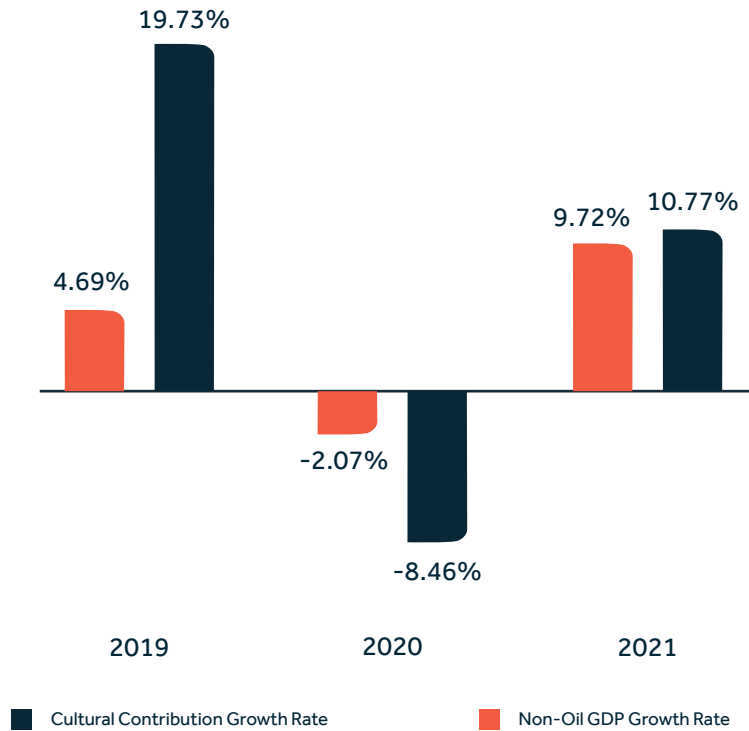


Figure 3: The Growth Rate of the Cultural Sector's Contribution to the GDP compared to the Non-Oil Sector's Growth in the 2019-2021 Period ⁽⁸⁾



However, the sector was not destined to continue this growth. The value of the culture's contribution to the economy declined by more than 8% in 2020. As detailed in the Report on the State of Culture for the years 2020 and 2021, many cultural activities have been severely impacted by the COVID-19 pandemic and the precautionary measures that followed. The Culture Sub-Account data shows that the scale of this impact exceeds the negative impact on the entire economy. Although the value of the culture's contributions has sharply declined, the recovery was strong, with the sector's contribution growing slightly higher than the growth of the non-oil economy at 10.8% in 2021.

However, it should be noted that despite this growth, the sector's size has not recovered to its size relative to the entire economy. Its highest percentage occurred in 2019 (1.57%) despite the fact that the value of the sector's contribution was higher in 2021, indicating that the sector was more affected by the pandemic compared to the impact rate on the entire economy due to its reliance on luxury products and services that are more vulnerable to lower expenditure, closure of its facilities and cancellation of its events. With the availability of data for the subsequent years, it will become clear whether the recovery pace is still ongoing or the growth will quickly stabilize at a certain ceiling.

Sector's Composition: Contribution of Cultural Fields

The Culture Sub-Account data represents the cultural sector's components based on the size of their contribution to the economy. The cultural sector is made up of a varied spectrum of activities with varying capacities to generate economic value. As shown in (Figure 4), nearly three-quarters of the cultural sector's contribution to the economy comes from the books and publishing activities and the architecture and design activities (Architectural Services and Designs) at 37% and 35% respectively. The Books and Publishing Sector contributes to the national economy by more than SAR 12 billion, which includes printing, publishing, and selling books, periodicals, and other relevant activities. This large proportional size of the Books and Publishing Sector may be linked to the sector's decades-long history. Despite facing challenges,⁽⁹⁾ it is one of the most complete cultural sectors in terms of

its basic organizational infrastructure, the stability of practice and the existence of professional institutions, in addition to its overlap with other sectors such as Education and Information, with well-established regulatory and professional frameworks. The same applies to the architectural services, which have been a regulated practice for decades and are linked to the fully-regulated construction market. Visual arts, cultural handicrafts, and cultural and natural heritage activities also stand out, accounting for one-fifth of the sector's contribution, with 13% and 7% respectively. In contrast, the audiovisual and interactive media (including film, video, TV program, web design and computer games production activities) collectively contribute less than SAR 700 million, representing only about 1% of the sector's contribution.

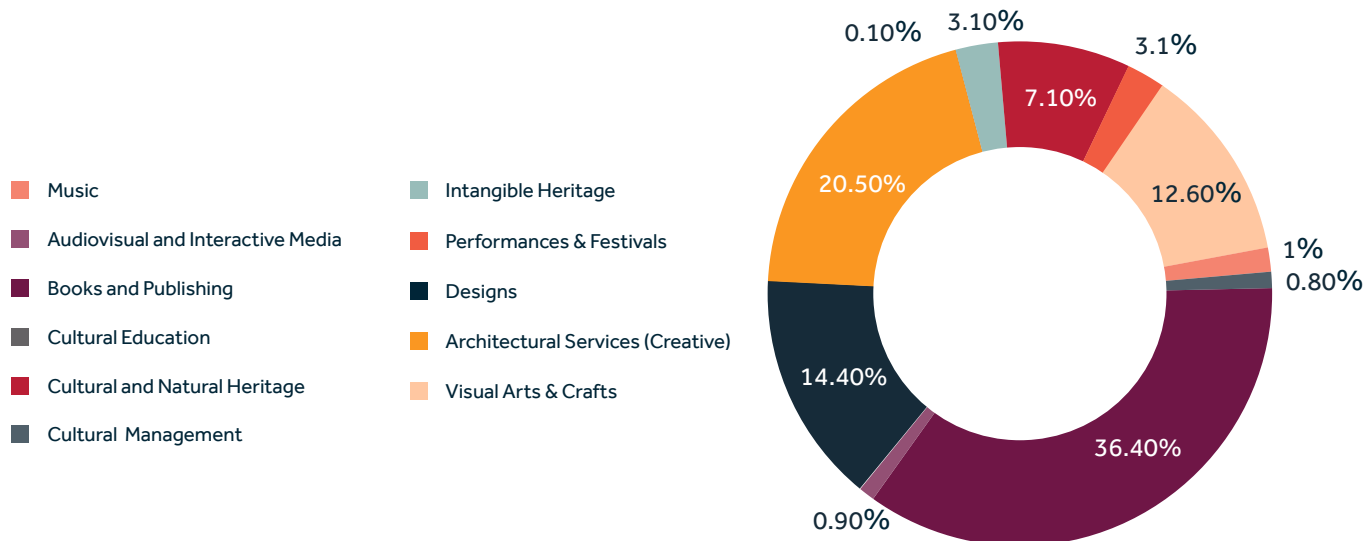


Figure 4: Contribution of the Cultural Fields to the Cultural Sector's Added Value in 2021 ⁽¹⁰⁾

The analysis on the sector's components reveals the potential opportunities for growth in the cultural sector. When comparing the leading positions achieved by other countries in the cultural and creative industries, we find that the economic value of these sectors is typically concentrated in three fields: Books and Publishing, Design, and Architectural Activities. When looking at (Figure 5), we clearly notice the relatively small size of the audiovisual media fields in the Kingdom compared to all the countries in the list. The contribution of the audiovisual and interactive media field to their economies reaches a maximum of 43% in France, and a minimum of 18% in Germany. This data confirms what is known from looking at the historical background of this sector in the Kingdom. The Film Sector was almost absent a decade ago, as well as the Music Sector, whose activities were relatively new, such as live concerts, while suffering from the migration of production institutions.⁽¹¹⁾ In current circumstances, this may present potential opportunities for rapid growth

that would increase the sector's size, thereby providing jobs for thousands of innovators and workers, and a stimulating environment for production and innovation. Statistics also show another growth opportunity in the cultural education field, whose added value to the economy did not exceed SAR 50 million in 2023, or the equivalent of 0.14% of the culture's contribution to the Kingdom's GDP. (Figure 5) shows a limited proportional size of the cultural education and training field. However, the percentage of its contribution rate in the countries shown in the figure is more than four times its contribution to the Kingdom. In addition, it is important to consider the transitive importance of this field in supporting all the cultural sector's activities that rely on the human factor, such as discovering talents and developing specialized creative skills and knowledge, making cultural education emerge as a promising field to expand the sector's contribution directly and indirectly.

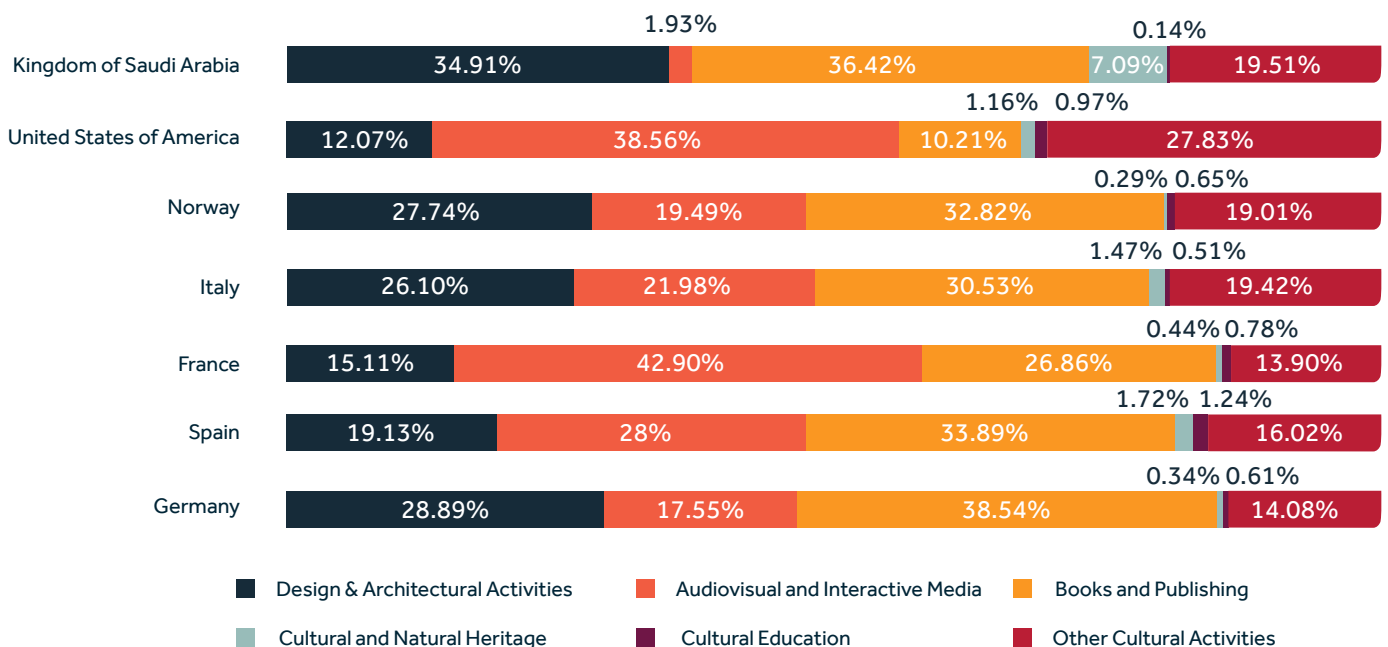


Figure 5: The Proportional Contribution of the Cultural Fields to the Cultural Sector's Added Value in the Economy of Some Countries ⁽¹²⁾

Cultural Business enterprises

Growth in the Number of Cultural Business enterprises

To determine the extent of the cultural sector’s vitality and diversity, it is important to look beyond the contribution value to the GDP, and assess the state of the economic actors in generating this value. The indicators related to business enterprises’ statistics were indicative of the sector’s dynamism, competitiveness, and potential capacity to attract investments and create jobs. Based on the classification followed in the Annual National Accounts for the Cultural Activities Classification, we found that 51,267 business enterprises have active commercial registers in this field, accounting for 3.67% of the total number of active business enterprises in the Kingdom.⁽¹³⁾ Although this percentage is lower than its counterpart in the

economies of other countries with more mature cultural and creative industries see (Figure 7), the number of cultural business enterprises assumes a larger share of their economic value, and their growth rate is faster than that of other business enterprises in the entire economy, growing by 23.56% between 2021 and 2023 compared to the average growth rate of 18.35% (Figure 6). The increase in the number of active business enterprises in the sector can be interpreted by the contribution size and its growth speed. They are considered potential indicators for the sector’s vitality, indicating that they encourage the launch of new businesses, thereby increasing the possibility of greater growth in economic value and job creation.

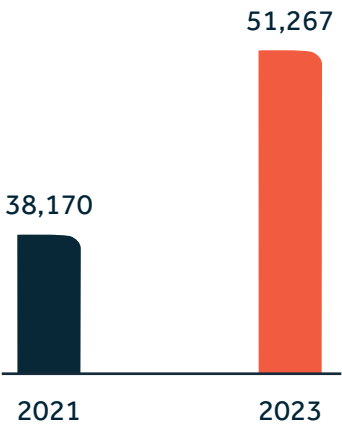


Figure 6: Number of Active Business Enterprises Engaged in the Cultural Activities till the End of 2023 ⁽¹⁴⁾

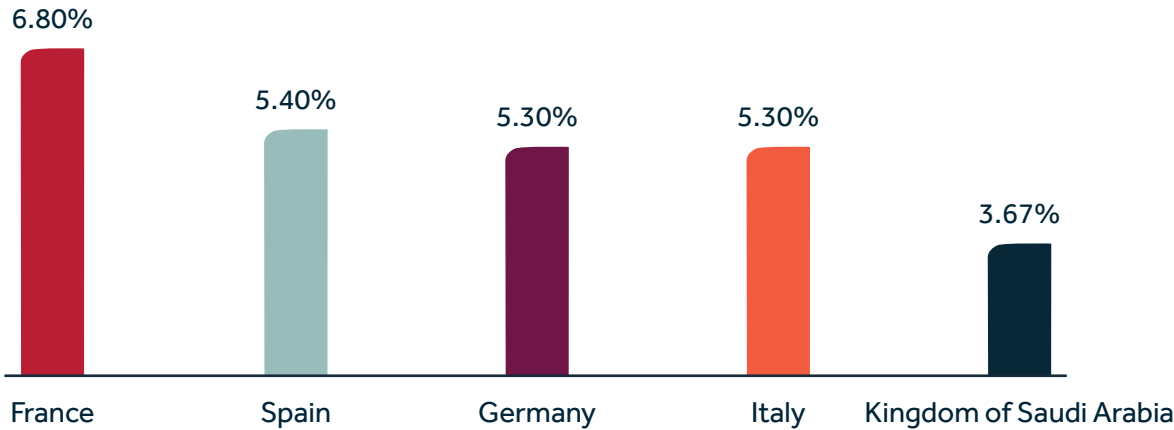


Figure 7: The Percentage of the Active Cultural Business Enterprises Compared to the Total Number of Active Business Institutions in Some Countries ⁽¹⁵⁾



Distribution of Cultural Business enterprises in the Cultural Activities Fields

Relatively consistent with their contribution size to the GDP, cultural business enterprises engaged in designs and architectural activities account for half of all cultural business enterprises (Figure 8). However, it should be noted that the proportion of business enterprises in activities such as Performances and Festivals, and Audiovisual and Interactive Media (including Music) is significantly higher than their contribution to the GDP, with the number of institutions in these sectors accounting for 13% and 9%, respectively, of the total cultural business enterprises, as opposed to their contribution of 3% and 2% of the value added by the cultural sector to the GDP.

Although the high representation of the Performances and Festivals institutions and the Digital, Audio and Interactive Media enterprises may be indicative of the vitality of these fields, the number of the business enterprises therein do not attain exceptional growth

levels (Table 1). The subsectors with annual growth exceeding the growth rate of all the cultural business enterprises are represented as follows: Designs and Architectural Services, and Cultural Education. The high growth rate in the Cultural Education field is a positive indicator and, as mentioned above, will have a ripple effect. Although 832 enterprises are active in the Cultural Education field, accounting for 1.6% of the total number of cultural business enterprises, their numbers have increased by more than 24%. Given the more detailed classifications of the cultural activities, it should be noted that two activities are experiencing exceptional growth, which are the Design (including Fashion Design) and Translation Sectors. This may be related to the regulatory developments in these sectors. The number of business enterprises engaged in these two sectors doubled between 2021 and 2023.⁽¹⁶⁾

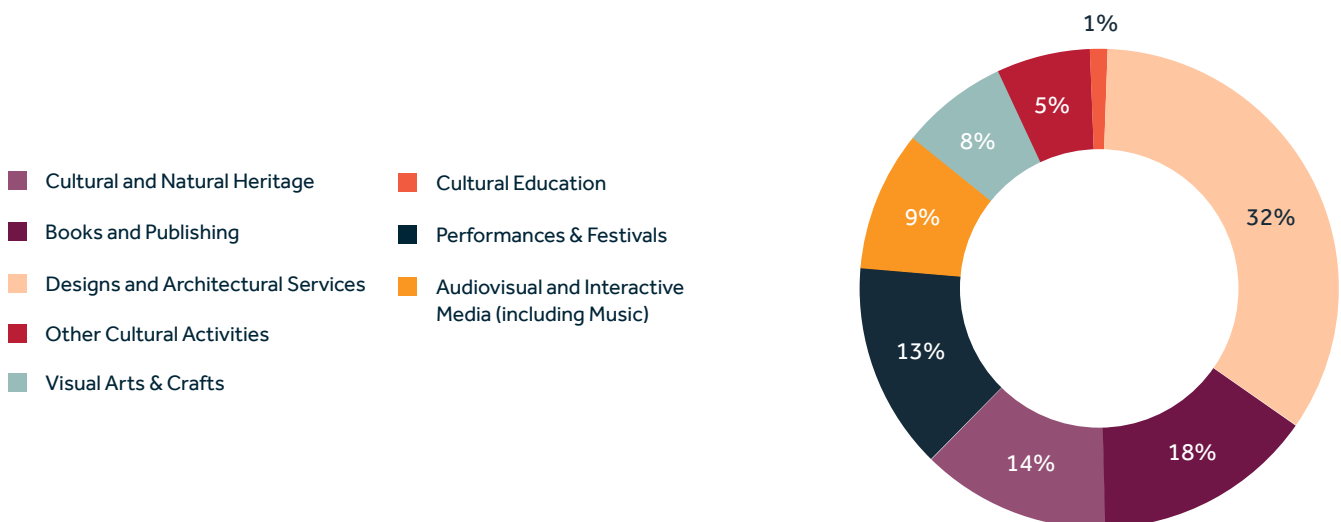


Figure 8: Proportional Distribution of the Cultural Business Enterprises by Activity Type in 2023

Table 1: Annual Growth Rate in the Number of Cultural Business Institutions in the Subsectors between 2021 and 2023 ⁽¹⁷⁾

Activity	Annual Growth Rate (%)
Designs and Architectural Services	16.19%
Books and Publishing	5.73%
Cultural and Natural Heritage	8.51%
Performances and Festivals	7.49%
Audiovisual and Interactive Media (including Music)	3.56%
Visual Arts and Handcrafts	9.78%
Other Cultural Activities	4.46%
Cultural Education	12.79%



Expenditure On Culture Indicator

Although this report has been prepared three years after the end of the COVID-19 pandemic, it is still important to refer to the crisis caused by the pandemic, a central point in understanding the economic trends that followed. As noted in previous reports, the main observation in several economic and non-economic indicators is the recovery, i.e. the rapid growth following an exceptional decline. That feature applies to expenditure indicators. Given the latest household consumption expenditure data (2022 Preliminary Estimates), it is noted that the continued rapid growth recorded in 2021 data - exceeding 20% - may be related

to the high inflation rates in the entertainment and culture sectors.⁽¹⁸⁾ In 2022, the rapid growth in household consumption expenditure on entertainment, recreation, education, and cultural services led to the return of expenditure in terms of value to the pre-pandemic levels and higher, with a total expenditure rate reaching SAR 176 billion, an increase of 27%. It is worth noting that this indicator is the best available evidence for the annual expenditure state, with the need to take into account its low accuracy, as it includes both the Education and Entertainment Sectors.

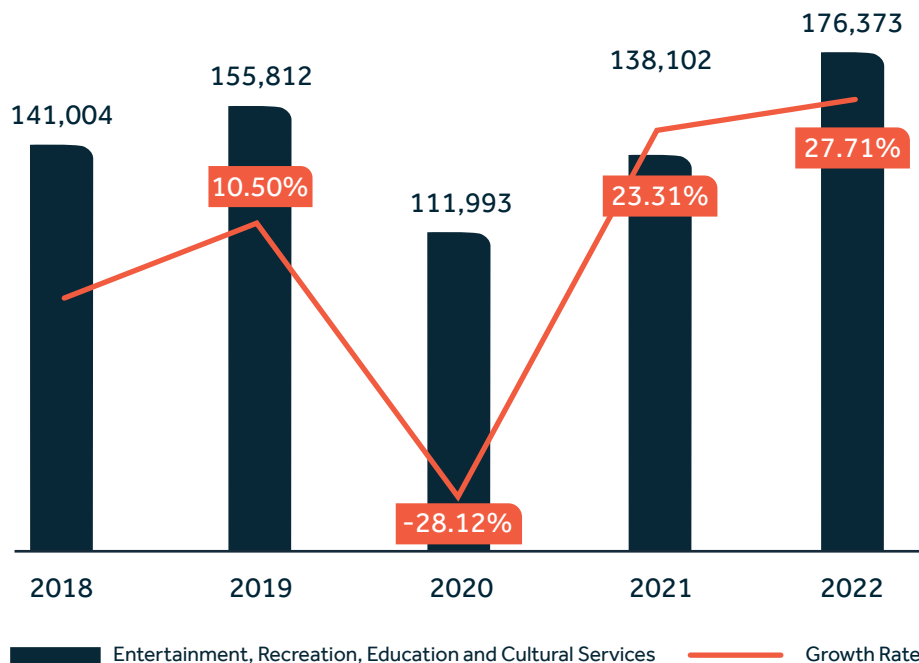


Figure 9: Household Consumption Expenditure in the Local Market on Entertainment, Recreation, Education and Cultural Services ⁽¹⁹⁾



Book Fair Sales

Sales figures in some markets can be regarded as an indicator of demand and expenditure. The report monitors their statistics as an indicator of expenditure on culture, while presenting them through two scopes: Book Fair Sales and Cinema Ticket Sales. Given the report’s observations in the First Scope, we find that the Kingdom’s book fairs attracted nearly 2.2 million visitors in 2023, recording a growth rate of 21.78% compared to last year. This growth is mainly due to the organization of a new book fair in the Eastern Province to be added to the previous annual fairs. The number of visitors to book fairs held in Riyadh, Jeddah, and Makkah has slightly increased by no more than 5%. In 2023, the

total sales in all book fairs held in the Kingdom reached SAR 59 million, a drop by nearly 7% compared to last year, despite the establishment of the Eastern province book fair, and the increase in the number of visitors to the Jeddah and Madinah fairs, as shown in (Table 2). This drop in the sales, coupled with the rise in the number of visitors, indicates a drop in the average per capita expenditure at the book fairs, which may be attributed to the effects of inflation or the availability of other means for buying books. The book fair’s associated events have also contributed in increasing the number of visitors without leading to a rise in the sales.

Table 2: Number of Visitors and Total Book Fair Sales in 2022 and 2023 (SAR)⁽²⁰⁾

Exhibition	Number of Visitors in 2022	Total Sales in 2022	Number of Visitors in 2023	Total Sales in 2023
Riyadh	1,050	38,506	1,007	28,196
Madinah	165	3,926	275	4,687
Eastern Province	-	-	304	11,563
Jeddah	598	21,537	620	15,040
Total	1,813	63,970	2,209	59,488



Cinema Revenues

About 17.7 million cinema tickets were sold during the year 2023, recording a growth rate of 23% compared to 2022 (Figure 11)⁽²¹⁾. The Cinema Sector has been witnessing continuous growth since the opening of the first cinema in 2018 in Riyadh, and the gradual spread of cinemas in most of the Kingdom's regions. This growth has continued over the past years, both in the cinema revenues (Table 3) and in the number of ticket sales (Figure 11), with the exception of the sharp decline witnessed in 2020 due to the pandemic. This growth is supported by what was revealed in the 2023 Cultural Participation Survey regarding the preferred methods for watching films. The survey showed that 21.1% of the respondents prefer to watch movies in cinemas slightly more than using the other methods for watching films, such as virtual viewing platforms and TV channels (Figure 12).⁽²²⁾

In 2023, cinema revenues in the Kingdom amounted to about SAR 922 million, recording a slowdown in the annual growth rate. Its growth rate did not exceed 1.6%, compared to a growth rate of 3.83% in 2022 (Table 3).⁽²³⁾ However, this slowdown does not indicate a decline in demand on cinemas, especially with ticket sales growing by 23%, but it may be due to a change in the pricing strategy of some cinemas. This low growth is also consistent with the limited expansion of cinemas in 2023, as indicated by the Management and Conservation Chapter, where the first cinema opened in Madinah, and the number of display screens rose by 5% compared to last year.⁽²⁴⁾

Table 3: Cinema Revenues during the 2018-2023 Period (SAR)

Year	2018	2019	2020	2021	2022	2023
Total Revenues	38,560,783	442,096,383	445,576,921	874,564,532	908,063,982	922,598,335



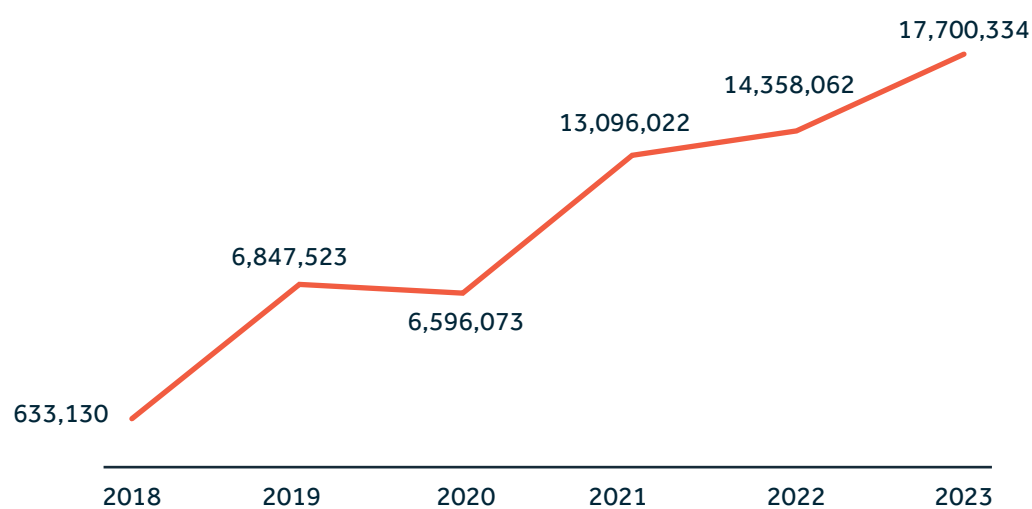


Figure 10: Number of Cinema Tickets Sold during the 2018–2023 Period

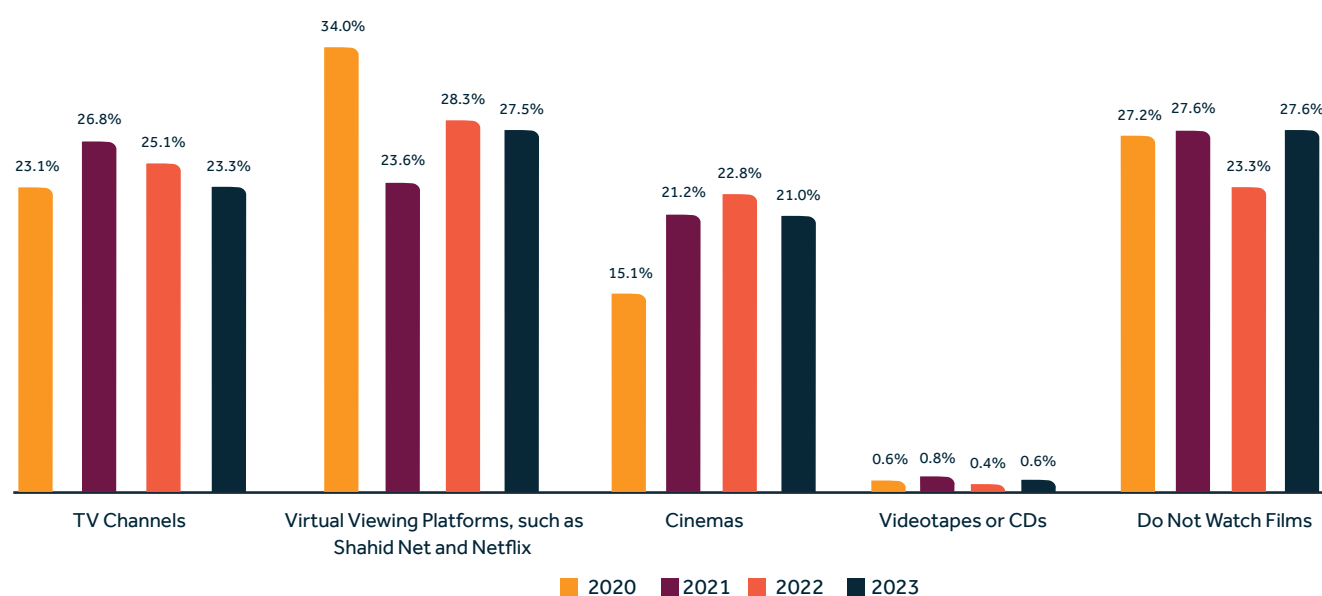


Figure 11: Proportional Distribution of Preferred Methods for Watching Films ⁽²⁵⁾



Cultural Tourism

This indicator provides a perspective on the close relationship between culture and tourism, particularly in regards to the economic aspect, as cultural tourism data provides an important indication of the attractiveness of the cultural resources and services for tourists, and the extent of their contribution to the economic activity by measuring the market share of domestic and inbound tourism trips that include cultural activities, such as visiting museums and art exhibitions, attending cultural festivals, visiting heritage and archaeological sites, etc., i.e. the percentage of trips that included these activities out of the total tourism trips.

In continuation of what was monitored in the Report on the State of Culture in the past two years, cultural tourism continued to grow in 2023, bringing the total number of domestic and inbound tourists participating in cultural activities to about 35.2 million tourists,

compared to 22.9 million tourists in 2022. The main driver for this growth is the significant rise in inbound cultural tourism. 13.77 million inbound tourists were recorded in 2023, with a high growth rate of more than 145% compared to 2022 (Figure 13). Furthermore, domestic cultural tourism has also grown, albeit to a lesser extent. About 21 million domestic tourists participated in cultural activities, with a growth rate of 23.73%, as shown in (Figure 14). It is noted that the growth rate in the number of domestic tourists who participated in cultural activities has dropped compared to 2022, in which the growth rate reached 46.38%, however, this drop does not necessarily mean a slowdown in cultural tourism, but may be attributed to the full recovery from the pandemic's impacts, whose decline contributed to the high growth rate in 2022.

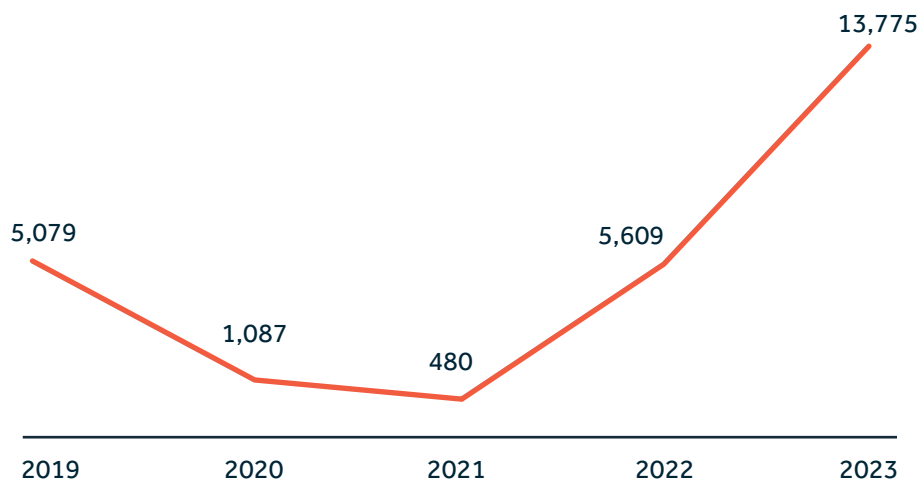


Figure 12: Number of Inbound Tourists who Participated in Cultural Activities (In Thousands) ⁽²⁶⁾

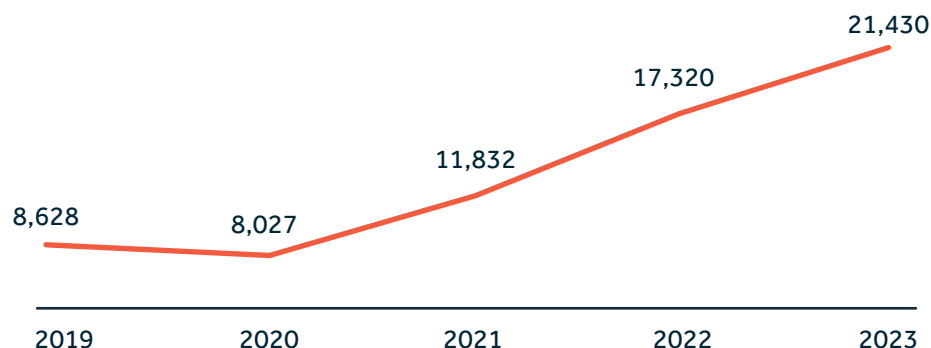


Figure 13: Number of Domestic Tourists who Participated in the Cultural Activities (In Thousands) ⁽²⁷⁾

The notable growth in inbound cultural tourism was accompanied by an increase in its share of total tourism trips. The market share of inbound cultural tourism reached about 50% of total inbound tourism trips in 2023, one of every two inbound tourism trips included a cultural activity, which clearly demonstrates that cultural activities have become an important source of attraction for inbound tourism. This growth in the inbound tourism market share is in line with last year's report which monitored a continuous growth in the share of inbound cultural tourism ever since the impacts of the coronavirus pandemic have subsided in

2021, exceeding the market share of the domestic cultural tourism, which constitutes 26.13% of total domestic tourism trips (Figure 15). The growth of inbound tourism and its market share can be attributed to several factors, including the regulatory developments witnessed in the Tourism Sector in previous years, such as the approval of the Tourism System and the Tourist Visa Regulation,⁽²⁸⁾ as well as the development and rehabilitation of the historical regions in the destinations for Hajj and Umrah pilgrims.⁽²⁹⁾

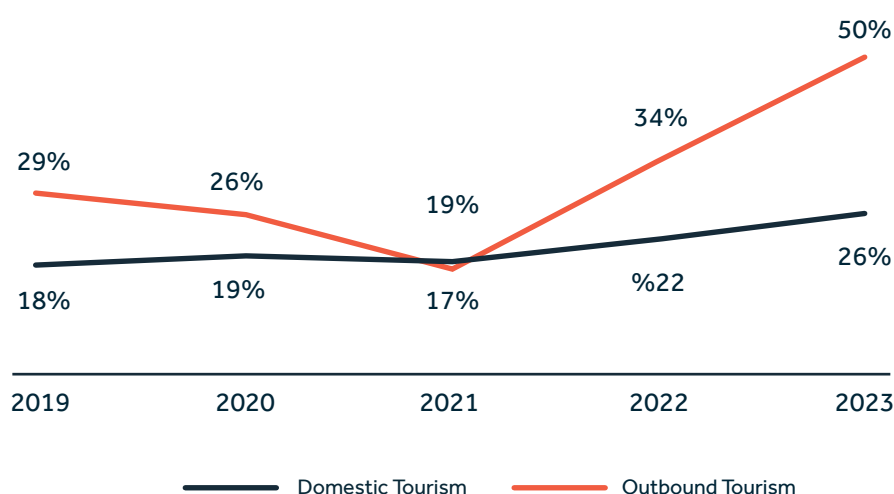


Figure 14: Market Share of the Tourism Trips that included Cultural Activities out of the Total Trips ⁽³⁰⁾

Geographical Distribution of Cultural Tourism Trips

In 2023, the Makkah region received the highest share of tourism trips that included cultural activities due to the influx of Hajj and Umrah pilgrims and visitors to the Muslims' Qibla, in addition to elements of tourist attraction in the cities of Jeddah and Taif. As shown in (Figure 16), the number of domestic and inbound cultural tourism trips to the Makkah region exceeded 16 million trips in 2023, accounting for 29.74% of the total cultural tourism trips in the Kingdom, with a growth rate of 74.26% compared to 2022.

Next came Riyadh, Eastern Province, Asir and Madinah as attractive destinations for the cultural tourism. The number of tourism trips to the Riyadh region exceeded 8.9 million trips, followed by the Eastern region with more than 8.8 million trips. There are also variations between domestic and inbound tourist destinations, while inbound tourism is concentrated in Makkah, the

Eastern province, and Riyadh respectively, Asir emerged as the top destination for domestic tourism that included cultural activities, followed by Riyadh and then Makkah (Figure 15).

As for the market share of the cultural tourism out of total trips, it is noted that it increased in the Al-Baha and Asir regions. 83% of the tourism trips to the Al-Baha region included cultural activities, compared to 45% in the Asir Region (Figure 17). This high share of cultural tourism in the total trips reflects the unique elements of cultural tourism in the Kingdom's southern regions. Although Riyadh, the Eastern Province, and Makkah were in the lead in terms of the number of cultural tourism trips, the market share of the trips that included cultural activities in these regions did not exceed 34%.

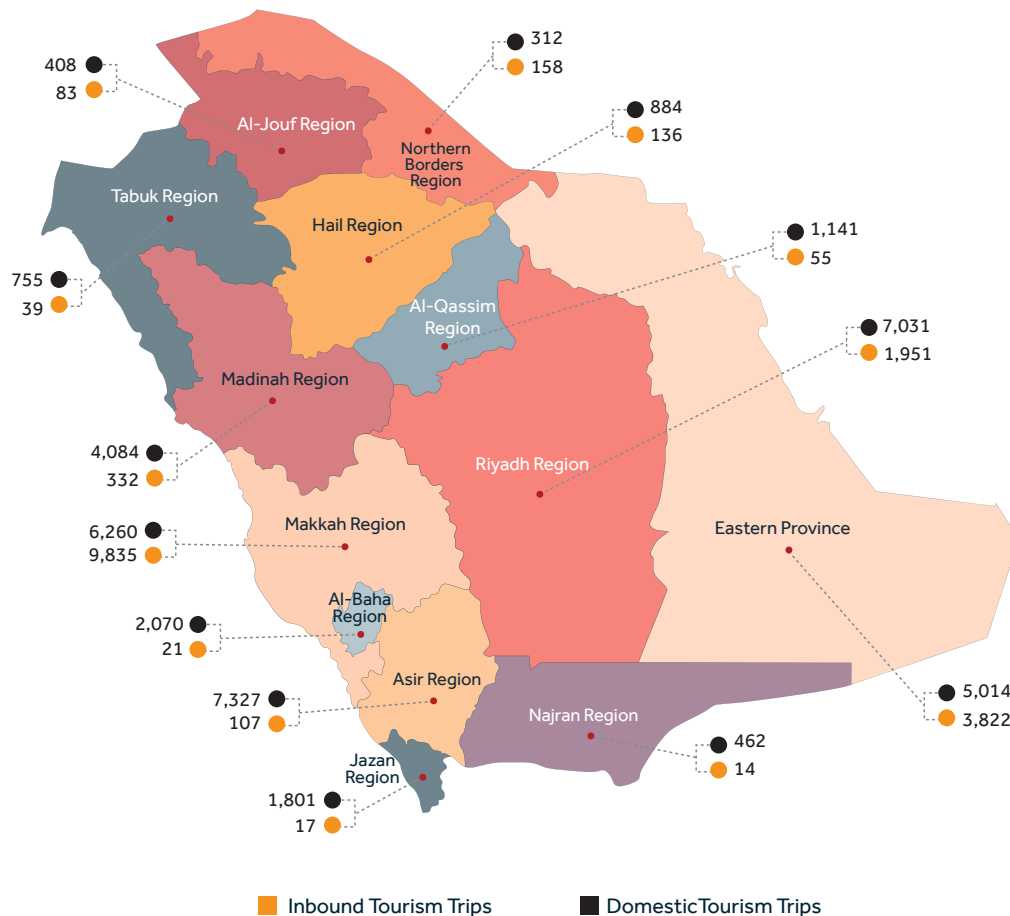


Figure 15: Number of Domestic and Inbound Tourism Trips that included Cultural Activities by Region (In Thousands)⁽³¹⁾

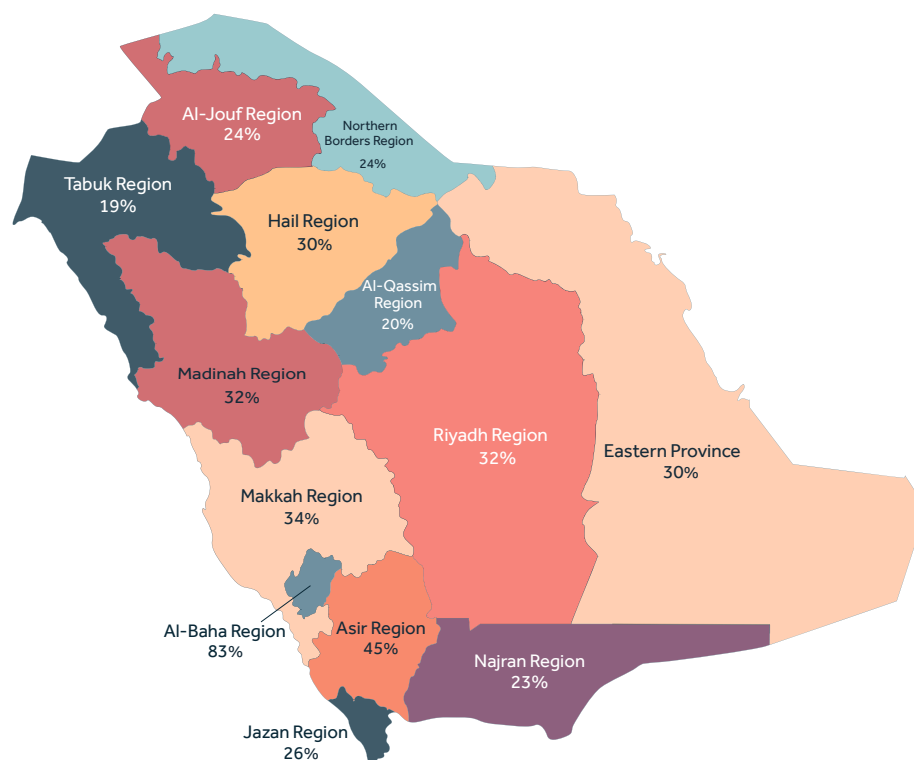


Figure 16: Market Share of Domestic and Inbound Tourism Trips that included Cultural Activities Out of the Total Trips by Region.



Distribution of Domestic and Inbound Tourism Trips by Cultural Activities

The diversity of cultural activities helps enrich tourists' experiences and enhance the vitality of the tourism sector. Cultural festivals and events rank high on the list of activities that attract both domestic and inbound tourism. The number of trips that involved attending cultural festivals and events amounted to about 15.2 million trips, followed by 12.5 million trips that involved visiting resorts and mountainous regions (Figure 18). The variation in the preferences of cultural activities between domestic and international tourism trips is evident in the visits to the historical and heritage sites,

while nearly eight million domestic tourism trips involved visiting the historical and heritage sites, the number of inbound tourism trips that included the same activity did not exceed 427,000. The diversity in activities and the variation in their attendance rate are due to several factors, the most important of which are the preferences of domestic and inbound tourists, as well as the types of cultural activities available in each region, especially the ones that receive most of the tourism trips, such as Riyadh, the Eastern Province, and Makkah.

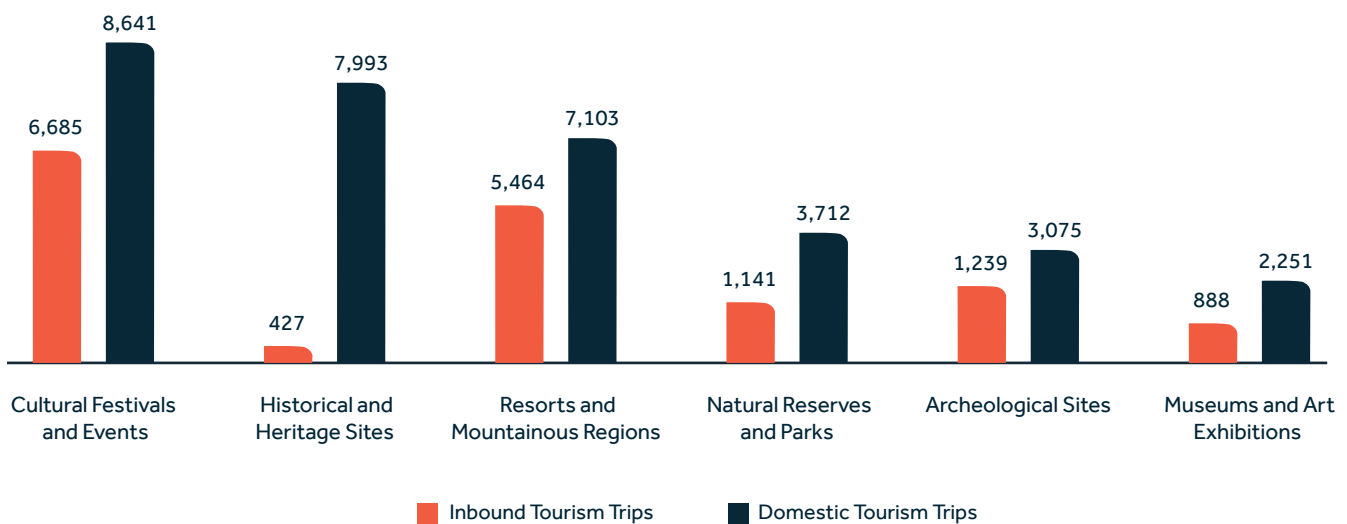


Figure 17: Number of Domestic and Inbound Tourism Trips that included a Cultural Activity (In Thousands)



Freelance Economy in the Culture Field

There is a well-established understanding that many cultural activities can be inherently carried out within the informal economy. On one hand, these activities are not inseparable from everyday life. On the other hand, some of them rely on individuals with creative skills, while some of their services do not require complex productive structures. For example, the works of calligraphers, concert singers, performers, or even productive families in the culinary and cultural handicrafts fields, have always been active in informal settings due to their flexible nature, while being neglected in the cultural statistics, despite providing sources of income for a diverse range of individuals and families. Nowadays, this is confirmed in the cultural sector with the emergence of the Platform Economy, and the expansion of the freelance channels. Creators can make their way towards professionalizing their talents. Despite the rising pace in the regulation of the cultural sector, the informal cultural economy that relies on individuals and freelancers may not be declining given the recent developments in work patterns in the digital age.

Based on the importance and expansion of this phenomenon, and the significance of examining it within the study and taking it into account when

developing labor policies in the sector, this version of the report provides indicators on the number and distribution of freelancers in the cultural fields, and those registered in the Freelance Platform Connecting Employers with Freelancers “Bahr,” one of the initiatives of the “Nine Tenths” Program provided by the Human Resources Development Fund (HRDF). 9,619 freelancers are active on the Platform, providing services in cultural activities (Figure 19), which is not a small number, especially when compared to the labor force in the sector, which was about 60,000 workers in 2022 (in addition to 117,000 chefs), and also when considering that those registered on the Platform only form part of an unknown number of freelancers working in the cultural sector.⁽³²⁾

Based on the Platform’s business classifications, cultural freelancers work in four service fields, with over 50% working in the literature, publishing, and translation field, while the other half is distributed in the culinary arts, film, architecture and design fields. As for gender distribution, it shows that a high percentage of female freelancers provides services via the Platform. Although all service providers in the culinary field are females, the high proportion of females is not only due to this activity, but also reflected in all the fields.





In another indicator, which may have less coverage compared to “Bahr” Platform’s statistics, the practitioners’ license data on the “Abde’a” platform provides another glimpse into different scopes of work, as the Platform issued over 250 licenses in the fields of culinary arts, music, and literary agent activity. The Platform’s statistics also include 598 licensed practitioners in the performing arts field, and 2881 practitioners in the cultural handicrafts field, taking into account the Platform’s novelty, and the nature of licenses that may not cover all practices, while not being expected to list all those who practice culture for an economic purpose.⁽³³⁾

These figures may not reflect the size of the freelancer market in the culture field, but it is important to showcase them in order to shed light on the Freelance Economy Phenomenon and take it seriously. Despite the opportunities it offers, it brings difficulties and challenges to workers’ well-being and their ability to achieve a decent living and protect their rights, starting with structural problems that lie in the risk of replacing fixed jobs with freelancing, and all that this entails from job insecurity to contractual issues, and the rights of freelancers versus platforms.

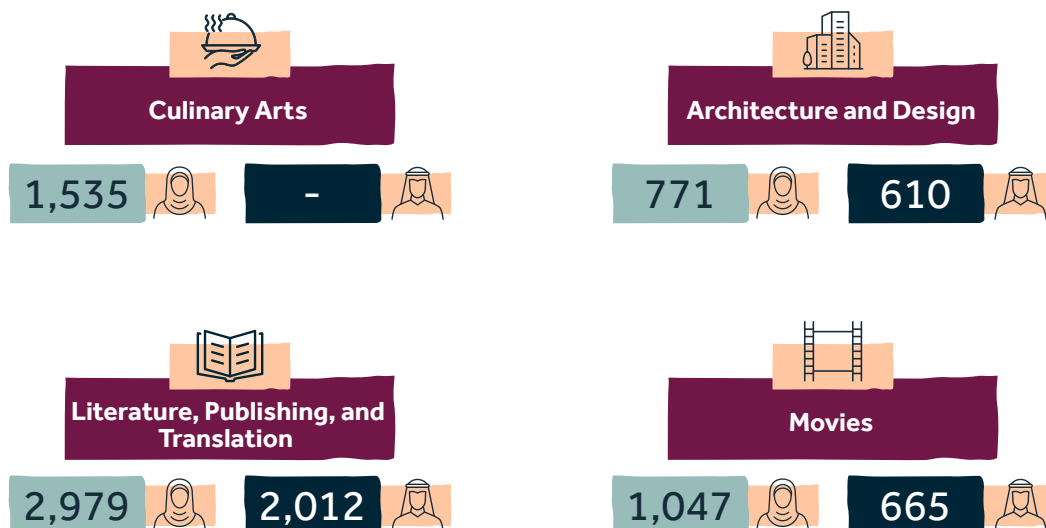
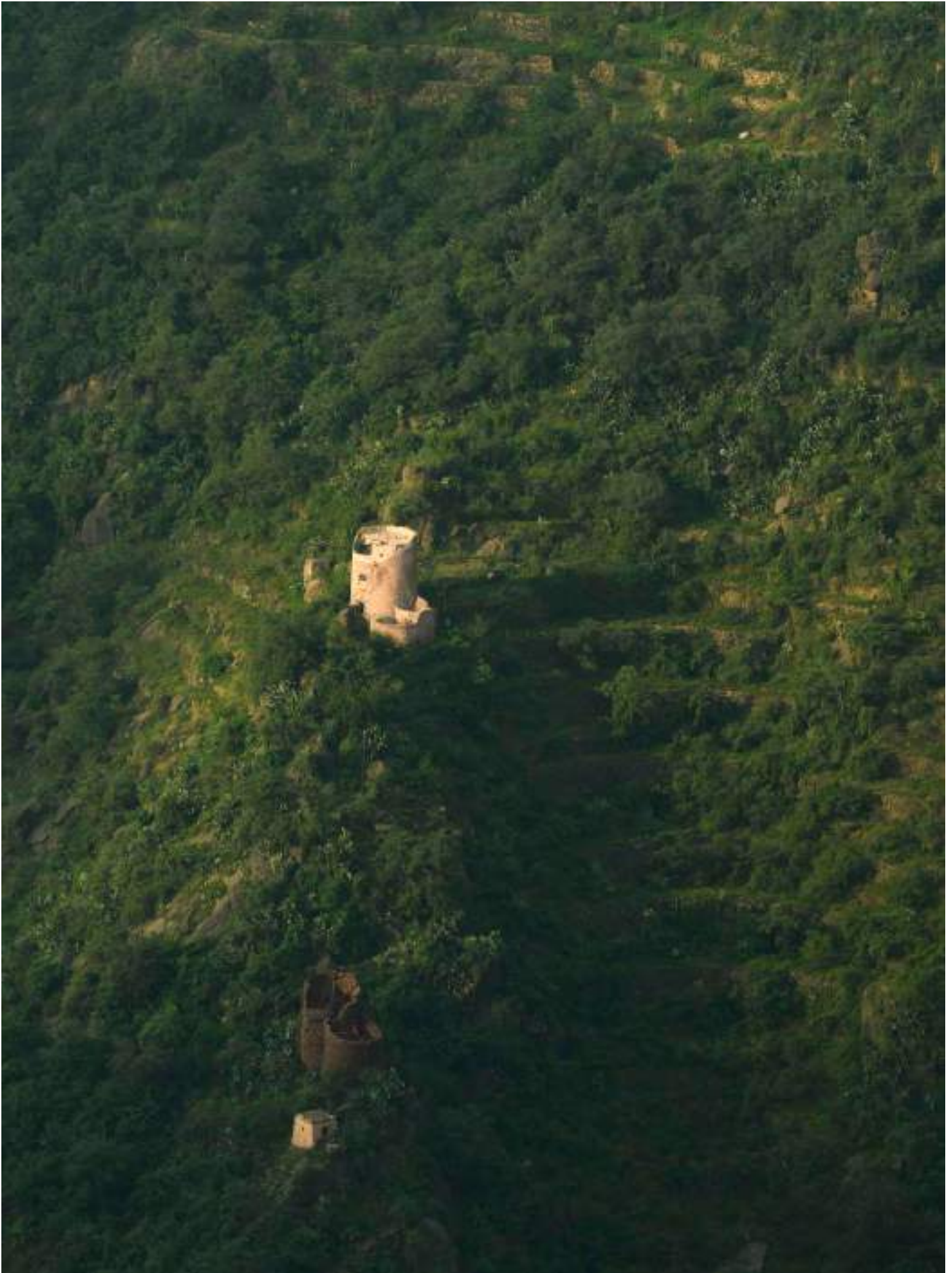


Figure 18: Number of Freelancers Registered on the “Bahr” Platform in 2023 by Services and Gender⁽³⁴⁾

References:

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7. Data from the **Ministry of Culture**, (February 08, 2024).
8. Data from the **Ministry of Culture**, (February 08, 2024).
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12. It is important to bear in mind that the comparison is not based on identical classifications; as countries differ in what may and may not be accounted for within the cultural activities, and the presentation of data needs to be coordinated according to the UNESCO Framework for Cultural Statistics for a rough comparison. Therefore, it should be noted that the difference in the cultural and natural heritage's contribution is likely due to an expansion in the classification adopted in the Kingdom's Culture Sub-Account. For sources and more details, see: Methodology Appendix.
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15. Comparison with the figures in case of European countries.
16. Data from the **Ministry of Commerce**, (February 07, 2024).
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30. Data from **Ministry of Tourism**, (May 5, 2024).
31. Data from **Ministry of Tourism**, (May 5, 2024).
32. Registration on the "Bahr" Platform does not require any professional criteria or qualifications. Therefore, it should be noted that the number of registrations exceeds the number of licensed practitioners through the "Abde'a" Program initiated by the Ministry of Culture, which has less than 600 practitioners. For details, see: **Management and Conservation Chapter**.
33. For details, see: **Management and Conservation Chapter**.
34. Data from **Human Resources Development Fund (HadaF)**.

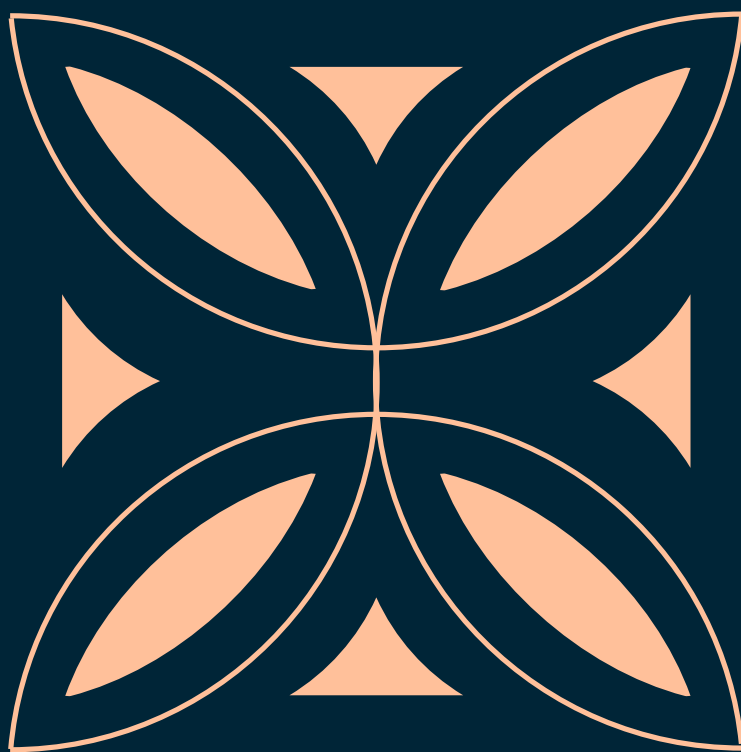
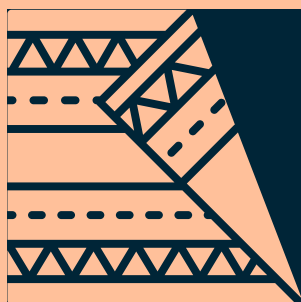


Chapter Six



Sustainability in the Cultural Sector

- Sustainability and Tangible Cultural Heritage
- Sustainability and Natural Heritage
- Sustainability and Intangible Cultural Heritage
- Sustainability in the Fashion Sector
- Sustainability in the Culinary Arts Sector
- Sustainability in the Architecture and Design Sector
- Sustainability in Cultural Facilities and Activities





The concept of sustainability focuses on balancing economic, social, and environmental considerations in the development process, striving to incorporate their benefits into all segments of society, while protecting natural resources to ensure their continuity for future generations. Therefore, it is imperative to align economic development plans with social welfare and environmental protection requirements. In the cultural sector, the sustainability concept refers to the efforts made by various actors to protect and safeguard the cultural and natural heritage from the risks of damage, degradation, and extinction, while enhancing the economic viability of the culture and heritage-related activities and professions, and expanding cultural participation to various segments of society. Since the 2021 edition, the report has been monitoring the cultural sector's contribution to achieving the Sustainable Development Goals (SDGs) in both their economic and social aspects, as the Management and Conservation Chapter monitors the preservation and documentation efforts of the cultural and natural heritage, while the Cultural Participation Chapter monitors the diversity and comprehensiveness of opportunities to engage in the cultural field for various segments of society, and the Creative Economy Chapter highlights the economic contribution of the cultural sector in its various components and the efforts made to stimulate its growth.

In this edition of the report, the Sustainability Chapter is an extension of this focus and complements what has been monitored in the rest of the report's chapters. This Chapter focuses on the relationship between the cultural field and its surrounding environment in terms of impacts and influences, particularly considering environmental and climate changes that pose a threat to various aspects of the human activities. The Chapter sheds light on the state of the environmental sustainability in the various components of the cultural sector, reviewing the potential effects of climate change on cultural heritage, and the main initiatives seeking to mitigate these effects. The Chapter also reviews the state of sustainability in the cultural sectors, such as Fashion, Architecture and Design, and Culinary Arts, highlighting the challenges that limit the wide adoption of sustainability practices and potential methods for enhancing them.

Global interest in the importance of sustainability in the culture and heritage fields has grown in the last two decades, as states and international organizations have taken cooperative measures aimed at preserving the natural and cultural heritage. For example, in 2005, the World Heritage Committee under the United Nations Educational, Scientific and Cultural Organization (UNESCO) warned about the climate change impacts on the World Heritage Cultural and Natural Sites. A survey conducted by the UNESCO World Heritage Center showed that climate change poses a threat to 46 World Cultural Heritage Sites,⁽¹⁾ and 79 World Natural Heritage Sites. This interest has also been reflected in UNESCO's reports and policy papers in support of efforts to understand the climate change impacts on the heritage, and find ways to protect and mitigate them.

As mentioned in this Chapter, the Kingdom's cultural sector is not immune to these impacts. It is expected that the rising temperatures and their accompanying fluctuations in the precipitation patterns and humidity levels will affect some urban heritage sites, forcing a new reality to be adapted by the cultural heritage preservation authorities. Furthermore, the natural environment and its natural heritage sites are subject to changes on land and at sea. Red Sea coral reefs are at risk of bleaching due to rising temperatures. Wildlife may face the risks of drought and water scarcity.

Climate change impacts extend to include agricultural and rural activities that are closely related to the cultural heritage. As pointed out in the Chapter, efforts to address the challenges require parallel and vigorous efforts to study and monitor their potential impacts on the various components of the cultural sector, along with developing protection and conserving methods and mechanisms to enhance their resilience and adaptability, especially given the lack of plans and mechanisms for managing natural and environmental sites in many authorities as monitored by the report.

The report monitored promising examples of efforts to enhance sustainability in various components of the cultural sector, which is an important step towards achieving sustainability in the sector, while maintaining hopes that more measures will be taken in the future. Given the unprecedented growth of the Kingdom's cultural sector, the leading role that the sector can play in enhancing sustainability practices at the national level has been highlighted, as it is closely related to the natural environment and linked to various forms of art and creative expression capable of spreading awareness of the importance of environmental sustainability. These efforts will contribute to national objectives of preserving environmental sites, improving quality of life, and ensuring a prosperous future for future generations.



Sustainability and Tangible Cultural Heritage

This section aims to shed light on the main potential impacts of climate change on the Kingdom's tangible heritage, and also monitor the efforts and initiatives seeking to safeguard heritage sites from these impacts and adapt to them while reviewing the availability of potential knowledge and capacities in this regard. Finally, this section reviews the most prominent efforts and practices made to achieve the sustainability of the Kingdom's tangible heritage.

Potential Impacts of Climate Change on Heritage Sites

Tangible heritage has long been vulnerable to natural factors and environmental influences, but climate change and its impacts exacerbate these factors and pose unprecedented challenges to the tangible heritage protection and conservation efforts.⁽²⁾ The potential impacts of climate change on the Kingdom's heritage sites vary due to their differences and their adaptability to these impacts. The Kingdom's territory expands to cover a vast area estimated at about two million square kilometers, including 13 administrative regions, each distinguished by its unique climate. For this reason, the impacts of climate change vary depending on the geographical and climatic conditions of each region in the Kingdom. They may also vary given the different types of heritage assets found in each region, and these differences may also be due to traditional building methods, which are mostly unprepared for potential and expected changes, as some are more porous than modern buildings.⁽³⁾

Predictive models indicate that the main expected climate change impacts on the Kingdom are high temperatures, accompanied by a rise in evaporation and humidity levels, specifically in the southwestern regions, in addition to fluctuations in precipitation patterns, with the possibility of increased rainfalls in some regions, which may cause floods and torrents threatening some heritage sites.⁽⁴⁾ Several experts note that the rise in humidity levels poses a challenge to clay and wood-based buildings. For example, the Old Town of AlUla witnessed heavy rainfalls and a record spike in humidity levels over the past two years, which affected some clay buildings and led to insect infestation inside the wood.⁽⁵⁾ If these phenomena develop in the future, they could pose significant threats to many urban heritage sites in the Kingdom, thus requiring proactive interventions and plans to prepare for these potential impacts.

It should also be noted that climate change effects will exacerbate the challenges facing the preservation of archaeological sites, including buried artifacts and archeological evidence. Changes in temperature, precipitation patterns, and associated changes in humidity levels lead to concomitant changes in the soil, which may affect the buried artifacts.⁽⁶⁾

Although the aforementioned climate change effects are based on predictive models marred by some uncertainties, especially those related to rainfall rates and opportunities,⁽⁷⁾ efforts are still needed to study and monitor potential effects, especially considering the significant lack of published research and studies on the effects of climate change on the Kingdom's heritage sites. Sustainable tangible heritage management efforts must include early plans and measures to enhance the adaptability and resilience of heritage sites to these variables, including the effective management of rainwater and torrent drainage systems, and restoration efforts that enhance the resilience and adaptability of heritage buildings.⁽⁸⁾





Natural and Environmental Risk Management at Urban Heritage Sites

One of the main global practices in the urban heritage sustainability field lies in enhancing the capacity of the authorities in charge of heritage sites conservation and management, and qualifying them to deal with natural disasters and the consequences of climate change, including their ability to predict, respond to, and anticipate potential effects before they become a difficult reality to deal with.⁽⁹⁾ At present, there is no available or sufficient data indicating the presence of plans and procedures for managing natural disasters' risks and the effects of climate change at the authorities concerned with heritage site management, indicating two possibilities: either they are not available at all, or they are under preparation and development.

However, the report identified some efforts and programs aimed at building risk management capacities in heritage sites. In this context, one of the main implemented plans is the "World Heritage Management: People, Culture, and Nature" Program, organized by the Ministry of Culture represented by the Heritage Commission in collaboration with the International Center for the Conservation and Restoration of Cultural Property (ICCROM) in October 2023. It aims to develop the capacity of practitioners and those operating in the world heritage management field by understanding how to protect the multiple heritage values of heritage sites and world heritage sites,⁽¹⁰⁾ and enhance them in their broader social, environmental, and economic context, and also understanding factors that affect heritage sites and world heritage impact assessments. As part of the

same effort, the Ministry of Culture, represented by the Heritage Commission, announced the establishment of a training program entitled "Disaster Risk Management for Cultural Heritage," aimed at addressing the challenges and opportunities regarding the enhancement of heritage sites' capacity to face the climate change phenomenon through managing potential risks and their adaptation methods. The Program serves as a platform for participants to share their experiences in this field, while urging them to develop heritage site management procedures that take into account multiple risks and disaster-related factors, including disasters caused by climate change, in a comprehensive natural context, in order to reduce and adapt to the risks, and enhance the readiness of existing communities to face such challenges.⁽¹¹⁾

The Royal Commission for AlUla (RCU), represented by the Kingdoms Institute, also announced the award of five research grants (fellowships) in cooperation with UNESCO, aimed at building capacity in the sustainable heritage management field, while enhancing risk response, and contributing to the SDG's realization within the Saudi Vision 2030.⁽¹²⁾ Among the civil initiatives in the same field, the Al-Turath Non-Profit Foundation, in cooperation with the Saudi ICOMOS, held a training program in the Al-Ula Governorate for male and female students of the College of Architecture and Planning and the College of Tourism and Archeology at King Saud University, which included a lecture on "Climate Change and Cultural Heritage Challenges".⁽¹³⁾

Table 1: Main Capacity-Building Efforts and Initiatives in the Heritage Sustainability and Climate Change Risk Management Field

Program	Organizer
World Heritage Management: People, Culture, and Nature Program	Ministry of Culture
"Disaster Risk Management for Cultural Heritage" Program	Ministry of Culture
Research Fellowships in Heritage Conservation, Readiness and Risk Management	The Royal Commission for AlUla in cooperation with UNESCO
"Climate Change and Cultural Heritage Challenges" Lecture	Al-Turath non-profit Foundation, in cooperation with the Saudi ICOMOS

Despite the limited applicable efforts and plans for managing environmental and climate risks in the tangible heritage field, recent years have witnessed significant national efforts, indicating the great attention given by the authorities to the importance of environmental sustainability, climate action and raising the readiness level for natural disasters. For example, the National Risk Committee, chaired by HRH Prince Mohammed bin Salman bin Abdulaziz, Crown Prince and Prime Minister, was established in 2018. Since its inception, the Council has issued multiple manuals and regulations for risk identification and assessment, in addition to notices regarding the importance of disaster and crisis readiness, the most important of which is the "National Framework for Risk, Emergency and Business Continuity Management," which includes the impacts of environmental and climate risks on the cultural heritage.⁽¹⁴⁾ In March 2023, the Climate Change Center was established at the King Abdullah University of Science and Technology (KAUST), which will contribute to collecting climate information, supporting decision-makers, and developing climate change-related policies, by bringing together experts and researchers in this field, and expanding cooperation and participation, in order to build human capacities capable of understanding the current climate situation, predicting future changes, and supporting plans and programs at all levels to mitigate the social, environmental and economic effects of climate change.⁽¹⁵⁾ It is hoped that these efforts will contribute in empowering the authorities in charge of the tangible heritage management and conservation, along with understanding the potential impacts of climate change on the heritage sites, and developing mechanisms and plans to manage the climate change risks, and adapt or mitigate their impacts.





Sustainability Practices in Urban Heritage Restoration and Maintenance

Restoration practices based on local natural materials and traditional building techniques play a crucial role in the urban heritage sustainability field. They contribute in preserving historical buildings' authenticity and their link to their natural environment. They are also considered more sustainable, since natural materials are more resistant to environmental factors, in addition to having a lower environmental impact, compared to modern building materials and methods. This section reviews the most prominent sustainability practices in urban heritage restoration and maintenance efforts, along with capacity-building efforts, the knowledge pertaining to the traditional building techniques, and the use of natural materials.⁽¹⁶⁾

Historic Jeddah

Among the main projects in this field is the Historic Jeddah Revitalization Project, which falls within the framework of HRH the Crown Prince's interest in preserving, conserving, and rehabilitating historical sites, in order to achieve Saudi Vision 2030's objectives, as the Project aims to highlight unique heritage landmarks in the region, including more than 600 heritage buildings, 36 historical mosques, and five major historical markets, in addition to corridors, squares, and sites of important historical significance. This Project will run for 15 years, as it involves making improvements to the infrastructure and service-oriented architecture (SOA), developing the natural and environmental field, while aiming to create an integrated environment in Historic Jeddah, including developed waterfronts, green spaces, and open gardens to cover 15% of the total area of central Jeddah in order to convert it into elements that support a sustainable environment. This Project took into account the natural materials used in the initial construction. The restoration materials were the same as the ones used for building Historic Jeddah's houses, including excavated stones and wood of various shapes and types, while the team relied on historical photos and descriptive materials of the old city of Jeddah in order to help rebuild and restore its demolished buildings in an accurate manner consistent with its past.⁽¹⁷⁾

Old Town of AIUla

As for the Old Town of AIUla, the restoration efforts under the supervision of the Royal Commission for AIUla (RCU) relied on the use of local natural resources, based on the archaeological excavations and the talks with the residents of the region, enabling RCU and its international partners to carry out restoration work using local methods and materials. For example, the restoration of the historical mosques' roofs relied on a restoration plan that preserves the status quo of those mosques, while strengthening what needed to be strengthened. The restoration efforts also included fieldwork involving the elderly by having them describe the shapes of the demolished buildings, in addition to hunting down natural materials, such as AIUla's Athel wood, palm fronds, and other materials used in traditional building.⁽¹⁸⁾

Historic Palaces

In 2023, several historical palaces in the Kingdom were restored, including King Abdulaziz Palace in Wadi ad-Dawasir, King Abdulaziz Palace in Lina, Al-Subai Palace in Shaqra, and Ibrahim Palace in Al-Ahsa. The restoration relied on traditional construction methods, with the addition of modern insulating materials to protect the buildings from rain and environmental factors, and the use of advanced techniques for insulating wooden materials at these sites.⁽¹⁹⁾

Mohammed bin Salman Project for the Development of Historical Mosques

The Prince Mohammed bin Salman Project for the Development of Historical Mosques seeks to restore, maintain, care for, and rehabilitate the heritage mosques in the Kingdom by employing traditional building techniques and local natural materials, as the relevance of these materials to the region makes them more suitable for the environmental conditions and are more flexible to help the building adapt to climate change. In its first phase, the Project completed the restoration of 30 historical mosques by the end of 2022, while aiming to restore 30 additional mosques in its third phase.⁽²⁰⁾

For example, we find that the Al-Duwaid Mosque in the Northern Borders Governorate is a prominent model for clay construction. Consideration was given in its construction to placing strip windows on the southern side, in order to allow heat to enter in the winter, while using gypsum in the construction as an alternative to hay due to its scarcity in the area surrounding the mosque.⁽²¹⁾

Hence, the modern restorer discerns the innovation of the ancient architect and matches his steps in the reconstruction of heritage mosques, as their representation of the cultural heritage provides us with serious solutions to adapt to the climate change. As for the development of the Al-Hosn Al-Asfal Mosque in the Asir region, restorers used traditional techniques to collect rainwater, through a dedicated stream connecting between the Mosque's roof and the reservoir. Worshipers can use this water for ablution, and the surplus will be diverted to irrigate the nearby farms.⁽²²⁾

This Project also takes into account the preservation of natural materials, including the trees that characterize each region. For example, in the Al-Baha region, the Al-Atawlah Mosque Development Project has preserved the pillars made of wild olive and juniper trees, making it one of the largest heritage mosques in Saudi Arabia due to its resilience.⁽²³⁾

Traditional Building Knowledge and Skills and the Use of Local Natural Materials

Traditional building techniques based on natural materials play a positive role in urban heritage preservation efforts, while the knowledge and skills associated with these methods are considered important elements of non-tangible cultural heritage that can be inspired to enhance the sustainability of modern buildings. This requires educational and training efforts to impart these skills and knowledge to new generations of craftsmen and architects. In recent years, significant efforts have been made to train on the use of the traditional building methods based on natural materials, perhaps the most important of which are the academic programs, training courses and apprenticeships offered by the Royal Institute of Traditional Arts in the traditional building arts field. These Programs aim to develop trainees' skills by combining theoretical knowledge with practical skills, and qualifying them to participate in heritage preservation projects and restoration work

in urban heritage regions, such as Historic Jeddah.⁽²⁴⁾ Furthermore, the Institute offers an apprenticeship program for traditional clay building techniques aimed at providing the necessary knowledge and skills pertaining to heritage architecture in the Kingdom, documentation and heritage assessment methods, and the selection of suitable building materials. Trainees will participate in creating a realistic clay building model under the supervision of practitioners specializing in the construction of traditional buildings in order to transfer manual skills and qualify a new generation of national competencies.⁽²⁵⁾ The number of graduates from the Traditional Building Arts Diploma Program reached 11 graduates by the end of 2023.⁽²⁶⁾ This training establishes a cadre of practitioners to support the tangible heritage sustainability and restoration efforts, while preserving this knowledge and skills from extinction, and inspire the underlying sustainability practices in broader contexts.



Table 2: The Royal Institute of Arts's Programs Related to the Traditional Building Arts and the Use of Natural Materials in 2023 ⁽²⁷⁾

Program	Type
Traditional Wooden Doors Art	Training Course
Natural Colors Extraction and their	Training Course
Al-Qatt Al-Asiri	Training Course
Traditional Building Techniques	Training Course
Al-Ahsa Doors	Training Course
Traditional Building Arts	Two-Year Diploma
Country Heritage: Manjur Woodwork	17-Week Specialized Program
Traditional Clay Building Apprenticeship	Training Program

The report also monitored the Heritage Commission's initiatives to train university students in the restoration field at the Prince Mohammed bin Salman Project for the Development of Historical Mosques.⁽²⁸⁾ These efforts, which aim to increase heritage sites' resilience to climate change and employ traditional building knowledge and techniques in heritage conservation efforts, are aligned with the achievement of the Sustainable Development Goals. They treat heritage as a valuable resource for rethinking sustainable development models, harnessing the heritage's potentials in enhancing the sustainability of cities and communities, while inspiring production and rational consumption patterns, enhancing communities' adaptability, and developing resilience to climate changes.⁽²⁹⁾

Sustainability and Natural Heritage

The natural cultural heritage concept refers to the natural topography, ecosystems, and biodiversity that hold great cultural, historical, or spiritual value for a community. The Kingdom is characterized by its diverse ecosystems, including deserts such as the Empty Quarter, coastal regions along the Red Sea and the Arabian Gulf, forest-rich mountainous regions such as Asir, and oases scattered in arid regions such as Al-Ahsa. All these environments contain a unique diversity of organisms and plants that play a crucial role in maintaining ecological balance, and are closely related to various cultural practices and economic activities. In the Management and Conservation Chapter, the

report documented the significant progress that natural heritage has made in the past few years in its protection and rehabilitation efforts, including the expansion of land and marine reserves, afforestation initiatives, and endangered species protection and breeding programs.⁽³⁰⁾ However, climate change and its effects pose unique challenges to sustainable natural heritage management efforts as a whole, requiring various interventions and protection methods to mitigate or adapt to these effects. This section reviews the most prominent potential effects of climate change on various ecosystems, encompassing key components of the Kingdom's natural heritage.

Most Prominent Potential Impacts of Climate Change on Natural Heritage

Marine Environment

The marine environment is considered a key component of the Kingdom's natural heritage. The Red Sea contains a collection of coral reefs with outstanding environmental and economic value, which are considered an important habitat for the reproduction of marine organisms, and a source of sustenance, food, tourism, and recreation, in addition to their vital role in absorbing carbon and mitigating climate change. This makes it a vital treasure that must be preserved, especially considering the significant degradation of coral reefs around the world. The marine environment in the Red Sea and Arabian Gulf faces many challenges as a result of human activities, including maritime navigation pollution, overfishing, the oil and gas industry, and plastic waste.⁽³¹⁾ The Arabian Gulf is one of the most degraded marine areas in the world due to dredging and pollution, putting many marine organisms at the risk of extinction. Meanwhile, the Red Sea faces several risks as a result of overfishing, excavation, and pollution.⁽³²⁾

The exacerbation of climate change effects, such as ocean warming, rising sea levels, and hot sea currents are among the challenges facing both the Red Sea and the Arabian Gulf. The Red Sea, especially in its northern parts, faces a clear challenge represented in the rise of its surface temperature at a rate of 0.17°C per decade, exceeding the global average. The Arabian Gulf experienced higher rates. Its temperature rose at a rate of 0.45°C per decade from 1982 to 2020. Coral bleaching represents one of the main effects of these temperature changes, which in turn affects many marine organisms, leading to the death of many algae and weeds.⁽³³⁾

In addition, the Red Sea and the Arabian Gulf are also suffering from acidification caused by an increase in CO₂ concentration in the atmosphere, which hinders the growth of coral reefs and other shell organisms.⁽³⁴⁾ Sea-level rise may also impact the marine environment, including mangroves and seaweed, potentially degrading coastal marine ecosystems.⁽³⁵⁾



Vegetation Cover and Desertification

Desertification poses a major environmental challenge in various regions of the Kingdom. Its increase is attributed to several factors, including drought, groundwater depletion, and overgrazing. It is expected that climate change will further exacerbate these factors, as predictive models indicate that the effects of rising temperatures by three degrees Celsius will lead to a decline in groundwater recharge rates by 5% annually during the decade from 2045 to 2055, resulting in a continuous shortage in groundwater reserves, which in turn may lead to an increase in desertification and vegetation cover degradation.⁽³⁶⁾

Biodiversity and Endangered Organisms

Rising temperatures caused by climate change pose a major threat to many organisms in the Kingdom, especially non-migratory species. The acceleration rate of this situation may exceed the adaptive capacity of these organisms. Among the main threats to rising temperatures are the impact on pollinating organisms, such as bees, and the effect of rising temperatures and changing precipitation patterns on soil water levels and vegetation cover.⁽³⁷⁾



Natural Heritage Sustainability Efforts and Initiatives

Realizing the severity of these challenges and their potential effects caused by climate change, many government initiatives aimed at preserving the natural heritage have been witnessed in recent years, with the most prominent being HRH the Crown Prince's launch of the Saudi Green Initiative, aimed at enhancing the Kingdom's environmental sustainability efforts and accelerating climate action. The Initiative contributes to the Kingdom's commitment to achieving net zero emissions and accelerating the shift towards a green economy, while protecting land and marine areas. Since its launch in 2021, the Initiative has formed an umbrella for various governmental and civil efforts aimed at sustaining the environment and confronting climate change.⁽³⁸⁾ This section reviews the main regulatory developments and efforts in the protection and rehabilitation of land and marine areas, in addition to the most prominent scientific efforts seeking to study the impacts of the environmental and climate changes on natural heritage sites.

Natural Heritage Sustainability Regulations and Decisions

At the regulatory level, the organization of the General Organization for the Conservation of Coral Reefs and Turtles in the Red Sea was approved in November 2023, following its establishment in 2021 as part of ongoing efforts to preserve the marine environment in the Red Sea. The Organization's tasks include regulation, supervision, and protection of coral reefs and turtles, and their nesting sites, along with their management, development and sustainability, and the rehabilitation of degraded coral reefs in order to contribute in the protection of the biodiversity and the preservation of their rich marine environment.⁽³⁹⁾

The National Center for Vegetation Cover Development and Combating Desertification has also issued two important guidelines, one for afforestation and the other for camping. The Camping Guideline directs visitors to the responsible and healthy practices that maintain the safety of the citizens and the environment during the leisure and recreation trips, while pointing out the locations where camping is allowed. As for the Afforestation Guideline, it emphasizes the importance of planting local plants, while providing interested citizens with the names and types of some trees, and how to plant and cultivate them.⁽⁴⁰⁾

Protection and Rehabilitation Efforts

In September 2023, the King Abdulaziz Royal Reserve Development Authority completed the removal of more than 30 million kilograms of environmental waste, which was accomplished over the course of the past two years in order to fulfill its role in rehabilitating the lands and restoring ecological balance and biodiversity. Various types of waste were removed from the soil and recycled, with the participation of the local community, volunteer teams and NGOs, which is an important indication of the concerted efforts of various parties in preserving the natural heritage.⁽⁴¹⁾

According to the Management and Conservation Chapter, efforts have continued to achieve the Saudi Green Initiative's targets pertaining to afforestation. The number of trees planted by the end of 2023 reached about 10,590,051 trees spread through out the Kingdom.

The Kingdom was also able to exceed the target it committed itself to in the United Nations Convention on Biological Diversity in 2001, which is to protect 17% of the lands and inland areas. The land reserves in 2023 reached 18.057% of the Kingdom's regions, as shown in (Figure 2).

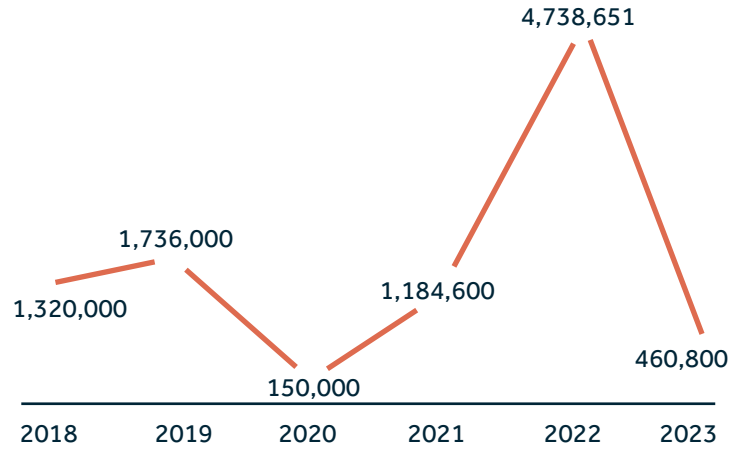


Figure 1: Number of Planted Trees within the Vegetation Cover Development Projects during the 2018 - 2023 Period⁽⁴²⁾

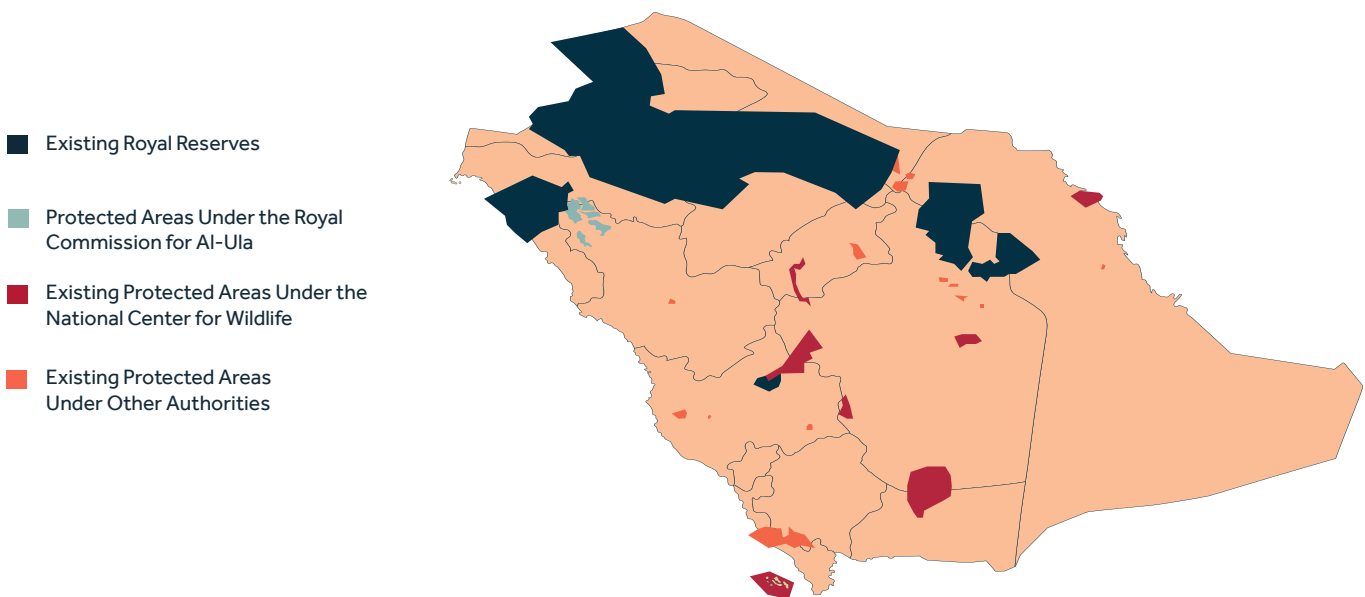


Figure 2: Existing Reserves in the Kingdom and their Areas up to the end of 2023⁽⁴³⁾

The number of organisms covered by protective measures has steadily grown in the past few years, reaching 135 species in 2023, compared to only five species in 2021.⁽⁴⁴⁾

Table 3: Number of Wildlife Organisms covered by the Protective Measures

Name	Number
Species of Endangered Wild Mammals	15
Species of Endangered Wild Reptiles	3
Species of Endangered Land and Sea Birds	25
Species of Endangered Sea Turtles	5
Species of Endangered Marine Mammals	3
Species of Endangered Osteichthyes	9
Species of Endangered Oysters	4
Species of Endangered Echinoderms	4
Species of Endangered of Sharks and Rays	67
Total	135

In March 2023, as part of the natural heritage sustainability efforts, the KAUST launched a Coral Restoration and Rehabilitation Initiative, starting with a 100-Hectare Coral Restoration Project on the Shushah Island, where two million coral reefs have been planted, while working on breeding the coral reefs needed for farming the restoration site in an outdoor coral nursery.⁽⁴⁵⁾ The Initiative employed innovative farming and monitoring technologies that will support and expand the rehabilitation efforts for affected coral reefs, thereby increasing the adaptability of the climate change impacts.

Aramco has also launched a series of initiatives to promote best practices for preserving the natural resources and minimizing the environmental impact of its operations, including marine ecosystem restoration initiatives through coral reefs farming and mangroves planting. These efforts have resulted in the planting of 4.3 million mangroves on the coasts of the Arabian Gulf and Red Sea since 1994.⁽⁴⁶⁾

On the other hand, the National Center for Environmental Compliance has implemented several initiatives under the National Transformation Program in order to contribute in reducing the pollution of various types, including the survey of 200 affected, environmentally degraded, or totally destroyed sites, such as abandoned agricultural lands, mining sites, abandoned quarries, and coastal regions to prepare for their rehabilitation, in conjunction with its work on developing and enhancing its capacity to improve the efficiency in responding to all emergencies and environmental incidents, and predicting the direction of the pollution movements in the marine environment. These efforts include qualifying 1,600 trainees from various authorities to combat offshore oil spills, along with developing surveillance and remote sensing systems, and establishing a database to analyze the deliverables of the modeling and simulation reports from all the accident reports in the marine environment.⁽⁴⁷⁾

These efforts are not only limited to government and private institutions, but also include community-based and voluntary efforts. 14 volunteer teams linked to branches of the Ministry of Environment, Water and Agriculture became active in the natural heritage preservation field in various Kingdom regions, in addition to 55 environmental associations registered in various Kingdom regions, whose activities vary between afforestation, vegetation cover preservation, water consumption rationalization, animal welfare and environmental awareness and guidance.⁽⁴⁸⁾

Research and Scientific Efforts

Research and studies pertaining to the impact of environmental and climatic factors on the natural heritage constitute a supportive base for protection and conservation efforts, and their availability is an important indicator of stakeholders' capacity to develop plans and mechanisms that manage the risks of potential natural disasters and the impacts of climate change on the natural heritage sites.⁽⁴⁹⁾ The report monitored the scarcity of studies carried out on the impacts of climate change on the natural heritage. The results of one of the surveys for published research on the effects of climate change on the cultural and natural heritage between 2016 and 2020 showed the absence of research related to the environment of the Kingdom and most Arab countries.⁽⁵⁰⁾ However, the report identified several institutional scientific efforts, hoping that it will soon provide a solid scientific base that supports the natural heritage preservation efforts and enhances its adaptability and resilience against the climate change impacts.

For example, the Third International Conference on the Marine Environment of the Red Sea (ICMERS-3) was held at KAUST in November 2023. Its topics included environmental challenges facing vital habitats in the Red Sea, and protection and rehabilitation efforts, in addition to climate change effects on various marine organisms.⁽⁵¹⁾ In the context of partnerships between academic institutions and protection and conservation authorities, King Khalid University signed a memorandum of understanding with the General Organization for the Conservation of Coral Reefs and Turtles in the Red Sea in November 2023, in an effort to enhance cooperation in the fields of research, training, and exchange of knowledge and experiences, and also provide training

opportunities for students and support them in their graduation projects to benefit from them in the labor market, in addition to studying and providing solutions to environmental issues, and organizing awareness events and activities that contribute to the preservation of the marine environment.⁽⁵²⁾

The authorities concerned with natural heritage protection and development in the ecosystem and the reserves are also making significant research efforts that will contribute to understanding the impacts of environmental and climatic factors on the various natural heritage components and enhancing their sustainability. Among these research efforts is the ecological study of the Imam Turki bin Abdullah Royal Reserve's environments, which includes a comprehensive survey of plant and animal species, and an environmental assessment of the reserve's current status, in order to specify the degraded habitats and identify threats facing the organisms within the reserve.⁽⁵³⁾

Despite these efforts, there is a knowledge gap regarding the effects of climate change on the Kingdom's natural heritage, due to the lack of studies and the limited availability of long-term monitoring and observation tools, which enable researchers to monitor changes over time.⁽⁵⁴⁾ Difficulty in accessing the data made available to the authorities concerned with natural heritage conservation and protection is also an obstacle to the development of the relevant research and studies.⁽⁵⁵⁾

In the absence of adequate knowledge, it is difficult to develop firm adaptation or mitigation manuals and plans. There is, therefore, an urgent need to intensify efforts in this field and raise cooperation among various actors in order to ensure the preservation of the natural heritage, and address climate change challenges.

Cultural Tourism and Natural Heritage Sustainability

Cultural tourism is one of the main methods to connect with natural heritage and evoke its aesthetic and cultural values. Visits to wild and mountain parks, nature reserves, and coastal regions are considered an important recreational activity and an economic asset. In recent years, the Kingdom's cultural tourism activities have witnessed an unprecedented movement, due to the increasing number of cultural and entertainment festivals and activities, the rehabilitation of many heritage sites to receive tourists, and the empowerment of ecotourism within the reserves, in addition to the major tourism projects led by the Public Investment Fund (PIF). As mentioned in the Cultural Participation Chapter, the Cultural Tourism Indicator recorded a growth in 2023. The most growing destinations were resorts and mountainous regions, followed by visiting reserves and natural parks. Therefore, tourism - especially in natural heritage sites - constitutes an important economic activity at the national level and in local economies, in addition to its recreational and cultural benefits.⁽⁵⁶⁾

Despite these multiple benefits, tourism activities, and projects may have effects that threaten the sustainability of land and marine natural heritage, such as pollution, vegetation cover damage, and wildlife threats. The tourism sector as a whole has a high environmental impact, contributing approximately 8% of the total greenhouse gas emissions, in addition to the high energy and water consumption.⁽⁵⁷⁾

Main Regulatory Developments in the Tourism Sustainability Field

In recent years, the tourism sector has undergone several regulatory developments, some of which have sought to enhance the sector's sustainability. In December 2022, the Ministry of Tourism issued Tourism Destinations Regulation, stipulating that environmental protection requirements must be met before tourist destinations are proposed, in coordination with the National Center for Environmental Compliance.⁽⁵⁸⁾ In August 2023, the Saudi Red Sea Authority issued seven regulations for maritime activities in the Red Sea, including marinas, cruises, and private tourist yachts. The regulations contain environmental obligations and requirements aimed at preserving biodiversity and preventing pollution in the Red Sea.⁽⁵⁹⁾

Since the tourism sector is closely linked to many cultural sectors, such as natural and urban heritage, culinary arts events, and others, the enhancement of the sustainability practices in this sector will benefit various other relevant cultural sectors. Recognizing the vital role played by the sector and potential opportunities to enhance its sustainability, this section reviews key regulatory developments and institutional efforts aimed at enhancing cultural tourism's sustainability in natural heritage destinations, along with reviewing models of environmental sustainability practices in major tourism projects, and highlighting some of the challenges that hinder the adoption of sustainability in the sector.



In October 2023, it was announced that the International Center for Sustainable Tourism Research was established, in partnership between the Ministry of Tourism and the Global Sustainable Tourism Council (GSTC) in order to become a reference for applied research, best practices and practical tools, thus accelerating the Travel and Tourism Sector's shift towards achieving net zero emissions.⁽⁶⁰⁾ Since its inception, the Center has issued several reports on ways to enhance sustainability in the tourism sector, including the use of solar energy in tourism facilities, and the reduction of carbon footprint and food waste.⁽⁶¹⁾

Table 4: Main Regulatory Developments Regarding the Sustainability of Tourism Activities and Facilities issued during the Last Three Years

Regulatory Decisions and Regulations	Date
Executive Regulation for the Vegetation Cover Development and Combating Desertification	June 2021
Executive Regulation on Hunting Wild Organisms	July 2021
Executive Regulation for the Protection of Aqueous Media from Pollution	July 2021
Executive Regulation for Management of the Marine and Coastal Environment	September 2021
Executive Regulation for the Protected Areas	October 2021
General Organization for the Conservation of Coral Reefs and Turtles in the Red Sea	December 2021
Tourism System	August 2022
Tourism Destinations Regulation	December 2022
Marina Design and Operations Regulation	August 2023
Cruise Ships Regulation	August 2023
Cruise Operators Regulation	August 2023
Visiting Private Yacht Regulation	August 2023
Large Yacht Chartering Regulation	August 2023
Maritime Tourism Agent Regulation	August 2023
Establishment of the International Center for Sustainable Tourism Research	October 2023
Approval of the Organization of the General Organization for the Conservation of Coral Reefs and Turtles in the Red Sea	November 2023

Despite these key regulatory developments, the tourism sector as a whole still lacks adequate regulatory frameworks and control procedures that establish the sustainability of tourism activities and facilities, especially outside major tourism projects. In some cases, it is noted that economic motivations prevail over environmental and social sustainability requirements, which may result in leniency towards tourists and tourism companies in order to support the sector's growth. For example, there are no strict regulations on waste recycling in tourism facilities and activities, and no environmental requirements in regards to supply and procurement, resulting in waste accumulation, including reusable waste and excessive plastic consumption.⁽⁶²⁾ Furthermore, the incomplete public transport networks in most cities, or their lack of connection to tourist activities and facilities' sites, contributes in increasing the carbon footprint of the tourist visits.⁽⁶³⁾



Ecotourism in Royal Reserves and Protected Areas

The Royal Reserve Ecosystem and other protected areas fulfill a crucial role in preserving biodiversity in vast Kingdom regions, and also contributes in mitigating the environmental impact of the tourism activities. For example, the Imam Abdulaziz bin Mohammed Royal Reserve Authority, which also oversees the King Khalid Royal Reserve, has developed a mechanism that ensures the mitigation of the environmental impact of tourism activities established within the reserve's boundaries. The process for issuing permits for the operation and establishment of tourism activities and facilities includes an environmental impact assessment, in which information is collected regarding the activity's duration, its nature, the number of visitors to the site or camp, and the number of vehicles and equipment used, and then the carbon impact is calculated according to this data. Based on this assessment, the environmental equivalent that the operators of the tourism facilities

and activities undertake to abide by will be established.⁽⁶⁴⁾

Environmental equivalent activities usually include planting trees, supporting rainwater drainage planning, and removing and recycling waste based on the capacity of each operator.⁽⁶⁵⁾

The Authority also strives to mitigate the environmental impact of tourist visits by dividing and rotating the sites available to visitors and tourism activities, and regularly assessing the impacts of these activities on the vegetation cover and the biodiversity, while excluding fragile environmental habitats from all tourist activities and visits.⁽⁶⁶⁾ The widespread adoption of environmental equivalent requirements in all royal reserves and other protected areas will contribute in mitigating the environmental impact of tourist visits, while achieving economic, cultural, and promotional benefits for cultural tourism.

Examples of Sustainability Practices in Major Tourism Projects

Among the prominent examples in this context is the achievements made by the Red Sea Global Company, developer of the Red Sea and AMAALA resorts. It undertook several efforts to preserve the main environmental habitats surrounding tourist resorts, most notably surveys conducted on land and marine organisms, which document the biodiversity and contribute to monitoring the state of natural habitats on a regular basis.⁽⁶⁷⁾ The Company also contributed to the "Saudi Green Initiative" through its own agricultural incubator, which was able to plant more than 200,000 trees by the end of 2022. The Company, in cooperation with the National Center for Vegetation Cover Development and Combating Desertification, aims to plant 50 million mangroves by 2030, in addition to the Company's plans to keep 75% of islands in the region as reserves or undeveloped areas, while fully relying on solar energy in all the facilities, and establishing a waste management and recycling center.⁽⁶⁸⁾

As for the Soudah Development Company, owner of the Soudah Peaks Project in the Asir region with its stunning mountainous nature and rich biodiversity, it has adopted several practices to preserve these natural resources and mitigate the environmental impact resulting from development projects, the most important of which are the periodic environmental surveys aimed at documenting and protecting plant and animal species within the Soudah Mountains region, and monitoring changes in these surveys from one year to the next. The Company also contributed to the Saudi Green

Initiative through afforestation and development of forests that characterize the region. The Company has finished planting 140,000 local trees, aiming to reach one million trees by 2030. Furthermore, the Company, in cooperation with the National Center for Wildlife, seeks to reintroduce species of wild animals, including the Arabian gazelle and the Nubian ram. Both species face a rapid decline in numbers, and constant threats due to poaching, and loss or degradation of environmental habitats.⁽⁶⁹⁾ As a result of these efforts, 10 mountain gazelles were released to the natural areas of the Soudah Peaks during November 2023,⁽⁷⁰⁾ preceded by the release of 15 endangered mountain ibexes in December 2021.⁽⁷¹⁾ Although such efforts are promising examples towards mitigating the environmental impact of tourism development projects on natural heritage sites, it should be noted that such sustainability practices are usually adopted in luxury tourism destinations, specifically in new ones, which raises questions about the state of sustainability and natural heritage preservation efforts in other tourism sector's destinations, such as coastal resorts and tourist accommodation facilities located in the vicinity of the wild and mountain parks, especially in light of significant data scarcity. It is hoped that regulatory and institutional developments in tourism, environment and culture ecosystems will introduce a mix of incentives and regulatory mechanisms that encourage the widespread adoption of sustainability in the tourism sector.⁽⁷²⁾



Sustainability and Intangible Cultural Heritage

The term “Intangible Cultural Heritage” refers to practices, traditions, forms of expression, knowledge, and skills inherited from ancestors, such as oral traditions, performing arts, celebrations, social practices and those related to nature and the universe, and knowledge and skills associated with cultural handicrafts.⁽⁷³⁾ Given the close connection between elements of natural heritage and the natural environment, they are susceptible to the impacts of climate and environmental change. This is evident when considering the potential impacts of climate change on many agricultural and rural activities such as palm and coffee bean cultivation, whose practices, knowledge, and products constitute key components of the Kingdom’s intangible cultural heritage.⁽⁷⁴⁾ In view of the cultural and economic value of these activities and the necessity to safeguard the associated knowledge and practices, this section reviews the main potential impacts of climate change on some of these activities and efforts made to enhance their sustainability, while also highlighting the role of the cultural handicrafts in offering models of sustainable production and consumption.



Palm Cultivation and Date Production

Palm Cultivation is considered one of the important components of the Arabian Peninsula’s cultural heritage. This importance was reflected in the listing of palm trees and their associated practices, knowledge, and traditions on the UNESCO’s Representative List of Intangible Cultural Heritage in 2019. Palm cultivation faces a potential challenge due to climate change, manifested in fluctuations in rainfall and its intensity, as well as rising humidity levels. Although palm trees can grow in humid areas, good productivity requires low rainfall and a dry climate during pollination and fruit ripening periods.

Rainfall and high humidity during pollination can lead to the spread of mold diseases and hinder the pollination process, while high relative humidity during the ripening and date phases can cause fruit rot and fermentation. Despite these challenges, the diversity of geographical terrains and climatic regions in the Kingdom and the abundance of areas suitable for palm cultivation increase the ability to adapt to climate change. In this context, the significant diversity in the various genetic compositions and the high-quality date varieties, which have high tolerance to a wide range of temperatures and humidity levels, can be utilized.⁽⁷⁵⁾



Coffee Beans Cultivation and Coffee Production

Coffee bean cultivation in the Kingdom is concentrated in the Jazan, Asir, and Al-Baha regions, forming an integral part of the cultural heritage of these regions and a source of income for many farmers. The coffee sector is witnessing concerted efforts from both governmental and private sectors to stimulate local production and develop the sector as a whole, but coffee bean cultivation faces several global challenges due to climate change. Numerous studies have noted the current decline in coffee productivity and yields in several regions around the world, especially in the Americas, with expectations that this decline may worsen, reaching a 70% of decline in global production.⁽⁷⁶⁾ Studies indicate that the main climate impacts on coffee bean cultivation and coffee production in the Kingdom include decreased precipitation rates, extended drought periods, and increased temperatures during the autumn. These changes significantly affect coffee trees and crop quality, as coffee cultivation cannot tolerate high temperatures or extreme cold.⁽⁷⁷⁾

Many farmers in the Jazan region, especially in the Fayfa Governorate, have faced significant challenges due to the spread of the mealybug pest, an insect that caused considerable destruction to several crops, such as mangoes, guavas, and coffee seedlings.⁽⁷⁸⁾ It should be noted that rising temperatures due to climate change contribute in the growth and reproduction of the mealybugs.⁽⁷⁹⁾ Despite these challenges, several available technological and agricultural solutions can be adopted to sustain the coffee sector in the Kingdom. For example, more heat-tolerant strains can be hybridized or grafted, along with employing agricultural practices to increase

the soil's water retention capacity, and harvesting rainwater through the restoration of terrace systems and the construction of dams and reservoirs for water collection.⁽⁸⁰⁾

Beekeeping and Honey Production

Beekeeping holds significant economic and cultural importance in the Kingdom, serving as a crucial source of income for many rural residents and a part of the national heritage. Local honey is considered an ingredient in many national and regional dishes. This activity is expected to face increasing challenges due to climate change through its impact on the bee food sources. Changes in temperatures and precipitation patterns adversely affect the availability of plants for bees, reducing their chances of finding food and directly impacting the honey production. High temperatures may also lead to the emergence of pests that negatively affect the bees' growth and reproduction rate, whereas low humidity levels can weaken the bee reproduction rate due to the dryness of eggs laid by queens. It should be noted that bees play a crucial role in maintaining ecological balance and pollinating plants, so any negative climate change effects on bees is likely to extend to other crops and agricultural activities.⁽⁸¹⁾ Mitigating and adapting to these effects require efforts to increase the numbers of local bee species highly adaptable to climate changes by encouraging their breeding and use instead of imported species, while rehabilitating bee food sources through the restoration and expansion of the vegetation cover that provides basic food sources for bees.⁽⁸²⁾

Pastoralism and Fishing

Rising temperatures, climate change, and altered precipitation patterns are also expected to exacerbate the challenges facing livestock management in the Kingdom, especially with regard to water scarcity and heat stress faced by animals. They negatively affect livestock health, productivity, and reproduction, coupled with potential effects on pastures' availability and quality due to changing precipitation patterns.⁽⁸³⁾ Pastoralism and livestock breeding are vital sources of income for many individuals and are closely linked to many cultural practices, whether in culinary arts or cultural handicrafts, thus requiring plans to adapt to potential changes and enhance sustainability. Similarly, marine fishing workers in the Kingdom's coastal areas may be affected by effects of climate change on coral reefs, which are safe havens for most marine organisms, including fish that rely on them for feeding and reproduction.⁽⁸⁴⁾

Sustainability Efforts and Initiatives in Culturally Significant Economic Activities

The report monitored various projects and initiatives undertaken by the Environment, Agriculture, and Water System's bodies and authorities in recent years to enhance the sustainability of culturally significant agricultural and rural activities. For example, the National Research and Development Center for Sustainable Agriculture (Estidamah) was established in 2017 to conduct applied research aimed at developing innovative agricultural solutions that support flexible and sustainable food systems, in addition to studying the use of advanced agricultural technologies that help farmers adapt to expected climate changes, such as water-saving irrigation techniques.⁽⁸⁵⁾ In January 2019, the Sustainable Agricultural Rural Development Program "Reef" was launched to enhance the capacities of small-scale agricultural producers, cooperative associations, and rural institutions; enabling them to access productive resources and agricultural services and facilitating market access to their products.⁽⁸⁶⁾ The Program successfully rehabilitated about 975 hectares in the southwestern regions for agriculture, contributing



to the expansion and development of coffee cultivation areas using modern techniques, such as Rainwater Harvesting (RWH) in order to conserve water resources and maximize their use. The Program's initiatives also included distributing high-quality coffee seedlings to farmers for free, while ensuring that they are cared for until reaching the production phase, thereby enhancing farmers' capacities and increasing the productivity of this vital crop.⁽⁸⁷⁾

Furthermore, the Saudi Good Agricultural Practices (S.G.A.P) Initiative, launched by the Ministry of Environment, Water and Agriculture in December 2018, contributes to the sustainability of culturally significant agricultural and rural activities by granting the S.G.A.P certification to farmers who meet several conditions and criteria, such as risk assessment, record keeping, food safety assurance, waste and pollution management, efficient use of fuel and energy, wastewater management, biodiversity and wildlife preservation, and provision of hygiene, public health, and occupational and environmental safety in agricultural enterprises.⁽⁸⁸⁾

The report also monitored several initiatives aimed at building partnerships among various actors and encouraging scientific research. The most notable of these is the International Saudi Coffee Sustainability Forum, organized by the Ministry of Culture in Jazan from October 1 to 2, 2022. The Forum sessions focused on the importance of promoting the farmers' role in improving, enhancing, and ensuring the sustainability of coffee production, while shedding light on the importance of supporting innovation and entrepreneurship in the coffee field, which will contribute to addressing sustainability challenges in the Saudi coffee value chain.⁽⁸⁹⁾ Additionally, the Center of Research Excellence in Date Palm at King Faisal University organized a scientific lecture entitled "The Impact of Climate Change on Agricultural Pests with a Focus on Date Palms".⁽⁹⁰⁾

The private sector's main efforts were reflected in the Aramco's Farmers Training and Coffee Beans Cultivation Initiative, which was launched in the Al-Dayer Governorate in 2016, in collaboration with the

Jazan Mountains Development Authority and the Al-Ber Charitable Association in Al-Dayer. The Initiative then expanded to include six other regions: Fayfa, Al-Reeth, Al-Aridhah, Al-Edabi, Al-Harub, and the adjacent Asir region. The Initiative includes the establishment of a laboratory to improve coffee quality, provide agricultural guidance to farmers, refine coffee beans' drying, peeling, sorting, and packaging processes based on scientific grounds, and install smart irrigation systems. Since its launch, approximately 1,050 farmers have benefited from the Initiative, and more than 200,000 new coffee seedlings have been planted. The Initiative also enabled beneficiary farmers to increase their productivity from 24 tons of coffee per year to over 800 tons by the end of 2021.⁽⁹¹⁾ These initiatives represent significant steps towards achieving sustainability for agricultural and rural activities and their resilience against climate and environmental challenges, contributing to the preservation of the knowledge, skills, and cultural traditions associated with them.



Cultural Handicrafts as a Sustainable Alternative

Cultural handicrafts and their associated knowledge and skills are crucial elements of non-tangible cultural heritage. Although these industries and the materials used in them are susceptible to environmental and climatic effects, they can provide more sustainable products and alternatives that rely on local natural materials and provide means for income and prosperity for practitioners and artisans. Many traditional arts and cultural handicraft products are distinguished by their use of natural raw materials from the local environment, and the exploitation of animal and plant surpluses, with less reliance on chemical materials. Many of these products are characterized by their high quality due to manual work, which ensures their longevity, thereby reducing consumption and waste.

In the Cultural Handicrafts Sector, many practitioners face challenges that may hinder the sector's growth and limit its capacity to provide sustainable alternatives. These challenges include limited production and the inability to expand due to the small number of trained practitioners. Additionally, the long production time required for creating several traditional arts and cultural handicraft products and the potential inconsistency in the handcraft's quality limit practitioners' ability to compete with consumer goods. Some practitioners also face difficulties in obtaining high-quality raw materials, such as the wool used in the Al-Sadu weaving, despite its local availability. Perhaps the sector's most significant challenge lies in the development of sustainable economic models that are not reliant on government financial support. To this end, many actors see the importance of supporting practitioners in the fields of cost estimation, pricing, marketing, and logistical support, enabling them to reach the global markets via e-commerce platforms.⁽⁹²⁾

The past few years have seen a rise in domestic demand for traditional arts and cultural handicrafts, sometimes exceeding practitioners' capacity to meet it. This rise in demand can be attributed to several factors, mainly the growth of the tourism sector and the desire of many government agencies and companies to acquire local heritage pieces. This growth in demand presents a golden opportunity for the cultural handicrafts sector to produce sustainable products that can be marketed

in tourist facilities and used in furnishing and decorating hotels and resorts. However, achieving this requires increasing training and qualification opportunities for practitioners, developing accredited classifications based on years of experience, and launching an accreditation certificate for sustainable traditional arts and cultural handicrafts to ensure their authenticity and compliance with sustainability criteria. Adopting a solidarity production model in developing products based on multiple practices, such as those combining wood and palm fronds, and leather and textiles, can contribute to the sector's sustainability in all its components.⁽⁹³⁾





Sustainability in the Fashion Sector

While the fashion sector holds a vital position in the global economy, it also contributes 8% to 10% of global emissions, exceeding the percentage of emissions from the aviation and shipping sectors combined. This high environmental impact is mainly due to the consumption of raw materials like cotton, which occupies 2.5% of the world's land, and the materials used in the clothing production processes, such as dyes that require an average consumption of 43 million tons of chemicals per year.⁽⁹⁴⁾ The Kingdom's fashion sector is experiencing an exponential growth, contributing 1.4% of the GDP in 2022, equivalent to SAR 46.9 billion, while also providing job opportunities for 230,000 people, representing 1.8% of the total workforce in the Kingdom.⁽⁹⁵⁾ The fashion sector is expected to witness a steady growth in the coming years, in line with economic diversification plans and support efforts directed at the local fashion sector, such as the "Saudi 100 Brands" Initiative launched by the Fashion Commission.⁽⁹⁶⁾ This expected growth requires parallel efforts to enhance the sector's sustainability and reduce its environmental impact, in line with the SDGs focusing on responsible production and rational consumption, while contributing to the realization of national objectives seeking to achieve net zero emissions by 2060. The report here reviews the key initiatives aimed at enhancing the sustainability of the fashion sector and the challenges faced by the sector's workers in achieving sustainability.

Sustainability Efforts and Initiatives in the Fashion Sector

The report identified several significant initiatives to enhance the fashion sector's sustainability, varying between dialogue meetings and training programs, in addition to clothing and textile recycling and usage initiatives. In this context, the Fashion Commission organized four editions of the "Swap Shop" initiative in both Riyadh and Jeddah over the past three years. This exhibition aims to promote sustainable consumption by swapping fashion items, as it gives visitors the opportunity to swap used clothes and accessories or exchange them for new items from a group of participating companies. The Initiative's Third Edition - which was held on the sidelines of the 2022 Fashion Futures Conference - saw significant interaction, with over 1,300 visitors and the swap of about 1,000 items out of the 5,500 ones participating in the Initiative.⁽⁹⁷⁾

The training programs, which are provided by the Fashion Commission in the digital design field to train 100 designers in using 3D design software, significantly contribute in reducing waste, especially in sample production processes, which cause significant fabric waste.⁽⁹⁸⁾ These programs aim to enable designers to create complete manufacturing files using digital tools, thus facilitating collaboration with global factories.⁽⁹⁹⁾ The Commission also organized several meetings with fashion designers to discuss the visions and efforts for the sustainability of this sector in the Kingdom. A virtual meeting entitled "Sustainability Opportunities in the Fashion Sector" was held in December 2023 to discuss the significant environmental impact of the fashion industry, high waste rates in the design and consumption phases, while also discussing the importance of using sustainable natural materials, such as organic cotton, linen, natural silk, organic wool, bamboo, and fabrics woven from recycled materials.⁽¹⁰⁰⁾ Notably, sustainability was one of the four main themes discussed at the Third Edition of the "Fashion Futures" Conference held in November 2022.⁽¹⁰¹⁾

In the context of partnerships and cooperation with academic institutions, the Fashion Commission signed a Memorandum of Understanding (MoU) with the King Abdullah University of Science and Technology (KAUST) in September 2022 in order to cooperate in enhancing the Kingdom's fashion sector through technology and scientific research. The cooperation fields included entrepreneurship and skill localization programs, research, and innovation in the fiber and textile science, and provision of training and employment opportunities for Saudi youth in the fashion industry. The MoU also included establishing a research center within the KAUST's Research and Technology Center to develop sustainable solutions in this field.⁽¹⁰²⁾

The report also monitored some initiatives for recycling textiles and using them in fashion production. For instance, the National Center for Waste Management launched the "MWAN" Initiative to recycle the pilgrims' Ihram clothing in the Hajj season of 1443 AH (2022). The Initiative aims to collect, process, wash, and disinfect the excess and used Ihram clothing from the pilgrim camps, and repair the damaged ones to make them available for reuse.⁽¹⁰³⁾ The "Dur Hospitality" Company, through its participation as a strategic partner in the Fashion Futures Forum 2022, presented the "Warmth" Initiative, which involves donating used linens, towels, sheets, pillows, blankets, and covers from its hotels to charities, with over 50,000 items donated through this Initiative. The Company also organized a workshop during the Forum to teach participants how to recycle old bed linens and make innovative robes from them.⁽¹⁰⁴⁾ In the same context, the "Kiswa" Company provides a clothing recycling service for individuals and institutions in all the Kingdom's regions. It collects, sorts, and classifies used clothes for recycling, donating the suitable ones to the contracted charities, while recycling the damaged ones and directing a portion of its revenue to charitable purposes.⁽¹⁰⁵⁾ Such initiatives, if expanded, could contribute to the sustainability of the fashion and tourism sectors simultaneously.

Fashion Sustainability Challenges and Opportunities in the Kingdom

Given future growth expectations for the fashion sector in the Kingdom and the support directed towards local fashion designers and makers, opportunities for building a sustainable sector have increased, especially with the expected rise in local and global demand for the sustainable fashion products. The survey conducted during the 2022 Fashion Conference to measure the importance of sustainability among Saudi consumers revealed that 84% of participants believe that sustainability is important to their clients. However, the high cost of some sustainable products is considered the main challenge. The same survey showed that 58% of participants were unwilling to pay extra for the sustainable fashion products. These results align with the consumers' opinions around the world. A survey conducted by the London Retail Academy indicated that 33% of the youth are unwilling to pay more than an equivalent of SAR 23 for sustainable products.⁽¹⁰⁶⁾

Importing textiles from outside the Kingdom contributes to reducing sustainability efforts in the sector and increasing its carbon footprint. The import process relies on sea or air freight methods. The high use of locally-

blended textiles reduces the feasibility of recycling efforts. Blended textiles are more challenging to recycle compared to single-component ones.⁽¹⁰⁷⁾ Despite these challenges, the fashion sector has ample opportunities to enhance sustainability, the most important of which is the potential use of locally available sheep wool to produce high quality and sustainable textiles for the fashion industry. A study conducted by King Abdulaziz University showed that local production of the Al-Nuaimi sheep breed could provide raw materials required to establish a textile factory.⁽¹⁰⁸⁾ The University's team manufactured clothing from the Saudi local wool. Some of the sector's actors recommended the utilization of palm fronds and other agricultural residues in the textile industry, thereby enhancing the sustainability of local resources and supporting innovation in textile industries within the Kingdom.⁽¹⁰⁹⁾ Collaboration between local fashion designers and fashion design colleges and programs in Saudi universities can support the recycling efforts, and reduce waste from the design and production process by supplying the excess textiles from the design processes for educational purposes.⁽¹¹⁰⁾





Sustainability in the Culinary Arts Sector

Many studies have shown that food production systems are affected by climate change. Agricultural production in many regions worldwide is expected to be impacted by changes in temperature and precipitation patterns, leading to direct effects on the availability of certain crops and food. Furthermore, the effects of climate change may increase production and import costs, thereby affecting food prices and their accessibility. This drives society to adapt its dietary habits and seek sustainable alternatives suitable for new climatic conditions. This highlights the importance of striving to enhance the sustainability of food production and consumption in the Kingdom, where the culinary arts can play a significant role.

In light of the threats posed by climate change to food production, irrational consumption poses another equally significant threat. The Kingdom experiences high rates of food waste, with statistics from the Ministry of Environment, Water, and Agriculture indicating that the percentage of wasted food exceeds 33%, at a financial cost of up to SAR 40 billion,⁽¹¹¹⁾ with rice topping the most wasted food at 34%, followed by flour and bread at 30%, and dates at 21.5%.⁽¹¹²⁾ The Ministry of Environment, Water, and Agriculture's data indicates that food waste and loss occur at various production, transportation, and marketing phases, up to the consumption phase, necessitating regulatory interventions to be made in order to enhance sustainability at all phases. This high level of food waste reduces food production efficiency, which in turn contributes to increasing the climate change-causing emissions and the financial waste, while having a generally negative impact on food security.⁽¹¹³⁾

Key Initiatives in Culinary Arts Sustainability Field

The report monitored several initiatives aimed at enhancing food and culinary sustainability in the Kingdom, the most significant of which were the Farmers' Markets launched by the Culinary Arts Commission in collaboration with the Ministry of Environment, Water, and Agriculture in various cities across the Kingdom. In 2023, the Culinary Arts Commission organized five farmers' markets in Riyadh, Abha, Taif, Al-Baha, and Al-Ahsa.⁽¹¹⁴⁾ These markets aim to preserve and enhance local food culture by providing farmers with a means to sell their products directly to consumers at fair prices, thus promoting the development of local food products, agricultural crops, and locally manufactured products.⁽¹¹⁵⁾ According to the Food and Agriculture Organization of the United Nations (FAO), local farmers' markets contribute in enhancing the environmental sustainability by avoiding emissions from shipping and transporting food products, especially imported ones, in addition to their role in supporting farmers and producers and raising consumer awareness to achieve positive changes in this vital field.⁽¹¹⁶⁾

To combat food waste on a national level, the National Program for Reducing Food Loss and Waste was launched in 2018, implemented by the General Food Security Authority (GFSA) in order to raise awareness about the importance of food diversity and the efficient use of natural resources, along with reducing diseases

caused by food waste, effectively dealing with waste, promoting cooperation between the governmental and non-governmental agencies, and fostering a culture of recycling through the use of leftover food.⁽¹¹⁷⁾

As part of the efforts to sustain food production systems, NEOM announced the launch of the "Topian" Food Company in December 2023 to establish sustainable food systems that redefine food production, distribution, and consumption methods. Topian develops sustainable and innovative solutions that encompass agricultural practices resistant to climate change, including temperature changes and water scarcity.⁽¹¹⁸⁾

The report also observed an example – probably the only one in this field – reflecting the culinary arts' role in enhancing food sustainability; i.e. the "Indulge Thyself" Restaurant in Jeddah. It avoids waste during the cooking process by applying a closed-loop food system, which allows it to prepare luxurious, zero-waste meals. To achieve this, the Restaurant adopts sustainable practices and cooking methods that ensure zero waste, such as using local "farm-to-table" products and a "head-to-tail" cooking method. The Restaurant also uses reusable serving dishes and avoids plastic products during the food cooking, storage, and service processes, along with converting any food surplus into compost used to grow the Restaurant's fruits and vegetables.⁽¹¹⁹⁾





Sustainability in the Architecture and Design Sector

Architecture and Design express the peoples' identity and culture, and are closely linked to the surrounding environment, interacting with the environmental and climatic factors, in terms of its impacts and influences. The significance of Architecture and Design lies in providing innovative solutions to the climatic challenges, particularly in the cities, due to the exacerbation of rising temperatures in these regions resulting from the "Urban Heat Island" phenomenon, where heat is trapped in the city infrastructure,⁽¹²⁰⁾ especially given the high urbanization rates in the Kingdom, reaching 85% of the population.⁽¹²¹⁾ Architecture and Design intersect with one of the Kingdom's most crucial economic sectors, the construction and contracting sector, contributing to about 5.5% of the GDP in 2021.⁽¹²²⁾ The Kingdom is witnessing urban growth and the establishment of mega infrastructure projects, thus providing opportunities for the enhancement of the sustainability principles in the architecture and urban planning field. Despite the absence of precise data to assess the state of sustainability in the architecture and design sector and its associated sectors, such as construction and contracting, it is noticeable that green building practices have declined in residential and commercial projects, while being restricted to a few government projects and some residential neighborhoods.⁽¹²³⁾ Some experts attribute this to the high initial cost of applying sustainability techniques and practices in architecture and construction, leading to the disregard of future benefits, especially in the absence of government incentives. Others attribute the reason to the lack of sufficient knowledge about the sustainability practices and various technologies that can be employed to improve energy and water efficiency, such as greywater systems, reuse of building materials, and other interventions that lead to long-term environmental and economic benefits.⁽¹²⁴⁾ This Chapter reviews some existing initiatives to enhance sustainability in the architecture and design sector, hoping they will be the beginning of more effective efforts to enhance the sector's sustainability.

Key Sustainability Efforts and Initiatives in the Architecture and Design Sector

Building Sustainability and Energy Efficiency

The report identified several government programs aimed at enhancing sustainability in the architecture and construction sector, and improving energy consumption efficiency. Among these significant programs is the Sustainable Buildings Program launched by the Ministry of Housing in November 2018, which provides a building sustainability assessment service for institutions and individuals in order to ensure compliance with criteria that improve energy and water consumption efficiency in buildings, while reducing the damage of the construction and material waste on the environment, in accordance with global specifications and measurements. The Program awards the beneficiaries with the "Mostadam" certificate, divided into five levels (Green, Bronze, Silver, Gold), up to the highest level (Diamond), depending on the total points received by the building or project during the assessment process.⁽¹²⁵⁾ According to the Program's data, it has contributed in applying the sustainability criteria in over 70 major national projects by the end of 2023.⁽¹²⁶⁾

Since its inception in 2010, the Saudi Energy Efficiency Center has also been making significant efforts to enhance energy efficiency in the construction sector, by developing regulations and specifications for air conditioners, household appliances, buildings' thermal insulation products, and lighting products, along with rehabilitating government buildings and road lighting to become more efficient.⁽¹²⁷⁾

King Salman Charter for Architecture and Urbanism

In November 2021, the Architecture and Design Commission launched the King Salman Charter for Architecture and Urbanism, with sustainability as one of its core values. The Charter provides an urban design methodology based on the Kingdom's cultural heritage, seeking to achieve urban excellence, while providing a guideline for decision-makers, specialists, and those interested in architecture and urbanism. The Charter outlines several sustainability strategies in urbanism, including environment protection and support by balancing between new developments and the natural environment to minimize negative impacts on wild and marine environments. It also includes using designs based on the surrounding natural systems to respect and enhance the environment, establishing urban environments integrated with the local geography and nature, and adopting technologies to reduce resource consumption and increase energy efficiency, such as using renewable natural resources as much as possible, designing water collection and recycling infrastructure, and reducing waste and carbon emissions. Finally, the Charter contains strategies to adapt to climate change and improve the infrastructure's resilience in facing and mitigating the long-term impacts of these changes.⁽¹²⁸⁾ To translate the Charter's principles and encourage their adoption, the Architecture and Design Commission launched the King Salman Urban Charter Award in December 2023 in order to celebrate projects that adhere to the Charter's principles. The Award is divided into three tracks: the (Built Projects) Track for project owners and design companies, the (Unbuilt Projects) Track for design companies, and the (Student Projects) Track for university students.⁽¹²⁹⁾



Cities Humanization Projects and Rehabilitation of Urban Regions

The past few years have witnessed tireless efforts to enhance the sustainability of cities and urban regions, notably the Green Riyadh Project, launched by the Custodian of the Two Holy Mosques King Salman bin Abdulaziz in March 2019, to raise Riyadh's ranking among its global counterparts, in line with the Saudi Vision 2030. The Project aims to increase the city's green spaces, intensify afforestation throughout the city, and efficiently use treated water for irrigation, thereby improving air quality, reducing temperatures, and encouraging an active and healthy lifestyle. The Green Riyadh Project includes afforestation of more than 7.5 million trees across roads, sites, and enterprises within and around the city, while using 72 types of trees native to Riyadh's environment. The Project is expected to contribute in lowering temperatures, reducing reflected glare and carbon dioxide, mitigating the impacts of dust air pollution, and improving the city's aesthetic and environmental aspects.

The Madinah Humanization Program, launched in 2017, has implemented several rehabilitation projects for neighborhoods, roads, and public spaces to make them walkable and increase open green spaces that contribute in improving quality of life and enhancing the region's economic value.⁽¹³⁰⁾ One of the Project's significant achievements lies in the completion of the first phase of the Quba Avenue, transforming a previously car-crowded road linking between Quba Mosque and the Prophet's Mosque into a pedestrian-friendly avenue with gathering, walking, and shopping spots. The Project won the Best Tourist Attraction Site Award for 2018 among the Kingdom's Tourism Excellence Awards.⁽¹³¹⁾



Private and Civil Sectors' Efforts and Initiatives

The AIUla Design Studio, launched in June 2020, provides free consultancy services to AIUla residents in order to help in developing their home designs in a sustainable and efficient manner. The Studio also developed a guideline to make buildings more sustainable by directing the design of the main openings towards courtyards or small open spaces, providing options for natural lighting and ventilation for all rooms, thus reducing the need for artificial lighting and air conditioning. In addition, the Studio combines modern design practices with traditional building methods, ensuring that homes provide greater comfort to residents with lower energy consumption and less reliance on cooling devices.⁽¹³²⁾

Among the main civil efforts in this field is the Annual Green Building Conference organized by the Saudi Green Building Forum, in collaboration with the Ministry of Municipal and Rural Affairs and Housing, which aims to bring together actors from government institutions, the private sector, researchers, and enthusiasts, along with offering "Palm" awards for outstanding projects in achieving sustainability. The 13th Edition of the Green Building Conference was held in October 2023 in Riyadh, attended by over 500 participants.⁽¹³³⁾

The Red Sea Global Company, developer of several tourist projects along the Red Sea coast, launched the Sustainable Architecture Competition in July 2020 in order to design one of the facilities in the Employees City at the Red Sea Project. The Competition, which is directed at the architecture and design students in the Saudi universities, aims to enable them to apply their knowledge and skills of sustainable architectural design, offering the winning design a chance to be implemented on the ground. The Competition's first edition saw the participation of approximately 600 designs, 50 of which were nominated for the final stage.⁽¹³⁴⁾

Sustainability in Cultural Facilities and Activities

Cultural activities, events, and facilities play a vital role in the individuals' lives, providing spaces for creativity and cultural participation, while increasingly contributing to the Kingdom's local economy. Like other economic sectors, they have an environmental impact, albeit less than other sectors. Cultural activities contribute to consuming natural resources and generating waste, whether through producing creative materials like the publishing, music, and film industries, organizing cultural events like festivals and book fairs, or consuming energy in cultural facilities. However, any serious assessment of sustainability in cultural facilities and activities faces a significant challenge, which is the scarcity of available or accurate data on the sector's environmental impact or sustainability practices in cultural facilities and activities.

As an emerging sector experiencing rapid growth, the cultural sector and all its institutions can become a leader in adopting environmental sustainability practices in all aspects of their activities and facilities. Although the environmental impact of cultural activities and production may be less compared to other sectors, it can play a crucial role in achieving national objectives pertaining to environmental protection and climate change confrontation due to the close connection between the various culture and natural environment components, and the central role played by the cultural sector in the education, training, and awareness-raising fields. The unprecedented government support for the cultural sector also enables it to adopt sustainability practices and absorb associated short-term costs resulting from them. For example, cultural institutions and facilities, such as theaters, museums, and public libraries, can play a vital role in enhancing the sector's sustainability through increased energy efficiency, partial or total reliance on renewable energy sources, increased green spaces, adoption of recycling practices, and enhanced environmental awareness among the public and the participants in the cultural events. Despite the lack of data on the state of sustainability in cultural facilities, we present two examples below on the cultural facilities that have successfully incorporated sustainability principles and practices in the design and management.

Local Examples of Sustainable Cultural Facilities

King Abdulaziz Center for World Culture "Ithra"

The King Abdulaziz Center for World Culture "Ithra" is distinguished by its high commitment to environmental sustainability in all its operational aspects. The Center was designed based on global energy efficiency criteria, such as ASHRAE 90.1 and LEED. The Center also has an energy management plan, which includes the use of renewable energy sources, water treatment, and its reuse for irrigating indoor and outdoor gardens. Furthermore, the Center manages waste through an integrated recycling program, and has multiple green spaces and open areas for organizing cultural events, reflecting its comprehensive commitment to enhancing sustainability and environmental awareness among its employees and visitors.⁽¹³⁵⁾



Al-Rahmania Library in Al-Ghat

As for the Al-Rahmania Library in Al-Ghat, its construction is distinguished by its use of natural materials from the surrounding environment, specifically the use of straw bales in building walls and the ventilation towers. They help in improving thermal insulation, reducing cooling costs, and saving energy. The Library also conserves water consumption in its surrounding gardens through using drip and sprinkler irrigation systems. The Library features an open green garden accessible to visitors, along with outdoor spaces available for activities and events. The Library is connected to a pedestrian and bicycle track, allowing visitors to reduce their dependence on cars.⁽¹³⁶⁾

Sustainability Practices in Cultural Activities and Events

As with cultural facilities, there is no available data on the state of environmental sustainability in cultural events and activities, such as book fairs and cultural festivals. However, available evidence indicates a poor adoption of environmental sustainability practices in many of these activities. The use of reusable materials, the recycling of waste at the festivals or cultural events, or their accessibility to public transportation is scarce.⁽¹³⁷⁾ Hence, there is a need to enact binding sustainability criteria for all public cultural activities, especially festivals and book fairs, which play a significant role in the cultural and social movement and can potentially disseminate sustainability practices on a broader scale. Adopting sustainability principles in these activities from waste reduction and efficient use of resources can contribute in achieving national environmental objectives and raising awareness about the importance of environmental conservation among attendees and visitors. This way, cultural facilities can be a major factor in enhancing environmental sustainability while achieving balance between economic development requirements, and preserving natural resources for future generations.



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Conclusion

Cultural Sector Highlights in 2023

The cultural sector in Saudi Arabia remains in the process of formation and development, given the recent establishment of its institutional framework starting with the creation of the Ministry of Culture in 2018. This was followed by a surge in cultural activity in 2019, which was then disrupted by the exceptional circumstances of the COVID-19 pandemic. The pandemic led to closures of cultural facilities, travel and tourism restrictions, and the cancellation of exhibitions and festivals, severely impacting cultural and creative industries globally, including in Saudi Arabia. Despite the sector's resilience—demonstrated by the shift to virtual options for organizing exhibitions, museums, and art education, and the adoption of digital forms of creative production—the impact was significant, although the sector's adaptability contributed to a swift recovery after the pandemic.

The recovery can now be evaluated based on recent developments in cultural data and statistics. For the first time, the cultural sector and its various fields have been included in the Gross Domestic Product (GDP), providing a tangible and solid indicator of its size. Data showed a sharp decline in the cultural sector's contribution between 2019 and 2020, which exceeded the general decline in non-oil GDP. Conversely, the sector's contribution has since returned with a growth rate higher than that of the non-oil economy, suggesting a promising indicator of the sector's ability to recover and achieve sustained growth, aligning with ambitious national targets.

Key highlights of the sector in 2023 include a stabilization of growth rates, following a surge over the previous two years, peaking in 2022 after the complete subsidence of the pandemic's effects. However, data for 2023 reflect either a slowdown in growth in some indicators, such as attendance at cultural activities and cultural tourism trips, or a noticeable decline in others, like literary production and art exhibitions. This can be interpreted as a period of stabilization following the initial burst of activity in 2022. The extent of this stability remains uncertain, and questions persist about the long-term cultural patterns and phenomena that will emerge.



Continued Organizational Movement in the Cultural Sector

Since the establishment of the Ministry of Culture, followed by the formation of cultural bodies in early 2020, the cultural sector in Saudi Arabia has been undergoing continuous transformations that reflect the key characteristics of this phase. Most of the organizational changes over the past years have involved issuing new regulations and bylaws, or restructuring and transferring powers to centralize cultural work and unify activities within the general framework. This centralization extends to areas related to or intersecting with culture, such as the environment and tourism sectors. The report's chapters cover some of these organizational changes in 2023, which can be classified into three main categories based on their objectives: First, ongoing work on issuing and approving regulations and restructuring, such as the approval of the Royal Institute for Traditional Arts (WIRTH). It also encompasses the transfer of powers, like the high order transferring the responsibilities of the National Center for Saudi Ardha and Diriyah Troupe to the Theater and Performing Arts Commission, and the approval to transfer the oversight and management of the Al-Salam Museum in Madinah, including its annual budget, to the Ministry of Culture.

Despite many organizational developments over the past five years, the report notes the continued effort to empower and activate existing or newly established regulations. For instance, the decision by HH the Minister of Culture to enable Historic Jeddah with the

powers granted to the Heritage Commission according to the Antiquities and Urban Heritage Regulations, as well as the activation of the Antiquities Violations Committee and the approval of procedural guidelines for the Museum and Heritage Authorities. Notable developments related to preservation and protection include the approval for Saudi Arabia to join the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions, the high order establishing the Imam Faisal bin Turki Royal Reserve, and the approval for organizing the General Organization for the Conservation of Coral Reefs and Turtles in the Red Sea.



Empowerment and Qualification of Cultural Practitioners

With the growth observed in the cultural sector, there has been a promising movement in cultural festivals, particularly in the fields of theater, performing arts, and films. This has had a notable impact on production in these sectors, as detailed in the section on Creativity and Cultural Production, and on training activities, as mentioned in the section on knowledge and skills. This dynamic has coincided with a significant focus on qualifying practitioners and creatives, enhancing their abilities, and enabling their participation in cultural activities, whether professionally or as amateurs.

For instance, there has been an increase in the number of cultural practitioner licenses issued through the “Abde’a” platform in 2023. These include licenses for music performance, crafts, performing arts, Saudi coffee experts, and literary agents, among others. Despite the platform’s expansion in offering new licenses each year, this expansion remains geographically limited, and there is a noticeable disparity in the number of licensed practitioners by gender. The platform, launched by the Ministry of Culture in 2021, aims to organize the cultural sector and elevate it to a more professional level by setting standards and criteria for cultural practice.

Similarly, the chapters on Management and Conservation, and Knowledge and Skills, reviewed various models for qualifying and supporting creatives, highlighting their diversity and geographical coverage. In 2023, several incubators, artistic and literary residency

programs, and writing retreats were introduced, targeting creatives in visual arts, architecture, literature, and poetry. The data showed gender parity among beneficiaries of these programs, and there were promising indicators of efforts to bridge the gender gap in some areas. For example, the proportion of women benefiting from poetry retreats increased this year, while the number of beneficiaries from children’s literature retreats also grew, reflecting a historical gender imbalance in these fields.

In parallel to these efforts, there has been notable activity at the level of amateur clubs, which are expected to contribute to involving amateurs and enabling their participation in the cultural field. This year saw significant growth in the establishment of cultural amateur clubs, attributed to the flexibility and spontaneity of these clubs and the support provided since the launch of the “Hawi” platform in late 2020, and the Ministry of Culture’s strategy for the nonprofit sector in 2021. This strategy redistributed roles and levels of nonprofit cultural organizations to include amateur clubs. However, data indicate challenges in the geographical coverage of these clubs. There is a need for further growth in peripheral areas, such as the Northern Borders region, which had no cultural amateur clubs by the end of 2023, and in densely populated areas like Riyadh and Mecca, where the rate of cultural amateur clubs is below the standard average per million residents.



Challenges and Aspirations

Over the past five years, the report has identified several challenges facing the cultural sector that require a concerted effort from government, private, and nonprofit sectors. One of the main challenges is the disparity in social participation, both in terms of attendance at cultural activities and contributions to cultural production. For example, the report highlights a significant gender gap in literary authorship and publishing, as well as in the publication of cultural research. This underscores the need for institutions to support female authors, as demonstrated by writing retreat programs. The report also notes the disparity between higher-income and lower-income groups, as well as between older and younger age groups. This highlights the importance of ensuring cultural offerings are inclusive and diverse, and not confined to elite circles.

A similar challenge is the geographic centralization of cultural activities. Most events and activities are concentrated in major cities, with a noticeable lack in smaller towns and peripheral areas. Cultural activities are often concentrated in city centers and prominent locations, rather than extending into residential neighborhoods and public spaces, where they could become an integral part of community life with local

involvement and organization. This emphasizes the need to activate nonprofit organizations, local communities, and municipalities to help address these gaps. The availability and accessibility of cultural facilities also pose a challenge. For instance, the museum and library sectors are undergoing organizational changes, including redefinition, standardization, and the closure and renovation of several facilities. This has impacted the availability of libraries and museums open to the public. Additionally, there is a lack of central data on cultural facilities not overseen by the Ministry of Culture or its affiliated agencies, such as university libraries, endowment libraries, public libraries, and museums run by private institutions. This has made it challenging to assess their availability and effectiveness.

Another significant challenge is the absence of accurate statistics, which stems from the recent establishment of cultural institutions in the Kingdom and the novelty of cultural statistics globally. In recent years, cultural policies have focused on refining and monitoring cultural indicators at the national level, recognizing their crucial role in development and the need to measure their economic contribution.



Conclusion

Moreover, the report notes gaps in scientific research and studies in cultural fields. The results of a survey of published research in peer-reviewed journals over the past four years reveal significant research gaps in music and film, with limited research in other areas such as theater studies, children's culture, museums, traditional arts, cultural education, and sustainability in the cultural sector. This highlights the responsibility of universities and research institutions to encourage and direct research towards these areas. Universities are expected not only to support research but also to actively contribute to the cultural movement, especially through their promising young talent. This can be achieved by

organizing exhibitions and cultural activities, supporting talented students, and stimulating student clubs. The absence of precise statistics remains a challenge, reflecting both the recent institutional changes in the cultural sector and the emerging nature of global cultural statistics. Recent cultural policies have aimed to refine and measure cultural indicators at the national level, acknowledging their vital role in development and the urgent need to assess their economic impact.





Sustainability in the Cultural Sector

In light of the growing national and global focus on sustainable development, the cultural sector faces additional challenges in adopting environmental sustainability principles and practices. These efforts remain limited and do not fully align with ambitious national goals for environmental preservation and climate change mitigation. Despite the support and growth the cultural sector is experiencing, and its diverse forms of expression and creativity that enable it to play a leading role in sustainability, the report aims to highlight several priorities and opportunities to achieve this.

The report underscores the need for more research and studies on the impacts of climate change on natural and cultural heritage sites. This knowledge base is crucial for supporting protection and adaptation efforts. Strengthening collaboration between heritage preservation bodies and academic institutions, and enhancing capacity-building programs for managing natural and environmental risks, are essential. Developing guidelines and procedures for sustainable heritage management and drawing on international experiences and efforts from organizations like UNESCO are also critical.

The rise in tourism, especially to natural heritage sites, such as the number of local tourist trips that included visits to resorts and mountainous areas, or visits to reserves and natural parks, necessitates careful management to mitigate environmental impacts. The

adoption of environmental equivalence mechanisms in some royal reserves is a promising model for reducing the ecological footprint of tourism activities. However, while major tourism projects, such as Red Sea resorts and Al-Soudah development, show clear attention to environmental sustainability, many other tourism activities and facilities still lack such practices. A broader perspective on the total and cumulative environmental impacts of tourism on natural heritage sites is needed, going beyond individual project assessments to address overall effects.

In the midst of these challenges, which can be attributed to the novelty of dealing with sustainability concepts and practices and addressing environmental impacts, promising steps towards broader adoption of sustainability practices are emerging. These include regulatory developments in the tourism sector, such as the regulations issued by the Saudi Red Sea Authority, related to organizing marine tourism activities and ports, which include environmental protection requirements. The most notable of these developments was the establishment of the Global Center for Sustainable Tourism Research in October 2023, in partnership between the Ministry of Tourism and the Global Sustainable Tourism Center. This reflects a growing interest in the sustainability of the tourism sector and is hoped to contribute to adopting more sustainability practices.

Conclusion

The report also emphasizes the importance of integrating environmental sustainability principles and practices into various stages of education and training in fields related to culture and creativity, especially in disciplines with high environmental footprints, such as architecture and design, fashion, and culinary arts. For example, incorporating traditional building and architectural techniques, which use natural materials and consider local climatic conditions, into university curricula can help develop sustainable solutions inspired by cultural heritage.

Additionally, cultural facilities like museums, theaters, and public libraries can set pioneering examples of sustainable architecture and construction, drawing from traditional building techniques, using sustainable

handcrafted cultural products in designs and décor, and adopting international and local energy efficiency and conservation standards. Given the significant growth in cultural events and activities, the importance of sustainable management of these events becomes evident, aiming to reduce their environmental impact and serve as models for sustainable consumption and focal points for promoting sustainability practices.

In conclusion, the fifth edition of the Cultural Status Report, with all its quantitative and qualitative data, seeks to outline parts of the complex and dynamic picture of the cultural sector in Saudi Arabia and to contribute to understanding the sector's state, including its potentials and opportunities, as well as the obstacles and challenges it faces.





Appendices

- Appendix (1): Methodology and Sources
- Appendix (2): Cultural Participation Survey 2023
- Appendix (3): Glossary





Appendix (1): Methodological Framework and Data Sources

Overview

The Fifth Edition of the Report on the State of Culture in the Kingdom of Saudi Arabia continues to build on the methodological framework used in previous editions, particularly the third and fourth editions. This approach aims to ensure consistency in concepts and continuity in data collection and presentation processes and comparing them in an integrated manner. The Report continues to track the state of cultural sectors and measure their indicators across five main chapters, reflecting the various cultural dimensions of these sectors. In addition, the Report includes a sixth chapter dedicated to the topic of the annual report, which focuses in this edition on sustainability in the cultural sector.

First: Methodology of the Fifth Report on the State of Culture 2023

As in previous editions, the 2023 report relied on preliminary material derived from previous models to develop its methodological framework, namely the "Culture Cycle" (2009) and the "Thematic Indicators for Culture" (2019) presented by the United Nations Educational, Scientific and Cultural Organization (UNESCO) as statistical references. In previous reports, these models were adapted to suit the Kingdom's local state, and the report's scope and objectives.

As for the Report's general structure, it followed the same one used in the previous two reports, 2021 and 2022. The Thematic Indicators for Culture were used as a basis for building internal chapters, while adding elements and definitions from the "Culture Cycle," with the addition of a new dimension pertaining to production and creativity in this Report. The Report's adopted approach will establish a framework for the qualitative analysis of the state of culture, which would be measured statistically in five dimensions (see figure below).

Based on this model, the Report reviews the state of cultural sectors in the Kingdom across multiple dimensions: Creativity and Production, Cultural Participation, Knowledge and Skills, Management and Conservation, and Creative Economy. Each dimension is allocated a separate chapter in the report.

While Chapter Six - as in the previous two editions of the report - focuses on a special topic to be discussed in a detailed and extensive manner.

Accordingly, the Report's current edition continues to adopt the same methodological framework used in the 2022 edition, while striving for the necessary development towards achieving the most appropriate use of data. This edition made two major changes:

1 Continuous Development and Restructuring of Chapter Indicators:

The Report sought to change some chapter indicators, including deletion, or transfer from one chapter to another, or addition of new indicators, including:

- The transfer of the statistics of the National Register of Craftsmen and Craftswomen from the Production Indicator in the traditional handicrafts field in the Creativity and Cultural Production Chapter to the Inventorying and Documentation of Intangible Cultural Heritage Indicator in the Management and Conservation Chapter.
- The use of the traditional handicrafts exhibition data to measure the Production Indicator, thereby achieving integration with the rest of the indicators in the Creativity and Cultural Production Chapter, including: Art Exhibitions, Architecture and Design Exhibitions, and Fashion Exhibitions.
- The development of a sub-indicator in the Knowledge and Skills Chapter to monitor the availability of programs and initiatives that discover and support cultural talents at various education levels.

2 Expansion on the Conclusion:

Among the most notable additions to the Report's structure in its fifth edition is the expansion of the Report's conclusion to extensively showcase the most prominent conclusions and general features that shaped the cultural sector during the year, which were discussed in the Report's chapters separately. The conclusion also highlighted the main challenges and shortcomings facing the cultural sector in the Kingdom, which need to be developed and addressed.

Second: Five Dimensions and Report's Chapters

The Report is divided into six chapters, plus three annexes: the Methodology and Data Annex, the Participation Survey Annex, and the Glossary of Terms Annex. The first five chapters address the following cultural dimensions:

1 Management and Conservation

The Chapter draws on the environment dimension model and adaptability to climate change in the UNESCO Culture | 2030 Indicators in its monitoring of the cultural preservation and conservation ecosystem, whether in heritage documentation practices and sustainable development of its resources, or the availability of infrastructure and facilities. In the second section, the Chapter focuses on the culture's regulatory aspect, including authorities, institutions, and support programs, which are considered a sub-indicator within the Prosperity and Livelihoods Dimension. The Chapter also addresses language policies and projects related to servicing the Arabic language.

2 Creativity and Cultural Production

In this Chapter, the definitions used in the report's earlier editions are employed, where Production means all the processes associated with cultural production, including the quantification of production levels and their diversity. Creativity is defined by the report as the unique workstyle. Since the scope of the report does not include artistic assessment of content, it merely uses local and global cultural awards as indicators for the creative state.

3 Knowledge and Skills

This Chapter reviews the features and trends of cultural education and training in the Kingdom throughout 2023. It assesses the efficiency of the educational system in the transfer of cultural knowledge and skills and capacity building, covering all education levels from basic education to specialized cultural training. The Chapter draws on the definitions of the UNESCO Thematic Indicators for Culture, while acquiring its title from one of these indicators.

4 Cultural Participation

This element covers aspects of social participation that go beyond the traditional production and consumption cycle. This definition aims to measure the extent of the cultural field's capacity in involving various segments of society in cultural activities, in addition to the effectiveness of cultural presence, and the ease of access to its various activities in different cities and locations. Measurement tools include an indicator for participation levels based on data revolving around visits the cultural participation questionnaires, as well as social integration and cultural tourism indicators.



5 Creative Economy

Through this Chapter, the Report views cultural activity in the Kingdom as an industry, while the indicators therein focus specifically on the economic aspect. The Report reviews and monitors growth trends, market size, and culture's contribution to the GDP. In addition, the Chapter reviews the state of the labor market in cultural fields and growth trends in the workforce, along with the cultural tourism indicator. Monitoring the culture's economic statistics and indicators in this section of the report will provide a comprehensive overview of cultural services and products market, while identifying potential demand areas, which is a valuable addition to market players from investors, regulators, and entrepreneurs.



6 Topic of the Report on the State of Culture 2023: Sustainability in the Cultural Sector

As in the previous edition, a sixth chapter is allocated to the annual report's topic, and so this edition addressed the topic of "Sustainability in the Cultural Sector," which provides a panoramic overview of the most prominent challenges facing the cultural sector as a result of potential environmental and climate changes, which are expected to pose a challenge to the conservation and protection efforts of natural and cultural heritage, both tangible and intangible. This focus on sustainability's environmental dimension plays an integral role with the rest of the Report's chapters, which address sustainability's economic and social dimensions, such as the Diversity and Inclusion Indicators reviewed in the Cultural Participation Chapter, the availability of cultural facilities and education and training opportunities mentioned in the Management and Conservation Chapter and the Knowledge and Skills Chapter, in addition to the economic dimension reviewed by the Creative Economy Chapter. This focus on sustainability in its various dimensions seeks to underscore the close interdependence and mutual effects between economic growth objectives, social welfare, and environmental conservation. The Chapter reviewed the potential impacts of climate change on the Kingdom's natural and tangible heritage sites, as well as some elements of intangible cultural heritage and sub-cultural sectors, while highlighting initiatives and efforts to enhance sustainability therein.



Third: Definition of Indicators

The Report builds on the methodology developed by the previous edition in the definition of terms and indicators contained in the report in order to fine-tune indicators and their measurement mechanisms (see Glossary of Terms in the report). This Methodology utilizes the following sources: First, the definition of the authority that provided data to the report (if any), if centralized data is employed. Second, the adoption of definitions contained in the relevant national manuals. Third, the utilization of international models and definitions that are compatible with the chapters' indicators. Fourth, the utilization of lexicons and robust studies as appropriate for the Report. Fifth, in the absence of an appropriate definition in these sources, the Report develops its own definition for indicator measurement. Accordingly, the Report's Glossary continues to use the same definitions while developing the definition of some indicators, namely: the Music Production Indicator, the Film Production Indicator, and the Traditional Handicraft Production Indicator in the Creativity and Cultural Production Chapter, and the Cultural Exhibitions Indicator in the Cultural Participation Chapter:

- **Music Production Indicator:** In the previous editions, this indicator focused on measuring the number of Saudi albums and songs released during the year, which the Report defines as: the songs performed by a Saudi singer. In this edition, the indicator measured the number of albums and songs released by Saudi music production companies, regardless of the singer's nationality, rendering it consistent with other production indicators that rely on cultural production within the Kingdom, such as: Publishing, Translation, Art Exhibitions, etc.
- **Film Production Indicator:** This edition of the report developed an indicator measurement mechanism based on the first official year for the film's screening, whether in cinemas, virtual platforms, or film festivals within and outside the Kingdom. The establishment of the measurement mechanism in this manner is one of the main additions provided by the Report. Determining the production year can vary between considering the start of filming, the end of filming, the completion of the post-production phase, or the premiere in cinemas. However, these measurement methods do not take into account the various phases that the film goes through - as a creative cultural product - ending with it reaching viewers. On the other hand, considering the production year to coincide with the film's first release

to the public means that the film - as a cultural product - is complete and consumable, as is the case in determining the production of written publications from books to articles, for example, which is set to the year that the book reaches readers as a completed cultural product.

- **Traditional Handicrafts Production Indicator:** Due to the transfer of the National Register of Craftsmen and Craftswomen's data to the Management and Conservation Chapter, the Indicator in the Creativity and Cultural Production Chapter relied on monitoring traditional handicrafts exhibitions as an alternative measurement mechanism to the Production Indicator.
- **Cultural Exhibitions Indicator:** The Report developed a definition that distinguishes between exhibitions that are inherently associated with attendance and reception, such as festivals, book fairs, museum exhibitions, etc., which are the main focus of this indicator in the Cultural Participation Chapter, and exhibitions of a creative nature that reflect artistic production, such as art, design, and fashion exhibitions, theatrical plays and live performances, which are presented in the indicators of the Creativity and Cultural Production Chapter.



Fourth: Data Sources

1 Preliminary Data from Relevant Entities

Data for the current edition of the Report on the State of Culture in the Kingdom of Saudi Arabia were collected from 107 different authorities, including the Ministry of Culture, cultural authorities, active institutions in the cultural ecosystem, as well as ministries, universities, and government and private agencies as shown in (Table 1). To ensure the data's accuracy and avoid any conflicts with other sources, the data has been thoroughly audited through rounds of updates and additional requests from stakeholders. In some limited cases, data collected from multiple authorities have been merged (see Fifth). It is noted that some of the Report's data and statistics may be limited and not exhaustive, but they provide the best available indicator for measurement, and this was noted in the relevant locations.

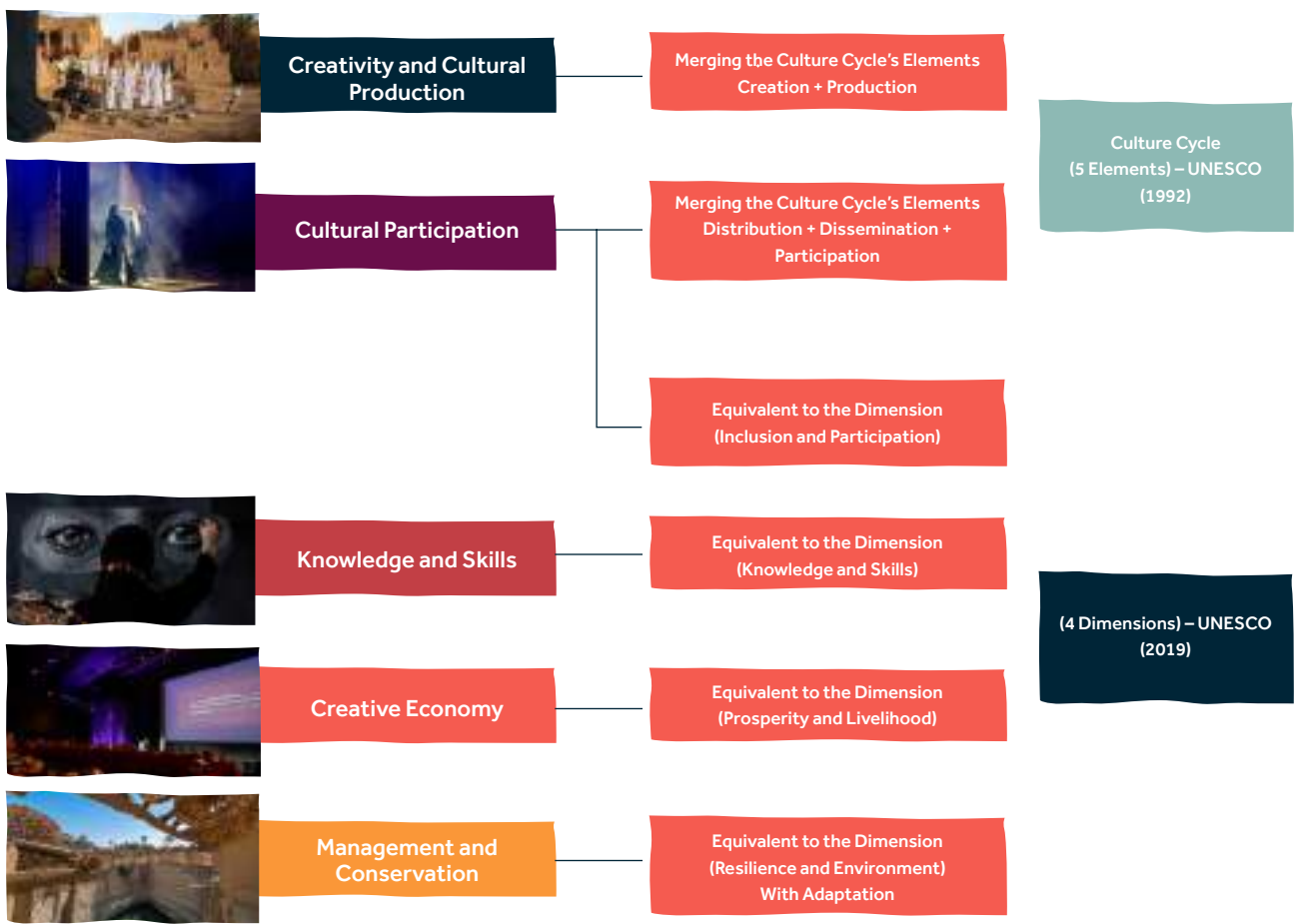


Table 1: The Contributing Entities to the 2023 Report Data

Sr.	Entity
Entities within the Culture Ecosystem	
1	Ministry of Culture – Operational Excellence General Department
2	Ministry of Culture – Engineering and Facilities Affairs General Department
3	Ministry of Culture – Deputyship of Corporate Communication
4	Ministry of Culture – Cultural Strategies and Policies Deputyship
5	Ministry of Culture - National Partnerships and Capacity Development Deputyship
6	Ministry of Culture – Legal and Regulations Affairs Deputyship
7	Ministry of Culture – International Culture Relations Deputyship
8	Ministry of Culture – Cultural Festivals and Events Deputyship
9	Ministry of Culture – Research and Cultural Heritage Deputyship
10	Literature, Publishing and Translation Commission
11	Fashion Commission
12	Film Commission
13	Heritage Commission
14	Visual Arts Commission
15	Museums Commission
16	Theater and Performing Arts Commission
17	Libraries Commission
18	Music Commission
19	Culinary Arts Commission
20	Architecture and Design Commission
21	Cultural Development Fund (CDF)
22	Royal Institute of Traditional Arts (Wrth)
23	King Salman Global Academy for Arabic Language (KSGAAL)
24	Diriyah Biennale Foundation
25	Red Sea International Film Festival Foundation

Sr.	Entity
Ministries	
26	Ministry of Investment
27	Ministry of Communications and Information Technology (MCIT)
28	Ministry of Economy and Planning
29	Ministry of Environment, Water and Agriculture (including the National Center for Vegetation Cover Development and Combating Desertification)
30	Ministry of Commerce
31	Ministry of Education
32	Ministry of Interior (including the emirates of the regions)
33	Ministry of Sport
34	Ministry of Tourism
35	Ministry of Energy
36	Ministry of Human Resources and Social Development
Government & Semi-Government Entities	
37	Council of Saudi Chambers
38	Saudi Central Bank
39	National Center for Wildlife
40	National Center for Non-Profit Sector (NCNP)
41	National Events Center
42	Technical and Vocational Training Corporation (TVTC)
43	Saudi Data and Artificial Intelligence Authority (SDAIA)
44	Saudi Tourism Authority
45	Saudi Authority for Intellectual Property (SAIP)
46	General Authority of Media Regulation
47	General Authority for Statistics
48	General Entertainment Authority (GEA)
49	General Authority of Civil Aviation (GACA)

Sr.	Entity
50	Saudi Conventions and Exhibitions General Authority (SCEGA)
51	Small and Medium Enterprises General Authority (Monsha'at)
52	Saudi Ports Authority (Mawani)
53	Royal Commission for AIUla (RCU)
54	Quality of Life Program
55	Social Development Bank
56	King Abdulaziz Foundation for Research and Archives
57	Public Investment Fund (PIF)
58	Tourism Development Fund
59	Events Investment Fund
60	Human Resources Development Fund (HRDF)
61	Saudi Broadcasting Authority
62	Diriyah Gate Development Authority
63	Imam Turki Bin Abdullah Royal Reserve
64	King Salman bin Abdulaziz Royal Reserve Development Authority
65	King Abdulaziz Royal Reserve Development Authority
66	Makkah Region Development Authority
67	Education and Training Evaluation Commission
Universities	
68	Saudi Electronic University
69	Imam Mohammad Ibn Saud Islamic University
70	Prince Muqrin bin Abdulaziz University
71	Princess Nourah bint Abdulrahman University
72	Al-Baha University
73	Al-Jouf University
74	Northern Border University
75	Jazan University

Sr.	Entity
76	Alfaisal University
77	Qassim University
78	Majmaah University
79	King Saud University
80	King Abdullah University of Science and Technology (KAUST)
81	King Abdulaziz University
82	King Faisal University
83	Al Yamamah University
84	University of Jeddah
85	University of Hafr Al Batin
86	Shaqra University
Private and Civil Sector Entities	
87	Soudah Development Company
88	NEOM Company
89	King Khalid Foundation
90	King Abdulaziz & his Companions Foundation for Giftedness and Creativity (Mawhiba)
91	Art Jameel Institute
92	Madinah Arts Center (affiliated to Namaa Almunawara)
93	King Abdulaziz Center for World Culture (Ithra)
94	Telfaz11
95	Misk Art Institute
96	Dur Hospitality
97	Rotana Group
98	Saudi Heritage Preservation Society
99	Saudi Arabian Society for Culture and Arts (SASCA)
100	Cinema Association

Sr.	Entity
Libraries	
101	King Fahad National Library
102	King Abdulaziz Public Library
103	King Fahad Public Library in Jeddah
104	Al-Rahmaniya Library in Al-Ghat (affiliated to Abdulrahman Al-Sudairy Cultural Center)
105	Dar Al Uloom Library in Al-Jouf (affiliated to the Abdulrahman Al-Sudairy Cultural Center)
106	Saleh Bin Saleh Social Center Library
107	Imam Ibn Al-Qayyim Public Library

2 Cultural Participation Survey

The Fifth Edition of the Cultural Participation Survey was conducted in Q1 2024, aiming to collect accurate and comparable data on participation rates of Saudi citizens and residents in various cultural activities. To ensure the consistency of standard measurement methods, the Survey's design continues to benefit from the UNESCO's benchmarks and common surveys in measuring cultural participation, such as the "European Framework for Community Engagement," with some modification to fit the Report's needs. In this edition, the Survey made an important development represented in replacing gradient questions in the attendance measurement format for cultural activities with open-ended questions in order to measure the participation frequency. The Survey's questionnaire contains 27 main variables, in addition to 15 clarification questions and 12 demographic questions (see Annex of the 2023 Cultural Participation Survey).

The Cultural Participation Survey continued to use the same methodologies as in the previous report and made some adjustments to the variables. In addition to measuring attendance rates for cultural activities (9 variables) as in previous editions, the cultural hobbies practice level (two variables) was included. In addition, the Survey continued to measure factors impacting the demand for cultural goods and services (10 variables), while also including cultural training and education trends (6 variables). Identification of the frequent attendance period using the "Past Twelve Months" approach was adopted in most questionnaire questions, particularly in the Attendance Rates Dimension, which is an approach used in many similar surveys to measure cultural participation (see "Measuring the Community Participation" Framework 2009, UNESCO).

- **Data Collection for the Survey's Fifth Edition**

In this Report's edition, coordination was made with the Saudi Center for Opinion Polling (SCOP) to cooperate in data collection and survey processes. They were conducted via telephone calls to a sample selected by a computer program in order to generate potential numbers, with a margin of error of 1.79%, during which the simple random sample method was used, which included 3,104 individuals, and was carried out from February 15 to March 6, 2024.

- **Survey Population and Sample Characteristics**

The survey population included all Saudi nationals and Arab residents in all thirteen regions of the Kingdom, i.e. males and females aged 18 years old and above. The sample involved 70.8% of Saudi nationals and 29.2% of Arab residents. (Table 2) shows the number and percentage of the survey participants by region.

Table 2: Participants in the 2023 Cultural Participation Survey and their Distribution by Region

Region	Frequency	Percentage
Riyadh Region	1043	33.6
Makkah Region	743	23.9
Madinah Region	186	6.0
Al-Qassim Region	100	3.2
Eastern Province	443	14.3
Asir Region	164	5.3
Tabuk Region	95	3.1
Hail Region	62	2.0
Northern Borders Region	30	1.0
Jazan Region	122	3.9
Najran Region	42	1.3
Al-Baha Region	29	0.9
Al-Jouf Region	46	1.5
Total	3104	100.0

3 Focus Discussion

The Report continues to use focus discussions (focus groups) to record the experiences and opinions of practitioners and experts in the relevant fields. The Report draws on qualitative data to understand and analyze the state of cultural sectors. Eight focus discussion sessions were carried out from June 5 to June 10, 2024, most of which were dedicated to the Report's topic: Sustainability in the Cultural Sector see (Table 3). A total of 54 participants engaged in these sessions, with an average of six participants per session.

Table 3: Focus Discussion Sessions

Session	Category
The Natural and Royal Reserves Ecosystem and their Role in Environmental Heritage Preservation	Experts and Specialists in the Environment and Reserves Management Fields
Design and Sustainability	- Specialists in the Sustainability Practices in the Architecture, Design and Fashion Fields - Practitioners and Designers in the Architecture and Fashion Fields
Non-Institutional Cultural Activity	Founders and Members of the Literary and Cultural Salons
Cultural Student Clubs	Founding Students and Participants in the Cultural Student Clubs
Impact of Climate Change on Economic Projects related to the Cultural Sector and Heritage Sites	- Experts and Specialists in the Climate Change and Urban Heritage Fields - Experts in the Irrigation, Agriculture and Beekeeping Fields
Tourism and Sustainability	- Specialists and Academics in the Tourism and Sustainability Fields - Officials within the Tourism Activities' Organizers
Arabic Language and Artificial Intelligence (AI)	- Specialists in the Arabic Language Sciences and Language Computing Fields - Technical Specialists in the AI Field
Traditional Handicrafts as a Sustainable Alternative	Experts, Consultants and Practitioners of Traditional Handicrafts and Officials within the Traditional Crafts and Arts Institutions

4 Other Surveys

As with the previous edition, this Report relied on data from central authorities as much as possible in order to provide accurate and consistent data for defining the chapters' indicators. Therefore, this Report's edition was restricted to carrying out a survey on research papers published in refereed journals within the Kingdom, and collecting podcast data. The art galleries survey was absent from this Report's edition, since it was not possible to obtain all the galleries' data at the time of writing this report.

- **Podcast Data Collection**

In May 2024, data was collected on a purposive sample of 25 digital radios (podcasts). This sample was selected based on the following characteristics: First, the podcast's content must be specifically limited to cultural fields. Second, the number of the podcast account followers on the X platform (formerly Twitter) or the producer's account must exceed 1,000 followers. This Report uses data on the number of podcast episodes produced in 2023, which was collected by counting their numbers via the Google Podcast App.



- **Survey of Scientific Papers Published in the Kingdom's Refereed Scientific Journals**

The Report continues to conduct the survey on research papers published in the Kingdom's refereed scientific journals during the 2020-2023 period, whose results are the basis of the Research Production Indicator in the cultural fields. The survey included 1,362 research papers published in 31 refereed scientific journals see (Table 4), and were classified into 29 topics to ensure consistency of the comparison with the previous year. It should be noted that the survey conducted in 2022 included 27 refereed scientific journals, some of which have stopped publishing, or access to new issues in open sources was not possible. On the other hand, the survey conducted in 2023 included three new journals: the Journal of King Abdulaziz Complex for Endowment Libraries, the Journal of Arabic Language Sciences and the Journal of Language Testing issued by the KSGAAL, and the King Fahad National Library Journal, which returned to publishing its issues after a hiatus in the past years. The survey was carried out using the same methodology as last year, i.e. in three phases: First, the inventorying of all available research papers in the open sources. Second, the classification of the research papers within the main topics based on keywords in the titles of the research papers and the abstracts. It is important to note that a research paper may address more than one topic, and then classified accordingly. Finally, the implementation of statistical data processing.

Table 4: List of Refereed Scientific Journals included in the 2022⁽¹⁾ and 2023 Surveys

Sr.	Journal
1	Language Planning and Policy
2	Linguistic Studies
3	Arabic Linguistics
4	Language Testing
5	Arabic Language Sciences
6	Arabic Language Teaching as Foreign Language
7	Darah Journal
8	Adumatu Journal
9	Journal of King Abdulaziz Complex for Endowment Libraries
10	King Fahad National Library Journal
11	Saudi Art and Design Journal issued by the Princess Nourah bint Abdulrahman University
12	Saudi Journal of Library and Information Studies issued by the Princess Nourah bint Abdulrahman University
13	Scientific Journal of King Faisal University: Humanities and Management Sciences
14	Journal of Arts issued by King Saud University
15	Journal of Islamic University in Arabic Language and Literature
16	North Journal of Human Sciences
17	King Khalid University's Journal for Humanities
18	Humanities and Administrative Science Journal by Majmaah University
19	Journal of Educational Sciences issued by King Saud University
20	Journal of Sharia Sciences and the Arabic Language issued by the Princess Nourah bint Abdulrahman University
21	Journal of Arabic Studies issued by Al-Imam University
22	Journal of Architecture and Planning issued by King Saud University
23	Al-Baha University Journal of Human Sciences (BUJHS)
24	Al-Jouf University Humanities Journal
25	Taif University Journal for Human Sciences

(1) Ministry of Culture, Report on the State of Culture in the Kingdom of Saudi Arabia 2022: Investment in the Cultural Sector, (Riyadh, Ministry of Culture, 2023), pp. 235 – 236.

Sr.	Journal
26	Journal of Umm Al-Qura University for Language Sciences and Literature
27	Journal of Umm Al-Qura University for Engineering and Architecture
28	University of Bisha Journal for Humanities and Education Studies
29	University of Tabuk Journal for Humanities and Social Sciences
30	Jazan University Journal of Human Sciences
31	Journal of Taibah University for Arts and Humanities

5 Published Reports

In some areas, particularly in the Sustainability in the Cultural Sector Chapter, the Report benefited from information contained in published reports of government agencies or international organizations' reports. Such sources included: periodic reports, statistical bulletins, and reports on specific programs carried out by stakeholders. Among these examples are UNESCO reports, King Abdullah University of Science and Technology (KAUST) reports, and National Center for Environmental Compliance (NCEC) reports.

6 Media Sources and Social Media

In addition to the direct data provided by various authorities, the Report refers to information and data published in the news and statements issued by government media agencies, such as the Saudi Press Agency (SPA), including information available from media centers of official authorities, whether on their websites or via their official accounts on the social media.



7 The Literary Authorship and Publishing Movement in Saudi Arabia for the year 14441445/ AH (2023): A Bibliographic and Bibliometric Study

The Report measured the Literary Publishing Indicator based on the statistics provided in the Literary Authorship and Publishing Movement Study by the researcher Khaled Al-Yousef. This Study, as described in its introduction, focuses on the Saudi literary production in 2023, particularly on published paperback books, while referencing some digital books, if any. As clarified in the Study's introduction, the data was collected from several sources as follows: First, the private researcher's acquisition of all that has been issued by Saudi authors, whether through purchase or gifting. Second, follow-up with news regarding new releases through open sources, including newspapers, journals, and websites. Third, the researcher's contacts with those interested in collecting books and following up on new releases. It should be noted that the researcher corrects the numbers contained in his study, which concern the releases of previous years and have not been monitored at the time. This Report relies on the numbers published in the last edition of the Bibliography.

Fifth: Aggregated Data Lists

To ensure a more comprehensive analysis and reading, the Report merged the data collected from multiple sources in certain areas: art exhibition data from multiple government and civil institutions and universities (Table 5), translated works data (Table 6), student clubs data (Table 7), training data from multiple institutions (Table 8), and libraries data (Table 9).

Table 5: Entities that the Report Relied on to Showcase the Art Exhibitions Data

Sr.	Entity
1	Ministry of Culture
2	Diriyah Biennale Foundation
3	King Abdulaziz Center for World Culture (Ithra)
4	Misk Art Institute
5	Misk Foundation
6	Art Jameel Institute
7	Madinah Arts Center (affiliated to Namaa Almunawara)
8	Royal Commission for Riyadh City (RCRC)
9	Royal Commission for Jubail & Yanbu (RCJY)
10	Diriyah Gate Development Authority
11	Saudi Arabian Society for Culture and Arts (SASCA)
12	Princess Nourah bint Abdulrahman University
13	Al-Baha University
14	Al-Jouf University
15	Northern Border University
16	King Abdulaziz University
17	King Faisal University
18	University of Jeddah
19	Saudi Electronic University

Table 6: Entities that the Report Relied on to Showcase the Translated Works Data during the Year⁽²⁾

Sr.	Entity
1	King Abdulaziz Foundation for Research and Archives
2	King Abdulaziz Public Library
3	Translation, Authorship and Publication Center at King Faisal University
4	Northern Border University

Table 7: Entities that the Report Relied on to Showcase the Student Clubs Data

Sr.	Entity
1	Saudi Electronic University
2	Princess Nourah bint Abdulrahman University
3	Al-Baha University
4	Northern Border University
5	Qassim University
6	King Saud University
7	King Abdulaziz University
8	King Faisal University
9	University of Jeddah
10	University of Hafr Al Batin

(2) With the exception of the data from the “Tarjim” Initiative launched by the Literature, Publishing and Translation Commission

Table 8: Entities that the Report Relied on to Showcase the Training Data from Multiple Institutions

Sr.	Entity
1	Intellectual Property Academy
2	Saudi Heritage Preservation Society (SHPS)
3	Misk Art Institute
4	Saudi Arabian Society for Culture and Arts (SASCA)
5	Thaqqif Institute
6	King Salman Global Academy for Arabic Language (KSGAAL)
7	Royal Institute of Traditional Arts (Wrth)
8	Diriyah Biennale Foundation
9	Red Sea International Film Festival Foundation
10	King Abdulaziz Center for World Culture (Ithra)
11	Madinah Arts Center

Table 9: Libraries that the Report Relied on to Showcase the Cultural Facilities Visit Data

Sr.	Library
1	King Fahad National Library
2	King Fahad Public Library in Jeddah
3	King Abdulaziz Public Library
4	Al-Rahmaniya Library in Al-Ghat (affiliated to Abdulrahman Al-Sudairy Cultural Center)
5	Dar Al Uloom Library in Al-Jouf (affiliated to the Abdulrahman Al-Sudairy Cultural Center)
6	Saleh Bin Saleh Social Center Library
7	Imam Ibn Al-Qayyim Public Library

Sixth: Cultural Data Classifications

One of the most notable developments in the quality of the cultural sector's data is the adoption of national classifications and criteria on which the accounting of the main indicators is based. The main challenge in several key indicators is the definition of the sector's boundaries, i.e. the activities, professions, and scopes that can be described as cultural. Therefore, the stability of classifications was the basis for developing important statistics on the culture's connections with the economy and education, perhaps the most important of which is the establishment of the Culture Sub-Account, which determines the culture's contribution to the GDP.

These activities are classified in a manner similar to the divisions proposed by the UNESCO Framework for Cultural Statistics in a number of major scopes see (Table 10). It should be noted that the data on the number and distribution of cultural business enterprises has changed from what was mentioned in the 2021 report due to a change in the approved

classification, resulting in the deletion of some activities' numbers and the addition of others. Although this is a subtle modification—the vast majority of the activities as well as the broader scopes remained unchanged—it had a significant impact on the overall numbers.

This Report's data reflects a stable classification in a way that no future differences are expected to emerge from the classification. However, it should be noted that there is no consensus on the international classification in all its details. Disparities will continue between countries in their culture sub-accounts, while sharing the general framework and the wider scopes. Therefore, we point out that comparisons in the Creative Economy Chapter were done after making adaptations between the classifications of different countries, with the importance of noting that the comparisons reflect the general trend in a manner that provides beneficial conclusions, but are not identical comparisons in any way.



Table 10: Classification of Cultural Economic Activities

Sector	Activity
Cultural and Natural Heritage	Museum and Historical Sites and Buildings Operation Activities
	Botanical Gardens, Zoos, and Natural Reserves Activities
	Retail of Other New Goods in Specialized Stores
	Retail of Used Goods
	Retail of Other Goods in Specialized Stores
Design and Creative Services	Engineering Architectural Activities and their Relevant Technical Consultancy Services
	Advertising
	Specialized Design Activities
	Sites Servicing, Maintenance and Beautification Activities
	Building Construction
	Manufacture of Other Textiles
	Manufacture of Clothing except Fur Clothing
Cultural Education	Cultural Education
Visual Arts and Handicrafts	Photography and Aerial Photography Production
	Manufacture of Jewelry and Relevant Items
	Manufacture of Cutting Tools, Hand Tools, and General Metal Tools
	Manufacture of Other Porcelain and Ceramic Products
	Manufacture of Communication Equipment

Sector	Activity
Books and Journalism	Reproduction of Recorded Media
	Creative, Arts and Entertainment Activities
	Printing and Printing-Related Service Activities
	Library and Archives Activities
	Other Publishing Activities
	Other Information Services Activities
	Wholesale of Other Household Goods
	Retail of Books, Newspapers and Stationery in Specialized Stores
	Rental of Other Personal and Household Goods
	Publishing of Newspapers, Magazines, and Periodicals
	Book Publishing
Audiovisual Media	Software Deployment
	Audio Broadcasting
	Programming, Radio, and Television Activities
	Film, Video and TV Show Production Activities
	Film, Video and TV Show Distribution Activities
	Film Screening Activities
	Film, Video and TV Show Post-Production Activities
	Web Portals
	Retail of Music and Video Recordings in Specialized Stores
	Rental of Videotapes and Discs
Other Cultural Activities	Other Professional, Scientific and Technical Activities
	Translation
	Manufacture of Other Food Products

Sector	Activity
Performances and Festivals	Creative, Arts and Entertainment Activities
	Sports, Leisure, and Entertainment Activities
	Activities of Other Membership Organizations Not Classified Elsewhere
	Audio and Music Publishing Activities
	Wholesale of Other Household Goods
	Manufacture of Musical Instruments





Appendix (2): 2023 Cultural Participation Survey

Have you visited any of the Kingdom's museums during the past twelve months?

	Percentage
Yes	14.74
No, you have not made any visits	8.79
No, but you would like to visit in the future	76.47
Total	100.00

If the answer is "Yes", how often?

	Percentage
1 to 3 Times	88.63
4 to 7 Times	8.68
More than 7 Times	2.69
Total	100.00

Have you attended any poetry readings or literary gatherings during the past twelve months?

	Percentage
Yes	7.30
No, you have not attended at all	21.91
No, but you would like to attend in the future	70.79
Total	100.00

If the answer is "Yes", how often?

	Percentage
1 to 3 Times	87.53
4 to 7 Times	8.67
More than 7 Times	3.80
Total	100.00

Have you attended any concerts or musical events during the past twelve months?

	Percentage
Yes	17.42
No, you have not attended at all	40.25
No, but you would like to attend in the future	42.33
Total	100.00

If the answer is "Yes," how often?

	Percentage
1 to 3 Times	86.95
4 to 7 Times	9.64
More than 7 Times	3.41
Total	100.00



Appendices

Have you attended any theatrical plays or live performances during the past twelve months?

Percentage	
Yes	11.00
No, you have not attended at all	26.91
No, but you would like to attend in the future	62.09
Total	100.00

If the answer is "Yes," how often?

Percentage	
1 to 3 Times	65.74
4 to 7 Times	5.64
More than 7 Times	28.62
Total	100.00

Have you attended any art exhibitions during the past twelve months?

Percentage	
Yes	10.66
No, you have not attended at all	24.51
No, but you would like to attend in the future	64.83
Total	100.00

If the answer is "Yes," how often?

Percentage	
1 to 3 Times	66.74
4 to 7 Times	3.53
More than 7 Times	29.73
Total	100.00

Have you visited a (non-commercial) public library during the past twelve months?

	Percentage
Yes	22.82
No, you have not made any visits	15.35
No, but you would like to visit in the future	61.83
Total	100.00

If the answer is "Yes," how often?

	Percentage
1 to 3 Times	81.76
4 to 7 Times	10.34
More than 7 Times	7.90
Total	100.00

Have you visited historical or archaeological sites/ locations during the past twelve months?

	Percentage
Yes	35.64
No, you have not made any visits	8.01
No, but you would like to visit in the future	56.35
Total	100.00

If the answer is "Yes," how often?

	Percentage
1 to 3 Times	80.64
4 to 7 Times	14.89
More than 7 Times	4.47
Total	100.00

Appendices

Have you visited any natural reserves or parks during the past twelve months?

	Percentage
Yes	32.70
No, you have not made any visits	8.28
No, but you would like to visit in the future	59.02
Total	100.00

If the answer is "Yes," how often?

	Percentage
1 to 3 Times	72.51
4 to 7 Times	16.65
More than 7 Times	10.84
Total	100.00

Have you attended a cultural festival or event in person during the past twelve months?

	Percentage
Yes	25.66
No, you have not attended any event	17.19
No, but you would like to attend in the future	57.15
Total	100.00

If the answer is "Yes," how often?

	Percentage
1 to 3 Times	84.70
4 to 7 Times	12.48
More than 7 Times	2.82
Total	100.00

If the answer is “Yes,” what are the main reasons for your attendance?

	Percentage
Suitable Times	16.80
Participation is free of charge or at reasonable ticket prices	12.39
Accompanying Family and Friends	45.53
I heard that the organization is good and the site is easily	7.33
Visiting Other Sites	7.64
Accompanying the Employer (Unreadable)	1.99
I'm interested in the event or festival (Unreadable)	2.45
Knowledge and Culture (Unreadable)	1.78
(Other)	4.09
Total	100.00



If the answer is "No," why did you not attend?

	Percentage
Time Constraints	33.85
Expensive Tickets	19.91
Safety Concerns	1.60
Preoccupation and Work Engagements	47.41
Health Problems	6.94
Unavailability of Transportation	8.60
Lack of Advertisements	10.09
Preference to participate in other activities (health, education...)	6.78
Other excluding what have been mentioned (State them)	4.91
Poor Financial State (Unreadable)	5.32
Mixing (Unreadable)	0.29
Not present at my place of residence (Unreadable)	5.42
I'm not interested in the cultural festivals and events (Unreadable)	2.00
Traffic (Unreadable)	1.31
Tickets ran out (Unreadable)	0.78
Total	155.21



Have you practiced a cultural or artistic hobby during the past twelve months?

	Percentage
Yes, in a professional manner	2.80
Yes, in an amateurish manner	11.88
No, but I would like to in the future	47.13
No, and I have not thought about it	38.19
Total	100.00

If the answer "Yes," what hobby do you practice in the artistic or cultural field?

	Percentage
Singing or Playing a Musical Instrument	12.70
Dancing or Traditional Dancing	7.05
Poem Writing or Recitation	22.41
Traditional / Cultural Handicrafts (Handicrafts)	11.83
Acting	2.85
Creative Writing	11.77
Translation	2.69
Fashion Design	3.03
Graphic Design	4.86
Painting and Sculpture	22.11
Photography	11.68
Cooking (excluding daily cooking)	15.74
Reading	12.22
Other excluding what have been mentioned (State them)	10.30
Total	151.24

Have you participated in volunteer work in the environmental field during the past twelve months (afforestation campaigns, volunteering in reserves, environmental commitment)?

	Percentage
Yes	11.76
No	16.44
No, but you would like to	71.80
Total	100.00

What kind of cultural events would you like to have more?

	Percentage
Theatrical Plays	13.10
Poetry or Literary Evenings	31.96
Music Festivals	14.98
Lectures and Seminars	24.73
Heritage Events	26.05
Fashion Exhibitions	10.74
Art Exhibitions	18.64
There is no event I would like to have more of (Unreadable)	5.26
Concerts (Unreadable)	1.22
Other excluding what have been mentioned (State them)	2.96
Total	%149.64

What was your preferred method for watching films during the past twelve months?

	Percentage
TV Channels	23.29
Movie Theater (Cinema)	21.09
Videotapes or Discs	0.46
Virtual Viewing Platforms (Shahid and Netflix)	27.53
You do not watch films at all	27.63
No Answer	23.29
Total	100.00

What was your preferred method for listening to music during the past twelve months?

	Percentage
CDs	2.16
TV Channels	6.77
Attending Parties	7.88
Digital Platforms with a Subscription (e.g. Spotify and Anghami)	5.64
Digital Platforms Without a Subscription (SoundCloud)	10.45
Digital Video Platforms such as (YouTube, Instagram, and Social Media)	28.66
Radio	8.12
You do not listen to music at all	30.32
Total	100.00

Have you watched a Saudi film during the past twelve months?

	Percentage
Yes, in cinemas	9.27
Yes, on virtual viewing platforms – such as (Shahid and Netflix)	34.59
No, not interested	12.00
No, but you would like to in the future	37.36
You do not watch films at all	0.64
Yes, in cinemas and on virtual viewing platforms	6.14
Total	100.00

How satisfied are you with the ticket prices for the cultural events and activities?

	Percentage
Very Dissatisfied	5.23
Dissatisfied	23.59
Neutral	39.32
Satisfied	24.53
Very Satisfied	7.33
Total	100.00

How satisfied are you with the availability of the cultural festivals and events in your city?

	Percentage
Very Dissatisfied	4.81
Dissatisfied	13.04
Neutral	20.43
Satisfied	40.47
Very Satisfied	21.25
Total	100.00

How satisfied are you with the availability of the cultural festivals and events close to your district?

	Percentage
Very Dissatisfied	6.77
Dissatisfied	23.39
Neutral	19.56
Satisfied	34.22
Very Satisfied	16.06
Total	100.00

How satisfied are you with the availability of the cultural facilities (libraries, museums, art exhibitions, theaters) in your city?

	Percentage
Very Dissatisfied	3.43
Dissatisfied	14.49
Neutral	17.57
Satisfied	43.96
Very Satisfied	20.55
Total	100.00

How satisfied are you with the availability of the cultural facilities (libraries, museums, art exhibitions, theaters) close to your district?

	Percentage
Very Dissatisfied	5.29
Dissatisfied	24.70
Neutral	16.87
Satisfied	36.97
Very Satisfied	16.17
Total	100.00

Appendices

How satisfied are you with the effectiveness of the activity provided by the cultural facilities?

	Percentage
Very Dissatisfied	1.04
Dissatisfied	9.13
Neutral	27.40
Satisfied	46.34
Very Satisfied	16.09
Total	100.00

Have you ever studied to obtain a degree in a culture-related specialization?

	Percentage
Yes, you have studied or are currently studying	5.46
No, but you would like to study	49.85
No	44.69
Total	100.00

If the answer is "No," why?

	Percentage
Poor Current and Future Job Opportunities	12.16
You have no interest or passion for it	51.47
Academic Average or Admission Requirements	7.91
Your desired specialization is unavailable	9.93
Getting Older (Unreadable)	3.92
Poor Financial State (Unreadable)	1.47
I have not completed my education (Unreadable)	1.88
Health Conditions (Unreadable)	1.39
Preoccupation and Work Engagements (Unreadable)	2.99
I have no time (Unreadable)	4.11
Other excluding what have been mentioned (State them)	2.77
Total	100.00

What is your motivation or desire for studying this specialization?

	Percentage
Current and Future Job Opportunities	24.46
Personal Passion and Interest	64.67
Academic Average or Specialization's Admission Requirements	6.85
To increase knowledge and culture (Unreadable)	2.49
Other excluding what have been mentioned (State them)	1.53
Total	100.00

Have you ever attended a training program, course, or workshop in one of the cultural fields during the past twelve months?

	Percentage
Yes, a virtual training program, course, or workshop only	1.77
Yes, an in-person training program, course, or workshop only	2.03
Yes, an in-person and virtual training program, course, or workshop	1.64
No, I have not attended any training programs, courses, or workshops	94.56
Total	100.00



If the answer is "Yes," what is the program or workshop field?

	Percentage
Creative, Literary, and Content Writing	22.59
Music (Singing and Playing Instruments)	7.67
Photography and Films	15.97
Theater and Acting	6.73
Arts and Painting	17.24
Heritage and Traditional Crafts	15.01
Fashion Design	4.82
Culinary Arts	9.47
Other excluding what have been mentioned	20.72
Total	120.22

If the answer is "No," what is the main reason?

	Percentage
There are no training opportunities in your region	23.32
Learned about the suitable training opportunities too late	10.83
Not interested	31.72
Time Constraints (Unreadable)	11.07
Preoccupation and Work Engagements (Unreadable)	11.55
I never knew about it	4.37
Little or No Advertisements	2.06
Health Conditions (Unreadable)	1.26
Poor Financial State (Unreadable)	0.96
Expensive Programs or Courses (Unreadable)	0.44
Getting Older (Unreadable)	0.41
Other excluding what have been mentioned (Other)	2.01
Total	100.0

How do you prefer to learn the cultural skills and the creative arts?

	Percentage
Attending Training Courses or Programs	36.34
Attending a University or Institute	17.71
Self or Free Learning (via books or online)	25.56
You are not interested	19.92
Other excluding what have been mentioned (State them)	0.47
Total	100.0

How satisfied are you with the training programs provided to develop cultural skills and capacities?

	Percentage
Very Dissatisfied	1.14
Dissatisfied	7.69
Neutral	32.89
Satisfied	40.03
Very Satisfied	18.25
Total	100.0

What do you think of the following phrase "Cultural academic specializations have a promising future in the labor market"?

	Percentage
Strongly Agree	29.02
Agree	44.34
Neutral	16.31
Disagree	7.51
Totally Disagree	2.82
Total	100.0



Appendix (3):Glossary

Terminology	Definition	Reference	Chapter
Language Proficiency Test	A standardized test to measure the Arabic language proficiency of its non-Arabic-speaking learners; as it measures four skills (reading, listening, writing, and speaking) in accordance with the global practices based on the standards of the Common European Framework of Reference for Languages (CEFR).	Education and Training Evaluation Commission	Management and Conservation
Social Integration	This dimension provides a framework for assessing the extent of the culture's contribution in building social cohesion and enhancing integration and participation, while focusing on the accessibility of the world of culture, the right of all people to participate in the cultural life, and their freedom of cultural expression.	2030 Culture Indicators	Cultural Participation
Creativity	Unique workstyle	Report's Definition	Creativity and Cultural Production
Art Residency	Programs that host a group of creators in a particular cultural sector; in order to reside at a location outside their permanent place of residence and work on developing their businesses, while providing them with accommodation, financial and moral support, vocational guidance, and opportunities to fit in with the host region and interact with the surrounding environment.	Ministry of Culture	Management and Conservation, Knowledge and Skills
Deposit	Depositing copies of works subject to this System - if they are prepared for publication and circulation with the public - at the King Fahad National Library free of charge, as a matter of obligation.	King Fahad National Library (Deposit System)	Creativity and Cultural Production
Saudi Literature	Literary books published by Saudi authors, whether issued by publishing houses within or outside the Kingdom.	The Literary Authorship and Publishing Movement by Al-Yousef	Creativity and Cultural Production
Archiving	Activities that include the definition, assessment, description, storage, conservation, management, and retrieval of digital records to maintain their integrity over time.	Glossary of the Cultural Ecosystem	Management and Conservation
Planning Works	Technical, scientific, mechanical and engineering drawings containing an adequate amount of illustrated or graphic work.	Copyright Works Registration Guideline (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production
Architectural Works	Works produced until the completion of the buildings, bridges, gates or other structures based on the architectural plan.	Copyright Works Registration Guideline (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production
Cultural Activities	Activities that embody or convey forms of cultural expression, irrespective of their commercial value; as the cultural activities may be an end in and of themselves, or may contribute to the production of cultural goods and services.	2009 UNESCO Framework for Cultural Statistics	Cultural Participation
Antiquities	Fixed, movable, buried and sunken objects built, manufactured, produced, adapted or drawn by man, which have acquired archaeological characteristics due to human intervention over the ages, even though their history can be traced back to a later period, but not less than 100 years.	Glossary of the Cultural Ecosystem	Management and Conservation

Terminology	Definition	Reference	Chapter
Qualification Program	A training program ranging from one year to less than two years.	Technical and Vocational Training Corporation (TVTC), General Directorate of Private Training	Knowledge and Skills
Education Program	A coherent or continuous set of educational activities designed and organized to achieve predetermined learning objectives or completing a specific set of educational tasks within a sustainable timeframe.	Education and Training Fields in ISCED	Knowledge and Skills
Cultural Training	A term that refers to training in any of the cultural fields based on the definition of culture and arts and their 16 sectors defined in the National Strategy for Culture.	Ministry of Culture	Knowledge and Skills
Cultural Heritage	Material (tangible) and/or non-material (intangible) manifestations of the cultural heritage of the local communities, which have been passed down from generation to generation and have acquired historical, religious, aesthetic or cultural value for these communities.	Glossary of the Cultural Ecosystem	Management and Conservation
Natural Cultural Heritage	Geological or physiographic formations and habitats of threatened animal or plant species that acquire aesthetic, scientific or cultural value (natural heritage is considered universal if it contains exceptional universal value).	Glossary of the Cultural Ecosystem	Management and Conservation
Urban Heritage	Everything built by man from cities, villages, districts, buildings, including spaces, institutions, and artifacts of urban, historical, scientific, cultural or national value.	Glossary of the Cultural Ecosystem	Management and Conservation
Embedded Program	An e-learning method that mixes between in-person and distance education to achieve the educational content's objectives, and the mixing percentage varies based on the objectives, needs and capacities.	Guidelines for the Secondary Education Tracks System, Ministry of Education	Knowledge and Skills
Distance Education	Learning through a combination of technologies, in which learners and teachers are separated from one another geographically, temporarily or both.	Guidelines for the Secondary Education Tracks System, Ministry of Education	Knowledge and Skills
Archaeological Excavation	All the excavations, probes, investigations and dives carried out based on scientific bases, aimed at finding antiquities under ground, on its surface, in waterways, lakes, or in marine areas.	Glossary of the Cultural Ecosystem	Management and Conservation
Sustainable Development of Heritage	Heritage is linked to sustainable development through two principles: First, the sustainability of heritage requires its protection and transition to future generations. Second, it is a means by which heritage contributes to the sustainable development.	UNESCO, World Cultural Heritage Department	Management and Conservation
Cultural Services	Commercial activities that cater to the cultural needs or interests without being material goods, but may involve production and distribution processes. These goods include film screenings, live performances, design services, and heritage preservation services.	Glossary of the Cultural Ecosystem	Creative Economy
Training Diploma	A two- to three-year training program.	Technical and Vocational Training Corporation (TVTC), General Directorate of Private Training	Knowledge and Skills
Qualification Course	A training program of more than a month and less than a year, whose training hours exceed 60 hours.	Technical and Vocational Training Corporation (TVTC), General Directorate of Private Training	Knowledge and Skills
Development Course	A training program that does not exceed one month, whose training hours are less than sixty hours.	Technical and Vocational Training Corporation (TVTC), General Directorate of Private Training	Knowledge and Skills

Terminology	Definition	Reference	Chapter
Joint Year	The first academic year in the Tracks System, including a set of the joint year's subjects that all students must participate in their study.	Guidelines for the Secondary Education Tracks System, Ministry of Education	Knowledge and Skills
Cultural Tourism	Tourism trips that involve practicing one or more cultural activities, such as visiting museums, exhibitions, and cultural festivals and events, visiting heritage regions, or visiting reserves.	Glossary of the Cultural Ecosystem	Cultural Participation
Language Policies	A body of ideas, laws, controls, rules and practices that accomplish linguistic change in a community, group or system. If such a policy is in place, a serious assessment can be conducted for the planning.	Language Policy and Planning Book	Management and Conservation
Creative Cultural Industries	Sectors whose activities are centered on the production, promotion or distribution of goods and services, whose content are derived from heritage, artistic or cultural data.	Glossary of the Cultural Ecosystem	Creative Economy
Live Performance	A live performance presented to the audience that includes expressive methods embodying intangible human creativity, in which body language is attuned to rhythm and sound. It is performed by professionals or amateurs, individually or collectively, on various occasions, such as dancing, opera and puppet theater.	Arts Curriculum - Second Year of Secondary School - (Ministry of Education)	Creativity and Cultural Production
Theatrical Play	A form of performing arts, in which a written theatrical script (prose or poetry) is converted into a live stage performance presented by actors in front of an audience.	Arts Curriculum - Second Year of Secondary School - (Ministry of Education / Theater Commission)	Creativity and Cultural Production
Translated Work	A work or text resulting from the conversion of the original work or text into another language and culture.	Report's Definition	Creativity and Cultural Production
Virtual Classrooms	They are online classrooms, similar to traditional classrooms in regards to the presence of teachers and students, which are not bound by a time or place.	Evaluation and Admission Guideline - Tracks System, Ministry of Education	Knowledge and Skills
Saudi Film	A film that meets the criteria of the (Cultural Test), which is an evaluation system that involves four categories: 1) Content, including the film's language, characters, location and theme. 2) Creativity, Heritage and Diversity. 3) Main Filming Locations and Production Studios. 4) Staff.	"Standard Definitions for Films (Film Commission) British Film Certification"	Creativity and Cultural Production
Feature-Length Film	An audiovisual content and a form of narrative art, which lasts up to 40 minutes or longer, distributed for public viewing through appropriate means and media.	Standard Definitions for Films (Film Commission)	Creativity and Cultural Production
Short Film	An audiovisual content and a form of narrative art, which is less than 40 minutes long, distributed for public viewing through appropriate means and media.	Standard Definitions for Films (Film Commission)	Creativity and Cultural Production
Digital Book	A book in a digital electronic format (e.g., Portable Document Format "PDF" or interactive EPUB format) that is displayed on a computer through special software and equipment to enable the individual to read it.	Unified Dictionary of Curriculum and Teaching Methods Terminology (ALECSO)	Creativity and Cultural Production
Museum	A place where archeological, artistic, cultural, historical or scientific materials are permanently on display; as their display achieves cultural, educational or recreational objectives. It opens its doors to the public at fixed times.	Glossary of the Cultural Ecosystem	Management and Conservation
Natural Reserves	Land, marine or coastal sites designated by the Ministry of Environment, Water and Agriculture and the National Center for Wildlife Development, dedicated to the wildlife protection and development.	Executive Regulation of Ecosystem	Management and Conservation

Terminology	Definition	Reference	Chapter
Cultural Facilities	The structures, spaces, and their annexes and complementary elements specified by law, in various cultural activities are organized, in accordance with the culture fields established by the Ministry of Culture.	Glossary of the Cultural Ecosystem	Management and Safeguarding, Cultural Participation
Multi-Use Cultural Center	A center whose activities are specialized with all that pertains to culture and arts , and may contain several cultural facilities such as libraries, museums, theaters, and others.	Cultural Vitality in Arab Cities	Management and Conservation
General Track	One of the secondary education tracks concerned with providing the student with knowledge, skills, and positive attitudes towards specializations related to Shariah, human, natural, and applied sciences, and enhancing integration between the scientific and humanitarian fields.	Secondary Education Tracks, Ministry of Education	Knowledge and Skills
Specialized Tracks	Four new specialized tracks in the Tracks System consistent with the 21st century's demands; as the student joins the track that corresponds to his inclinations, directions and capacities.	Secondary Education Tracks, Ministry of Education	Knowledge and Skills
Archaeological Survey	All the archaeological sites' exploration works and their documentation by various scientific means, whether on the earth's surface, underground or under water.	Glossary of the Cultural Ecosystem	Management and Conservation
Theater	A place where plays are performed, and it is a generic name for the building in all its details from the stage, the backstage, the audience hall, the dressing rooms, the makeup room, as well as the storage areas of accessories and decoration, etc.	Theater and Performing Arts Commission	Management and Conservation
Cultural Participation	Any conscious act by an individual to receive or practice a cultural activity, manifested in several dimensions, including: pursuit of information about culture, or expression using cultural products or activities, including expenditure on cultural services or products.	Glossary of the Cultural Ecosystem	Cultural Participation
Work	Any literary, scientific or artistic work.	Guideline to Registration of Copyright Works (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production
Artistic and Applied Art Works	Artistic works are 2D artworks, and Applied Art Works are 3D artworks.	Guideline to Registration of Copyright Works (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production
Written Works	Works expressed in words, regardless of their content, whether books, handbooks or the like, and include the literary, scientific and artistic fields.	Guideline to Registration of Copyright Works (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production
Cultural Training Institutes	"They are training facilities licensed to invest in the training activity within the culture and arts fields. They are divided into: Training Centers, Training Institutes, and Higher Training Institutes."	Ministry of Culture	Knowledge and Skills
Art Exhibition	A collection of artworks displayed in art or commercial galleries, open areas, or other exhibition spaces, whether for a single artist or a group of artists, and it is typically temporary in nature	Report's Definition	Creativity and Cultural Production
Curriculum	A purposefully selected and systematic body of knowledge (i.e., value-based information, skills, and attitudes) that learners must acquire through learning experiences organized by formal and informal frameworks.	2030 Culture Indicators	Knowledge and Skills
Library	An organized collection of printed books and periodicals or any other written, audio or visual documents, as well as the services of the personnel responsible for providing such documents to readers and facilitating their use for information, research, education or recreation purposes.	Glossary of the Cultural Ecosystem	Management and Conservation

Terminology	Definition	Reference	Chapter
Modes Clothing	They are clothes designed to be modest and less revealing of body parts, such as long sleeves and loose clothes (Modest Clothes).	Fashion Commission	Creativity and Cultural Production
Cultural Product	A product with artistic, aesthetic, symbolic, and spiritual values that can be distinguished from other goods and services.	2009 UNESCO Framework for Cultural Statistics	Creativity and Cultural Production
Non-Profit Cultural Organizations	An ecosystem of civil activities, voluntary services and non-government organizations, which are mainly non-profit, and aim to achieve the purposes of public benefit or the purpose allocated in the cultural field.	Ministry of Culture	Cultural Participation
Cultural Professions	Professions involving creative and artistic production or heritage collection and preservation, including the generation, development, reflection or preservation of the cultural sense.	Glossary of the Cultural Ecosystem	Creative Economy
Historical Sites	Locations that have witnessed critical historical or national events, or are mentioned in the literary heritage, and do not necessarily contain visible or buried antiquities.	Glossary of the Cultural Ecosystem	Management and Conservation, Cultural Participation
Publishing	Making information available to the public through several different means, such as the release of hard copies, websites or other electronic applications.	Glossary of the Cultural Ecosystem	Creativity and Cultural Production
Literary Publishing	Published literary books, including novels, stories, plays, poetry, criticism, biographies, travel literature, and translated literary works.	The Literary Authorship and Publishing Movement by Al-Yousef	Creativity and Cultural Production
Stereoscopic Topographical Works	3D designs and models that reflect topography, science, and geography, and may include photographic or graphic data and information.	Guideline to Registration of Copyright Works (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production
Inventorying of Cultural Heritage	Listing of the cultural heritage's assets and elements in the State Register; in order to obtain a clear and common understanding of the elements that are culturally important for the conservation and management purposes; as the list includes basic information (name, location, date, origin, etc.).	Glossary of the Cultural Ecosystem	Management and Conservation
Copyright Works	One of the creative fields of intellectual property, which grants an author or creator the right to use and exploit the work and prevents others from using it without his consent.	Glossary of the Cultural Ecosystem	Creativity and Cultural Production
Culture Cycle	The cultural production process resulting from a series of interrelated processes or phases, collectively forming the cultural cycle, or the chain of activities added to the cultural value, or the supply chain in the cultural field.	2009 UNESCO Framework for Cultural Statistics	Creativity and Cultural Production
Demi-Couture	Clothes made using haute couture principles, but sold in a ready-to-wear manner.	Fashion Commission	Creativity and Cultural Production
Heritage Conservation	Measures aimed at ensuring the viability of the intangible cultural heritage element, and its transition to future generations, including its identification, definition, documentation, search, conservation, protection, promotion, enhancement, and transfer, mainly through formal and non-formal education, and the revival of various aspects thereof.	Glossary of the Cultural Ecosystem	Management and Conservation
Photographic Works	The recording of light or any other radiation on any medium over which an image is produced, or through which an image can be produced by any means and does not form part of a film.	Guideline to Registration of Copyright Works (Saudi Authority for Intellectual Property "SAIP")	Creativity and Cultural Production

Terminology	Definition	Reference	Chapter
Cultural Facilities' Visit Rates	The trend in the number of visits to a selection of cultural sites or locations or to performing arts sites.	2030 Culture Indicators	Cultural Participation
Cultural attendance rates	Percentage of residents who have participated at least once in a cultural activity outside their homes during the past twelve months.	2030 Culture Indicators	Cultural Participation
Sustainable Development	Development that fulfills present needs without affecting future generations' ability to do so	United Nations	Sustainability in the Cultural Chapter
Climate Change	A change in climate due, directly or indirectly, to human activities that alters the composition of the atmosphere. This change is added to natural climate fluctuations observed over the same time periods.	United Nations	Sustainability in the Cultural Chapter
Adaptation	Adjusting natural or man-made systems as a response to actual or projected climate motivators and their effects in order to minimize damage and take advantage of beneficial opportunities	Intergovernmental Panel on Climate Change (IPCC)	Sustainability in the Cultural Chapter
Mitigation	A human intervention aimed at reducing greenhouse gases or enhancing their absorption mechanisms	Intergovernmental Panel on Climate Change (IPCC)	Sustainability in the Cultural Chapter
Supportive Handicrafts	One of the fields of traditional cultural industries that support other handicraft fields, including industries related to agarwood oil, rose water, wax and soap manufacturing, Arabic calligraphy, water channels, and other handicrafts.	Heritage Commission	Management and Conservation
Linguistic Corpus	Groups of written linguistic data or structured metadata according to a special framework that achieve their ends.	King Salman Global Academy for Arabic Language	Management and Conservation



Data-Providing Entities





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