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A sustainable and inclusive cultural renaissance for the Middle East



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EXECUTIVE SUMMARY

The Middle East is experiencing a cultural renaissance; people are attending more concerts, movies, and theater performances, and visiting more museums. In particular, public investment in arts and culture is rising sharply in the Gulf Cooperation Council (GCC)¹ countries. The scale of change could attract foreign direct investment (FDI) into the flourishing of the region as an arts and culture destination for citizens, residents, and visitors.

Given the region's ambitious net-zero agendas, GCC cultural leaders have an opportunity to bring culture and sustainability together. These countries could become global pioneers of incorporating sustainability into culture, so the arts contribute to environmental preservation and social inclusion. GCC countries could cut lifetime carbon emissions² by at least 1.3 million metric tons (equivalent to removing 320,000 cars from the road for one year)³ if they build all cultural assets planned until 2030 sustainably. Similarly, these countries could reduce emissions of greenhouse gases (GHGs) by more than 600,000 metric tons annually if they were to host all their planned cultural events and film productions in a more sustainable manner.

In culture terms, that means supporting local communities and encouraging artists to bring together culture, the environment, and social inclusion. It means preserving heritage sites and making arts and crafts widely accessible. Cultural leaders should ensure that cultural assets and programs are sustainable and that they provide support to artists and the local communities. That could result in higher returns on investment, such as savings of US\$14 billion through sustainable construction of all cultural assets planned until 2030, an important contribution to meeting net-zero emissions targets; job creation; and attractive tourism destinations and events. Cultural leaders also need a new approach to cultural governance so that the cultural renaissance flourishes for generations to come.

THE MIDDLE EAST'S CULTURAL REBIRTH

The Middle East is enjoying a cultural rebirth. Arts and culture are now top of the agenda. Creativity is flourishing. Some countries in the region, particularly the GCC states, are positioning themselves as future global tourism destinations, drawing on their significant heritage.⁴ This cultural renaissance comes after many years in which Middle East countries regarded culture as nationally, but not economically, important. Pride in the region's achievements and cultural endowment was a given. However, countries looked to other sectors for economic growth and development.

Today, cultural growth and development are central to the region's massive national transformation programs. Already, the flowering of cultural activities is having a positive impact on education, heightening the general well-being of the population, and creating jobs and new forms of economic activity. In Saudi Arabia, where for decades there were no cinemas at all, the government launched the Red Sea International Film Festival in 2019. Saudi Arabia is creating a media ecosystem to support content and talent creation.⁵ The country is also staging "Saudi Seasons," an annual series of festivals offering entertainment, car races, and cuisine. The Saudi government is likely to invest over \$100 billion⁶ in culture to increase domestic household spending on entertainment and leisure, and to turn the country into a global tourism destination.⁷ One major tourism project is Diriyah Gate in Riyadh, which will include arts districts, arts academies, a new media arts institute, museums, and hotels.⁸

The same pattern is happening across the region. Abu Dhabi has announced major investments in cultural and creative industries, including four museums under construction with a total value exceeding \$2 billion: the Guggenheim Abu Dhabi, the Zayed National Museum, the Natural History Museum, and teamLab Phenomena Abu Dhabi. Qatar, which recently hosted the FIFA World Cup, intends to continue spending on new cultural facilities, including a children's museum in Doha.⁹

The vital importance of environmental, social, and governance standards in culture

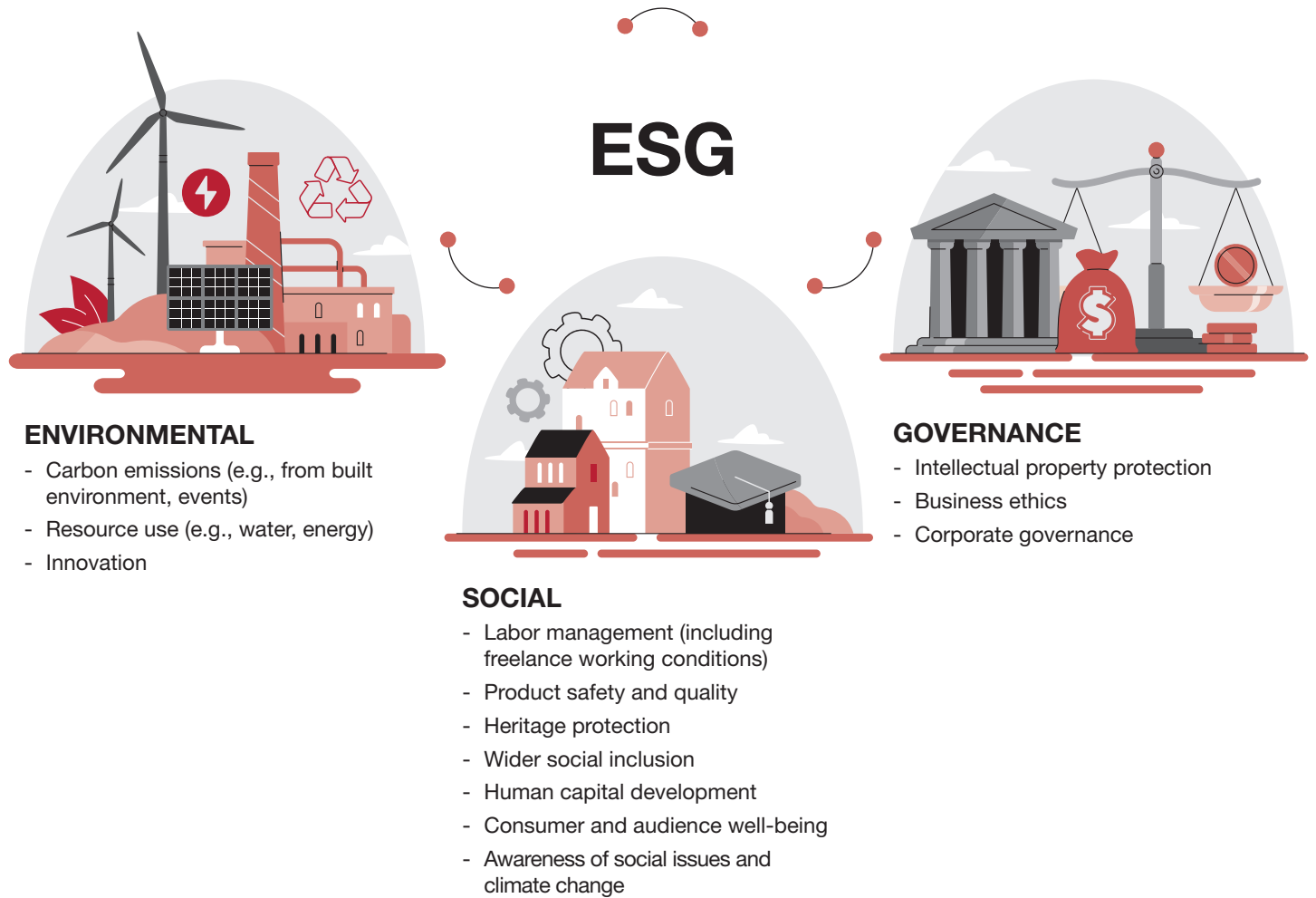
The GCC's cultural renaissance is occurring simultaneously with the region's economic and environmental transformation. These countries have made significant net-zero commitments, are moving toward a new energy system based on renewables, and are prioritizing sustainability. Across the region, environmental, social, and governance (ESG) standards are becoming the norm, as they are in other developed countries.

Culture fits neatly with this ESG trend. Quantifying the environmental aspects is straightforward. Organizations can measure the carbon emissions from buildings and events and use of resources such as water and energy. Museums, galleries, and performance venues can gauge their emissions. Organizations often include innovation in their environmental criteria because they recognize the need to develop new materials and processes that make their assets and operations more sustainable. One relevant example for GCC countries, given their ambitions for creative industries, comes from the film industry in Hollywood. The producers of *The Amazing Spider-Man 2* won an award for their environmental efforts nearly a decade ago. A sustainability manager was present during the filming, and over half of the waste was kept out of landfills. The production avoided the use of 193,000 plastic water bottles and donated thousands of meals to the homeless as part of its social effort. Similarly, the British rock music band Coldplay has announced an extensive sustainability program for its 2023 world tour, which is important given the high profile performers appearing in the GCC.¹⁰

To an extent, culture organizations can assess and compare their social impact. They can look at the management and development of human capital in terms of wages and working conditions. They can monitor whether they are attracting qualified women and whether those women are in positions of responsibility. Organizations can also get a sense of which groups in society they are reaching. For example, the Teatro Argentino de La Plata in Buenos Aires has trained over 600 unemployed individuals in theater management and performing arts, which allows them to secure jobs.¹¹

The governance aspect of ESG tends to be more qualitative. *Governance* refers to such areas as corporate oversight and regulation, and ethical considerations. All of these are increasingly important in the region given the desire to attract foreign direct investment (FDI) (see *Exhibit 1*).

EXHIBIT 1
Environmental, social, and governance issues in the culture sector



Source: Strategy&

Along with the desire of many in the arts world to include sustainability in their work, there is external pressure. Fashion consumers increasingly want more environmentally sustainable clothing. New York State is considering a Fashion Sustainability and Social Accountability Act. The law would be the first in the U.S. to require sustainability and labor standards in large fashion companies.¹²

Some communities have succeeded at merging sustainability and the protection of cultural heritage. In Angkor Wat, Cambodia, for example, the conservation efforts and collaboration among 30 countries and the local communities helped preserve the site while transforming it into a sustainable tourism destination that welcomes 5 million tourists yearly and supports 700,000 residents.¹³



THE BENEFITS OF A SUSTAINABLE AND INCLUSIVE CULTURAL TRANSFORMATION

Marrying the GCC region's cultural renaissance with sustainability involves more than meeting ESG requirements, important though such requirements are. These countries' efforts in terms of culture and sustainability can produce identifiable financial, net-zero, tourism, productivity, and FDI benefits. Moreover, they can set exemplary global standards.

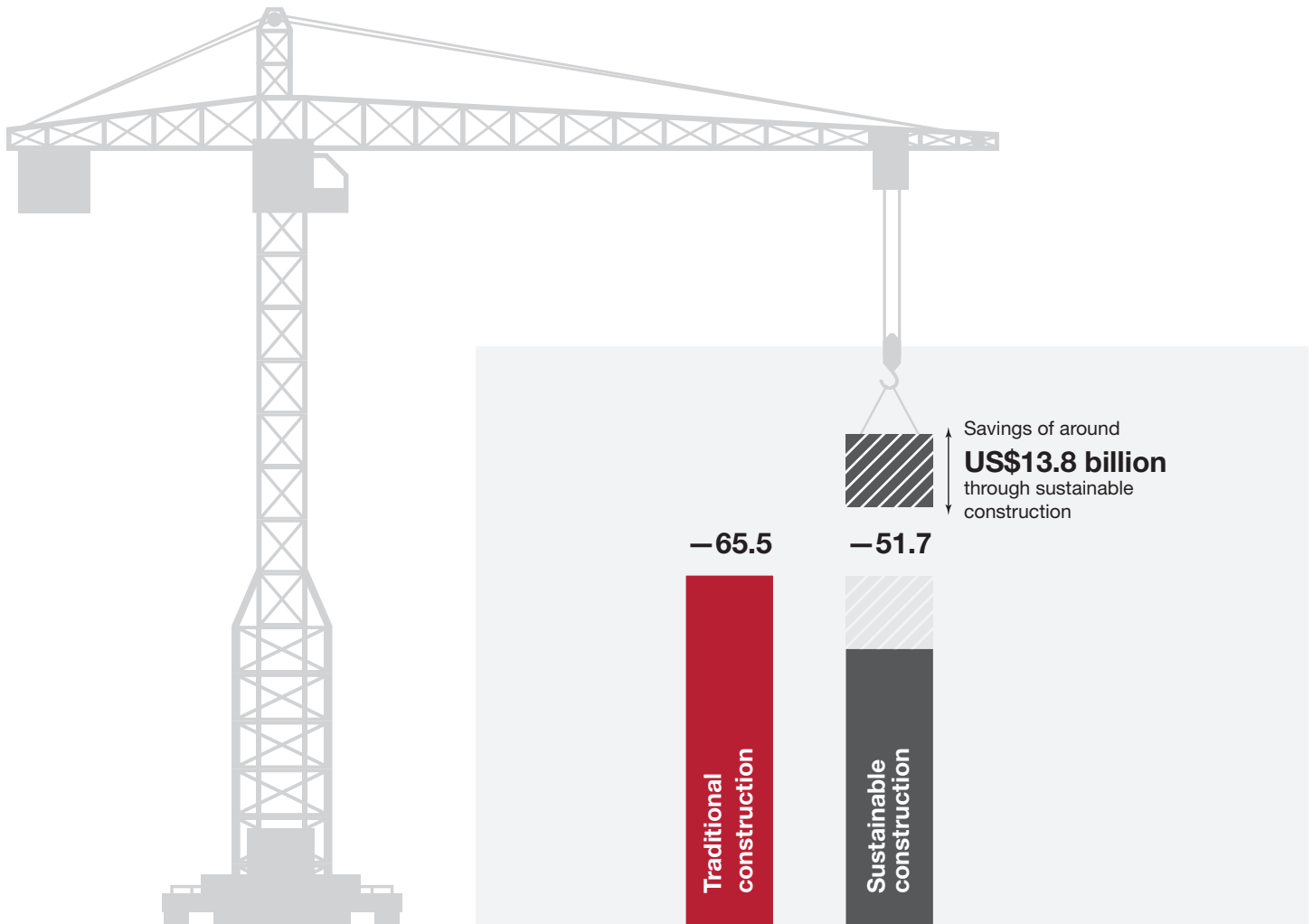
Boosting direct financial returns

GCC countries can generate notable financial returns through sustainable construction in the cultural arena. Much of the infrastructure for the region's cultural renaissance is new, which means it can be built to the highest standards of environmental sustainability. Unlike developed countries, in which cultural facilities undergo expensive retrofitting, these countries can start with sustainable buildings from the ground up. Although the initial capital spending on environmentally sustainable structures can be significant, substantial long-term savings can be attained through, for example, the reduction of energy and water consumption. Also, sustainable construction uses materials that are more durable and that have a smaller carbon footprint, resulting in longer life and lower replacement costs.¹⁴

There is a notable financial gain from adopting sustainable construction methods for the cultural assets planned for development in the GCC by 2030. These savings come from less need for maintenance, and lower consumption of energy and water. Using the latest sustainable construction methods and materials, as opposed to a traditional, "business-as-usual" approach, can save almost \$14 billion in terms of the net present value of the capital and operating expenses of cultural infrastructure over its life cycle (see *Exhibit 2, page 7*). This estimate is conservative when considering the sheer volume of construction expected in the culture sector and the savings that could be generated from each asset.

EXHIBIT 2**Expenditure savings by using sustainable construction compared to traditional construction**

Net present value of capital and operating expenditures of cultural assets planned in the GCC until 2030 (US\$ billions)



Source: Strategy&

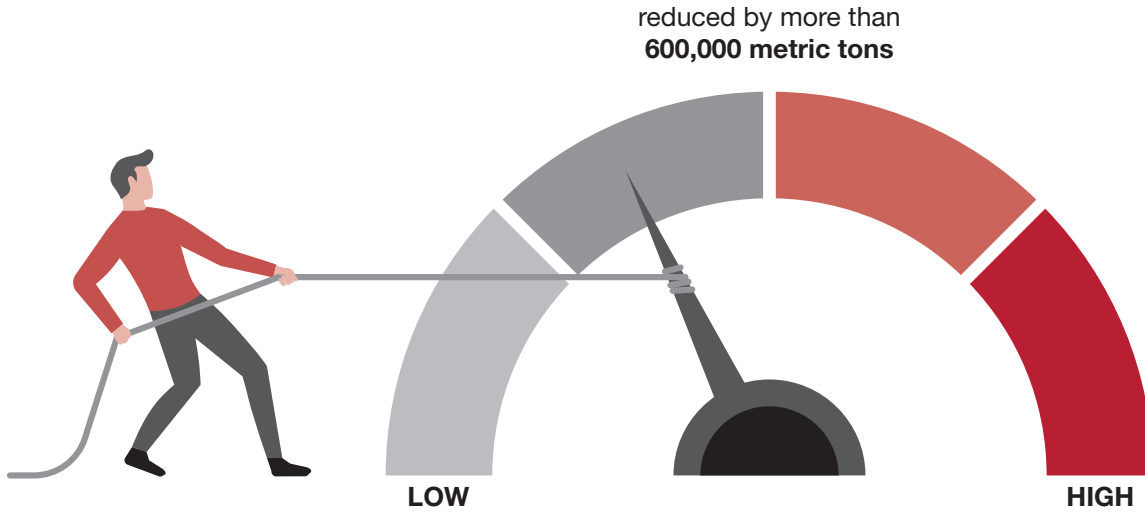
Contributing to national net-zero ambitions

The culture sector can play an important role in realizing GCC countries' ambitions to achieve net-zero emissions of GHGs.¹⁵ Cultural institutions can reduce GHG emissions by using renewable energy and minimizing resource waste in cultural events and film production. The region could reduce GHG emissions by more than 600,000 metric tons annually compared with a business-as-usual scenario if they were to host all their planned cultural events and film production in a more sustainable manner.

To put that in perspective, such a reduction is equivalent to the emissions produced by a city of roughly 130,000 inhabitants in a year, based on the global average per capita emissions of 4.7 metric tons annually.¹⁶ Again, such estimates are conservative, as they assume only 30 percent fewer emissions. GCC countries could slash these emissions by up to 80 percent—the equivalent of a city with 340,000 inhabitants.

Benefits of incorporating ESG principles into culture

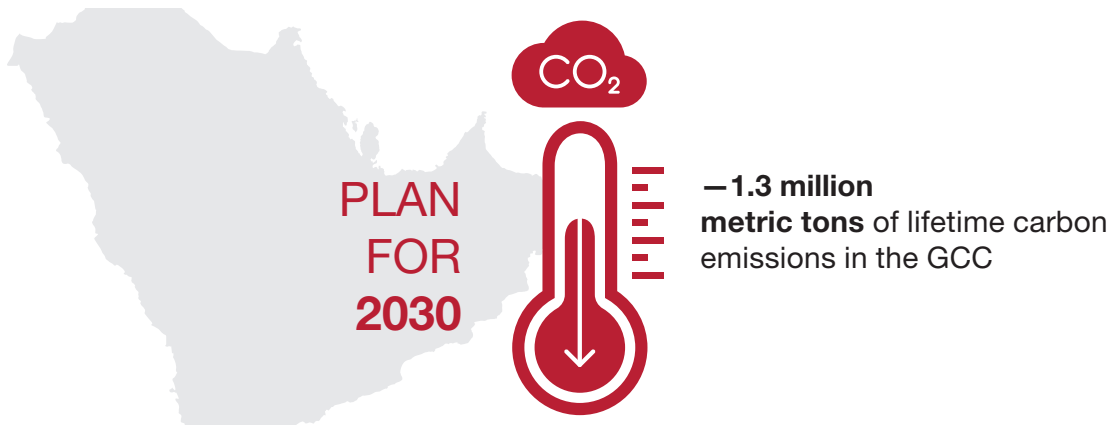
Annual GHG emissions reduced through sustainable events and film production in the GCC



Similarly, if all the cultural assets in the GCC planned until 2030 were built sustainably, it would result in a lifetime carbon emissions reduction of more than 1.3 million metric tons¹⁷—equivalent to taking over 320,000 cars off the road for one year.¹⁸

Benefits of incorporating ESG principles into culture

Lifetime GHG emissions reduced through sustainable development of cultural assets in the GCC planned until 2030



Increasing visits

Sustainable cultural assets and events could attract an additional 8 million visits to the region by 2030—equivalent to the total number of visits today to cultural assets. One study from Portugal showed that visitors are more likely to attend, and return to, events if there is a commitment to “sustainable development and environmental protection,” possibly leading to 30 percent more repeat visitors.¹⁹

Enhancing productivity

Sustainable assets improve personal well-being and increase productivity. The Green Building Council of Australia concludes that just giving people in a building maximum access to daylight can increase productivity by 18 percent.²⁰ That means that a person who frequents a “green” library needs to work only four days a week to produce output like that of someone working a full five days in a non-sustainable library.



Increasing FDI and private-sector investment

Incorporating ESG into culture could encourage more foreign investment, a priority for many cultural leaders. Large sums are going into sustainable investments globally, as well as into cultural assets, with investors seeking new opportunities. GCC countries are already receiving some of these funds; the inflow of FDI into Dubai’s cultural and creative industries exceeded \$1.3 billion in 2021, the second-highest amount globally.²¹

INCORPORATING SUSTAINABILITY INTO CULTURAL DEVELOPMENT

GCC governments can integrate sustainability into cultural development in many ways. Already, Saudi Arabia has launched the Culture and Green Future initiative in cooperation with the Arab League Educational, Cultural and Scientific Organization (ALECSO) to make the culture more sustainable and amplify its role in driving the sustainability agenda in the Arab world.²² Similarly, the Department of Culture and Tourism–Abu Dhabi has developed Sustainable Tourism Guidelines to encourage the tourism sector to integrate sustainability into its operations.²³



Incorporating sustainability into design



Facilitating investments in cultural ESG projects



Promoting social inclusion and sustainable development



Providing financial support to artists



Protecting creative production



Using the arts to promote sustainability



Ensuring arts and culture are accessible to everybody



Preserving cultural heritage

Incorporating sustainability into design

GCC cultural leaders can set a global example by integrating leading practices and the most exacting sustainability standards into their cultural infrastructure and events. Integrating sustainability and culture also applies to events and creative production, such as films. Given the significant reductions in emissions that cultural organizations can achieve, these countries can require as standard the local sourcing of inputs, recyclable or low-waste material for tickets and for food and beverage packaging, energy efficiency, and sustainable waste management. For large-scale events, cultural leaders can take advantage of the region's development of integrated public transport, so that sustainability also includes how people travel to and from an event.²⁴

Facilitating investments in cultural ESG projects

Governments and financial authorities need to provide easy and convenient ways for investors to inject money into cultural opportunities. Several initiatives are underway that illustrate how such investments would work. In Saudi Arabia, the Cultural Development Fund partnered with the stock exchange, Tadawul, to provide a channel through which Saudi companies can invest in cultural and heritage projects. Tadawul-listed companies can thereby improve their verifiable social and environmental commitments, which shareholders want. They can also improve their access to international markets by showing strong performance on sustainability.²⁵

Authorities can also help businesses make good sustainability decisions so that they meet visitors' desire to enjoy tourism without excessive environmental impact. For instance, the Department of Culture and Tourism–Abu Dhabi is developing a carbon calculator that estimates the carbon footprint of all hotels in the emirate.²⁶

Promoting social inclusion and sustainable development

Cultural leaders can promote social inclusion by working closely with communities to develop cultural assets, which leads to physical regeneration, sustainable growth, and job creation. It is vital that cultural leaders involve local communities as joint creators of the vision, concept, and strategy for destinations that the government has identified for development. By building consensus with local communities, cultural leaders empower people to participate in sustainable development. Cultural assets can come to life when a community is part of the endeavor, telling the story in a way that faithfully reflects its heritage.

Investment in cultural destinations means new jobs and skills improvement. Cultural projects can provide new positions such as heritage guide, museum employee, or event performer. One example is the restoration of the Darb Zubaydah pilgrimage route that connects Iraq and Saudi Arabia. The Abbasids developed this 1,300-kilometer-long ancient path during the eighth century CE so that pilgrims could make the journey to Makkah safely.²⁷ The involvement of community members provides visitors a sense of authenticity and offers an opportunity for the community to preserve its heritage. Such job opportunities mean that community members can upgrade their work skills. Projects can also source local products and materials, which contributes to economic development and avoids the emissions involved in transporting items over long distances.

Providing financial support to artists

The combination of culture and sustainability is a means for governments to encourage the development of the arts in the GCC, which assists the growth of the region's creative industries. Some of the support can be financial, such as establishing minimum daily and hourly wages in the culture sector. Governments also can provide incentive packages such as stipends and discounted rents, which allow artists to focus on creation.

Protecting creative production

Governments can help the arts through legislation, such as to help artists retain control over their creations. These changes are vital to creating a supportive environment for creative and digital industries more broadly.

Using the arts to promote sustainability

Cultural leaders can encourage the use of art for sustainability. For example, in Barcelona, a project sought to reuse food waste by turning it into products, including garments, paper, and soap.²⁸ Such approaches educate people and promote the new ways of thinking about sustainability. GCC governments could allocate funds to projects that encourage creative approaches to region-specific issues such as the desert climate and the water shortage.

Ensuring arts and culture are accessible to everybody

Although many people associate the arts and culture with cities, the GCC's cultural renaissance offers an opportunity to make arts and culture accessible to all. Leaders can invest in cultural offerings in small and remote population centers. They can spread culture to these areas through partnerships with regional authorities and cultural organizations. Similarly, they can ensure that performances and exhibitions tour, rather than remain in just one city.

Preserving cultural heritage

Inclusion also means protecting heritage so that the next generation can enjoy its cultural endowment. The tremendous economic changes of recent decades mean that traditions, cultural habits, practices, and collective memory are at risk of being lost. In the past, people communicated their heritage informally and in person, in the form of, say, ancient coffee-making techniques and Arabic calligraphy. Another example is Al Ardah, a folklore dance that can be accompanied by poetry and that varies from region to region. Today, however, oral transmission in close-knit communities is increasingly rare. Cultural leaders can use technology to document, record, and research the region's heritage, thereby bridging the gap between generations and educating people about their culture. GCC countries can also use technology to preserve physical monuments and explore them for more heritage.²⁹

REIMAGINING CULTURAL GOVERNANCE

The marriage of culture and sustainability is an ambitious agenda that requires a new approach to cultural governance. There are many organizations involved in promoting culture, including ministries, authorities at the national or federal, provincial, and local levels, and authorities in GCC countries' giga-projects. Cultural leaders can champion this agenda through a hybrid model that simultaneously centralizes strategic leadership and decentralizes implementation.

Cultural leaders can put themselves at the heart of the strategy by creating a center of excellence. This body would pioneer and coordinate all cultural sustainability and inclusion efforts. Its first step would be to develop a strategic plan that states the country's ambitions in terms of culture and sustainability. The plan should be comprehensive, with initiatives that the cultural organizations can pursue. The center of excellence would oversee all aspects of the plan, including performance management, culture, partnerships, policies, operations, and recruiting. It would define key performance indicators so that cultural leaders could measure progress, and so that they could communicate what was happening to culture sector participants.

The actual implementation of the strategic plan would be decentralized, both inside and outside the government. The plan works through a cultural coalition that includes various government ministries, departments, authorities, heritage bodies, performance venues, museums, galleries, art schools, universities, not-for-profit organizations, and communities. The objective is to convene these groups and partner with them to instill the notion of combining culture and sustainability, to create joint initiatives and projects. Such a way of achieving the central organization's goals, whether that organization is a ministry or a department, is in line with the trend toward making government act as an enabler rather than a direct manager.

Cultural leaders can also transform their central culture organization into a role model of excellence for creativity and governance. They can change how the organization operates, providing an inspiring work environment for their employees. The culture sector typically attracts young, ambitious, and unconventional people who want an atmosphere different from that of the traditional government ministry. Cultural leaders can attract these kinds of talented people by instilling the principles of sustainability into their organization's workplace culture, governance, and operations, and then rigorously monitoring the impact.

CONCLUSION

The GCC countries are experiencing a remarkable cultural renaissance. For cultural leaders, this burgeoning cultural scene offers a unique opportunity to put the region in the global vanguard by bringing together culture and sustainability. The culture sector can make an important contribution to reducing emissions while proposing solutions to some of the difficult problems that affect the region.





ENDNOTES

1. The GCC countries are Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates.
2. This estimate assumes a 40 percent reduction in embodied carbon and net-zero operational carbon, per targets set by United Nations High Level Climate Champions. See “Why Hunting Down the Carbon in Buildings Is Crucial to Fighting Climate Change,” World Economic Forum, January 20, 2023 (<https://tinyurl.com/yr3s9te>).
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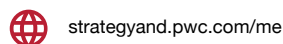
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