

Building the infrastructure to support Saudi Arabia's cultural renaissance

Since the inception of Vision 2030, Saudi Arabia has placed arts and culture at the heart of its developments, from dedicated culture projects to integrated assets within giga projects. The Kingdom is now moving from strategy to execution. Cultural offerings including exhibitions, fashion weeks, music festivals, theater plays, and cultural seasons are in full swing across the Kingdom and attracting crowds.

Having opened so many new possibilities for the arts and culture, the country needs to build out additional infrastructure and the required ecosystem that will sustain the planned growth of these offerings. That means building venues that span the entire value chain, from creation to production and exhibition as well as talent development. Those facilities include academies, incubators, studios, museums, and theaters.

Our research suggests that projects for up to almost 150 cultural facilities representing US\$70 billion to \$80 billion by 2030 are already in the pipeline, at different development stages. About US\$7 billion to \$10 billion of this investment has been spent to date, we estimate. For large-scale projects in which culture is central, such as Diriyah Gate Cultural District, King Salman Park with its iconic Royal Arts Complex, Jeddah Central Development, the Red Sea Project, and Al Ula Development, cultural investments range from 10% to 30% of total project budget, our research suggests.

The overarching goal of these projects is to position Saudi Arabia as a global cultural hub, diversifying the economy and boosting tourism. Cultural investments are intended to **contribute revenues of about \$20 billion** and create more than 100,000 jobs in the sector by 2030. More direct spending on culture will bring with it indirect spending on hospitality, retail, and food and beverage, among others, and increase the value of land and real estate in and around cultural districts.

While this is a significant opportunity to develop truly impactful venues that empower the creatives, engage the community, and serve as enablers for the growing cultural ecosystem, success factors need to be in place to reap the benefits of this investment. Here we identify some of the most important ones:

First is the need to develop a clear vision and a business plan that is sustainable in the future, both operationally and financially. Such a plan could leverage public-private partnerships and tap into diverse revenue streams.



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A second success factor is to place cultural assets close to one another, where possible, so that they form an integrated district. The benefits of such districts include their ability to attract visitors, create knowledge-sharing platforms, foster cultural identity and social cohesion, realize operational synergies such as back-office space sharing, and develop a collaborative creative community. The Kingdom is already adopting this approach with the **Royal Arts Complex** and other facilities.

Involving artists and communities themselves in the development efforts is a third success factor as it will allow for the design of a human-centric user experience and help to preserve cultural identity.

Disciplined and agile execution is a fourth success factor. This includes a structured approach to execution, identifying and mitigating risks early on, defining clear time lines and roles and responsibilities, and embedding contingencies in the plan. Maintaining frequent and open communication among the various parties can avoid time delays and budget waste, and will ensure that changes in strategy or design requirements are reflected in the execution.

A fifth factor is the ability to strike a balance between environmental sustainability ambitions, budget, and impact achieved. Setting a sustainability plan at project inception can infuse sustainability considerations in all phases of the project life cycle including design, development, and operations. Saudi Arabia is already blending sustainability and cultural heritage in several projects including Diriyah's LEED platinum certification for pedestrian spaces, local materials, and eco-friendly transport; Ithra's LEED Gold with its xeriscaping, smart irrigation, and a heat-reducing steel-tube façade mirroring the traditional *mashrabiya*; and the King Salman Park, which integrates rainwater harvesting, green spaces, and energy-efficient tech.

Other elements that will need to be in place include talent training programs for the workforce required to operate the venues; a calendar of events that activate districts and assets all year long, ensuring a constant flow of both visitors and tourists; strategic and operational partnerships that help the projects achieve their scale ambitions and fast-tracked execution time lines; and guidelines for cultural activations tailored to different regions, to ensure consistency, quality, safety, and alignment with broader cultural, social, environmental, and urban objectives among stakeholders.

Much has been achieved in a short time in the Kingdom's cultural opening. Much more can and needs to be done to ensure that the renaissance takes root and brings tangible impact. The new building phase that is necessary to ensure lasting impact is already under way. If well managed and successful, this transformation will increase the quality of life for residents, raise Saudi Arabia's appeal to tourists, and turn culture into one of the Kingdom's economic pillars.

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