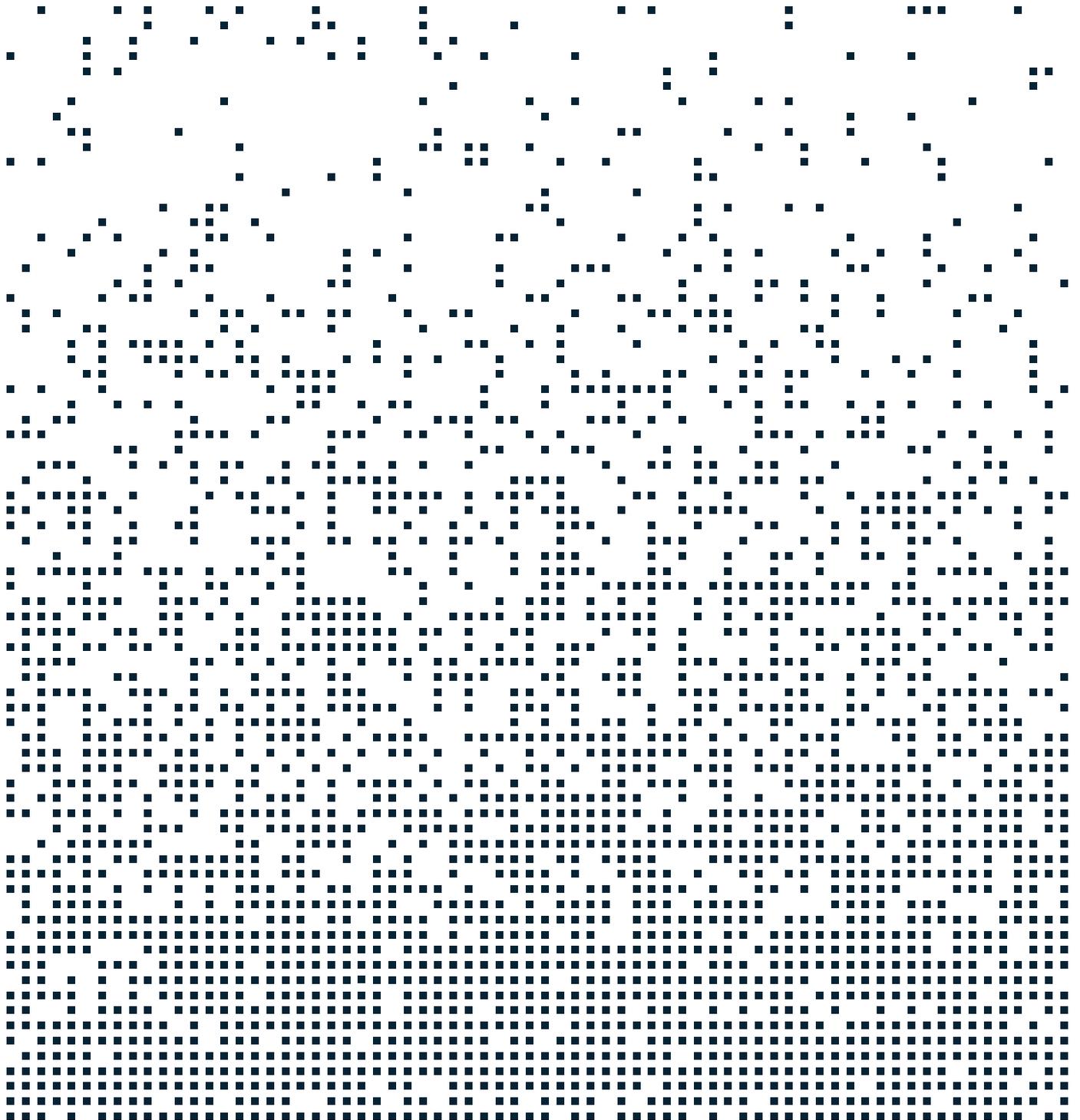


Report on the State of Culture in the Kingdom of Saudi Arabia, 2020

Digitalization of Culture



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Message from the Minister

The Covid-19 pandemic tested the resilience of sectors across the globe – culture and creative industries are certainly no exception. While 2020 brought about unprecedented challenges for the Saudi cultural sector, it generated equally exciting opportunities. Under the leadership of the Custodian of the Two Holy Mosques King Salman bin Abdulaziz Al Saud and the Crown Prince His Royal Highness Prince Muhammad bin Salman bin Abdulaziz Al Saud, the Kingdom’s cultural sector continued to resiliently flourish.

The Saudi people hold a deep-seated belief in their nation’s cultural vision, and over the course of this past year, they worked diligently to transform that vision into a lived reality. Despite tremendous obstacles and social distancing measures, culture and creative industries proved their indispensable value as a potent unifying force. Nowhere has this been more evident than in the sector’s ability to adapt to the virtual space and utilize its various tools and platforms – as the sector looked inward for inspiration, it was met with ubiquitous creative talent and innovative adaptability.

The cultural sector stands as a testament to the vitality of Saudi Vision 2030. The Kingdom is dedicated to promoting and protecting national cultural heritage, while exploring new cultural horizons. Over the past year, community involvement in cultural sub-sectors such as culinary arts, fashion, and the visual arts increased dramatically. Economic contributions from the architecture and design, film, and music sectors also witnessed a substantive uptick, in addition to positive strategic momentum in publishing, translation, and language, as well as cultural activities at large.

Together we weathered an unprecedented year for culture. The Covid-19 pandemic contributed to both the challenges and achievements of all sixteen cultural sub-sectors. The importance of cooperation between the legislative, financial, manufacturing, and incubating institutions to advance cultural objectives is now glaringly clear. Everyone, from concerned individuals, intellectuals, and creatives to the general public, worked collectively to create suitable alternative activities and adapt to the shifting realities of life. We are now witnessing these efforts manifest in a rich and robust Saudi cultural ecosystem.

Today we are pleased to present to you the second edition of **The Report on the State of Culture in the Kingdom of Saudi Arabia, 2020: Digitalization of Culture**. The report highlights areas of cultural growth as well as stories of



Prince Badr bin Abdullah bin Mohammed bin Farhan Al Saud
Minister of Culture

setbacks and corresponding recovery. It sheds light on Saudi cultural production across various fields, and documents the most important cultural initiatives, projects, programs, and events of the year, while tracking opportunities and challenges unique to each sub-sector.

Prior to the pandemic, a shift towards the digitalization of various industries was already underway. The pandemic has accelerated the pace of digital transformation and, in turn, amplified its importance. Therefore, the lion’s share of the report is dedicated to discussing the digitalization of culture, documenting the personal realities of cultural practitioners in our country as they navigate the new normal. The report demonstrates that even as the challenges before them grew, so too did their achievements.

Our aim in the annual cultural report is to monitor the state of culture in Saudi Arabia and present an accurate picture of the sector, in both good and challenging times.

Proud of our culture—our journey together will undoubtedly continue to flourish.



Acknowledgements

The number of contributing entities that provided quantitative and qualitative data nearly doubled this year, magnifying the significance of the report's second edition by broadening its view of the different cultural fields and by helping develop many new performance indicators. These contributing entities included ministries and government agencies, various civil institutions, and companies and organizations from the private sector. Their continued cooperation and the expansion of participating actors in the Kingdom is much anticipated for continually improving the quality, efficiency, and accuracy of the report, which derives its fundamental value from the accumulation of knowledge every year. Finally, we would like to extend our sincere thanks and gratitude to all of the entities that have participated alongside us to share in the report's success. The success of the report is indebted to them for their fruitful cooperation, proactive contribution, and dedicated role in the growing cultural movement during a time of ongoing economic and social development in the Kingdom.



Introduction

- Cultural Reality in 2020: Challenge and Response
- The Theme of the 2020 Report on the State of Culture: The Digitalization of Culture
- Sources and Data
- Ongoing Work and Future Prospects





An unprecedented pandemic set the stage for an unprecedented year; sectors—without exception—were forced to innovate, adapt, and resiliently reorient. Beyond endangering the lives of millions of people and overwhelming health care systems on a global scale, the pandemic ravaged economies, general well-being, and the everyday realities of social life. The impact of the Covid-19 pandemic has disproportionately extended to—and weighed heavily on—culture and creative industries. From the abrupt closure of cultural facilities and their production operations to the cancellation of events, festivals, and exhibitions, the sector’s tenacity was put to the test.⁽¹⁾ Despite unprecedented challenges, the unique circumstances of 2020 brought about a plethora of opportunities for cultural stakeholders to develop flexibility and explore novel alternatives. Creative expressions of culture were used to create meaning and demonstrate solidarity, which became even more important in the face of crisis.⁽²⁾ Nevertheless, the Kingdom and its various cultural subsectors showed commendable flexibility and innovative creativity to successfully navigate the pandemic, elevating the sector to higher heights in the process.

The second edition of the “Report on the State of Culture in the Kingdom of Saudi Arabia” (2020) sheds light on the reality of cultural activity and the novel response to the conditions posed by the Covid-19 pandemic. Although the report strives to provide content that monitors the developments and features of cultural reality from year to year, the 2020 report stands as particularly significant because it offers preliminary documentation on the impacts of the pandemic on cultural subsectors. It does so by backgrounding the pandemic while foregrounding the response to a new reality through describing and monitoring it and its consequences beyond the circumstantial conditions. Thus, this report and its chapters address “The Digitalization of Culture” as a central theme because it represents the most significant creative response of the cultural subsectors to the pandemic. Additionally, the digitalization of culture documents the transformation of culture prior to and during the pandemic, highlighting those transformations which began before it and will likely extend beyond it.

Cultural Reality in 2020: Challenge and Response

Individual and institutional stakeholders in the cultural scene faced a unique challenge in implementing the public health measures set by the Kingdom’s government to address the pandemic. Major festivals and book exhibitions were postponed, and theaters, galleries, libraries, and museums were closed. International cultural contributions and various cultural activities that had grown significantly in number and quality in previous years were also canceled. As might be expected, cultural spaces saw less activity and practices subsided, especially during the lockdown extending from mid-March to the middle of the year. Even when the lockdown lifted, the return to public life and activities was limited because of preventative health measures.

In a quick response to this novel reality, a virtual cultural phenomenon arose on social media, video platforms, and specialized websites. Forums, workshops, competitions, and exhibitions were hosted online, not to mention musical performance and reading clubs, all of which is detailed throughout the chapters of this report with accompanying examples.

Saudi cultural stakeholders were already familiar with the virtual world as they have been engaged with online forums since the turn of the millennium. Visual production (on video platforms), translation, and online publication activities have also become commonplace over the last decade. Digital communication has always provided an avenue of creative activity, and the first edition of the Report on the State of Culture reviewed aspects of it. But the virtual cultural activity this year stood out in various ways—namely, in terms of the increased volume and types of digital experiences and the increased and varied role and contribution of cultural institutions. Virtual events were no longer restricted to individuals with limited resources. In 2020, Arabic language forums were held remotely, and patrons visited museums online. What is more, competitions and programs were organized by institutions spearheaded by the Ministry of Culture, such as the “Culture in Isolation” initiative. Various other institutions and their diverse contributors also enriched the cultural subsectors, as is detailed throughout the chapters of this report.

The impact of the pandemic on culture was not limited to the emergence, presence, and spread of virtual cultural spaces but also manifested in creative and cultural content and

practices. The report documents the impact of the pandemic thus far on literary works and galleries, art exhibitions, and interior design, especially for households. Additionally, fashion designers added their creative touch in the design of pandemic-related items, such as facial masks.

Culture provided some stakeholders and interested individuals with a way of coping with the challenges of home quarantine and social distancing brought on by the pandemic. Others approached the lockdown as an opportunity to take some respite from the fast pace of events to contemplate and recalibrate. Tellingly, fine artists and writers devoted themselves to their work, museums redesigned galleries, and libraries digitized their collections. These and other examples of opportunities grasped during the pandemic are described throughout the chapters of the report.

The ability of the sectors to adapt and remain flexible is a positive indicator of their vibrancy. However, this should not overshadow the piercing impact of the pandemic, as the preliminary indicators presented in each chapter illustrate. The pandemic affected the overwhelming majority of production and distribution cycles—from the closure of theaters to the decreased number of art exhibitions and theatrical performances—generating a marked decline in ticket sales and revenues.

It is important to note that not all cultural stakeholders had the same capacity to respond to the pandemic. Small private museums showcased limited response capacity, as did sectors that depend on sales to sustain themselves. For example, for the publishing, festivals and (to a lesser extent) music sectors—which rely heavily on in-person or live events to generate activity—could not compensate for lost revenues through online or virtual events. This also affected the associated artisans and producers who normally attend these live events and rely on festivals or performance seasons for their activities and livelihoods. The full extent of the pandemic’s immediate impact—and whether it will produce more substantive medium- and longer-term effects—remain unknown.

The deleterious effects of the pandemic transcend economic ramifications. Arguably more profound has been the shift in the nature of production and reception of culture driven by digital transformation. During the pandemic, checking out a book online, attending a virtual poetry night, or visiting a virtual museum became familiar practices, if not the only available access points to experience culture or acquire cultural products. To what extent will such practices continue to persist long after the pandemic is history? And what opportunities does the acceleration of digital transformation present to the cultural sphere?





The Theme of the 2020 Report on the State of Culture: The Digitalization of Culture

The first edition of the annual report—titled “Report on the State of Culture in the Kingdom of Saudi Arabia, 2019: Facts and Figures,” sought to present a panoramic picture of culture across the country. It provided a brief historical sketch of developments in each field of culture and established a framework for subsequent annual reports to adopt—notably in providing a comprehensive overview as well a detailed discussion of focused topics. The 2020 report maintains the framework and scope of the previous report insofar as it aims to describe the documentation of culture and the achievements of individuals and institutions and monitor changes in trends and patterns in creative processes, production, and forms of dissemination and participation in the various cultural fields. In addition to this broad scope, each report adopts a special theme as a distinctive contribution of its own. The theme of this year’s report is “The Digitalization of Culture.”

Over the last two decades, digital technologies and virtual spaces have reshaped our relationship to culture on a global

scale. They are no longer simply a way to communicate or preserve cultural products but have become a field unto themselves. Cultural production and dissemination have become dependent on digital applications in several cultural fields and new arts. The Covid-19 pandemic did not create this digital dimension of culture but instead exposed its depth and breadth and how culture operates within it. The pandemic has increased the urgency of the issues, opportunities, and challenges presented by digitalization and the development of digital applications. The report engages with several aspects of digital transformation in each cultural field, and all discuss several dimensions related to the digitalization of culture.

Culture in the Digital Space

The internet has facilitated public discourse on cultural content and provided opportunities for communication between stakeholders and relevant parties. It has become a central point of access to cultural products and the platform on which initiatives and cultural links are forged. Virtual culture—in its simplest form—is the theme of the 2020 report. As all the chapters demonstrate, every cultural subsector leveraged virtual activities, which formed a significant portion of the cultural calendar on aggregate. Arabic





language, literary criticism, and playwriting forums were hosted virtually, as were poetry nights, digital broadcasts of concerts via social media platforms, and dialogues with artists and authors. Design, photography, and reading competitions were also held online. Both institutions and individuals contributed to shaping the virtual landscape since the cost of organizing virtual events is low. This aspect allowed for equitable conditions to create and experiment, particularly during periods of lockdown.

Digital Consumption of the Cultural Product

Many traditional cultural products have corresponding digital formats—think of digital books and digital streaming of movies and music. The consumption of cultural products through these mediums in the Kingdom has increased over the last few years. The pandemic has amplified this growth, especially among younger generations, as indicated by various data points presented throughout the report. Relatedly, digital services provided by cultural institutions such as public libraries have also grown, as some libraries were able to deliver borrowing services without requiring in-person library visits during the quarantine and lockdown periods.

The Digital Cultural Experience

Some digital transformations go beyond merely consuming a cultural product through digital media, but rather involve designing a novel cultural experience with digital channels and applications. Virtual theater and museum exhibitions presented by artistic and cultural institutions, for example, found new ways of creative expression despite relying on a connection between the work and the audience. This

year's report documents the salient developments in digital cultural experience thus far, which seem to have been driven by unique, pandemic-induced circumstances more so than well-established practices of virtual presentations.

Digitization for Preserving Cultural Heritage

The use of digital technologies to preserve and archive cultural heritage is one of the most significant aspects of the digitalization of culture. Preserving and archiving heritage elements protect them from being lost and increase their societal reach and impact through digital copies. In turn, this allows them to be used in creative cultural work. Throughout the report's chapters, projects led by the Ministry of Culture to digitize manuscripts, museum collections, and heritage documentation projects are reviewed, as are national archival, film, and artwork projects. Together, these initiatives aim to close the gap in this field, applying the latest available technologies to protect the cultural heritage and make it available to the broader public.

The report's chapters offer a descriptive data commentary on aspects of digitalization following each sector's respective content and requirements, thereby providing an analysis of digitalization and the challenges thereof. The chapters attest to the importance of virtual space in driving economic recovery after the shock of the pandemic. At the same time, however, virtual space is not as attractive and has less of an impact when compared to in-person events. The responses of cultural actors in the fields of music, arts, and festivals attest to this fact, which is documented in the Cultural Participation Survey.

Some chapters have laid bare the lack of preparedness of some fields to offer an integrative digital experience beyond



a simple post or display on already-existing social media and video platforms. The shortcomings in some fields result from the absence of local alternatives for digital music and video services—a market dominated by international companies. Lastly, the chapters highlight that active institutions recognize the importance of digital technologies in preserving cultural heritage and archiving our collective creative legacy. This is most evident in the cross-sectoral digitization projects currently underway—such as in heritage, museums, and libraries—or on projects for specific institutions.

Sources and Data

As in the first edition of the report, this year's edition relies on data from entities as the main source of official statistics and documentation of activities. To measure the levels of cultural participation, the report utilizes the Cultural Participation Survey, carried out in two phases during the last quarter of 2020 on a sample size of 3,112 individuals from all regions of the Kingdom. The survey questionnaire was standardized with the intention of enabling future observations and comparisons.

The report added a new source of data this year. It surveyed a sample of small private museums to help measure the impact of the Covid-19 pandemic on the museum sector. Additionally, a partial survey was conducted on several

active art galleries. Since one of the report's main aims is to monitor the events of the year, it draws on news from official media outlets such as the Saudi Press Agency and the media centers of official entities, including their official social media accounts. Social media is a primary source of data since so many of the year's events were carried out on these platforms.

Quantitative metrics and indices can only go so far in measuring the wide-ranging, cross-sectoral impact of thriving culture and creative industries. Thus, the report employs qualitative data to understand and analyze the shape and change of cultural trends. Doing so opens a window to the lived reality in cultural fields through the cultural actors' experiences and perspectives. Whereas the first edition of the report utilized interviews, the 2020 report utilizes focus groups because they encapsulate and relay a more comprehensive range of shared encounters, experiences, and viewpoints.

Ongoing Work and Future Prospects

Despite pandemic-induced disruption, the Ministry of Culture and its cultural bodies continued to develop initiatives for the cultural sectors. They outlined their strategies and announced infrastructure projects, and even began to implement some of them. The pandemic slowed the





momentum of public activity, but the hard work of developing the cultural sector remained nearly on pace with 2019. This is demonstrated by the launch of several initiatives by the Ministry of Culture in 2020, including the Cultural Scholarship Program, nominations for the National Cultural Awards, and the public libraries initiative. The ministry also announced the extension of the 2020 Year of Arabic Calligraphy into 2021. Archaeological excavations continued, resulting in several discoveries announced by the Heritage Commission.

Further, the ministry announced the establishment of several specialized museums, some of which have already broken ground. Moreover, the ministry established the Thunaiyat Ad-Diriyah Foundation and the organization of the King Salman International Complex for the Arabic Language. The addition of more than eighty cultural professions to the Saudi Standard Classification of Occupations was a key organizational development this year.

In February 2020, the most important structural development in the organization of the cultural sectors was the founding of eleven specialized cultural commissions. Having begun their work shortly before the onset of the pandemic, the new cultural commissions set out to organize competitions and virtual events and to announce programs, cooperation agreements, and initiatives. During the pandemic, the commissions benefited from charting development strategies for the sectors—the fruit of which became apparent during the year.

This report could not have been completed without the participation of about seventy different agencies, institutions, and groups. It is the collaborative effort of many ministries, government entities, cultural foundations,

and cultural institutions, all working together to contribute the data needed to chart cultural milestones across the Kingdom's rich cultural fields. The report is also guided by the perspective of more than 130 experts, practitioners, and cultural affairs officials in the Kingdom, who participated in 18 focus group discussions conducted during the last quarter of the year. Only through the close cooperation of this wide range of individuals and institutions could the valuable data the report contains be compiled.

As for the year's developments and achievements, the report cannot include every momentous contribution in a nation brimming with creative people, just as it cannot include every commendable work initiated by an active institution. The purpose of the report is to highlight the general patterns in culture by quoting examples without bias. This year's report on the state of culture builds upon the foundation of the first edition and the benchmark data contained in it so that it might contribute to the creation of accumulated knowledge of cultural reality in the Kingdom. Lastly, the report prioritized accuracy over completion in presenting data from rapidly changing sectors undergoing significant organizational transformation, hoping that it accurately reflects the sectors' rapid pace of development and positive trajectory.

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Executive Summary

The 2020 **Report on the State of Culture in the Kingdom of Saudi Arabia** aims to monitor developments across all cultural sectors and document the achievements of participating individuals and institutions. The report also measures levels of cultural participation, while tracking relevant trends in cultural creativity and production. It features the special theme of “Digitalization of Culture,” including a preliminary account of the impact of the Covid-19 pandemic on cultural sectors. Cultural and creative industries faced exceptional challenges this year, such as postponing and cancelling public events and activities, the closure of cultural facilities during periods of lockdown, and the abrupt halt of international cultural tourism

- In a dynamic response to the circumstances imposed by the pandemic, a broad cultural scene flourished in the virtual space. The unusual circumstances did not only change means of cultural dissemination but also left their mark on creative content. However, the virtual alternative did not offset the profound impact of the pandemic on the cultural sphere, as cultural production and distribution cycles were severely hindered. Furthermore, cultural actors did not enjoy equal opportunities to digitalization, either due to limited access to the necessary technologies or due to the inherent nature of the activities themselves.
- The Covid-19 pandemic has only increased the urgency of understanding the opportunities and challenges presented by the digitalization of culture. The report addresses a number of aspects of digital transformation in each cultural sector across four dimensions: (1) culture in the virtual space; (2) digital consumption of cultural products; (3) the virtual cultural experience; and (4) utilizing digitization to preserve cultural heritage.
- While virtual options created important opportunities for overcoming pandemic-induced stagnation, the report provides indications of the limited appeal and impact of virtual activities when viewed comparatively as a substitute for in-person ones.
- The report documents the lack of preparedness of some cultural sectors to provide comprehensive digital experiences that go beyond simple displays on social media platforms. Local alternatives to digital streaming services were also inadequate or nonexistent altogether. Finally, the report highlights the importance given to the digitalization of cultural heritage, as reflected in a number of ambitious active digitization projects undertaken by a number of institutions across all cultural sectors.

The report draws on a number of sources: 1) quantitative data from 70 entities, including ministries, government agencies, cultural institutions, public libraries, and art galleries; 2) the Cultural Participation Survey (2nd wave) for which a representative sample of 3,112 individuals from across the Kingdom were interviewed; and 3) two surveys covering samples of private museums and art galleries. The report also makes use of a range of published reports and media sources, in addition to qualitative data from 18 focus groups in which 130 practitioners, officials, and experts in cultural affairs in the Kingdom participated.







Language

- In 2020, contributions by academic institutions and Arabic language centers enriched the sector in different forms, including scholarly publications, online forums, and conferences –a format that allowed for greater public participation. The Kingdom’s Arabic-language journals were recognized with high rankings in the Impact Factor criteria used to evaluate journals published in Arabic.
- The sector witnessed the launch of several initiatives, ranging from new Arabic language standardized tests to language programs and educational competitions on social media platforms. Pandemic-induced digitalization contributed to expanding the outreach of language-related activities to a broader audience through the adoption of virtual events. One illustrative example is the wide public participation in online celebrations of the World Arabic Language Day, hosted by a variety of institutions.
- The 2020 Cultural Participation Survey provided insights into participants’ preferences on the use of Arabic and English in different contexts. While only 1% of the sample preferred to use the English language socially, 8% of respondents preferred to use English in professional or educational settings. This disparity highlights the need to develop a system of robust language policies that promote the Arabic language as an engine for knowledge production and localization.
- The pandemic posed additional challenges to institutes for teaching Arabic as a second language. On top of their technological unpreparedness to teach Arabic online, these institutes witnessed a sharp drop in demand for their services in light of the suspension of international travel. Despite these challenges, institutes have quickly adapted and benefitted from E-learning programs that have made significant progress at Saudi universities in recent years.
- A number of institutions in the Kingdom are working towards addressing the growing need to integrate Arabic language with digital technologies, especially in the field of artificial intelligence. In addition to these institutions, The King Salman International Complex for Arabic Language was established in 2020 with a mandate that sets out the intersection of language and artificial intelligence as one of its many scopes of work.





Literature

- Literary publishing rates continued to grow despite this year's exceptional circumstances. The total number of published titles increased to 663; the novel remains the most popular form, accounting for 201 titles. Biographies and memoirs also witnessed notable growth in 2020. The pandemic impacted literary content itself, as reflected in a number of works whose themes were inspired by the pandemic in the second half of the year.
- Virtual literary events emerged as an alternative to in-person activities that were canceled or postponed due to the pandemic. Not only did formal institutions host virtual events, but individuals took the initiative to hold literary meetings on their personal social media accounts. Many literary competitions were also held online, some of which were extremely popular. For example, more than 95,000 people participated in the "Literature in Isolation" initiative, organized by the Literature, Publishing, and Translation Commission, which was established and unveiled its strategy in 2020.
- According to the Cultural Participation Survey, 3.6% of respondents attended literary and poetry events this year. While the foregoing percentage does not necessarily reflect an unusually low turnout for this kind of cultural activity, the survey indicates a particularly low rate of participation among women and young people compared to the older male demographic.
- Digital media offered new avenues for the circulation of literary works: podcasts, social media platforms, and video broadcasting platforms all influenced the form of literary works to varying degrees. For example, very short stories and new forms of "flash" poetry translate well to social media posts, while performance-oriented genres are more suited to audio-based platforms. Although literary production leveraged digital media, "digital literature" as a genre is largely absent from the literary scene, with the exception of a few experiments.

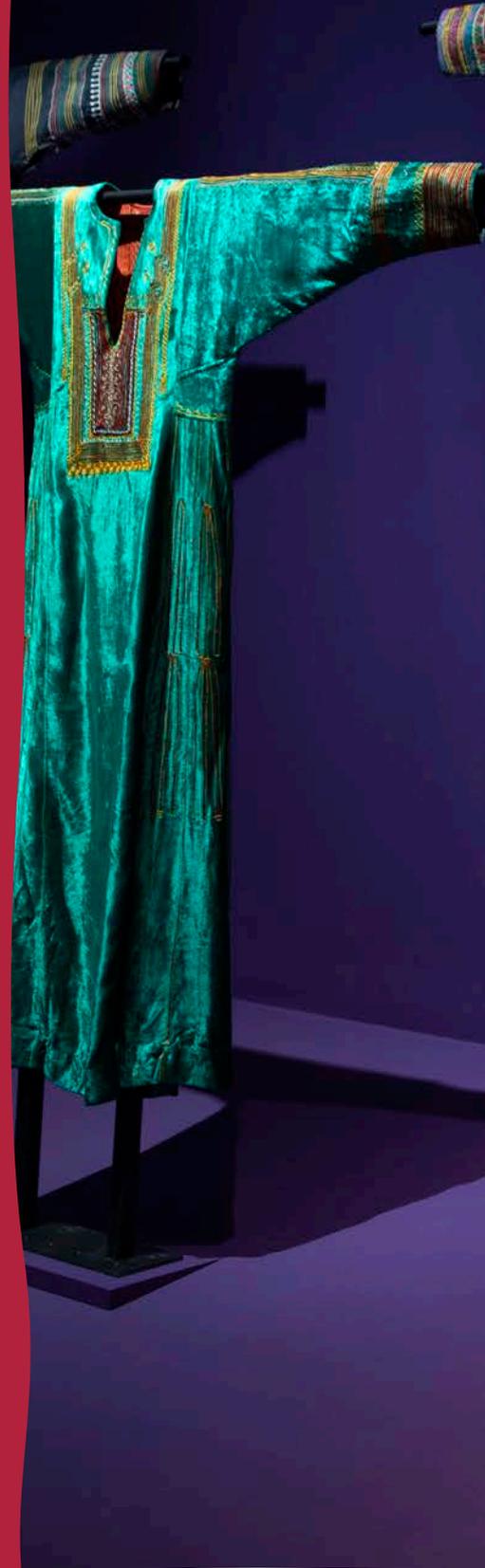






Fashion

- The fashion sector faced logistical challenges in 2020 due to the pandemic. By May, preventive public health measures resulted in a decrease in industrial production of apparel by 46%, in addition to the temporary closure of outlets such as retail stores and shopping centers. These challenges led to a low point of 5 billion riyals in clothing and shoe sale revenue in the second quarter of 2020. However, the industry bounced back as restrictions were lifted and normalcy began to return, bringing in a total of more than 9 billion riyals in the fourth quarter.
- Despite sector-specific challenges, the pandemic has led to the emergence of new and creative trends, with an increased focus on comfort and home-friendly attire. Designers have also created different mask designs to complement outfits for a variety of social and professional settings.
- Online shopping doubled in the past two years, with 15.26% of respondents in the General Authority of Statistics' survey in 2018 reporting they shopped online, compared to 30.17% in 2019. Due to the pandemic, reliance on e-commerce amplified this trend: online shopping sales were 364% higher in early 2020 than in the comparable period in 2019. The number of online stores registered on Maroof platform grew by 171% from January to October, with the sale of clothing and jewelry among the most represented activities on the platform.
- In the traditional segment of the sector, a total of 1,932 artisans of various styles of traditional fashion and jewelry were registered in the Saudi Handicrafts Program (Bari') this year. A plethora of initiatives offered support for artisans who had lost opportunities to reach their regular clientele due to pandemic-induced difficulties. Most importantly in 2020, **Al Sadu**, a traditional Saudi Arabian and Kuwaiti weaving style, was inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity.
- Key organizational developments have improved professionalism in the fashion design sector. Data from the Ministry of Human Resources and Social Development in 2020 reflects the growing number of fashion design professionals in the country. This trend has been catalyzed by the recognition of new cultural professions, some fashion-related, in the new Unified Saudi Vocational Classification Guide. In February 2020, the Fashion Commission, a body responsible for developing the sector, was established.







Film

- In 2020, Saudi film production was marked by the prominence of feature films and by production agreements between the private sector and digital streaming platforms. Despite the pandemic, more Saudi films were screened in movie theaters this year compared to 2019. Beyond feature films, production grants were awarded by the Red Sea Film Festival Foundation and Daw' Film Competition to support local films. Additionally, several films and film directors received funding and grants from international film labs and festivals.
- Saudi film festivals were hit hard by the Covid-19 pandemic: the first Red Sea International Film Festival was canceled, and the sixth Saudi Film Festival was moved online. The latter garnered over 63,200 views on YouTube – a unique experience that brought new life to the burgeoning Saudi film industry during nationwide quarantine.
- The pandemic propelled virtual spaces to the helm of the sector, not just as a medium to screen Saudi films, but also as an interactive arena for competitions and creative discussions pertaining to film and the art of filmmaking. The Saudi film library has expanded into various streaming platforms, allowing Saudi films to reach new audiences - both locally and internationally - thereby bypassing domestic distribution obstacles. According to the Cultural Participation Survey, digital platforms retain a higher preference rate (34%) than other alternative viewing options.
- Although the Saudi film sector lacks several key components, it reflects boundless potential. The Saudi film industry is indeed one of the fastest growing film industries in the Middle East, with over 6 million movie tickets sold in 2020- a much higher figure than the previous year's, despite extended cinema closures. This performance coincided with the expansion in the number of theaters from 12 to 33 across the Kingdom. Furthermore, box office revenues in Saudi Arabia generated the largest profit growth in the region. The sector counts on the Film Commission - established in February 2020 - to support the film industry by empowering local talent and fostering an environment conducive to a prosperous filmmaking industry.







Theater and Performing Arts

- Theatrical production had a strong start at the beginning of the year. However, due to the pandemic, the number of theatrical performances and other performing arts events experienced a sharp decline when compared to pre-pandemic figures. There were only 68 theatrical performances in 2020, compared to 169 by the same groups the year prior. This decline prompted many actors, screenwriters, directors, and producers to channel their activities toward virtual events and online workshops.
- As the pandemic forced specific cultural sectors, including theater, to operate virtually, a debate emerged about virtual theater. While only one attempt was made to present a fully virtual production, some theatrical experiences took advantage of digital media to broadcast live theatrical performances – a practice expected to continue long after the pandemic is behind us. Aside from digitizing dissemination of theatrical performances, attempts to introduce digital technologies into the production or narrative construction of local theater were largely absent.
- More than 45,000 people attended theatrical performances presented by the General Entertainment Authority (GEA) in the first quarter of 2020 – a significant increase from the same period in previous years. However, the cancellation of in-person theatrical performances due to the pandemic led to a decline in total attendance in the remainder of the year. For example, plays presented by the Saudi Arabian Society for Culture and Arts (SASCA) drew in only 9,637 attendees in 2020, compared to 37,000 in 2019.
- Performing arts events were particularly popular, drawing more than half a million attendees to events organized by the GEA in the first quarter of the year alone. These events included performances, circuses, stand-up comedies, and more. SASCA branches presented 44 traditional art shows, attended by approximately 7,655 people.
- The theater sector witnessed a number of significant initiatives and organizational developments this year. Among the most important were the establishment of the National Theater at the beginning of the year and the subsequent establishment of the Theater and Performing Arts Commission. Partnerships were formed with the Ministry of Education and the Ministry of Human Resources and Social Development to improve professionalism in the sector by offering educational and development opportunities.







Music

- Although the live music sector flourished in 2019, the pandemic came with its own set of ramifications on musical performances and events this year. Most in-person activities were canceled, while lockdowns, border closures, and travel restrictions limited the local live music scene. Artists had to produce their works remotely, and the National Music Ensemble, which was established at the beginning of the year, had its activities postponed.
- As in other cultural sectors, concerts and music events were restricted to virtual platforms. Live concerts, musical evenings, and conversations with a number of Saudi and Arab artists were streamed online, offering innovative ways to deliver a musical experience.
- Although virtual broadcasting facilitated the delivery of music events to an expanded audience online and free of charge, these new types of shows had a limited ability to attract a wide audience, as evident in data-driven indicators. The Cultural Participation Survey indicated that the average attendance rate for virtual musical events was less than 2.5%, reflecting a major challenge to the viability of virtual platforms as a replacement for live concerts.
- While consumption of music through streaming services and their revenues in the Kingdom continue to rise, these numbers are generated through international streaming platforms. There remains a need for national streaming platforms that effectively curate local music and cater to listeners' diverse tastes across the Kingdom.
- The Music Commission was established in 2020 to undertake the development and regulation of the music sector, which remains primarily reliant on amateur and self-trained artists. To address this shortcoming, the Ministry of Culture issued licenses for the first two music academies in the Kingdom this year. The Saudi Standard Classification of Occupations also formally recognized music-related professions in efforts to buttress the professionalization of the sector.







Cultural Festivals and Events

- The Covid-19 pandemic posed a major challenge to the cultural festivals and events sector in 2020- all events, festivals, and seasons were canceled, with the exception of National Day celebrations, which were held with comprehensive precautionary measures. Most events were moved online, challenging event organizers to adapt their programs and plans accordingly. Despite their efforts, not all the events proved economically sustainable. Put simply, the available platforms for hosting events online do not provide the same ambiance and experience as in-person events.
- Despite the abundance of virtual activities during quarantine, online events were less popular than in-person events. Attendees missed the sensory experiences associated with live events, especially those themed around food, family, and children. The Cultural Participation Survey indicated that only 10% of respondents attended online events.
- The General Entertainment Authority (GEA) issued only 162 events licenses from January to October 2020, down from 502 events licensed in the same period of 2019. The total number of event attendees in 2020 was just 3,754,883 people. For comparison, a single event in 2019, the Jeddah Season, attracted more than 14 million visitors.
- The impact the pandemic had on the sector can be seen clearly through indicators of cultural tourism. While attending cultural events accounted for 44% of all domestic trips that included cultural activities in 2019, it dropped to merely 26% for the first nine months of 2020. Likewise, only 1,669,991 trips taken by domestic tourists included attendance of cultural events, compared to 5 million in 2019.
- The General Entertainment Authority (GEA) registered 1,128 facilities and locations for holding events and festivals. Of those sites, 59.9% are in the central region of the country, 16% in the western region, 7.9% in the northern region, 7.5% in the eastern region, and 8.4% are in the southern region. In addition, 4,349 commercial enterprises specializing in exhibitions and conferences are active today, together with 1,709 commercial enterprises specializing in organizing entertainment events.







Architecture and Design

- In spite of the pandemic-induced productivity challenges, prominent architectural and urban projects were announced this year at a similar pace to 2019. Work on mega-projects that will help develop the architecture and design sector in the Kingdom also continued uninterrupted.
- The pandemic contributed to reshaping design preferences and priorities. New trends in home design and furniture selection emerged, with an emphasis on curated living spaces, outdoor patios, lighting, and ventilation. Concerns about social distancing led to a reconsideration of the design of public, commercial, and professional spaces to make seating and high-traffic areas more compatible with safety requirements.
- Various design houses grappled with challenges, including a contraction in the private sector and difficulties implementing projects in their final stages remotely. Administratively, the transition to remote work led to faster and more effective communication between designers and clients. Despite the slowdown of production and manufacturing processes, some fields - such as game design and manufacturing - were met with high demand during quarantine.
- The sector enjoyed a creative boom in 2020, with a number of distinguished works winning local and international awards. Competitions emerged as a means for supporting students, amateurs, and professionals in the architecture and design field. The winners were awarded the opportunity to transform their works into architectural and design products.
- The virtual space allowed the sector to remain active through online events, such as conferences and exhibitions. Similarly, online classes and training programs gained popularity during quarantine, as they seized the opportunity to expand virtually despite some challenges, such as their weak educational outcomes.
- A number of important organizational developments in the sector took place in 2020. These included the establishment of the Architecture and Design Commission in February, in addition to a number of the Kingdom's regions opting into the urban code projects launched several years ago, the latest of which was the comprehensive development of Wadi Hanifa under a new urban code. Likewise, several design studios were established to support the implementation of these projects.







Heritage

- Survey and excavation work that had already commenced continued with the onset of the Covid-19 pandemic, taking all necessary precautionary measures at the sites. In particular, four archaeological sites were excavated near Makkah and Riyadh, and 13 excavation missions were undertaken by both local and international teams. Work on a number of projects to document and preserve national heritage, such as the Coding of Urban Heritage Buildings project, also continued. This work complemented the development and rehabilitation of several heritage sites around the Kingdom, including historic villages and mosques.
- A number of documentation initiatives to preserve the intangible cultural heritage of the Kingdom emerged in 2020, ranging from local communities recording elements of their own heritage to institutional projects aimed at documenting oral history. Internationally, the art of **Al Sadu**, a traditional Saudi Arabian and Kuwaiti weaving style, was inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity, and adorned the logo of the G20 Summit, which was hosted by the Kingdom in 2020.
- In 2020, a number of initiatives to develop the national cultural heritage sector were launched concurrently with the establishment of the Heritage Commission in February. The most prominent of these initiatives were a project to restore and rehabilitate urban heritage buildings of architectural and historical significance in Riyadh city center, the establishment of the Center for the Protection of Underwater Cultural Heritage in the Red Sea and Arabian Gulf, the Tadwin project to create digital records of sites of rock art and inscriptions, and the announcement of key archaeological discoveries.
- As domestic tourism recovered after a slowdown in March 2020, heritage trips' share of all trips that included cultural activities increased compared to 2019. With the suspension of many tourism activities, heritage sites were among the few tourist attractions that were still open to the public during the pandemic.
- Despite the cancellation of many live heritage festivals and events, the virtual space allowed practitioners in both public and private heritage institutions and associations to revitalize the sector and engage with the public through various forms, such as online workshops.
- Artisans in the Kingdom were affected by the cancellation of heritage events and festivals, which remain the main outlets for displaying and marketing their artisanal work. To address this challenge, financial support programs were launched, and 600 artisans received material compensation for loss of work during quarantine.







Visual Arts

- The Covid-19 pandemic disrupted the momentum of ongoing forums, exhibitions, and programs in the visual arts scene. As many art exhibitions were canceled, and various logistical challenges impacted on artistic production, the Saudi art community showed resilience by exploring virtual alternatives, with artists capitalizing on their free time to continue creating whilst building a community of solidarity and support. The pandemic influenced creative output, with some exhibitions focusing explicitly on themes inspired by it. The Visual Arts Commission - a body responsible for developing and regulating the sector - was also established in 2020.
- In December 2019, the Ministry of Culture announced that 2020 would be the Year of Arabic Calligraphy. In 2020, the ministry announced that the year would extend to 2021 to allow more time for the initiative to actualize its true potential. The initiative was accompanied by the launch of several related initiatives and competitions aimed at supporting, training, and motivating amateurs and professionals interested in Arabic calligraphy. Activities celebrating the Year of Arabic Calligraphy were held in public venues across various cities in the Kingdom.
- In 2020, only 162 art exhibitions were held in the Kingdom, compared to 255 in 2019, with 59% of them held in the regions of Makkah and Riyadh. According to a survey of several art galleries - drawn from a non-comprehensive list of galleries - 67 in-person art exhibitions were held in 2020 and 13 were held virtually, while 32 exhibitions were canceled.
- The 2020 Cultural Participation Survey reported a decline in the attendance at art exhibitions compared to previous years. Only 7.8% of those surveyed reported attending an exhibition in person, and even fewer (2.5%) reported visiting a virtual exhibition. 21.7% of those surveyed expressed an interest in owning original artwork.
- The use of digital technologies as a platform for showcasing artworks was a central theme in the visual arts sector this year. Although virtual exhibitions were limited both in number and in terms of their ability to present work effectively and draw in attendance, they were increasingly regarded as complements to in-person exhibitions and an opportunity to make them more accessible to a geographically broader audience.







Museums

- Museums all around the world have been adversely affected by the Covid-19 pandemic, as most museums were forced to close their doors in mid-2020. In Saudi Arabia, museums were closed by mid-March, resulting in postponed events and widespread cancellations. Small private museums were particularly challenged. A survey conducted on a sample of small private museums in the Kingdom found that 33% of them had lower average revenue, and more than 15% of those surveyed reported that they might suspend activities even after the pandemic.
- The pandemic led to the utilization of virtual museum tours and exhibitions, but these events were not particularly popular. The exception was those museums with the financial and technical capacities to use websites and social media accounts to reach the public. Other museums, especially small private museums, were at a disadvantage in the digital space. Given the centrality of a robust digital infrastructure only 13% of small private museums were able to maintain a strong online presence during the pandemic
- Although the museum sector has taken important steps to digitize collections in recent years, and nearly a third of the public museum holdings have been digitized, there is still a long way to go in order to complete the digitization of collections and prevent the loss of any materials. This will be achieved through the creation of a national database and by introducing digitization standard practice in private museums. The survey of small private museums indicated that about 44% of them had databases with photos of items, while 33% had no record of their holdings.
- Museums in the Kingdom are classified according to their holdings (general versus specialized museums) and their size (large versus small museums). Several new projects were launched in 2020 to establish specialized and public museums affiliated with development-oriented institutions and projects. In addition, 13 large private museums will be established as major national projects, 11 of which will be in Riyadh, one in Makkah, and one in the Tabuk region. Presently, there are 261 private museums licensed in the Kingdom, of which 43 are large (owned by institutions) and 218 are small (owned by private individuals).
- The museum sector in the Kingdom is undergoing pivotal organizational and structural transformations. In January 2020, the Council of Ministers issued a decree to transfer supervision of the National Museum in the King Abdulaziz Historical Center to the Ministry of Culture. In February, a decision was made to establish the Museums Commission, with the primary purpose of sector-based management and development. And in July, the formation of its Board of Directors was announced.







Libraries

- The Covid-19 pandemic affected most of the basic services offered by libraries, including receiving visitors, providing reading spaces, and lending out books. All libraries stopped receiving visitors in mid-March and were closed for varying lengths of time. After the stay-at-home order was lifted and public institutions were allowed to resume their activities, some libraries reopened to visitors while abiding by relevant precautionary measures
- Libraries were able to continue fulfilling their indispensable cultural role during the pandemic after moving activities online. Some libraries adapted quickly and continued their activities virtually, offering public events, academic discussions, and events for children and young adults online. Similarly, some libraries utilized their online capabilities, by granting members of the public and researchers alike online access to their collections. These adaptations mitigated the negative consequences of the pandemic on the sector.
- Efforts to digitize knowledge have been growing in the sector in the last few years. Many libraries have already adopted projects to this end, with special attention given to digitizing rare collections. This year, the Libraries Commission launched an integrated platform to house digitized manuscripts in the Kingdom.
- The Libraries Commission was established in 2020 to oversee the organization and support of the library sector in the Kingdom. The Commission's first initiative for the development of public libraries was announced by the Minister of Culture in 2020. It includes the establishment of 153 new public libraries in various regions of the Kingdom by 2030, with the first 13 libraries slated to be completed by 2022.







Natural Heritage

- As has occurred elsewhere across the world, biological diversity in some parts of Saudi Arabia experienced a revival during the stay-at-home period due to the decrease in logging, hunting, and off-road driving in areas of plant growth. Several environmental initiatives and virtual awareness programs were launched this year to maintain and spread awareness of these positive outcomes.
- The Kingdom set out to establish its largest marine reserve, spanning an area of 5,373 square km including nine islands, in the Red Sea. Efforts are also underway to add Uruq Bani Ma'arid to the UNESCO World Heritage List, the first natural heritage site the Kingdom has nominated. Moreover, efforts have continued to register the Farasan Islands archipelago as the first Saudi nature reserve in the UNESCO Man and the Biosphere Programme.
- Despite the ban on public gatherings and closure of nature reserves during the stay-at-home period, ecotourism activities had resumed by the middle of the year. Domestic tourism trips to natural or mountainous areas increased from 3.3% of all trips in 2019 to 4.2% in the first nine months of 2020. Several state-sponsored tourism initiatives have also been launched to boost environmental tourism, such as the Saudi Summer 2020 "Breathe" (**Tanaffus**) and "Winter Around You."
- Digital technologies play an expanding role in natural heritage conservation practices and policies. Despite the relatively recent utilization of digitalization in the field, the Uruq Bani Ma'arid serves as an exemplary model for what the sector in the Kingdom can achieve. Digitalization efforts have also facilitated the documentation of natural heritage and the creation of shareable and interactive online content to raise awareness of the cultural significance of natural sites.
- Institutional and organizational developments in 2020 reflected a growing interest in environmental issues. The Ministry of Environment, Water, and Agriculture inaugurated five specialized centers responsible for protecting the environment and wildlife. These five centers are complemented by a new environmental fund that contributes to financial sustainability efforts within the sector. The Kingdom also became party to the Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilization to the Convention on Biological Diversity this year.







Food and Culinary Arts

- The Culinary Arts Commission was established and launched its strategy in 2020. 191 dishes were categorized in the ongoing inventory of traditional foods, 115 of which were recorded in Al-Madinah alone after the Commission launched a culinary arts documentation project there. In addition, several other initiatives emerged from the public and private sectors, resulting in the publication of a number of books on Saudi cuisine.
- The Covid-19 pandemic accelerated digital transformation in the restaurant sector. Most restaurants have moved to a delivery model. While some restaurants have created new offerings in line with health requirements, others have begun selling meal kits, which have allowed the sector to keep pace with the growing interest in culinary arts in the Kingdom.
- The cancellation or deferral of most culinary events were among the most prominent features of the culinary sector in 2020. Comparing the attendance figures for events that took place prior to the pandemic to others that took place subsequently reveals the extent to which the pandemic affected attendance at such events.
- The number of Saudis who reported working as general chefs was 1,523, accounting for only 2.44% of the total number of workers in the sector. Only 31 Saudi head chefs were reported, marking a slight increase over the past five years.
- As of 2020, there were 3,444 active enterprises registered for selling traditional foods and 2,374 registered as traditional cafes. The number of small family-owned online culinary businesses (locally dubbed the “productive families”) increased, with a total of 12,568 stores registered on the Maroof digital platform in the kitchen and bakery category. Several public and private initiatives were launched this year to support family-owned businesses.







Publishing and Translation

- According to legal deposit statistics at King Fahad National Library, 8,497 new book titles were registered in 2020. Nevertheless, the publishing sector encountered logistical and financial challenges, including a limited publishing capacity. The percentage of books by first-time authors decreased this year, accounting for only 40% of the total titles. Moreover, the statistics reveal a low representation of titles by female authors.
- Although translation initiatives saw significant activity in the Kingdom, the number of translated books has not kept pace with the total number of published titles: in 2020, 513 books were translated, down from 600 books translated on average each year over the last five years.
- Online reading activities were popular as a way to deal with isolation and social distancing. These activities included initiatives in response to the pandemic as well as traditional book club activities held virtually. Likewise, institutions active in the field organized virtual events, including forums and online training courses.
- While the publishing sector faced a number of difficulties in 2020, the biggest challenge was the cancellation of book fairs inside the Kingdom and beyond. These cancellations led to a drop in overall book sales, compounded by the closure of bookstores. Despite the increase in online book sales, this increase did not offset the financial impact of the loss of traditional sources of revenue for publishing houses.
- Despite the challenges that the e-book industry still faces, there are positive indications for its potential growth. The Cultural Participation Survey reported that a quarter of respondents had read an e-book, and 80.64% of them had purchased e-books in the past. Data from the past two years also suggest that online book sales were growing even before the pandemic accelerated the pace of digitalization.
- Developing the publishing and translation sectors falls under the mandate of The Literature, Publishing, and Translation Commission, established in 2020. In addition to developing these sectors, the commission is responsible for supporting translation and the publishing industry more broadly, improving professionalism, and regulating the sector's markets.



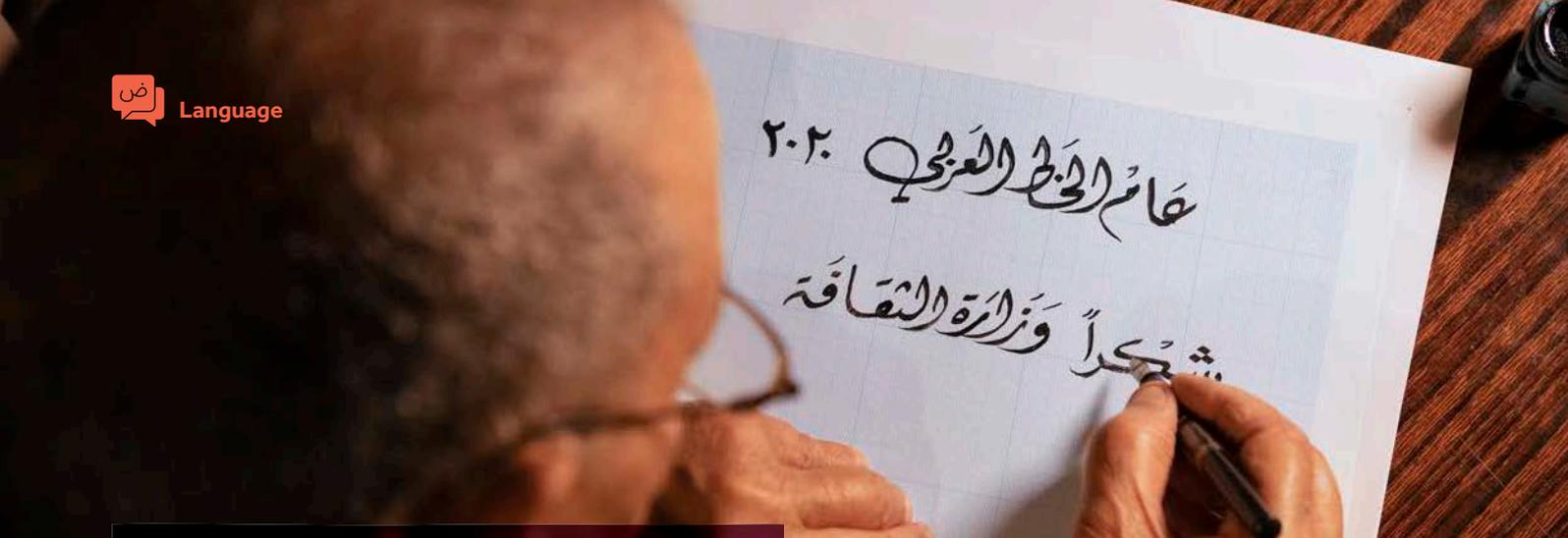




Language

- Scientific Research and Scholarly Production
- Recognition and Dissemination
- Arabic Language and Digital Technologies
- Participation
- Organizational Developments





The Arabic language maintains a pervasive and deeply penetrating presence across social, cultural, and educational dimensions in the Kingdom. It has, therefore, a potent, identity-shaping force throughout various facets of Saudi society. Arabic has concurrently received institutional support for activities of linguistic production over the decades and through 2020. These activities include publishing books and scientific journals on the Arabic language and holding academic conferences and seminars. The latter were affected by the Covid-19 pandemic, thereby expanding participation as events moved to the virtual space. This new reality affirmed the importance of linking the Arabic language with digital technologies, the most pressing being artificial intelligence (AI) given its applicability to everyday activities. To that end, the Kingdom promotes AI technologies through several bodies, including the King Salman International Complex for Arabic Language—the establishment of which was approved by the Council of Ministers in 2020—the King Abdulaziz City for Science and Technology, and a plethora of entities dedicated to promoting the utilization of modern language applications to meet the exigent demands of today’s technological age.

Scientific Research and Scholarly Production

Linguistic Research and Publication

Saudi universities are active in producing scholarly material related to Arabic linguistics, alongside several specialized and non-specialized institutes and research centers that contribute to linguistic research and publication. This year, the King Abdullah bin Abdulaziz International Center for the Arabic Language continued to publish its three academic journals: Arabic Linguistics, Language Planning and Policy, and Teaching Arabic as a Second Language.⁽¹⁾ Two of these journals achieved high rankings in the Arab Citation and

Impact Factor (ARCIF) index for peer-reviewed academic journals in the Arab world. Arabic Linguistics was ranked first in 2020, and Language Planning and Policy came in second,⁽²⁾ with the latter obtaining a score of 1.92 from the Association of Arab Universities in their annual Arab Impact Factor rating.⁽³⁾

The Center for Research Excellence in the Arabic Language at King Abdulaziz University also released a series of research projects that were selected for the Research Priorities Grant Program. The program was launched by the Center in 2019 to encourage researchers in the field of Arabic language studies to explore several topics, including language and identity, language and society, language and media, language and children, and language and translation.⁽⁴⁾

Table 1-1: Select linguistic journals and books released in 2020 by publishing houses and specialized research centers at Saudi universities

Parent Institution	Book or Journal Title	Author or Issue
Umm Al-Qura University ⁽⁵⁾	Umm Al-Qura University Journal of Language Sciences and Literature	Two issues
Al-Imam Muhammad ibn Saud Islamic University ⁽⁶⁾	Journal of Arabic Sciences	Two issues
The Islamic University of Madinah ⁽⁷⁾	Islamic University Journal of Arabic Language and Literature	Three issues
Dr. Abdulaziz Almani, Chair for the Studies of Arabic Language and Literature at King Saud University ⁽⁸⁾	The Brocade by Imam Abu Ubaidah Muammar Ibn Al-Muthanna Al-Taymi	Analysis by Abdullah Al-Jarbu, Abdul Rahman Al-Uthaimin

Parent Institution	Book or Journal Title	Author or Issue
The Scientific Publishing Center at King Abdulaziz University ⁽⁹⁾	Manifestations of Heritage in Contemporary Literary and Linguistic Studies	Edited by Abdul Rahman Raja Allah Al-Sulami
	The Intellectual and The Construction of Linguistic Identity	Samir Hamid - Moqbel Al-Daadi Osama Ahmed Al-Sulami
	Children's Linguistic Skills: Identification, Development, and Evaluation	Ali Abdul Mohsen Al-Hudaibi Saleh Ayad Al-Hajouri Ali Mohammed Al-Ghamdi
	Language Transformations and The Effectiveness of Technology in Producing Meaning: A Study in Literature for Children	Abdul Hamid Al-Husami Ibrahim Abu Talib Fawzi Sweileh
	The Interaction Between Identity and The Language of Instruction	Ahmed Kroum Hessa Al-Rashoud Saeed Al-Qarni

Table 1-2: Linguistic journals issued in 2020 by Arabic language institutions and research centers with linguistic contributions

Parent Institution	Journal	No. of Issues
Academy of the Arabic Language on the World Wide Web in Makkah ⁽¹⁰⁾	Journal of the Academy of the Arabic Language on the World Wide Web	3
King Faisal Center for Research and Islamic Studies ⁽¹¹⁾	Journal of Linguistic Studies	3
King Abdullah bin Abdulaziz International Center for the Arabic Language ⁽¹²⁾	Arabic Linguistics	2
	Journal of Language Planning and Policy	2
	Teaching Arabic as a Second Language	2
The Center for Research and Intercommunication Knowledge ⁽¹³⁾	Journal of Asian Interest in Arab Studies "Al-Iste'arab Al-Asiawe"	1

Scientific Conferences and Seminars

During the lockdown period and its corresponding travel restrictions, the digital space posed itself as an opportunity to utilize electronic platforms that would enable virtual attendance of scientific forums and conferences. The increased use of digital space in turn fostered more connections between interested parties and researchers specialized in language sciences and made the sector more active. For example, the Department of Arabic Language at King Saud University, in cooperation with the King Faisal International Prize,

held the third international conference on "the Arabic linguistic and literary achievement in foreign studies." The conference drew nearly 3,000 researchers and interested parties across various virtual platforms, including Zoom and YouTube.⁽¹⁴⁾ On July 9, the Islamic World Educational, Scientific and Cultural Organization (ICESCO) held a virtual international forum titled "Arabic for Non-Arabic Speakers Beyond the Covid-19 Pandemic: Renewing Strategies and Developing Tools and Methods."⁽¹⁵⁾ The King Abdullah bin Abdulaziz International Center for the Arabic Language launched its first edition of the Virtual Scientific Forum during the home confinement period.⁽¹⁶⁾

Table 1-3: Select conferences and symposia specialized in the Arabic language, 2020

Host Organization(s)	Symposium / Conference	Date Held
The Islamic World Organization for Education, Science, and Culture (ICESCO) and King Abdulaziz University	The Arabic Language: Prospects in a Transforming World (International conference) ⁽¹⁷⁾	December 21
The Department of Arabic Language at King Saud University and the King Faisal International Prize	The Arabic Linguistic and Literary Achievement in Foreign Studies (International conference, third edition) ⁽¹⁸⁾	November 10–12
Center for Research Excellence in the Arabic Language at King Abdulaziz University	Manifestations of Heritage in Contemporary Literary and Linguistic Studies (International symposium, first edition) ⁽¹⁹⁾	June 28–29
King Abdullah bin Abdulaziz International Center for the Arabic Language	Virtual Scientific Forum	June 22
The Arabic Language Academy in Makkah and the Knowledge Enrichment for Conferences and Research Company ⁽²⁰⁾	Arabic Language and Literature (International conference, first edition)	February 7–9

Saudi journals in the field of Arabic language rank highest on the Arab Citation and Impact Factor rating (ARCIF) 2020⁽¹⁾



Journal of Language Planning and Policy
 ARCIF: 0.1
 ISSN: 1658-7413
 King Abdullah bin Abdulaziz International Center for the Arabic Language, Riyadh, Saudi Arabia



Journal of Arabic Linguistics
 ARCIF: 0.2353
 ISSN: 1658-7421
 King Abdullah bin Abdulaziz International Center for the Arabic Language, Riyadh, Saudi Arabia



Umm Al-Qura University Journal of Language Sciences and Literature
 ARCIF: 0.0588
 ISSN: 1658-4694
 Umm Al-Qura University, Makkah, Saudi Arabia



Journal of the Academy of the Arabic Language on the World Wide Web
 ARCIF: 0.0625
 ISSN: 1658-6530
 Academy of the Arabic Language on the World Wide Web, Makkah, Saudi Arabia

Language Programs and Initiatives

Several initiatives and programs were launched in the language sector in 2020. These ranged from institutional efforts to joint initiatives between institutions and private sector companies to promote the Arabic language - some of which coincided with the World Arabic Language Day and the Year of Arabic Calligraphy. The Research Center for Arabic Language and Literature at Umm Al-Qura University launched the second phase of the Encyclopedia of Arabic Poetry with the theme "A million verses from the era of linguistic argumentation." It is the first electronic encyclopedia of Arabic poetry to focus on this topic.⁽²¹⁾ The King Abdullah bin Abdulaziz International Center for the Arabic Language hosted a set of specialized remote training programs for Arabic language teachers of non-native speakers, which continued throughout the month of September,⁽²²⁾ with 300 participating trainees from all over the world.⁽²³⁾ The Center for Research Excellence in the Arabic Language at King Abdulaziz University also celebrated World Arabic Language Day with the launch of its "Arabic for Health Practitioners" series.⁽²⁴⁾

Similarly, the Wadi Makkah Technology Company, owned by Umm Al-Qura University, the Saudi Commission for Health Specialties, and the Saudi Patient Safety Center signed two memoranda of understanding to launch the Abjad Training Portfolio as well as a standardized test to gauge Arabic language proficiency for non-native health practitioners. These projects aim to bridge a crucial patient-practitioner communication gap, simultaneously improving medical efficacy and patient experience at

1) "Arab Citation and Impact Factor (ARCIF) Database," ARCIF Analytics, <https://emarefa.net/arcif/ar/>.

once. They also aim to reduce errors and meet approved standards for patient safety.⁽²⁵⁾

The Minister of Culture declared the year 2020 the Year of Arabic Calligraphy.⁽²⁶⁾ This program, which spanned multiple cultural sectors, celebrates Arabic calligraphy and reinforces its significance as a symbol of the Kingdom's cultural identity through several artistic and educational initiatives.⁽²⁷⁾ Among those activities was the launch of the Basics of Arabic Calligraphy series by King Abdulaziz University and a student Arabic calligraphy competition for four calligraphy styles: Thulth, Naskh, Diwani, and Reqa. The university also launched an Arabic calligraphy education unit and an Arabic calligraphy initiative within the Linguistic Volunteer Program, in addition to hosting some prominent figures in Arabic calligraphy.⁽²⁸⁾

The Iqraa Linguistic Scale

The Iqraa Linguistic Scale Platform was launched in 2020 under the patronage of the governor of the Makkah Region. It is a standardized scientific test designed by Wadi Makkah Technology Company in cooperation with the National Center for Assessment and the Education and Training Evaluation Commission (ETEC). The test assesses the level of Arabic language competency for general purposes among non-native speakers. The test was designed according to internationally recognized scientific standards for assessment and evaluation. The project is expected to provide about 360 testing centers around the world, targeted toward institutions and companies that include non-Arab personnel, as well as individuals wishing to measure their Arabic language competency for work or study purposes.⁽²⁹⁾ The test marks an addition to the pool of language proficiency tests approved by the ETEC, such as the standardized Arabic language test for non-native speakers, made available by the Commission on its website in 2017.⁽³⁰⁾

Academic Accreditation for Programs Teaching Arabic to Non-native Speakers Worldwide

In December 2020, the ETEC launched the "Our Language is Accredited" initiative for centers, institutes, and programs for teaching Arabic to non-native speakers worldwide. This initiative aims to control the quality of Arabic language education programs by providing reference services in three different areas: academic institutional accreditation for institutes and centers that teach Arabic to non-native speakers; academic program accreditation for programs for teaching Arabic to non-native speakers; and training and quality consulting services.⁽³¹⁾



Recognition and Dissemination

World Arabic Language Day

World Arabic Language Day—designated on the 18th of December by the United Nations Educational, Scientific, and Cultural Organization (UNESCO)—is an annual occasion to hold activities pertaining to the Arabic language and its rich idiosyncrasies. It is celebrated by public educational institutions and centers as well as private sector companies through a range of joint activities. In 2020, these activities ranged from cultural and academic seminars to promotional and outreach competitions. On Twitter, the hashtag #World_arabic_language_day provided a space for those interested to interact and participate in the celebration virtually despite the circumstances of the pandemic—137,000 tweets were posted from participants within the Kingdom alone.⁽³²⁾ The theme of the celebration this year was: "Arabic Language Academies: Necessity or Luxury?"⁽³³⁾ Discussion panels and seminars were also held to elucidate the central role played by linguistic academies in protecting and preserving the Arabic language in the face of competition from foreign languages, especially in the fields of colloquial and scholarly communication.

In addition to the live-streamed meeting organized by UNESCO and broadcast on YouTube—in cooperation with the Permanent Delegation of the Kingdom of Saudi Arabia and the Sultan Bin Abdulaziz Al Saud Foundation—several centers, educational institutes, and literary clubs organized joint meetings and seminars through electronic platforms. A list of these events can be found in Table 1-4.

Table 1-4: Examples of virtual seminars and meetings held to celebrate World Arabic Language Day 2020

Event	Organizer(s)
Academies and Institutions of Arabic Language: Reality and Ideal ⁽³⁴⁾	King Abdullah bin Abdulaziz International Center for the Arabic Language, in cooperation with the Permanent Mission of the Kingdom of Saudi Arabia to UNESCO
The Comprehensive Arabic Dictionary: Concept, Objectives, and Methodology ⁽³⁵⁾	College of Arabic Language at the Islamic University of Madinah
The Role of Linguistic Academies in Supporting Arabization and Translation: Reality and Aspirations ⁽³⁶⁾	Center for Translation and Arabization at King Abdulaziz University
Electronic Lexicography: Towards a New Horizon ⁽³⁷⁾	Arabic Online Program at the Saudi Electronic University
Arabic Language Academies: Necessity or Luxury?	Academy of the Arabic Language in Makkah and the Sibaway Institute for Arabic Studies
Linguistic Academies and Consolidating Efforts in Service of the Arabic Language ⁽³⁸⁾	Literary Cultural Club in Jeddah, in cooperation with the Center for Research Excellence in the Arabic Language
Arabic Linguistic Academies: Challenges and Adaptation ⁽³⁹⁾	Literary Club in Riyadh, in cooperation with the Center for Research Excellence in the Arabic Language
Language Academies: Necessity or Luxury? ⁽⁴⁰⁾	Literary Cultural Club in Hail
World Arabic Language Day Meeting ⁽⁴¹⁾	Jawf Youth Council

World Arabic Language Day featured a series of celebratory and educational competitions and others aimed at encouraging creative production and cooperation in service of the Arabic language.

Table 1-5: Examples of competitions held to celebrate World Arabic Language Day 2020

Competition	Contest Form/Audience	Organizer(s)
Celebrating Our Language Competition ⁽⁴²⁾	Outstanding efforts in the service of the Arabic language— Individuals and institutions	Arabic Linguistics Institute at King Saud University, in partnership with Dr. Abdulmohsen bin Saad Al-Ruwaished Law Firm
Development of Specialized Digital Dictionaries Competition ⁽⁴³⁾	An online application that serves lexicons— Individuals or groups	Saudi Electronic University
Arabic Empowerment Competition ⁽⁴⁴⁾	Creative ideas for initiatives to empower the Arabic language in society— Individuals	King Abdullah bin Abdulaziz International Center for the Arabic Language
Question in Language Competition ⁽⁴⁵⁾	Interactive educational questions—Twitter users	Literary Club in Riyadh
World Arabic Language Day Competition ⁽⁴⁶⁾	Interactive educational questions—Twitter users	Literary Club in Jeddah
World Arabic Language Day Competition ⁽⁴⁷⁾	Video clip on the importance of the Arabic language— Secondary and university students in the Jouf Region	Literary Cultural Club in Jouf

Arabic Language Awards

Saudi Arabia has several Arabic language awards for linguistics and literature, poetry, translation, and general prizes for creative works written in Arabic. Among the most prominent international language prizes is the King Faisal International Prize, the 2020 theme of which was Linguistic Studies on Arabic in Other Languages. Dr. Michael Carter was awarded this prize in the language and literature category for his fifty years of publishing reference works contributing to the study of Arabic grammar in English.⁽⁴⁸⁾ Domestically, two prizes are presented annually in the Makkah Region: the Makkah Excellence Award and the Jeddah Innovation Award. The Center for Research Excellence in the Arabic Language at King Abdulaziz University won the Makkah Excellence Award this year in the cultural excellence category for its initiative titled, "Endowment of the Language of the Qur'an," a project that seeks to support financial sustainability in Arabic language initiatives.⁽⁴⁹⁾

Arabic Language and Digital Technologies

Digital technologies have penetrated every facet of society—a ubiquitous and visceral presence amplified by the Covid-19 pandemic. The discussion about the relationship between these technological developments and Arabic is no longer limited to affirming that Arabic is a language of science but has expanded to determining how Arabic speakers can benefit from digital developments. This question is especially relevant regarding a range of AI technologies that utilize natural language processing; these technologies are largely dependent on the unique structure of each language and require the development of language-specific applications. Therefore, the need for linguistic technology projects has grown in recent years, and specialists recognize the need for localized projects that promote these technologies and ensure their compatibility with the Arabic language.⁽⁵⁰⁾ Besides providing an overview of projects for developing digital content and building corpora for AI applications, this section discusses online Arabic instruction for non-native speakers in the Kingdom. The field of teaching Arabic for non-native speakers makes for a prolific example of both the opportunities and challenges facing the sector as they pertain to digital technologies—a reality made glaringly clear by the Covid-19 pandemic.

Most prominent international and local awards for the Arabic language

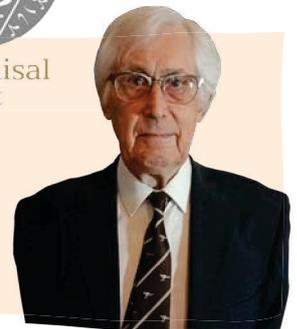
International Awards



King Faisal
PRIZE

King Faisal International Prize

Category: Language and literature
Winner: Michael Carter
Nature of work: Works in the field of linguistic studies on Arabic in other languages



Saudi Regional Awards



Makkah Excellence Award

Category: Cultural excellence
Winner: Center for Research Excellence in the Arabic Language at King Abdulaziz University
Nature of work: Endowment of the Language of the Qur'an initiative



Jeddah Innovation Award⁽¹⁾

Category: Creativity in the Arabic language

First place: Al-Furqan Group for Education and Information Technology
Nature of work: Noorani Method initiative for Arabic phonetics

Second place: King Abdulaziz University
Nature of work: Center for Research Excellence in the Arabic Language

Third place: King Abdulaziz University
Nature of work: "Proficient Fingertips" to teach the language of the Quran to deaf students at the university level



1) Saudi Press Agency, "Prince Mishaal bin Majed sponsors the third edition of the Jeddah Innovation Award Ceremony," November 2, 2020, <https://www.spa.gov.sa/2150987>.

Teaching Arabic as a Second Language Remotely

The education sector was disproportionately impacted by pandemic-induced disruption due to lockdowns prompting a rapid global shift to remote learning, instruction, and examination. Institutes for teaching Arabic as a second language faced unique challenges, most notably the difficulty of teaching languages with distance education techniques. The reason is that language instruction requires a sustained and direct in-person interaction. Additionally, the available technologies were ill-suited for language instruction. Some experts and practitioners in the field of teaching Arabic as a second language have noted that the pandemic revealed deficiencies in the technical readiness of institutes. This deficit was reflected in the modest or nonexistent registration at some institutes because of limited travel capabilities and insufficient remote language teaching tools.⁽⁵¹⁾

Many educational institutions were underprepared to teach remotely, and distance education in its current form remains unable to provide what is known as “linguistic exposure,” defined as the communicative experience and knowledge students acquire by interacting with their environment inside and outside the classroom. Despite these challenges, institutes for teaching Arabic as a second language benefited from the experiences of E-learning programs that have made significant progress at Saudi universities in recent years. For example, the Saudi Electronic University made its Arabic Online program for teaching Arabic to non-native speakers

available on the website of the ICESCO Digital House initiative. ICESCO launched the site in 2020 to mitigate the pandemic’s effects with its free program to teach Arabic to non-native speakers.⁽⁵²⁾ In December 2020, the Wadi Makkah Al-Maarifa Company launched the Learn Arabic platform in partnership with the Institute of Arabic Language for Non-Native Speakers at Umm Al-Qura University, a non-profit community initiative aimed at facilitating Arabic language education for non-native speakers.⁽⁵³⁾ It is hoped that the pandemic will accelerate the adoption of integrated electronic education programs dedicated to teaching Arabic as a second language and equipped with all necessary tools by major educational institutions. Teachers should, in parallel, be qualified and trained on how to use these programs.⁽⁵⁴⁾

Arabic and Artificial Intelligence

Artificial Intelligence (AI) applications are used in daily practices. Many of the spell-checking tools, translation applications, and personal apps available on smart devices depend on a machine functioning like the human brain. Machine learning and natural language processing are at the core of AI despite being relatively young fields. They can facilitate AI that mimics the intelligence of the human brain. This type of indispensable intelligence requires language processing since analyzing and understanding language is one of the most prominent functions of the human brain.⁽⁵⁵⁾ However, interfacing with languages can prove difficult, and Arabic, in particular, presents a unique set of challenges. The efficiency of AI and its ability to



process natural language depends on several factors, including the quality of available corpora discussed in the “Report on the State of Culture 2019,”⁽⁵⁶⁾ as the machine relies on its content to train AI algorithms.

Additionally, training AI requires an abundance of digital content that can be easily classified and processed.⁽⁵⁷⁾ It is difficult to measure the quality and quantity of Arabic digital content. This challenge is due to a lack of reliable, standardized measurement tools, as well as the challenges posed by multilingualism and paywalls around scholarly works. Notwithstanding these barriers, Arabic digital content is generally scarce and of poor quality, particularly compared to content in other languages. Recent surveys indicate that the volume of Arabic digital content is neither proportional to the number of Arabic speakers nor to those owning a computer in the Arab world.⁽⁵⁸⁾

To reduce the technological gap in the language sector, several institutions in the Kingdom are working with researchers across various disciplines to develop digitalization and AI projects that incorporate the Arabic language. The King Abdulaziz City for Science and Technology is perhaps the most prominent of these institutions and includes a special unit for human linguistics technologies and Arabic language processing.⁽⁵⁹⁾ The City has already made various technological contributions, including the use of Arabic as a technical language for the data storage and retrieval systems of general and specialized search engines; technological applications for speech recognition and generation, including Arabic text-to-voice; and an automatic identification system for the Saudi dialect that the City developed using data from the Saudi Voice Bank, which houses more than 60,000 audio files from 1,000 Saudi Arabic speakers of various ages, dialects, and communication modes.

The City is also working to develop machine learning technologies for modeling and processing language, such as machine conversation—systems prevalent in customer service. It has designed an automatic chatbot capable of answering inquiries by relying on AI algorithms and vision-based character recognition of Arabic symbols. These developments are in addition to the City’s efforts to build language resources and corpora for text and speech processing, such as the Arabic language corpus, discussed in the 2019 Report.⁽⁶⁰⁾ In 2020, the City developed a Covid-19 corpus that monitors Arabic digital content in the press coverage of the pandemic since its inception and draws from more than 300 million words collected from various Arab newspapers.⁽⁶¹⁾

Despite the growing interest in AI and linguistic computing projects in the Kingdom, these projects still fall short in



meeting their soaring demand—a trend that indicates great unmet potential for growth at the intersection of linguistics and AI. The problem is compounded by virtue of the dependency of the development of AI projects on the growth of cumulative knowledge, for which individual efforts (or the contributions of individual institutions) are not sufficient. The dearth of projects is also due to enormous challenges and weak investment incentives, including limited direct economic returns for many investors and business owners. These same businesspeople await the development of AI infrastructures so that they can implement the technology in more profitable user-facing products and services.⁽⁶²⁾ AI technology has already begun to attract several investors in the Kingdom benefiting from the work of computational linguists in the field of machine learning.⁽⁶³⁾ One such example is the work of Lucida Technologies, a company specializing in social media data analysis by using AI and natural language processing. Major international companies such as Google and IBM still dominate the prospects for AI in the Arab region compared to small and emerging local companies.⁽⁶⁴⁾

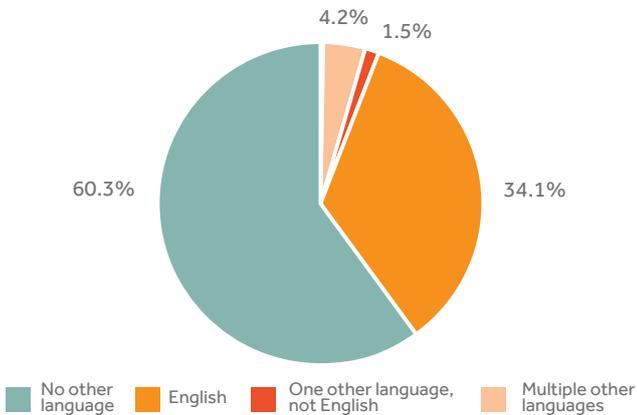
Moreover, as it stands today, the motivations of large companies are purely economic, failing to cater to the needs of the Arabic language, researchers, and specialists in the field at large. Their technologies are often subject to restrictions based on intellectual property rights. Therefore, it is increasingly important to invest in local projects, enhance the presence of the Arabic language in AI, and develop tools for dealing with the unique challenges of Arabic language processing.⁽⁶⁵⁾

Participation

The 2020 Cultural Participation Survey included questions that measure preferences for language use in social, professional, and educational settings in an attempt to gather baseline data on quotidian language use. The survey was conducted in the last quarter of 2020 and included a representative sample of Saudi and Arab respondents from all regions of the Kingdom.⁶⁶ Of those surveyed, 60% reported that they are not fluent in a language other than Arabic (see Figure 1-1), and 87% of participants answered that they prefer to speak Arabic socially. In comparison, only 12% prefer to mix both Arabic and English equally in social settings. However, professional and educational settings offer a different picture. Survey results indicate that the percentage of those preferring to use the English language rises to 8%, whereas 17% of the sample prefer to combine both Arabic and English in those environments (see Figure 1-2).



Figure 1-1: Percentage distribution of survey respondents fluently speaking a language other than Arabic



When breaking down respondents' answers by age-group, the Cultural Participation Survey indicates that a high percentage of those who are fluent in another language besides Arabic are younger, in contrast to the higher share of older respondents who answered that they do not know a language other than Arabic (see Figure 1-3). Tellingly, the participants' responses also show age-group differences in preference for using English in social, educational, or professional settings (see Figure 1-4). Only 5% of those over the age of 45 prefer to use English in their educational and work environments, and 9.5% of those under the age of 31 prefer to use it in those environments. Among younger respondents, 19.60% prefer to combine the two languages, which is 8% higher than those preferring to combine the two languages in the older age-group.

Figure 1-2: Percentage distribution of preferred language in social and educational, and/or professional settings⁶⁷

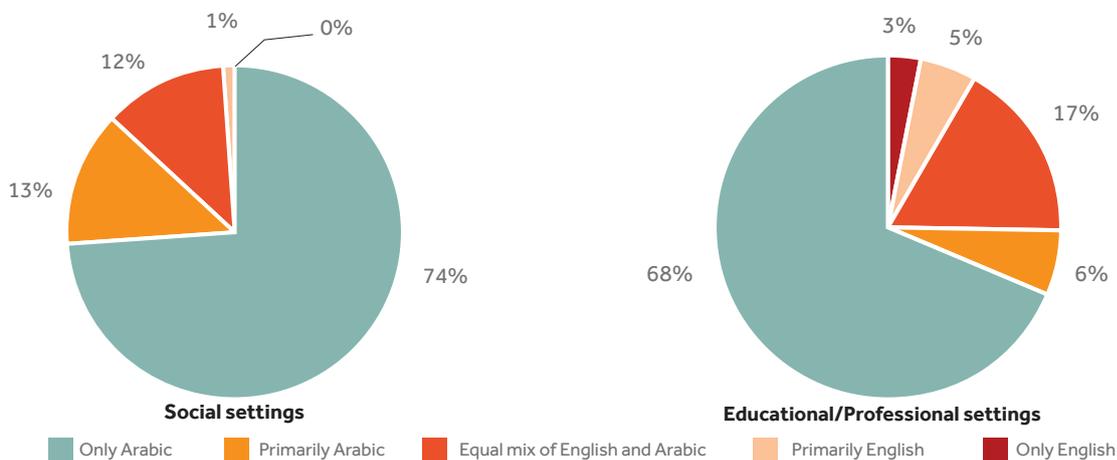


Figure 1-3: Percentage distribution of those who answered that they fluently speak another language besides Arabic, by age-group

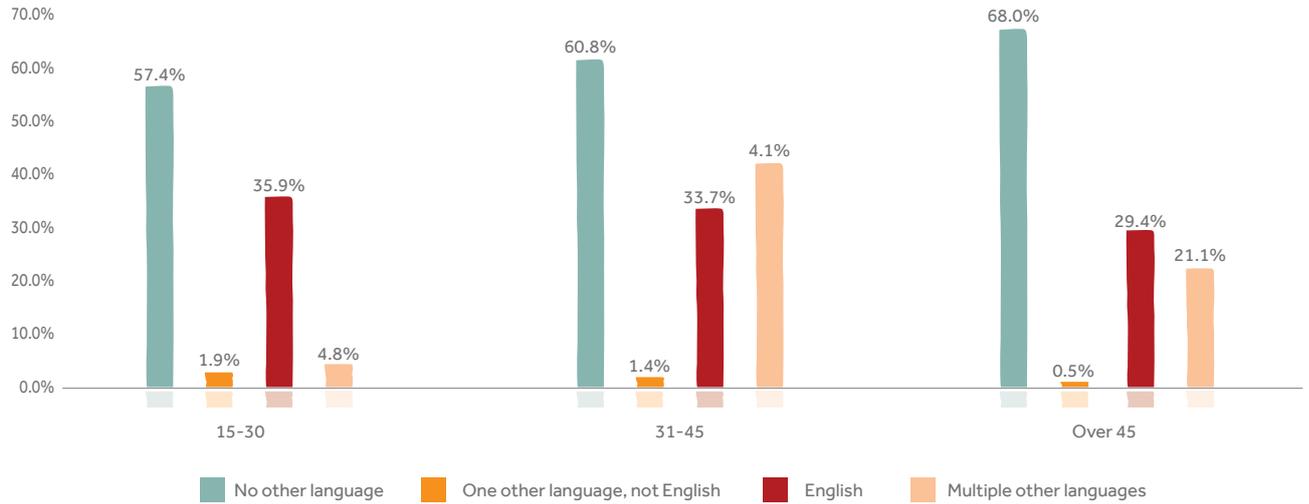
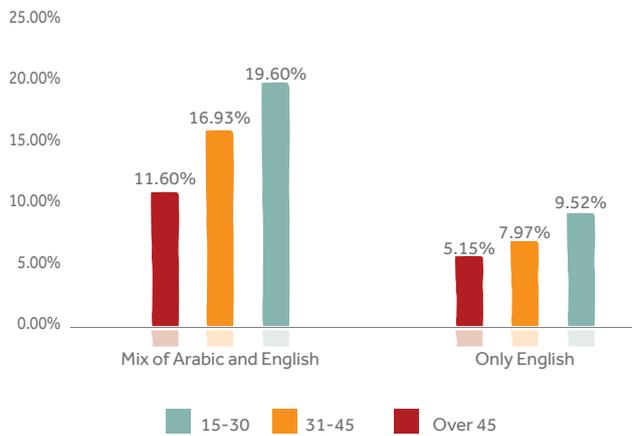


Figure 1-4: Percentage distribution of preference for using English in educational and/or professional settings, by age-group



The Future of the Arabic Language

This crystalizing phenomenon in professional and educational settings reflects what linguists and experts in linguistic planning and policy consider one of the most pressing issues hindering the realization of knowledge societies in the Arab region. Arabic's influence in both the Kingdom and the Arabic-speaking world is limited by the lack of knowledge production, particularly scholarly knowledge, and its decreasing applicability in professional and educational settings.



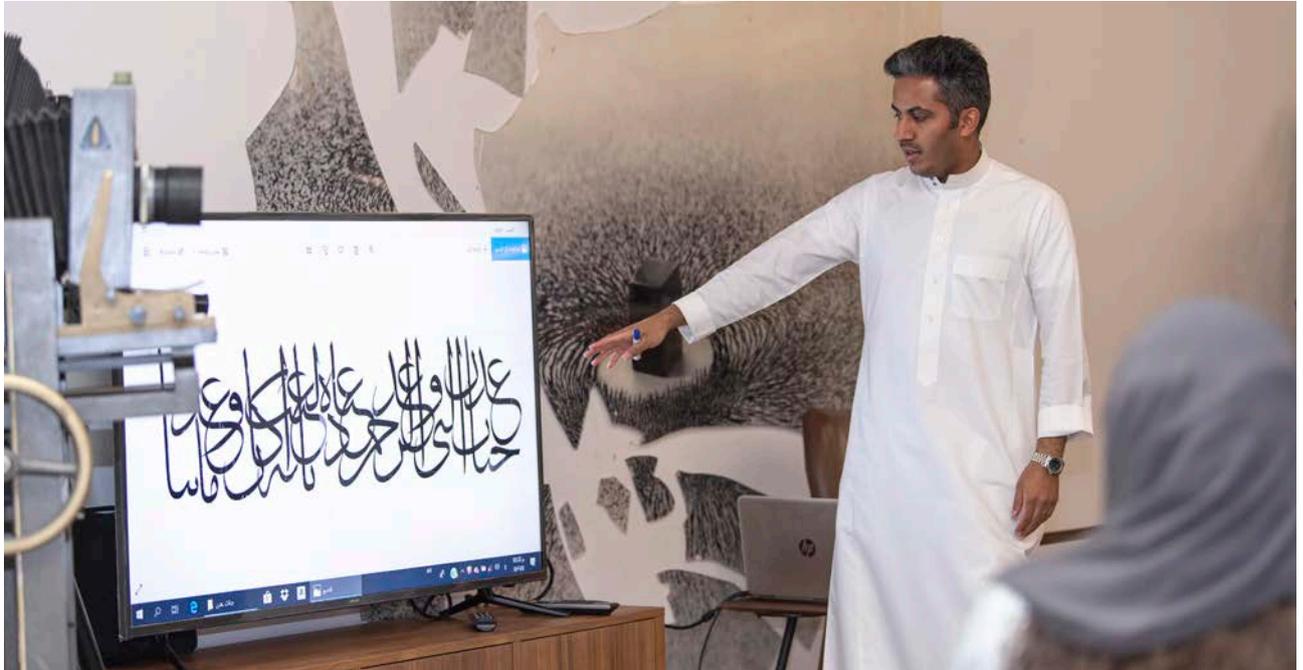


The 2019 Report discussed the history and reality of the institutional attention paid to Arabic in the Kingdom, focusing on the status of Arabic as an official language in all public fields, especially education. Despite the Kingdom's great strides in international indices monitoring and assessing the state of knowledge and the knowledge economy,⁽⁶⁸⁾ there needs to be a more concerted effort to bridge the chasm between the solid systemic protection enjoyed by Arabic and the reluctance in translating this protection into real-world applications. This gap can be attributed in part to the absence of an integrated system of language policies. Such a system would include a methodology by which all language-related sectors, primarily the education sector, would participate, ensuring the work is sustainable and strategic objectives are reached. This effort would solidify the position of Arabic as a primary engine for the production and localization of knowledge.⁽⁶⁹⁾

Organizational Developments

King Salman International Complex for the Arabic Language

After the Ministry of Culture announced its establishment in 2019, The King Salman International Complex for the Arabic Language was launched in 2020. The Complex is organizationally linked to the Minister of Culture and aims to consolidate linguistic scholarly work by creating the appropriate environment for its development. It supports scholars and researchers in conducting research and establishing standardized practices for language preservation. Among the tasks entrusted to the Complex and the organizations under its purview are setting language policies, issuing dictionaries, approving terminology, enriching Arabic content and scholarly production, and



developing tools in service of the Arabic language, including AI technologies.⁽⁷⁰⁾ The Complex, a long-awaited new entity, marks an addition to the variety of language institutions in the Kingdom and is tasked with fulfilling its specialized role as a language academy, together with various preexisting institutions, including academic institutions and specialized centers that promote Arabic.⁽⁷¹⁾

Decisions and Regulations Promoting Arabic

Building on the 2019 Report's list of the decisions and regulations concerning the promotion of the Arabic language, totaling 149 decisions through 2015,⁽⁷²⁾ the following presents the most prominent decisions issued from 2015–2020:

- In 2018, the Council of Ministers passed a resolution adopting Arabic as an official language at conferences and seminars organized inside Saudi Arabia by adding a paragraph to a clause of the Regulations on Holding Conferences and Seminars in the Kingdom Through Government Agencies with International Participation.⁽⁷³⁾
- In 2020, through a follow-up public announcement, the Saudi Commission for Tourism and National Heritage (now the Ministry of Tourism) re-emphasized that tourist accommodation facilities are required to use Arabic to communicate with clients. The Commission had previously issued a circular on the topic in 2012 and distributed it to workers in the sector throughout the Kingdom. This initiative—which was launched last year



through the Makkah Cultural Forum with the theme “How can we model the language of the Qur’an?”—was adopted by Prince Khaled Al-Faisal.⁽⁷⁴⁾ The resolution affirms the close relationship between the Arabic language and the Islamic religion; the Kingdom enjoys the honor of being home to the sacred sites of Makkah and Madinah. In addition, the resolution reflects that the Kingdom is aware of the importance of raising the status of the Arabic language, both among its residents and the visitors flocking from all parts of the Islamic world to visit the Two Holy Mosques.

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Literature

- Creativity and Production
- Recognition and Dissemination
- Participation
- Digitalization in the Literature Sector
- Organizational Developments





Contrary to sector-wide trends, literary writing and publishing have increased this year - lengthy periods of preventative isolation to combat the Covid-19 pandemic granted writers time to introspectively look inward and devote themselves to deeper creative work. The pandemic also influenced the nature of works published in the second half of the year. While attendance of and participation in literary festivals and events—both domestic and global—was affected by pandemic-induced cancellations, Saudi writers continued to be remarkably well-represented in literary prizes. Decisions to postpone or cancel in-person literary events were done in conjunction with a move to virtual participation via digital platforms which hosted a large number of virtual literary events. In addition, virtual competitions to promote literary production were organized by the Ministry of Culture and literary clubs in different regions of the Kingdom. The most important organizational development was the founding of the Literature, Publishing, and Translation Commission at the beginning of 2020. Its goals to strengthen literary content and support writers were announced in the fourth quarter of the same year.

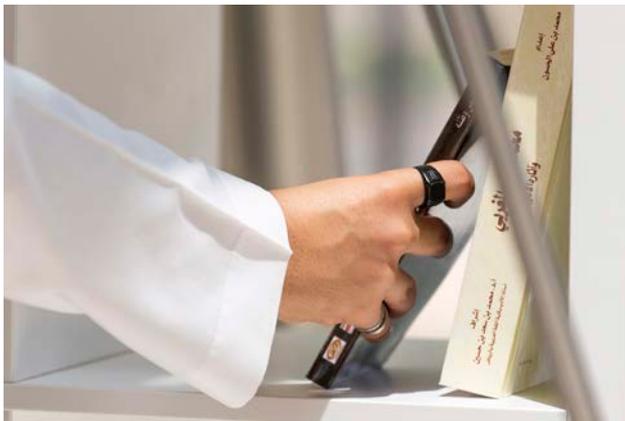
Creativity and Production

Literary Publishing

Although the pandemic has negatively impacted production across various sectors, literary publication rates remained on the same upward trajectory seen over the last four years.⁽¹⁾ Statistics on literary publication, compiled by the researcher Khalid Al-Yusif, indicate that the novel remains the most published genre, with more than 200 novels published in 2020. This rate is the highest for annual Saudi novel publishing yet recorded. More female novelists were published than their male counterparts for the first time in 2020, with 123 female novelists published compared to 78 male novelists. This comparison demonstrates that women's voices have an established presence in Saudi literature, especially in the narrative field. This contrasts with poetry, where female poets produce significantly less than male poets.

Table 2-1: Number of novels published, by gender

Year	Total Number of Novels Published	Male Novelists	Female Novelists
2004	30	22	8
2005	28	21	7
2006	48	26	23
2007	50	31	19
2008	64	49	15
2009	67	50	17
2010	86	50	36
2011	105	71	34
2012	86	63	23
2013	91	54	37
2014	79	50	29
2015	95	51	44
2016	141	84	57
2017	136	77	59
2018	150	75	75
2019	161	85	76
2020	201	78	123
Total	1619	1039	682



A recent increase has been noted in literary publications under the title of “essays.” Although these literary works are similar to prose poems, some writers prefer to call them essays as a broader category. In total, fifty-eight works of criticism on different literary genres, a necessary accompaniment to creative activity, were published. Overall, literary publication in 2020 increased from the year prior, from 604 published literary books to 663, more than 150 of which were written by first-time authors. Furthermore, the number of biographies published doubled—a trend first made clear earlier in the year when several well-known writers published their autobiographies at roughly the same time.



Table 2-2: Bibliography of literary publications, 2019–2020⁽²⁾

Field	2019–2020 Index	2018–2019 Index
Arabic Literature	18	6
Translated Arabic Literature	-	1
Arabic Literature-Bibliographies	3	2
Arabic Literature-History and Criticism	17	24
Arabic Literature-Biographies	22	5
Arabic Literature-Biographies-History and Criticism	2	2
Arabic Literature-Travelogues	3	3
Arabic Literature-Memoirs and Diaries	7	1
Arabic Literature-Translated Memoirs and Diaries	-	2
Arabic Literature-Articles	14	-
Arabic Literature-Essays	151	150
Arabic Literature-Translated Essays	4	3
Novels	201	161
Translated Novels	9	12
Novels-History and Criticism	10	13
Arabic Poetry	100	103
Arabic Poetry Anthologies	3	-
Arabic Poetry for Children	2	-
Translated Arabic Poetry	6	10

Field	2019–2020 Index	2018–2019 Index
Translated Arabic Poetry Anthologies	2	1
Arabic Poetry-History and Criticism	24	25
Short Story Collections	53	70
Short Story Anthologies	2	2
Short Stories for Children	4	1
Translated Short Stories	2	2
Short Stories-History and Criticism	4	4
Total	663	604

Publishing by Literary Clubs

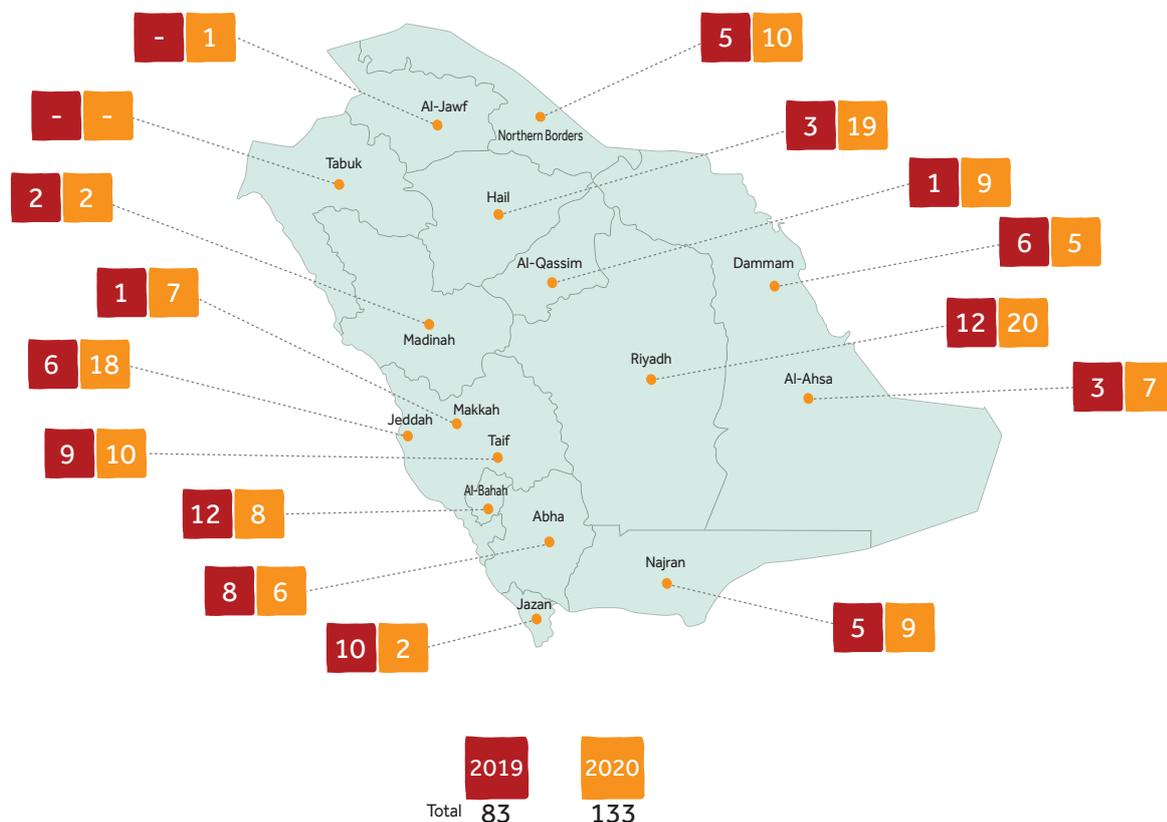
Literary publishing is one of the key functions of literary clubs in all the Kingdom's regions. Publishing standards in the literary clubs differ from those in private publishing houses because the clubs do not aim to make a profit. This allows clubs to consider a broader range of works for publication, including scholarly and academic studies, and to support rising talent and new authors who have not

yet published their first works. But in general, publishing activities vary from one club to another. While some have been active in literary publishing for years, others have been barely active.

Private Publishing Houses

Publishing literary works of Saudis outside the Kingdom has declined over the last three years. In 2018, 243 works were

Publishing activity by literary clubs



published outside the Kingdom. This number dropped to 214 in 2019, then to 197 in 2020. Many factors contributed to this decline, including the emergence of several local publishers in recent years who have competed to publish the works of Saudi writers. Just one of these publishers published 210 literary titles in 2020.

The Report of the State of Arabic Poetry

The Academy of Arabic Poetry issued its first report on the state of Arabic poetry in the middle of 2020. The report, which was prepared by thirty researchers specializing in literary criticism, describes the contemporary poetry scene in the Arab world, the most critical issues and transformations that it has undergone, and the poetry scene in the Kingdom of Saudi Arabia in 2019. The Academy announced its intention to prepare the report annually, making it one of the most important initiatives that the Academy has undertaken, along with several other vital initiatives announced this year.⁽⁵⁾ The Academy was founded in 2016 at Taif University with the goal of supporting talented poets in the city. In early 2020, the Academy's activities broadened to include the entire Kingdom with the launch of several key initiatives, including the inauguration of the Prince Abdullah Al-Faisal Competition, which provides for two separate tracks for high school and university students (both male and female), and the launch of the "Report on the State of Arabic Poetry." The Academy also oversees poetry clubs, now numbering 595, for students in schools in Makkah Province. The Academy announced at the beginning of March 2020 that it would hold an annual poetry forum in the Kingdom, beginning in the city of Jeddah. However, it was postponed due to the Covid-19 pandemic.

The Covid-19 Pandemic and the Content of Literary Works

Increases in literary publishing reflect a broader increase in literary writing. Two major factors have led to this increase in literary production during the pandemic. First, the pandemic has given writers ample free time to complete their creative projects or begin new ones. The second factor is the nature of the pandemic itself and the preventative policies that accompanied it, which gave writers the opportunity for deep rumination and creative introspection—both of which ultimately transmuted to their work. This affected the nature of literary works produced during this time,⁽⁴⁾ as demonstrated by poems with titles like "Corona and the Earth is Reborn" by Jassim Al-Sahih and "Pandemic" by Tareq Al-Sumaili. Some narrative works that appeared in the second half of the year, like "Time Flies: Writing on the Wall of the Room" by Saeed Al-Suraihi and "Qays Might: Isolation Narratives" by Hassan



Al-Nemi, also reflect the pandemic's influence. Another noteworthy development is the publication of many memoirs and diaries this year, reflecting the sense of the importance of documenting this unique historical moment.

Literary Prizes

Literary prizes give a general idea about the state of literary production. Many writers participate in major competitions for reasons that transcend mere monetary incentives. That is, to disseminate their works and attain sector-based recognition. This is especially true for international prizes or large prizes that give winners far-reaching visibility and intellectual credibility in the literary scene.

National Cultural Awards

The Ministry of Culture announced that it would begin accepting nominations for the National Awards on June 30, 2020. One of these awards is the Literature Award, which is aimed at individuals or organizations that contributed to enriching the sector in the last two years. The winners will be announced in 2021.⁽⁵⁾

The Prince Abdullah Al-Faisal Prize for Arabic Poetry

The second edition of the prize, which is organized by the Academy of Arabic Poetry at Taif University, offered prizes in the following three categories: Classical Arabic Poetry, Dramatic Arabic Poetry, Sung Poetry, and a new fourth category for the Best Initiative in Service of Arabic Poetry. The poet Abd Al-Latif Al-Mubarak won the prize for Classical Arabic Poetry for his entire poetic oeuvre, while the poet Haifa Al-Jabri won the prize for Sung Poetry for her sung poem "Damascus."⁽⁶⁾

The Rashid bin Humaid Culture & Sciences Award

Saudi writers and researchers in the literary field were remarkably well-represented in this Emirati award, winning nine out of eighteen awards for literature and literary studies.⁽⁷⁾

Table 2-3: Prizes won by Saudi writers and critics in the Rashid bin Humaid Culture & Sciences Award

Category	Winner	Notes
Literary Criticism	First Place: Dr. Al-Reem Al-Fawwaz	Topic: The polarity of space and the organization of meaning in the novel Sleepless Fire and Restless Water
Classical Arabic Poetry	First Place: Hassan Al-Khawildi Second Place: Ahmed AlRowaie	-
Modern Poetry in Classical Arabic	First Place: Ahmad Al-Hajji	-
Short Story	Second Place: Talal Al-Harbi	-
Children's Literature	First Place: Faraj Al-Dhafeeri Second Place: Abdullah bin Rustum	-
Poetry	First Place: Hassan Al-Rubaih Second Place: Yasser Al Ghreeb	-

Sheikh Zayed Book Award

The Sheikh Zayed Book Award, which is presented in the Emirates, announced a large number of nominations for the award this year. The long list included seven Saudi authors

Table 2-4: Authors on the long list for the Sheikh Zayed Book Award

Competition Category	Long-Listed Author	Literary or Critical Work
Literature	Hussein Ali Hussein	The novel The Faces of the Courtyard (The Book Cultural Center, 2020)
Literature	Maqbul Al-Alawi	The novel Seferberlik (Dar al Saqi, 2019)
Literature	Mohammed Ibrahim Yaghob	The poetry collection The Shrine of Forgetfulness (Arab Diffusion Company, 2019)
Children's Literature	Ali Al-Saba'an	How the Owl Lost its Beak (Ashjar Publishing and Distribution House, 2019)
Children's Literature	Latifeh Al-Shelwi	The Hat Maker (Kadi and Ramadi Publishing House, 2019)
Young Author	Hassan Abdu Sumayli	The poetry collection A Walk in the Courtyard of Doubt (Tashkeel Publishing House, 2019)
Young Author	Dr. Asma Alahmadi	"The Problems of the Narrated Self in the Saudi Feminist Novel: A Critical Study 1999–2012" (Arab Scientific Publishers, 2019)

Literary publication by private publishing houses

Number of Literary Publications in 2020



in three different categories: Literature, Young Author, and Children's Literature. The shortlist for the competition will be announced after March 2021.⁽⁸⁾

Recognition and Dissemination

Literary Competitions

Local competitions and prizes invigorate the local literary scene and encourage burgeoning talents. Most of these contests are either small or medium-sized. Some of them have seen the participation of writers from around the world, while others targeted Saudi writers, ranging from those well-established, young writers and even new talents in different cities and regions across the Kingdom.

Literature in Isolation Initiative

Given pandemic-induced lockdowns, the Ministry of Culture established the Culture in Isolation initiative. This initiative spans several cultural sectors, in addition to the Literature in Isolation initiative, which was organized by the Literature, Publishing, and Translation Commission. The Literature in Isolation initiative aimed to encourage Saudi writers to transform the experience of isolation into an opportunity to produce literary works. The temporary platform created for participants to submit their work was very popular. Within the span of merely a few days, more than 95,000 participants had utilized the platform. On July 23, the Commission announced the best submissions in different literary genres. In the Poetry category, the submissions of Athir Al-Faysal, Najla Matari, Athir Al-Sada, and Shuruq Al-Mahmadi were selected. Abd Al-Wahid Al-Ansari's submission was selected in the Diaries category. In the Short Story category, the selected authors



were Sami Ahmad Hassan, Wala Takruni, Zaynab Al-Shaykh Ali, Bilqis Mufarih, and Mahmud Al-Husayni.⁽⁹⁾ The high number of submissions in the Diaries category is noteworthy, as the increased popularity of this genre is one way the pandemic has influenced the literary scene.

Literary Club Competitions

Literary clubs play an especially important role in supporting rising literary talents by holding several competitions and offering small and medium-sized prizes aimed at writers local to the club and creatives from the Kingdom more broadly. It is worth noting that this year a large number of national literature competitions were held to celebrate the 90th National Day. Most of these competitions were aimed at amateurs and beginners.

Table 2-5: Literary prizes awarded by literary clubs and the winners' names

Club Name	Prize Name	Winners	Notes
Literary Club of Jeddah ⁽¹⁰⁾	The Narrative Pathways Prize for Short Stories	From second to sixth place, in order: Hadiya Hafi, Khalaf Sarhan Al-Qurayshi, Muhammad Al-Shahri, Sara Al-Quzi, Kamil Abd Al-Jawwad Rizq	The first prize was withheld.
Literary Club of Abha ⁽¹¹⁾	Human in the Heart of the Nation Competition	The first three places in order: Hawra Al-Humaili, Husayn Al-Zaydani, Hassan Al-Qarni	The competition was part of the Culture to Your House Initiative, which coincided with preventative health measures.
Literary Club of Jeddah ⁽¹²⁾	Abqr Forum Competition	The first three places in order: Abduh Al-Gozi, Raid Al-Wasabi, Ahmad Hawsawi	The competition was restricted to those who had not previously published a poetry collection and were under age thirty-five.
Literary Club of Riyadh ⁽¹³⁾	"To Glory and Supremacy" Competition for Sung Poetry	The first three places in order: Dalal Al-Maliki, Muhammad Al-Bakri, Abd Al-Aziz Al-Jasim	The competition was part of the 90th National Day events.

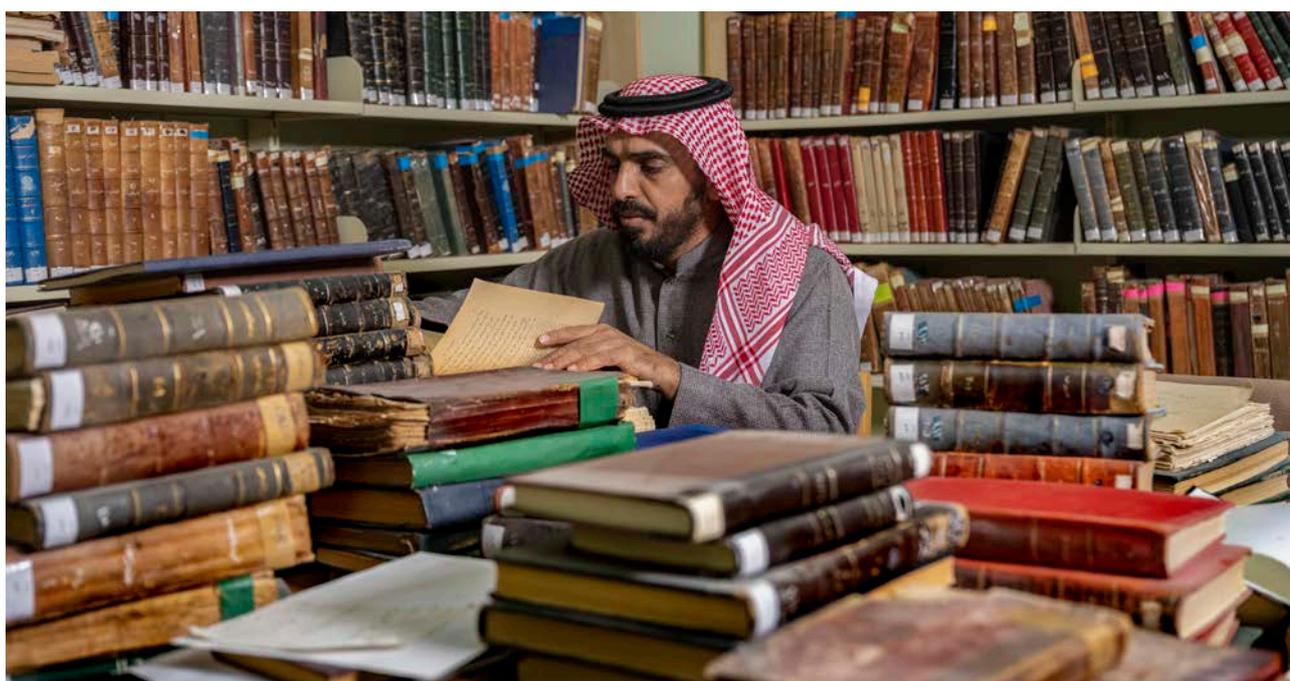
Club Name	Prize Name	Winners	Notes
Literary Club of the Eastern Province ⁽¹⁴⁾	Poetic Mettle Competition	The first three places in order: Salih Al-Rafai, Haytham Al-Akrumi, Abdullah Al-Uwaid, and Duha Al-Ghatam (tied in third place)	The competition was part of the 90th National Day events.
Literary Club of Tabuk ⁽¹⁵⁾	Neom in the Eyes of Dreamers Competition	The first three places in order: Yasser Al Ghreeb, Yusif Madkhali, Husayn Al Ammar	The competition was part of the 90th National Day events and was held on Twitter. ⁽¹⁶⁾
Literary Club of Abha ⁽¹⁷⁾	Elevation of the Nation Competition	In the Patriotic Poem category: Ibrahim Hallush	The competition was part of the 90th National Day events.

International Participation

Saudi poets commonly participate in Arab poetry festivals but rarely in international ones. At the beginning of the year, the critic Dr. Saad Albazei and the poet Muhammad Yakub participated in the Fifth Cairo International Forum for Arabic Poetry.⁽¹⁸⁾ That same month, the critic Majdi Khawaji and the poets Ibrahim Hallush, Hassan Al-Zahrani, and Mofareh Al-Shaqiqi participated in the Sharjah Arabic Poetry Festival.⁽¹⁹⁾ These events were held before the cancellation of public events and the imposition of restrictions on domestic travel due to the Covid-19 pandemic. The cancellations led the Saudi House of Poetry to launch a new initiative, the first International Balconies Poetry Festival, a virtual poetry festival where forty-two poets from twenty-seven countries participated in various languages. It was held in June via a live streaming platform.⁽²⁰⁾

The Saudi Society for Comparative Literature⁽²¹⁾

The Society was founded at King Saud University on October 6, 2020, to strengthen academic research on comparative literature, both in the Arab world and globally. It focuses on Saudi literary achievements and enriching the production of knowledge about Saudi literature through studies, criticism, analyses, and translations. The paucity of private actors in the comparative literature field renders this work even more significant. The Society launched a series of events that began in September with two lectures by Dr. Saad Albazei and Dr. Moneera Al-Ghadeer. It also held a panel discussion, titled "The Other in Saudi Society: A Reading of the Novel Throwing Sparks by Abdo Khal," in December in cooperation with the Saudi Novel Reading Group. The Society also announced a list of events planned for 2021.⁽²²⁾

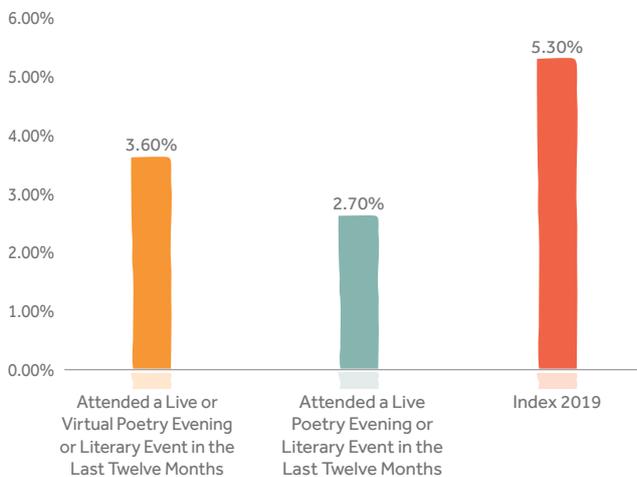


Participation

Literature Evenings

The 2020 Cultural Participation Survey, which gathered data in the last quarter of the year from a representative sample of 3,112 people from all regions of the Kingdom, reveals that attendance of literature and poetry evenings declined by nearly half. The attendance rate increases somewhat when virtual events, many of which were held this year after in-person literary festivals and events were canceled during the pandemic, are taken into account (see Figure 2-1). The attendance rate for men was twice the attendance rate for women (4.8% compared to 2.4%). Some observers note that virtual literary evenings by nature only attract a small segment of interested parties due to their inability to replicate the in-person experience. This demonstrates the importance of live evening events that allow for interaction between writers and their audience, especially for poetry.

Figure 2-1: Percentage of those who attended a poetry evening or literary event in the last twelve months



The numbers presented above do not necessarily indicate a fall in popularity, as the nature of these literary events attracts only a niche audience geared towards literary interests. The Survey indicates that the demographic makeup of those in this segment tends to be older and male. The attendance rate rises noticeably for those who are 55 and older in comparison with other age groups. The attendance rate for females is just 2.4%, a phenomenon which the 2019 Survey also reflected. This indicates that it is essential to look for ways to increase the participation of young people and women to reach a more diverse audience for literary events.

Figure 2-2: Percentage of those who attended a poetry evening or literary event in the last twelve months, by age

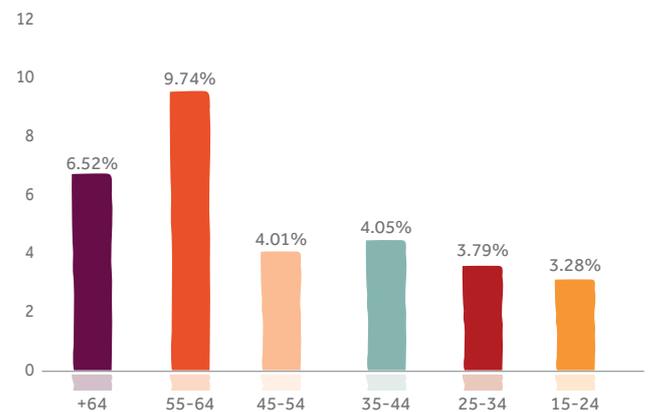
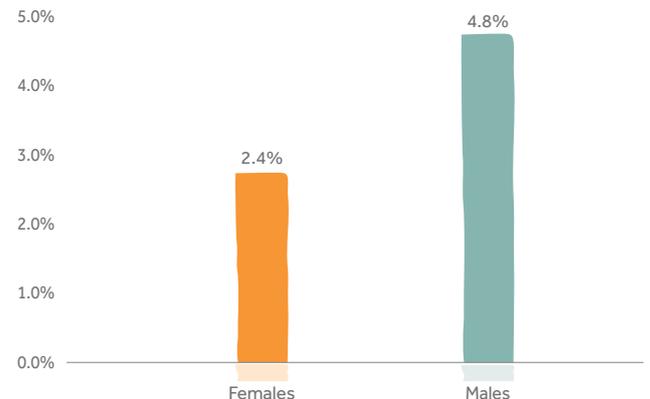


Figure 2-3: Percentage of those who attended a poetry evening or literary event in the last twelve months, by gender

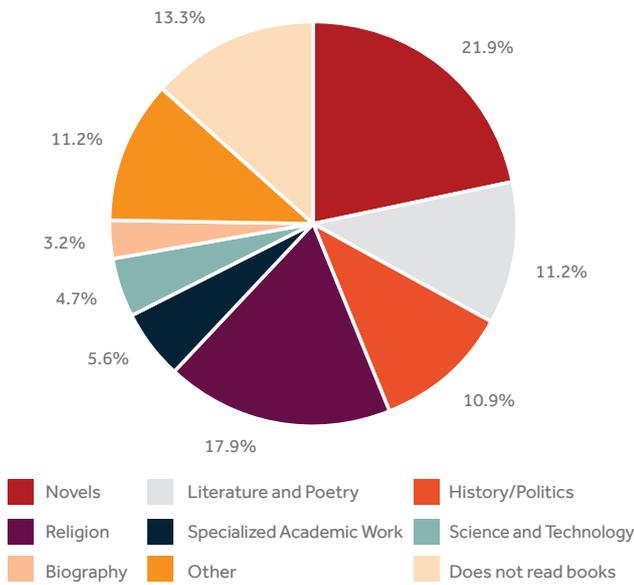


Reading Literature

In many cases, the published book is the final form of the literary product. Consequently, the relationship between the author and reader centers on the book—be it a novel, poetry or short story collection, or any other literary genre. Reading

literature was the most popular hobby of respondents in the 2020 Cultural Participation Survey, which showed that 31.1% of participants prefer reading novels and literature or poetry books. Reading novels alone represented 21.9% of the total percentage for all types of books.⁽²³⁾

Figure 2-4: Most popular literary genres among readers



Digitalization in the Literature Sector

Digital Literature and the Impact of Digital Mediums on Literary Works

Although the term “digital literature” is generally associated with the rise of the internet and the inclusion of digital elements in literature, its definition remains fluid and, in many ways, unclear. This is especially true given that other, overlapping terms have appeared, such as interactive literature, media literature, and generative literature, referring to literary experiments on social media. Some critics define digital literature as texts that utilize digital technology in a poetic or narrative work.⁽²⁴⁾ With this definition, digital literature can be differentiated as literature in which digitalization constitutes an essential part of the work, therefore excluding literature that uses digitalization merely as a medium for publishing. Although the use of digital mediums is an old phenomenon, their utilization by writers remains limited to several recent, incomplete experiments. The most complete example of a work whose composition relied upon digitalization is the poet Muhammad Habibi’s three digital poems produced in early 2006.

The paucity of projects that rely upon digitalization does not mean that they are totally absent, especially since new ways to circulate literary works have spread, like podcasts, social media platforms, and video streaming platforms. Making use of the possibilities offered by these mediums allowed digital tools to support literary works without altering their contents. Digital mediums and tools have influenced the form of literary works in different ways. For example, they have greatly increased the visibility of very short stories and a form called “miniature narratives,” as well as “flash” or “fragmented” poems on social media. Poetry and other recited literary works have been more represented than other literary genres on streaming and audio platforms, with the use of audio effects.⁽²⁵⁾

Virtual Literary Events

The preventative health measures that accompanied the Covid-19 pandemic led to the cancellation or postponement of all in-person events and resulted in the emergence of a wave of events held remotely across various platforms. For example, the World Encyclopedia of Arabic Literature initiative organized more than nineteen virtual events streamed on YouTube during the months of partial or total lockdown.⁽²⁶⁾ Several civil, private, and government



organizations took similar steps. From July 7 to October 10, 2020, the Literature, Publishing and Translation Commission held a series of twenty-two virtual events.⁽²⁷⁾ These literary gatherings dealt with various topics like poetry, novels, short stories, and children’s literature, as well as literary debates. All of the events were streamed live on the Ministry of Culture’s official YouTube channel.⁽²⁸⁾ In general, these platforms act as an alternative to in-person events that can be offered virtually without altering their format, like events that primarily involve dialogue between the presenter and guests, scientific and literary seminars, and events where only the presenters speak, like lectures and poetry and short story evenings. These virtual events are not only offered by organizations and institutions but also by several individuals who transformed their personal pages on social media into platforms to hold literary events. One such example is the Literary Salons initiative, which expanded from an annual event held only during Ramadan to a weekly initiative that started during the lockdown and continued for the rest of 2020. The salon hosted fifty-six Arab authors on virtual platforms and held its first Literature Forum for two days, from December 30 to 31, under the title “Linguistics: Theories and Application.”⁽²⁹⁾

Organizational Developments

The founding of the Literature, Publishing, and Translation Commission in February 2020 was the most important organizational development in the sector. The Commission is responsible for literary production oversight and supporting writers, as well as creating strategic opportunities for investment in the sector. Dr. Mohammed Hassan Alwan

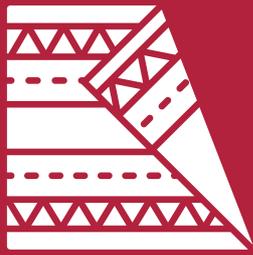


was appointed chief executive officer of the Commission. In July, the Commission’s Board of Directors was formed, with the Minister of Culture, His Royal Highness Prince Badr Bin Abdullah bin Farhan Al Saud, as chairman. The Deputy Minister of Culture Hamid bin Mohammed Fayez was appointed as vice-chairman, and Dr. Saad Albazei, Dr. Hamzah Al-Mozainy, Dr. Aziza Al-Mania, and Dr. Khalid Al-Rafai were appointed as members.⁽³⁰⁾ The Commission announced its three strategies for literature, publishing, and translation respectively in November. The literature sector plans to focus on five main agendas: strengthening Saudi literary content, increasing the visibility of Saudi writers, developing educational programs and discovering new talents, creating and sustaining productive partnerships, and cooperating with the Ministry of Education to enrich educational curricula with meaningful literary content.

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Fashion

- Creativity and Production
- Recognition and Dissemination
- Sustainable Management for Preservation of Traditional Fashion and Handicrafts
- Digitalization and Consumption in the Fashion Sector
- Infrastructure and Creative Economy
- Organizational Developments





Fashion is a cultural creative sector garnering deep interest due to its societal appeal and strategic significance. Two of the numerous initiatives and organizational developments in the sector in 2020 stand out: the establishment of the Fashion Commission and the certification of fashion-related professions in the Saudi Standard Classification of Occupations by the Council of Ministers in June. Initiatives were also undertaken to preserve traditional fashion and document it as an element of intangible cultural heritage. Additionally, public programs supported artisans whose revenue streams were restricted when the Covid-19 pandemic affected heritage festivals and seasonal events. The Covid-19 pandemic left its mark on Saudi designers' content — logistical challenges were particularly pronounced for producers in the sector. A boom in online shopping—the only option available to consumers during quarantine—contributed to an increase in online fashion retailers and a surge in online marketing.

Creativity and Production

As in other sectors, the Covid-19 pandemic influenced the fashion industry's production and creative activity in 2020. While the pandemic did have an adverse effect on manufacturing, it also inspired a creative response from those working in the field, as evident by the novel designs that emerged in response to preventive health measures. Masks became essential accessories once they were required in crowded areas, adding an aesthetic dimension to their medical function. Saudi designers introduced various styles and colors of masks to suit different tastes. This adaption continued with the gradual return to so-called "normal life" as masks became part of work uniforms. Some ministries, government entities, and private-sector corporations had masks made for employees with company logos printed on them.⁽¹⁾

As people grew accustomed to staying at home, they began to buy more comfortable clothes. As a result, fashion designers prioritized simple, relaxed-fit clothes with comfortable fabric types. Traditional women's attire was popular for its comfort and elegance.⁽²⁾ A market also appeared for beachwear to satisfy the demand created by border closures during summertime, setting off an increase in the popularity of local ecotourism, one of the few available options for recreation during the pandemic.⁽³⁾

Production in the sector was affected by the changes in global trade systems brought on by border closures and preventive health measures. This was especially true for companies dependent on foreign production.⁽⁴⁾ Internal manufacturing was equally impacted, as garment manufacturing production decreased by 46% in the Kingdom during May 2020.⁽⁵⁾ Some

local brands opted for temporary solutions to adapt to changing conditions to offset financial losses, including tailoring products, like masks, to consumers' needs during quarantine.⁽⁶⁾

Stimulating Production in the Sector

Despite the slowdown in production in the sector due to the pandemic, the efforts and support to develop startups in the sector resumed. At the end of 2020, the Fashion Incubation Program was launched virtually by the Ministry of Culture to provide knowledge support and improve the production of entrepreneurs, students, freelancers, and other workers in the fashion sector and related fields.

The program maintains a tripartite structure: The Hackathon, a three-day competition for designers, technicians, and sustainability experts; the Bootcamp, a five-day virtual event for competitors to improve their work and gain practical expertise and entrepreneurial skills from regional and international experts; and finally, the Incubator, an extensive program to support startups in the sector in developing their projects and obtaining financial support. The Hackathon features a first-place prize of a 5–7-day trip to Milan, Italy, the fashion capital of the world. Second-, third-, and fourth-place winners are granted financial and honorary prizes.⁽⁷⁾

Fashion Design Awards

Local Awards

The Ministry of Culture launched the National Cultural Awards initiative to support creative artists and encourage production

in cultural sectors at the end of June.⁽⁸⁾ Nominations were open on the initiative’s website through the end of September, and award winners will be announced in 2021.

Awards in the Arab World

The Vogue Fashion Prize was launched in 2020 with support from NEOM to seek out regional Arab talent. Among the ten finalist designers were two Saudi contestants: Saudi designer Yousef Akbar in the couture category and sisters Sarah and Siham Albinali in the ready-to-wear category.⁽⁹⁾

Five designers from the Arab world, including Saudi designer Yousef Akbar, won in the evening wear category of the annual Fashion Trust Arabia prize to support Arab talent.⁽¹⁰⁾ The competition was launched virtually this year on the prize’s Facebook and Instagram pages.

International Engagements

Despite the cancellation and postponement of many international fashion shows and events, Saudi fashion designers made their presence felt internationally through several engagements abroad. Designer Lulu Muhanna participated in New York Fashion Week 2020,⁽¹¹⁾ and fashion pieces from Norah Alhumaid’s collection were included in the Oriental Fashion Show in January at the Louvre in Paris.⁽¹²⁾ Designer Saja Alyousef’s Spring/Summer 2021 collection, inspired by Jabal al-Qarah in Al-Ahsa, was showcased in September at the first International Digital Fashion Week. FNL Network launched the initiative to support designers whose shows were postponed due to Covid-19.⁽¹³⁾

Recognition and Dissemination

Venues for Showcasing and Selling Fashion

The 20th Saudi Weddings Fair in Jeddah kicked off this year’s shows at the beginning of March, giving numerous Saudi fashion designers the opportunity to showcase their work⁽¹⁴⁾ and drawing more than 18,000 attendees.⁽¹⁵⁾ As in other cultural fields, the fashion sector proved flexible in handling cancellations of in-person events. Fashion shows and forums were held virtually this year on websites and social media platforms. Some forums adopted a hybrid model, synergistically combining a virtual element with in-person participation as life gradually returned to normal. Virtual events were held in parallel with the in-person audiences while following preventive health measures. For example, the College of Design at Qassim University organized the Fashion Design and Expectations Conference, held in late November, in addition to discussions on the relationship between fashion design and sustainable development, the use of technology in clothing production, and the field’s role in community service. The conference also held virtual shows for students’ work.⁽¹⁶⁾

The event planning company Add organized the digital 2020 Zari Ramadan fashion exhibition, offering a comprehensive virtual experience that included an exhibition with over fifty designers alongside seminars, discussions with fashion manufacturers, and the Zari Lounge, where attendees could network directly.⁽¹⁷⁾ Nevertheless, this year was not wholly devoid of in-

Sample of fashion shows and conferences in 2020



person fashion shows. For example, works from Samah Khashoggi's summer collection were showcased on a Red Sea cruise to Ras Al-Abyad island in October as part of the Saudi Summer 2020 (Breathe) activities.⁽¹⁸⁾

Fashion Heritage was particularly challenged by the cancellation and postponement of cultural heritage events and musical performances, thereby impacting artisans by limiting their opportunities to showcase and ultimately sell their products. Some fixed shop retailers, however, resumed activity when preventive health measures were lightened. One of these is "Sogha" in Riyadh, which sells traditional artisan crafts under the auspices of the Saudi Handicrafts Program (Bari').⁽¹⁹⁾

Sustainable Management for Preservation of Traditional Fashion and Handicrafts

National Lists

New methods were employed in 2020 to document intangible cultural heritage, including traditional fashion. In collaboration with the Ministry of Culture, the Saudi Heritage Preservation Society ("We Are Our Heritage") held a virtual campaign entitled "Engaging the Local Community in Preparation of Preliminary Lists of Elements of Cultural Heritage." Specialists communicated with community members from various regions across the Kingdom (Western, Eastern, Northern, and Central regions) to collect and document intangible cultural heritage, including fashion and related crafts.⁽²⁰⁾ The utilization of digital media is considered as a preliminary step toward the systematic work in preserving, archiving, and documenting national cultural heritage that the Ministry of Culture is preparing for.

International Lists

It was officially announced in 2020 that the art of Al Sadu weaving, a traditional weaving style, is inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity, an entry shared by both Saudi Arabia and Kuwait. Al Sadu is a craft used to decorate traditional fabrics for various purposes, including clothes, furnishings, and other textiles.⁽²¹⁾ Efforts have been underway since 2018 to have the Hasawi bisht, a style of handwoven cloak, inscribed as a traditional garment on the List of the Intangible Cultural Heritage of Humanity.⁽²²⁾



Digitalization and Consumption in the Fashion Sector

The Covid-19 Pandemic and Opportunities for Growth in Online Shopping

The rapidly increasing popularity of e-commerce in the Kingdom has generated fertile soil for sustained growth the fashion sector. According to a survey conducted by the General Authority for Statistics on penetration and use of information and communication technology among families and individuals, the segment of the population that shops online has doubled in size, from 15.26% in 2018 to 30.17% in 2019. According to the 2019 survey, about 67% of people making these online purchases have ordered clothes, shoes, or sports equipment, making these the primary types of products bought online.⁽²³⁾

The pandemic is accelerating this trend—local fashion brands were quick to adapt by launching websites and increasing their digital presence. "Fashion and Jewelry" was among the

top five activities of the electronic stores registered on the “Maroof” platform run by the Ministry of Commerce. The number of these stores increased by 171% in the first nine months of 2020.⁽²⁴⁾

Challenges to E-Commerce in the Fashion Sector

As observed in the 2019 Report on the State of Culture, Saudi designers are no strangers to cyberspace, and recent growth in the sector has opened up opportunities for Saudi designers. E-commerce outlets have become more accessible over the past five years and have become vital to designers’ visibility, showcasing of their work, and reaching a larger consumer base at a lower cost. The accelerated digitalization brought on by the pandemic may take this trend to new heights in this vital segment of the industry. However, seizing the opportunity for online sales is not immune its own respective set of challenges, especially pertaining to the unfair competition with global “fast fashion” companies. These retailers disproportionately control the online market by producing massive quantities of clothing that can be sold for low prices with little attention paid to quality. Furthermore, local designers struggle with intellectual property theft in the absence of stringent policies to control and limit such activity.⁽²⁵⁾

Displaying products online poses further challenges. Fashion designers have limited website templates and few professional photographers to showcase products online, and they struggle to apply their own artistic touch as freely as they would in traditional stores. Logistics and after-sales

services are also important to winning consumers’ trust when they make electronic purchases. However, trademark owners have limited control over these services in online stores, as they are operated by other companies. This can damage the trademark’s marketing reputation if after-sales service issues arise, such as delivery delays or returns and exchanges.⁽²⁶⁾

Infrastructure and Creative Economy

Sector Growth

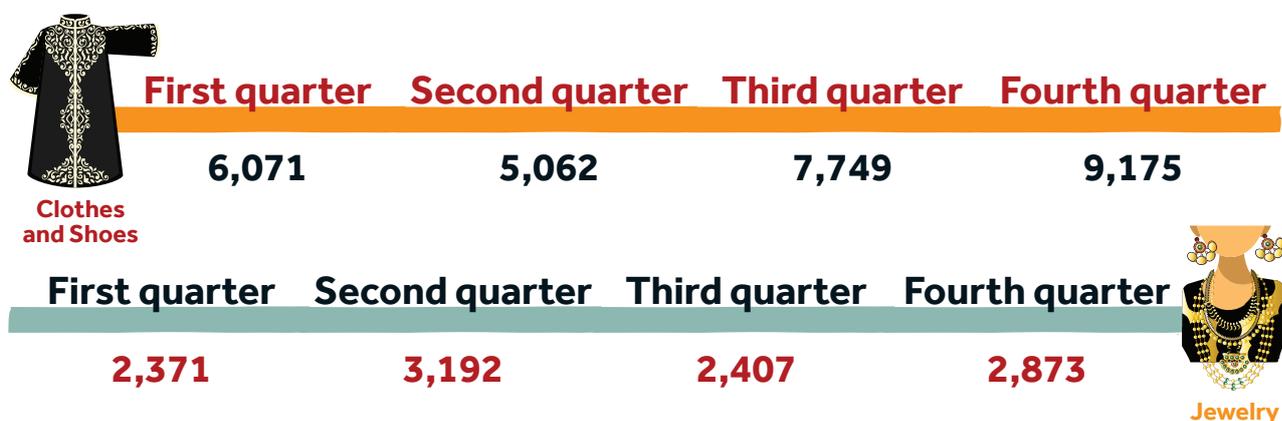
The fashion market depends primarily on importing various items from abroad (see Table 3-1).⁽²⁷⁾ Garment manufacturing in the Kingdom makes up for only 1.4% of all commercial activity, whereas textile manufacturing accounts for 1.2%.⁽²⁸⁾ Data from the Ministry of Commerce indicates that there were 714 commercial operations registered under Fashion Design, Garments, Shoes, and Jewelry category in 2020.⁽²⁹⁾

Table 3-1: Import and export value for clothing and garment category for 2020 (in millions of SAR)⁽³⁰⁾

Exports	Imports
1,011	9,869

Following the lockdown in early 2020, the value of point-of-sale transactions in the clothing and shoes sector plummeted in the first half of the year, then returned to higher levels in the following months.⁽³¹⁾

Value of point-of-sale transactions in the clothing, shoes, and jewelry sector in 2020 (millions of SAR)⁽¹⁾



1) “Monthly Statistics Bulletin,” Saudi Central Bank, December 2020, <https://www.sama.gov.sa/ar-sa/EconomicReports/MonthlyStatistics/Monthly%20Bulletin%20Dec2020.pdf>

Supporting the Sector

Artisans' work and spaces available to showcase their work were significantly affected by the pandemic as celebrations of national and social occasions came to an abrupt halt. These included national holidays, the holy month of Ramadan, and Saudi National Day celebrations, during which the demand for traditional costumes and products usually increases. Against the backdrop of these challenges, the Saudi Heritage Preservation Society ("We Are Our Heritage") launched the "We Won't Stop" initiative to support artisans. The initiative supported numerous crafts in the field of fashion, such as bishts, embroidery, prayer beads and accessories, weaving, and more. A total of 350 artisans were supported during three rounds of aid, including 141 artisans working in industries related to the field of fashion.⁽³²⁾

Table 3-2: Fashion crafts that received support from the "We Won't Stop" initiative

Craft	Number of Artisans
Weaving and embroidery	102
Al Sadu	69
Al-Qatt Al-Asiri (traditional interior wall decoration)	11
Prayer Beads	7
Beading	4
Sandals and other leather crafts	4
Bishts	3
Textiles	3
Wool	2

Work Opportunities and the Workforce

Ministry of Human Resources and Social Development's data reflects an increase in professionalism in the field of fashion design. The absence of Saudi designers registered with the Ministry in the "Report on the State of Culture 2019" is juxtaposed with the most recent data as of 2020, relaying a positive and substantive uptick of Saudis registered under the profession of fashion designer. Additionally, the number of those registered under the garment detailing profession has multiplied since last year, primarily reflecting organizational development toward recognition of this profession. In this

regard, the Ministry of Culture announced a collaboration with the Ministry of Human Resources and Social Development to incorporate new cultural professions into the new Saudi Standard Classification of Occupations that has been approved by the Council of Ministers. This new classification recognizes more than eighty new cultural professions, including some in the fashion design sector, such as textile design.⁽³³⁾

Table 3-3: Number of Saudi workers in registered professions in the fashion sector, by year⁽³⁴⁾

Profession	2019	2020
Fashion Design	-	49
Garment Detailing - General	47	618

Approximately 1,932 artisans have been registered in the Saudi Handicrafts Program (Bari') in various fashion and jewelry fields. This includes 679 in embroidery, 956 in garments, and 296 in jewelry.⁽³⁵⁾

Education and Skills

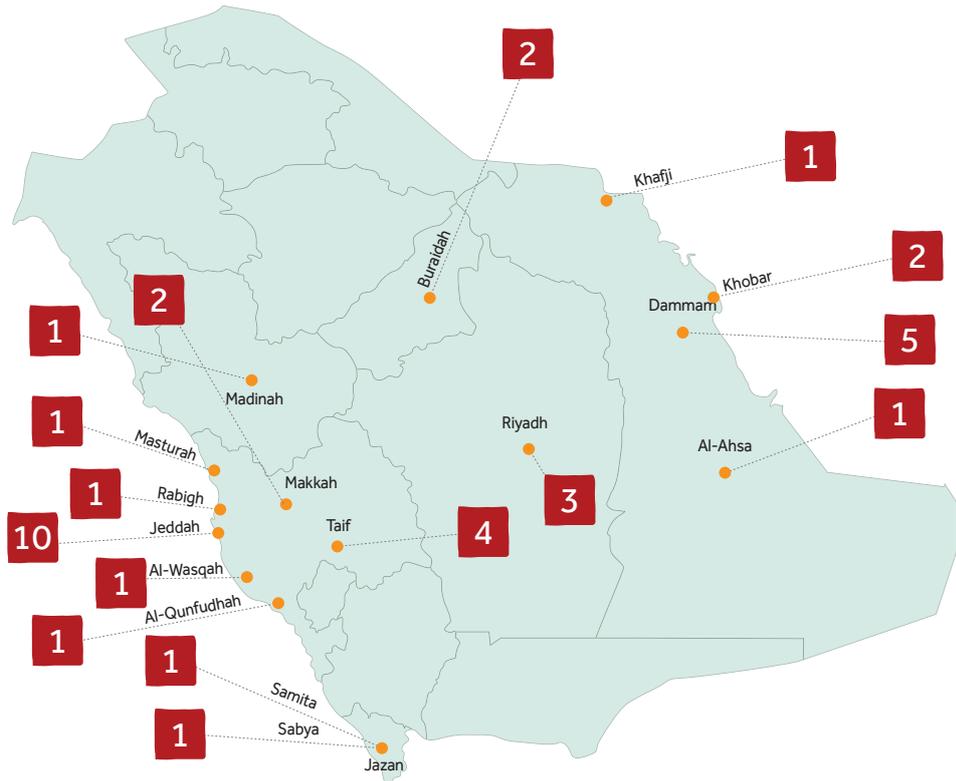
Training

The Technical and Vocational Training Corporation offered many fashion-related courses and programs in 2020. A total of seventy-seven programs were held at thirty-seven different centers and institutes throughout the Kingdom. A total of 1,108 women and five men graduated from these programs.⁽³⁶⁾ The General Entertainment Authority also held training sessions for both the participants and the winners of the Entertainment Challenges, one of which included a costume design category.⁽³⁷⁾

To adapt to pandemic-induced challenges, several virtual fashion and jewelry sessions were held in cooperation with the Google Digital Garage platform, covering embroidery, Al-Qatt Al-Asiri, and crafting prayer beads. These courses were offered to artisans registered with the Craftsman Register and to those interested in such courses. The total number of beneficiaries reached 200 people.⁽³⁸⁾

Furthermore, the Thaqiq Institute of Culture and Arts for Training at the Saudi Arabian Society for Culture and Arts launched a series of courses on fashion design that targeted beginners and amateurs in the field. The first courses on fashion design began in Ramadan, remotely and in accordance with preventive health measures.⁽³⁹⁾

Geographic distribution of training centers and institutes offering fashion courses and programs



Source: Technical and Vocational Training Corporation, as of December 30, 2020.

Organizational Developments

At the beginning of the year, the Minister of Culture announced the formation of the Fashion Commission as one of 11 cultural commissions. The Council of Ministers approved this move in early February 2020, and Burak Cakmak was appointed as CEO.⁽⁴⁰⁾ The Commission will oversee the fashion sector and is responsible for its development. The commission's responsibilities include, but are not limited to, creating and implementing a strategy for the sector, proposing standards and metrics, holding exhibitions and conferences, and motivating designers and workers in the field.⁽⁴¹⁾ In the second quarter of 2020, the Board of Directors of the Fashion Commission was formed, with Minister of Culture Prince Badr bin Abdullah bin Farhan Al Saud serving

as chairman and Deputy Minister of Culture Hamed bin Muhammad Fayez serving as vice-chairman. The board comprises Princess Reema bint Bandar, Princess Deena Aljuhani, Khaled bin Ahmad Al-Tayer, Burak Cakmak, and Rafi Thakran.⁽⁴²⁾ As part of its strategy, the commission proposes regulations required by the nature of its responsibility toward the development of the sector.



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Film

- Creativity and Production
- Recognition and Dissemination
- Participation
- Digitalization in the Film Sector
- Infrastructure and the Creative Economy
- Organizational Developments







Since the opening of commercial cinemas in the Kingdom, interest in producing feature films has grown substantially. New entities have arisen that are dedicated to developing local filmmaking and transforming it into a self-sustaining cinematic industry undergirded by a robust filmmaking infrastructure. However, the Covid-19 pandemic exacerbated the challenges facing the sector by disrupting film-related initiatives and festivals. Despite these setbacks, the sector proved resilient; several organizations introduced new competitions to produce short films and screen them on digital platforms to stimulate covid-induced stagnation. Forums and film festivals also moved online, offering a novel experience that inclusively granted access to a broader segment of film-lovers by initiating new and innovative participation methods. This digital expansion coincided with an increase in data consumption on these platforms during lockdown.

Although cinemas were closed for months, the number of cinema visits in the Kingdom in 2020 surpassed previous years. This trend is attributable to the rise in the number of cinemas in the Kingdom from 12 in 2019 to 33 in 2020, in addition to their wider geographic distribution across new cities in different regions of the Kingdom.

Creativity and Production

In 2020, private production companies, state production, and non-profit production offered a wider range of production opportunities for feature films, documentaries, and animated films. The animated film *Masameer*, directed by Malik Nejer and produced by Myrkott Animation Company and Tihama Holding, was screened this year.⁽¹⁾ The film *The Book of Sun*, directed by Faris Godus, was also screened, and the film *40 Years and One Night*, directed by Mohammed Alholayyil and produced by Abdulrahman Khawj, finished production. These two films won the Tamheed Fund awards offered by the Red Sea International Film Festival Foundation in 2019.⁽²⁾ The film *Najd*—a drama directed by Sameer Arif and produced by Khaled Al-Rajeh that is set in the city of Najd over 60 years to the present—was also released this year.⁽³⁾

In 2020, a prominent example of government film production was the documentary film *A Difficult Stage*, produced by the Center for Government Communication at the Ministry of Media. The film documents a series of human experiences in five regions of the Kingdom during the pandemic and lockdown. Seventy Saudis participated in filming the documentary, which took 75 days. It was shown at a special screening at AMC Cinemas in Riyadh in September.⁽⁴⁾

A second example of government production is the feature film *The Tambour of Retribution*, directed by Abdulaziz Alshlahei and produced by the Saudi Broadcasting Authority.

The film, which takes place in the late 1990s, was screened for the first time at Cairo International Film Festival.⁽⁵⁾

Manga Productions Company, which is under the auspices of the MiSK Foundation, produced the animated film *The Journey*. The film uses Japanese anime and DX4 technology to depict the history of Middle Eastern civilizations. A byproduct of a collaboration with the Japanese company Toei Animation, the film was directed by Kobun Shizuno and produced in both Riyadh and Tokyo by a team of more than 300 people. The first screening of the film was planned at the Cannes Film Festival in May, but the festival's 2020 edition was postponed after the pandemic outbreak.⁽⁶⁾

Filmmaking and the Covid-19 Pandemic

The pandemic disrupted some initiatives that support production, like the King Abdulaziz Center for World Culture's (Ithra) annual Saudi Film Days, which was planned for April and May 2020 but was postponed to 2021.⁽⁷⁾ The Red Sea Lodge, a competition organized in collaboration with its academic partner, TorinoFilmLab, selected twelve screenplays for feature films, six from the Kingdom and six from the Arab world. A team consisting of a director, a producer, and a writer worked on each project. The teams participated in three art residency programs in Jeddah,⁽⁸⁾ where experts offered training courses and specialized workshops that continued virtually after the spread of the pandemic.⁽⁹⁾

Table 4-1: Saudi projects selected for the Red Sea Lodge

Project Title	Writer	Director	Producer
Basma	Fatima Albanawi	Ali Alsumayin	Sarah Elnawasrah
Practicing Polygamy	Malak Qouta	Malak Qouta	Bentley Brown
Four Acts of Disruption	Hossam el-Helwa	Hossam el-Helwa	Mohammed Alhamoud
When the Star is Falling	Mohammed Salman	Mohammed Salman	Mousa Althonian
Sharshaf	Hana Alomair	Hind Al Fahhad	Talal Ayeel
A Trip to Disney	Abdul Aziz Al-Tuwajiri	Maha Al-Saati	Hussain Slam

Table 4-2: Arab projects selected for the Red Sea Lodge

Project Title	Director	Country
Scheherazade Goes Silent	Amira Diab	Palestine
Inchalla It's a Boy	Amjad Al-Rasheed	Jordan
The Arabic Interpreter	Ali Kareem	Iraq
Bullets and Bread	Mohammad Hammad	Egypt
The Basement Notes	Hadi Ghandour	Lebanon
I am Arzé	Mira Shaib	Lebanon

Film Projects Supported by the Red Sea Film Festival Foundation



Untitled Omnibus Feature

Private project to produce five short films by Saudi female directors **Hind Al Fahhad, Jowaher Alamri, Noor Alameer, Sara Mesfer, and Fatima Al-Banawi**, which discuss contemporary women's issues⁽¹⁾. The films were produced in collaboration with Cinopoetics Pictures⁽²⁾ and received a total of US\$400,000 in support⁽³⁾.



1) Saudi Press Agency, "The Red Sea International Film Festival reveals the details of its inaugural edition." February 17, 2020, <https://www.spa.gov.sa/2035784?lang=ar&newsid=2035783>.

Jeddah Focus Project

with US\$20,000 in funding for each film⁽⁴⁾.

Film	Director	Country
Amira	Mohamed Diab	Egypt and Palestine
Carnival City	Wael Abu Mansour	Saudi Arabia
Daughters of Abdulrahman	Ziad Abu Hamdan	Jordan
The Man Who Sold His Back	Kawthar bin Haniyeh	Tunisia
Alley	Basil Ghandour	Jordan

Wael Abu Mansour



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Film Prizes

Local Prizes

National Cultural Awards (Film Award)

The Ministry of Culture announced in 2020 that it would begin accepting nominations for the National Cultural Awards in all cultural sectors, including the film sector. The awards honor creative efforts, celebrate pioneers, encourage community participation, and stimulate the private and non-profit sectors to get involved in cultural fields. The winners will be announced in 2021.

The Red Sea International Film Festival

The Red Sea International Film Festival announced that its US\$500,000 film production grant would be divided between two films. The film *Sharshaf*, directed by Hind Al Fahhad, written by Hana Alomair, and produced by Talal Ayeel, won the Saudi Production Grant. The Egyptian film *Bullets and Bread*, directed by Mohammad Hammad and produced by Mohammed Hefzy and Kholoud Saad, won the Arab Production Grant. The Saudi film *Four Acts of Disruption*, written and directed by Hossam el-Helwa and produced by Mohammed Alhamoud, won the US\$25,000 development grant.⁽¹⁰⁾

The Saudi Film Festival

Submissions for the sixth edition of the Saudi Film Festival (held virtually this year)



384 Submissions

105 films by 86 male and 19 female directors

279 Screenplays

230 submissions qualified for the competition, including 53 films by 40 male and 13 female directors and 177 screenplays by 137 male and 40 female writers. They competed for 12 prizes with a total value of 285,000 SAR (approximately US\$76,000).

Categories of Competing Films

23 narrative films **14** documentary films **17** student films⁽¹¹⁾

1) Saudi Film Festival, "Saafa: Daily Program of the Sixth Edition of the Saudi Film Festival," Issue 1. September 1, 2020.

Table 4-3: List of films selected for prizes at the Saudi Film Festival 2020

Category	Prize	Submission	Director/Writer
Feature Film Competition	Golden Palm Prize for Best First Film	And When Do I Sleep?	Husam AlSayed
	Golden Palm Prize for Best Second Film	Lumiège	Dhay Al-Rashed
	Audience Prize	Block	Mohammed Atabani
Documentary Film Competition	Golden Palm Prize for Best First Film	The Village	Mohammed Al-Hammadi
	Golden Palm Prize for Best Second Film	Hawas	Khaled Zidan
	Audience Prize	Talal fi Daker	Saad Taheeh Al-Shahri
Student Film Competition	Golden Palm Prize for Best First Film	Return	Anas Al-Hamid
	Golden Palm Prize for Best Second Film	The First of Rajab	Nora Al-Fraikh
	Audience Prize	The Red Circle	Abdulaziz Sarhan
Unproduced Screenplays Competition	Golden Palm Prize for Best First Full-Length Screenplay	Scenarist	Muhammad Al Shaheen
	Golden Palm Prize for Best Second Full-Length Screenplay	Children of a Village	Muhanna Al-Muhanna
	Golden Palm Prize for Best First Short Screenplay	Screaming	Nayef Al-Osaimi
	Golden Palm Prize for Best Second Short Screenplay	Al-Qunbar	Aqbil Al-Khamis

International Prizes and Participation

At the end of 2020, the Film Commission nominated the feature film *Scales*, directed by Shahad Ameen, for inclusion in the Best Foreign Film category at the 93rd Oscars.⁽¹¹⁾ The film won several prizes in 2019.⁽¹²⁾

Table 4-4: list of Saudi films that won or were nominated for international prizes in 2020

Film	Director	Category	Prize	Nomination
The Tambour of Retribution	Abdulaziz Alshlahei	Feature Film	Salah Abu Seif Award (Special Jury Prize) and the Best Acting Performance Award to Faisal Al-Dokhi, part of the Horizons of Arab Cinema Competition at the Cairo Film Festival ⁽¹³⁾	-
The Girls Who Burned the Night	Sara Mesfer	Short Film	Special Mention, part of the Cinema of Tomorrow Competition, Certificate of Appreciation to the director at the Cairo Film Festival ⁽¹⁴⁾	-
Last Visit	Abdulmohsen Aldhabaan	Feature Film	Special Mention by the Jury in the Feature Film Category in the Official Competition of the first Amman International Film Festival ⁽¹⁵⁾	The Golden Falcon Feature Film Competition at Al-Ain Film Festival. The official competition of the Giffoni Film Festival in Italy ⁽¹⁶⁾
A Trip to Disney	Maha Al-Saati	Feature Film	Best Screenplay Prize at the El-Gouna Film Festival. ⁽¹⁷⁾ US\$10,000 in support from the ART network ⁽¹⁸⁾	Accepted by the Malmo Arab Film Festival in Sweden, received development funding. Accepted by the Filmmaker Lab of the Toronto International Film Festival
Najd	Sameer Arif	Feature Film	The Golden Falcon Feature Film Competition at Al-Ain Film Festival ⁽¹⁹⁾	-
40 Years and One Night	Mohammed Alholayyil	Feature Film	-	Best Original Score at the following festivals: ⁽²⁰⁾ Los Angeles Film Awards, Southeastern International Film and Music Festival, International Sound and Film Music Festival, Solaris Film Festival, World Film Festival Prize
Arabian Alien	Meshal Al-Jaser	Short Film	Best Narrative Short at the Atlanta Film Festival ⁽²¹⁾	The Official Competition of Sundance Film Festival, the Official Competition of the Palm Springs International Festival of Short Films ⁽²²⁾
Goin' South	Mohammed Alhamoud	Short Film	-	Grand Prize and Audience Award at the official competition of the Quebec City Film Festival The official competition of the Corti da Sogni International Film Festival for Short Films, 21st edition, delayed until 2021. The Official Competition of the Clermont-Ferrand International Short Film Festival. ⁽²³⁾

Recognition and Dissemination

Screening Venues

Despite the closure of cinemas from the end of March until June due to the pandemic outbreak, films in 2020 were screened for longer periods than in 2019.⁽²⁴⁾ The film *Masameer* was shown in cinemas around the Kingdom and Dubai in the United Arab Emirates⁽²⁵⁾ from January to March. The *Book of Sun* was shown at a special screening in Jeddah as cinemas were reopening following the lockdown.⁽²⁶⁾ Soon thereafter, the film was shown at other cinemas in the Kingdom and the United Arab Emirates until the beginning of October.⁽²⁷⁾ The premiere of the films *The Book of Sun* and *40 Years and One Night* was planned for the first official edition of the Red Sea International Film Festival in March 2020 – however, the festival was postponed due to the pandemic outbreak.⁽²⁸⁾ The same circumstances led the film *Najd* to be screened in July as well.⁽²⁹⁾



Table 4-5: Saudi films screened at cinemas in the Kingdom in 2020⁽³⁰⁾

Title of Film	Film Type
Masameer	Feature Film
Najd	
The Book of Sun	
Bonwira	
Ohrob Ya Khalfan	
321 Action	
Scales	
Last Visit	
Born a King	
Fifty Thousand Photographs	
Jaber	
The Investor	
Goin' South	
And When Do I Sleep?	
Barakat	
Self Breath	
Look Straight Ahead	
Spring Without Flowers	
Edible	
TWSTBF	
Dream of Dust	
Team	
Reunion	
Taghbish	
Swan Song	
Team12	
To What You Love	
Thoughts About Thoughts	
Stories from Historic Cities	Documentary

Table 4-6: Number of Saudi films granted clearances in 2020⁽³¹⁾

Commercial Films	
Feature Films	10
Short Films	6
Non-profit Films	
Feature Films	2
Short Films	3

After being shown in cinemas, *The Book of Sun and Masameer* were shown exclusively on the digital platform Netflix.⁽³²⁾ The film *The Perfect Candidate*, directed by Haifaa Al-Mansour,⁽³³⁾ and the film *Scales*, directed by Shahad Ameen,⁽³⁴⁾ were shown exclusively on OSN in 2020. Saudi television also screened several films this year, like the film *Najd*,⁽³⁵⁾ which appeared on television after leaving cinemas. The documentary *A Difficult Stage*⁽³⁶⁾ was also shown on the Government Communication Center's channel on YouTube. Television, alongside digital platforms, offers a stable, guaranteed opportunity for screening Saudi films after they have left cinemas.

Table 4-7: Number of licensed commercial cinemas in different regions of the Kingdom at the end of 2020⁽³⁷⁾

City	Number of Cinemas
Riyadh	16
Jeddah	6
Abha	1
Jazan	1
Al-Majma'ah	1
Dhahran	1
Hofuf	1
Jubail	1
Dammam	3
Tabuk	1
Hafar Al-Batin	1
Total	33

Table 4-8: Number of cinemas operating in the Kingdom by company⁽³⁸⁾

Operating Company	Number of Cinemas
VOX	11
MUVI	10
AMC	6
Empire	3
Cinopolis	2
Total	32

In contrast, screening opportunities for short films in independent cinemas remain limited. The Ithra Center cinema is the only non-commercial cinema that shows short



films and documentaries, and screens feature films.⁽³⁹⁾ The Art Jameel Institute announced in 2019 that it would hold a competition to design an independent cinema in Hayy: Creative Hub, the first of its kind in the Kingdom. It was set to open in 2020.⁽⁴⁰⁾

In a new development for the short film sector, six short films produced by Telfaz11 were shown on Netflix under the title "Six Windows in the Desert,"⁽⁴¹⁾ offering global visibility to Saudi movies, many of which are short films.

Different branches of the Saudi Arabian Society for Culture and Arts (SASCA), located all over the Kingdom, also screened films this year. The Society's branch in Dammam screened sixty-four films, its branch in Al-Ahsa screened forty-five, and its branches in Hail and Al-Jawf screened two films each.⁽⁴²⁾ To celebrate the Kingdom's 90th National Day, the sixteen SASCA branches across the Kingdom screened seven films, which 622 people attended.⁽⁴³⁾

In the Prince Faisal bin Fahd Fine Arts Hall,⁽⁴⁴⁾ the Red Sea International Film Festival screened five Saudi and Arab films as part of the fourth edition of MiSK Art Week, held on December 3–7. These screenings were followed by discussion sessions with the films' directors.⁽⁴⁵⁾

Film Festivals

The Red Sea International Film Festival

The inaugural edition of the Red Sea International Film Festival was planned for March 12–21, 2020, in Jeddah's historic district. However, the outbreak of the Covid-19 pandemic led to the cancellation of the festival's inaugural edition- only to be postponed until November 2021.⁽⁴⁶⁾

The Saudi Film Festival

The Saudi Film Festival was held in a unique way this year to compensate for the disruption that this sector witnessed during the quarantine. After the festival's administration announced that the sixth edition of the festival, which was planned for April 9–15, 2020, would be postponed due to preventive health measures, the festival was held virtually through the festival's YouTube channel on September 1–6, 2020.⁽⁴⁷⁾

The festival, which the SASCA organized in Dammam, was held as usual with support from the Film Commission in the Ithra Center's theater but without an in-person audience. Beginning on April 6, the festival's activities and screenings were streamed continuously for six days, totaling 127 hours of streaming.⁽⁴⁸⁾ Live streaming for 24 hours a day was a unique experiment that other film festivals worldwide, which have limited hours of live streaming, did not offer.⁽⁴⁹⁾

To adapt to the lockdown, a few sporadic initiatives emerged to screen local films on digital platforms. These included the "Tajreeb" program, which was launched by the Red Sea International Film Festival. The program screened eleven new Saudi short films, which were not bound by any artistic constraint, on the festival's YouTube channel on November 18–30.⁽⁵⁰⁾ The Ministry of Culture also launched the Culture in Isolation initiative during the lockdown in April. It encompassed several cultural initiatives, including screening a series of Saudi films under the title "Film Night." The link to watch the screenings was published on the ministry's different social media accounts.⁽⁵¹⁾

Film Competitions

Daw' Competition in Support of Saudi Films

At the beginning of 2020, the Ministry of Culture announced the directors, writers, and producers who won the Daw' Competition in Support of Saudi Films, which is part of the Quality of Life Program. The competition launched in September 2019 with SAR 40 million (around US\$10.67 million) in funding for films divided among the winners of the competition's four categories. This funding allowed their projects to proceed to the production phase.⁽⁵²⁾



Table 4-9: Winners of Daw' Competition in Support of Saudi Films⁽⁵³⁾

Competition Category	Name of Participant	Title of the Screenplay
Feature Films	Mohammed Salman	The Raven Poem
	Muhammad Al-Atawi	Among the Sand
	Dania Nassief	My Ancestors' Home
	Ayman Jamal	School
	Abdulmohsen Aldhabaan	Holes
	Osama Alkhurayji	Codon
	Abdulaziz Alshlahei	Hubal
	Tawfik Alzaidi	Nora
Short Films	Afnan Bawyan	Saleeg
	Nora Abu Shusha	Ya Hazi Fiki
	Rima Al-Majid	Year 30:00
	Raja Al-Otaibi	Forgive Me
	Maha Al-Saati	VHS Tape, Replaced
	Abd Al-Rahman Al-Jandal	Street 105
	Qasim Al-Shafi'i	The Way Back
	Fahad Al-Osta	The Blind Man and the Book
	Hassan Said	Strings
	Ibrahim Alkhairallah	Ball
	Alaa Yusif	Language Barrier
	Scripts Under Development	Mujtaba Saeed
Raid Al-Shaykh		Monster Fight Club
Omar Al-Badran		Ghazayil
Mufarrij Almajfel		Who are You?
Hassan Al-Hajaili		Sidrat al-Muntaha
Abd Al-Aziz Al-Issa		Twenty Years of Solitude
Completed Films Distribution	Maan Abd Al-Rahman	Madness
	Danya Alhamrani	The Saudi Woman's Success Story
Student Films	Mariam Khayat	A Monster from the Sky

The 48hr Film Challenge

New competitions were created to revitalize stagnating film production during the quarantine period, although they did not aim to produce actual filmmaking, according to experts.⁽⁵⁴⁾ The Red Sea International Film Festival collaborated with the Alliance Française of Saudi Arabia, the Consulate General of France in Jeddah, the French Embassy in Riyadh, and the National High School for Image and Sound Professions, La Fémis, to launch the 48Hr Film Challenge, which asked competitors to make a short film in two days in October. The competition was aimed at talented filmmakers between the ages of 18 and 25. The Jury selected fifteen teams to compete out of seventy-eight participants and offered them five workshops on filmmaking to develop their submissions. The two winning films were screened on the festival's YouTube channel.⁽⁵⁵⁾

The Up-Close Competition

The Cinema Club at the SASCA's Al-Ahsa branch organized the "Up-Close Competition" for writers of documentary screenplays about the Al-Ahsa region and its people. The competition, which was held virtually in June in partnership with the Al-Ahsa Marketing Committee of the Al-Ahsa Chamber of Commerce, hosted fifty-four writers of fifty-nine screenplays. The second phase of the competition



included a workshop to develop the three winning screenplays at the Cinema Club's workshop to transform them into documentaries with guaranteed funding of 50,000 SAR (around US\$13,300) and a cash award.⁽⁵⁶⁾

Elevation of the Nation Competition

To celebrate the 90th National Day, the Society's branch in Abha announced a national competition titled "Elevation of the Nation." Its goal was to stimulate creatives in different cultural fields. The competition had six categories, including film.⁽⁵⁷⁾

Global Recognition

The film *Sharshaf*, directed by Hind Al Fahhad, was selected by the Tribeca Film Institute - in collaboration with the Red Sea Film Festival Foundation - to represent the Kingdom at the Tribeca Film Institute's Creator's Market. The market was held alongside the Tribeca Film Festival, which was held virtually in April 2020.⁽⁵⁸⁾ Hollywood Foreign Press Association (HFPA) invited the director Maha Al-Saati to participate in the third HFPA Residency after her short film *Hair: The Story of Grass* won the HFPA Short Film competition.⁽⁵⁹⁾

Furthermore, Netflix announced a new collaboration with director Haifaa Al-Mansour to direct the film *The Selection*, based on a series of books by Kiera Cass.⁽⁶⁰⁾ Al-Mansour's film *The Perfect Candidate* was screened in cinemas in Germany after being dubbed into German.⁽⁶¹⁾ The film received support from the Saudi Film Council⁽⁶²⁾ and the German Federal Film Fund.⁽⁶³⁾

As part of the G20 Summit events held virtually this year in Riyadh, six Saudi films were screened on the Summit's website.

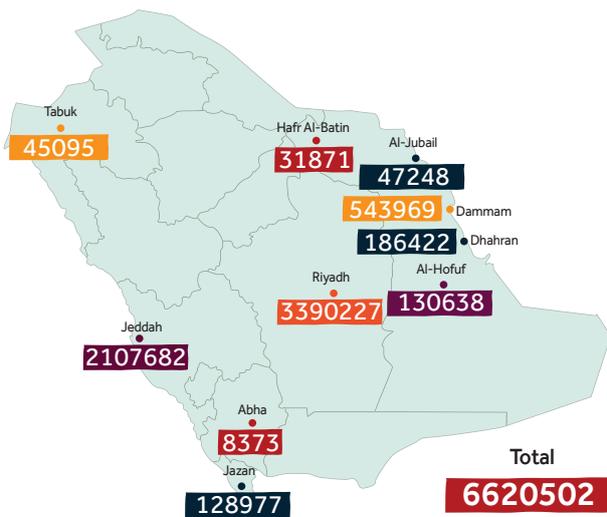
Table 4-10: Films Screened on the G20 Summit's Website in 2020.⁽⁶⁴⁾

Film	Director
Born a King	Agusti Villaronga
Fifty Thousand Photographs	Abduljalil Al-Nasser
Bastah	Hind Al Fahhad
The Cave	Abdulrahman Sandokji
Swan Song	Hana Al-Omair
Joud	Andrew Lancaster

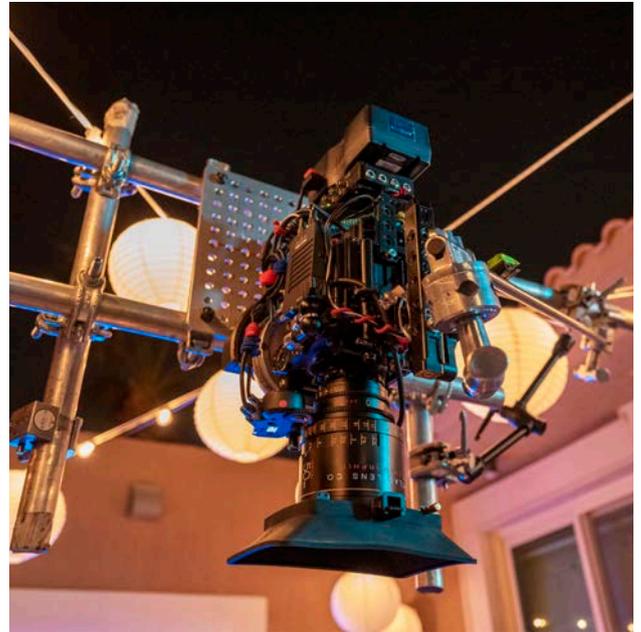
Participation

Despite the closure of cinemas in 2020 from March to June and preventive health measures that limited available seating once reopened, over 6 million tickets were sold in 2020 - a substantive uptick from 4 million tickets in 2019.⁽⁶⁵⁾ These figures may be attributable to a broader trend of new cinemas opening this year in Riyadh, Jeddah, and Dammam, in addition to other cities. The total number of cinemas soared to 33 in 2020 from 12 in 2019.⁽⁶⁶⁾ The fact that a larger number of Saudi films were available at box offices in 2020 compared to previous years may be an additional factor leading to the increase in cinema tickets sold this year. The film Masameer proved particularly popular in cinemas, selling over 150,000 tickets.⁽⁶⁷⁾

Number of Cinema Tickets Sold in 2020

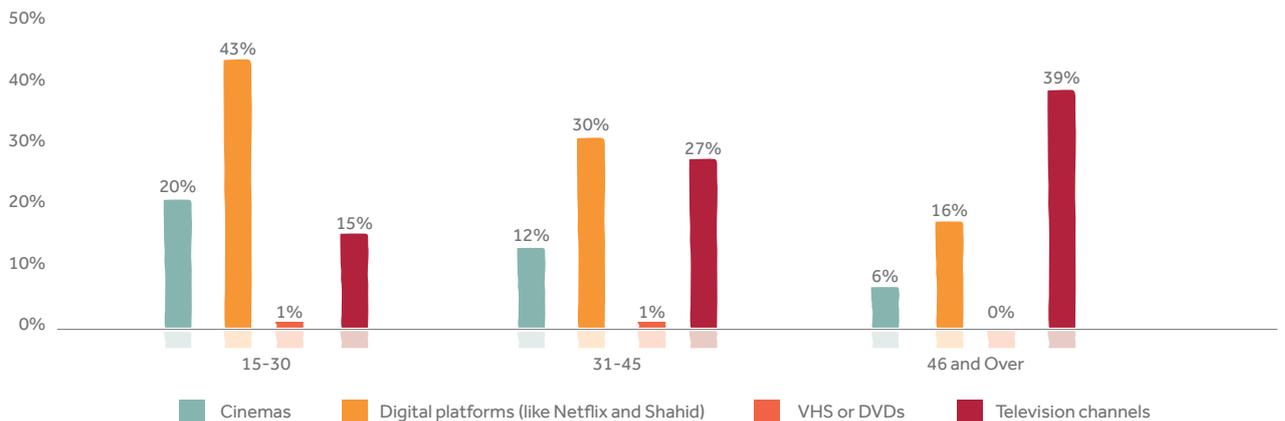


Source: General Commission for Audiovisual Media, January 3, 2021.



The 2020 Cultural Participation Survey, which was conducted in the last quarter of the year with a representative sample of 3,112 people from across the Kingdom,⁽⁶⁸⁾ reported a remarkable increase in the percentage of people reporting preferring watching films on digital platforms, with a total of 34% of those surveyed, compared with 27.1% of respondents who preferred watching movies in cinemas, and 23.1% who preferred watching films on television. In addition to the unique circumstances in 2020, which made digital screening methods a popular choice, the Survey showed that the 15 to 30 age group expressed the strongest preference for digital platforms, with 43% of this age group preferring them (see Figure 4-1). This can be attributed to many factors, including the fact that this age group is accustomed to using technology.

Figure 4-1: Preferred film viewing method, by age group



As for film festival platforms, the Saudi Film Festival's digital experience offered a new model for interacting with festival events and, more importantly, with the films screened during the six-day festival. Screenings on YouTube allowed films to reach an unlimited audience that encompassed different segments of those interested in film, not just those present in the immediate geographic area of the festival. Statistical data from the festival showed that the 127 hours of streaming reached 300,000 subscribers on the festival's channel and generated 63,200 views. The festival's Arabic publications received 27,300 hits and reactions on Twitter, Facebook, Instagram, news sites, and RSS services from people worldwide, including the Middle East, North Africa, Europe, and North and South America.⁽⁶⁹⁾

Digitalization in the Film Sector

As the 2019 report indicated, the rise of Saudi film has been coupled with digital platforms since the beginning of the millennium. These platforms provided a space for screening local productions and delivering them to audiences both inside the Kingdom and abroad at a time when cinemas were absent. After commercial cinemas took center stage, Saudi film faced difficulties in achieving visibility and competing at the box office, although its visibility was stronger and more pronounced on digital platforms. This disparity raises the question of how much these platforms can enhance Saudi films' visibility and recognition compared to cinemas.



Digital Screening Platforms

The business model of digital platforms offers a guarantee that films will be permanently available for screening. This makes these platforms a popular screening option for filmmakers who wish to avoid the risks of screening their films in cinemas that might stop showing the film earlier than agreed upon with the operating company if the film is not profitable.⁽⁷⁰⁾ This was an issue that several local Saudi films faced in 2019.⁽⁷¹⁾ According to experts and professionals in the field, Saudi films' visibility on digital platforms like Netflix, OSN, Shahid, Jawwy, and others cannot replace screenings in cinemas. A full commercial run in theaters can lead films to be disseminated on digital platforms after leaving theaters, thus increasing the number of views they receive. This reality underscores the need to adopt policies that support local films at the box office until the local commercial film market can develop increasingly important.

Some of the Saudi films that were shown on digital platforms reached a wide geographic distribution of viewers, overcoming the distribution barriers otherwise faced by commercial cinemas. For example, *Masameer* and *The Book of Sun* were only shown in the regions of the Kingdom where cinemas are available and in the United Arab Emirates. However, the two films were viewed many times within the Kingdom on Netflix and remained popular for weeks after the films were added to the platform's list of the top-10 most viewed content in the Kingdom. Additionally, the films were available to a global audience in 190 countries on Netflix and were subtitled in more than thirty languages.⁽⁷²⁾ The platform also screened Abdulaziz Alshlahei's film *Zero Distance*, which had not been shown in theaters in the Kingdom.

Nevertheless, the global dissemination of national digital platforms like Shahid and Jawwy remains limited.⁽⁷³⁾ Digital platforms for films are supported by the wide availability of the internet in the Kingdom, where 93% of the population (as of January 2020) had access to the internet. Of those with internet access, 97% report watching various types of videos on the internet, reflecting the popularity of digital visual content in the Kingdom.⁽⁷⁴⁾

Netflix views accounted for the third-largest consumption of data during the lockdown, totaling 6% of all data. This can be attributed to several factors, including the increase in the number of Saudi and Arab films and shows on Netflix in 2020 and the platform's efforts to include global films that were obstructed by the closure of cinemas. The rise in the rate of individual consumption of mobile internet services in the Kingdom, which increased in this period to 930 megabytes, three times the global average, also played a role.⁽⁷⁵⁾

Digitalization and Film Festivals

In 2020, the digitalization of the Saudi Film Festival made it possible to observe the interaction of audiences with the screened films through the dialogue section on the channel's page- an innovative feature that was constantly active. The Festival's use of open streaming made film screenings available to new audiences of those interested in filmmaking.⁽⁷⁶⁾ However, virtual screening also posed a challenge to participating filmmakers as film festivals require that participating films not be available on open platforms. The result was that participating filmmakers could not participate in other film festivals and led many participants to withdraw their films from the festival. These withdrawals brought attention to the importance of finding solutions to this issue, which is one of the many challenges that the pandemic continues to pose on holding festivals worldwide by, for example, organizing screenings that require registration.⁽⁷⁷⁾ Holding festivals virtually has granted filmmakers and other workers in the sector an opportunity to view all submissions without needing to neglect their own commitments to do so. However, virtual festivals also reduced opportunities to meet other workers in the sector to exchange ideas and develop opportunities to collaborate. In the years to come, Saudi festivals may benefit from a hybrid model for holding festivals, which will offer the full benefits of traditional, in-person festivals while retaining the advantages of interacting virtually with the latest developments in the sector.⁽⁷⁸⁾

Infrastructure and the Creative Economy

Production Studios and Complexes

As part of developing the necessary infrastructure for the sector, the chairman of the board of directors of Saudi Media City Company (SHAMAS) announced the completion of a 5,500 m² media studio in Riyadh as part of the SHAMAS project in February 2020. Work on an additional seven towers that include administrative offices and studios is ongoing.⁽⁷⁹⁾ The founding of the NEOM Media Center was also announced as part of the NEOM Project. The center will include 400 independent companies in fields including film, television, and digital publishing.⁽⁸⁰⁾ In addition, construction works for Diriyah Art Oasis in Al-Diriyah Governorate have been launched, including digital arts, photography, film production, and sound art programs in a collaboration between the Ministry of Culture and the Diriyah Gate Development Authority.⁽⁸¹⁾



Growth in the Sector

Although the sector still lacks essential resources, the revenues it yields make it a promising investment market for the Kingdom. At a time when global ticket sale profits declined by approximately 80% due to the spread of the Covid-19 pandemic, the Kingdom achieved the highest profit growth in the Middle East. Ticket sales for the first ten months of 2020 brought in US\$73 million, a two million dollar increase from the same period in the previous year, which coincides with the previously mentioned increase in the number of tickets sold in 2020. According to global estimates, cinemas in the Kingdom achieved US\$110 million in revenues in 2020, despite the exceptional circumstances and the months-long closure of cinemas. These figures exclude profits from other Arab, Indian, or independent films.⁽⁸²⁾

Job Opportunities and the Sector's Workforce

Occupational classifications in the visual media field in the Kingdom do not distinguish between workers in film production and television production-many relevant occupations also remain absent in the sector. To address this issue, the Council of Ministers adopted the Saudi Standard Classification of Occupation, which includes eighty cultural occupations that reflect the Ministry of Culture's collaborative efforts and the Ministry of Human Resources and Social Development to ensure that the job market is aligned with the cultural industry's needs. The occupations cover various areas of the film sector and include roles such as Film Director, Lighting Designer, and Acting Coach.⁽⁸³⁾

Table 4-11: Number of workers in some of the sector's occupations, 2020⁽⁸⁴⁾

Profession	Saudis		Non-Saudis		Total
	Female	Male	Female	Male	
Film Production Manager	5	13	0	20	38
Film Production Specialist	7	21	2	93	123
Actor	27	275	0	8	310
Script and Screenplay Writer	109	63	0	4	176
Cinematographer	5	28	0	72	105
Sound Technician	3	53	4	423	483
Lighting Technician	2	19	0	237	258
Director of Photography	1	4	1	19	25
Costume Supervisor (Theater or Studio)	91	10	1	4	106
Cartoonist	20	10	2	14	46
Production Writer	349	295	0	168	812

Education and Skills

Education

In 2020, the Design and Arts College at Princess Nourah Bint Abdulrahman University introduced two new bachelor's degree programs in Filmmaking and Animation, which will begin accepting students in the next academic year.⁽⁸⁵⁾ NEOM



offers five scholarships to talented Saudis to obtain master's degrees at the National Film and Television School (NFTS) in one of the seventeen different filmmaking fields offered by the school.⁽⁸⁶⁾ As of mid-September 2020, 1,839 students had applied for any of the three tracks of the Culture Scholarship Program to study filmmaking, and candidates will be chosen according to the program's selection criteria.⁽⁸⁷⁾

In December, the Film Commission announced the Digital Filmmaker Program, a digital education and training program for various specializations associated with filmmaking, intending to empower local talents, develop filmmaking, and strengthen audience interest in the local film industry. The program also targets amateurs and other interested parties alongside professionals and those who work in the fields of screenwriting, production, and animation, in collaboration with a group of local, regional, and global universities and film institutes.⁽⁸⁸⁾

Training Programs

NEOM announced that fifty seats for Saudi beginners were available in six-month remote training courses offered by the NFTS in various fields linked to filmmaking.⁽⁸⁹⁾ In June, MBC Academy announced that it was opening for admissions, intending to develop the skills of Saudis aged 18 to 45 in the media, production, and entertainment sectors. The Academy offers training courses on different aspects of filmmaking for admits and talent management to graduates and offered virtual training programs during the pandemic.⁽⁹⁰⁾



The Institute of Culture and Arts for Training (Thaqqif), which is under the auspices of the SASCA, also offered thirteen training programs on filmmaking, which mixed in-person and virtual instruction, to 574 trainees.⁽⁹¹⁾

Netflix also entered a collaboration with Myrkott to host its works exclusively on its platform for three months, including a new feature film.⁽⁹⁷⁾

Supporting the Sector

Due to the devastation brought by the Covid-19 pandemic onto workers in the sector, the Red Sea Film Festival Foundation announced the establishment of a community relief fund to support Saudi filmmakers and aid the workers whose jobs and income were directly affected by the pandemic. The 200,000 SAR (approximately US\$53,300) fund offered up to 5,000 SAR (US\$1,300) in support per person.⁽⁹²⁾ The fund has thus far provided 93,100 SAR (US\$24,800) in support to thirty-seven workers in the film sector.⁽⁹³⁾ The beneficiaries of these funds were twenty-six men, who received 64,700 SAR (around US\$17,250), and eleven women, who received 28,400 SAR (roughly US\$7,600).⁽⁹⁴⁾ Twelve of these workers were higher-level workers, such as directors and producers, and twenty-five were from various levels in the film sector.⁽⁹⁵⁾

The Private Sector in Film and Production Services

In conjunction with the rapid pace of sector-based developments and the dynamism evident across public-sector entities, the private sector was equally active. Telfaz11 signed a five-year agreement to produce eight new films for Netflix, the first of which will be released at the end of 2021.⁽⁹⁶⁾

Organizational Developments

On February 4, 2020, the Council of Ministers issued a decree to create commissions dedicated to cultural sectors and delegated the responsibilities of the boards of these commissions to the Minister of Culture until the board of directors for each commission could be formed.⁽⁹⁸⁾ Afterward, on June 9, 2020, the Minister of Culture announced the appointment of Abdullah Al Eyaf Al-Qahtani as chairman of the Film Commission, which works to organize the Saudi film and cinema industry in the Kingdom and develop suitable production infrastructure to bring Saudi cinema to the world stage. Additionally, it helps to prepare local talents to compete globally, encourages investment in the sector, develops organizations to protect intellectual property rights of films, and carries out other tasks that have been delegated to it.⁽⁹⁹⁾ The Ministry announced the formation of the board of directors for the Film Commission, chaired by Minister of Culture Prince Badr bin Abdullah bin Farhan Al Saud. The Deputy Minister of Culture, Hamed bin Mohammed Fayez, was appointed as vice-chairman, and Haifa bint Abdulrahman Al-Mansour, Mohialdeen bin Saleh Kamel, Amanda Nevill, Mohammed bin Youssef Al-Khurajji, and the director Amer bin Jassim Al-Hamoud were appointed as board members. Board members serve three-year renewable terms. The board oversees the commission's strategies and determines its internal technical policies, by-laws, and procedures, as well as the programs that drive its work.⁽¹⁰⁰⁾

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Theater and Performing Arts

- Cultural Creativity and Production
- Recognition and Dissemination
- Participation
- Digitalization in the Theater Sector
- Infrastructure and the Creative Economy





Theatrical productions —particularly commercial theater—enjoyed widespread popularity in 2019. This momentum persisted into early 2020, then quickly dropped for the remainder of the year, with a marked decline in the number of theatrical and performing arts productions attributable to Covid-19. In response to the extraordinary circumstances brought about by the pandemic, some theater artists turned to electronic options, holding virtual meetings and workshops in addition to organizing remote playwriting and theater production courses. The digital transformations prompted by the pandemic sparked a debate around “digital theater,” the future of theater as an industry considering developments in digital technologies, and the adoption of digital strategies by many theaters worldwide. Several notable theatrical experiments broadcast productions live as they were being performed on stage, and these may continue even after the end of the pandemic.

On the organizational front, the theater sector benefited from several initiatives and regulations in 2020, most notably the establishment of the National Theater at the beginning of the year and the subsequent establishment of the Theater and Performing Arts Commission.

Cultural Creativity and Production

Theater Groups and Theatrical Production

There are thirty-eight theater groups in the Kingdom across its various regions.⁽¹⁾ Most are associated with the Saudi Arabian Society for Culture and Arts (SASCA), the primary incubator for theater and theater artists. These groups’ activities are exceptionally diverse, ranging from plays targeted toward the general public to elite or experimental shows for more specific audiences. Represented by such groups, the Kingdom has participated in regional and international theater festivals and events. These groups’ activities provide opportunities for many amateurs—who constitute the majority of theater artists today—to develop their talents and expertise.

The number of theatrical productions presented at the various local SASCA branches declined throughout 2020. A total of only fifty-three theatrical productions were held at all venues, compared to 125 the year before. This decline in the number of productions led, in turn, to a decline in the number of attendees, which was approximately 9,637 in 2020 compared to 37,398 the previous year. This decline was expected, given the preventative health measures in response to the Covid-19 pandemic, which banned gatherings and canceled all public activities during lockdown periods. This led many theater groups, whether independent or associated with the SASCA, to hold virtual meetings, workshops, and training sessions remotely.

Table 5-1: Theatrical productions presented by the Saudi Arabian Society for Culture and Arts (SASCA)⁽²⁾

Branch	Number of theatrical productions, 2019	Number of theatrical productions, 2020	Approximate number of attendees to all theatrical productions, 2020
Najran Society for Culture and Arts	3	0	0
Taif Society for Culture and Arts	11	6	1,100
Jazan Society for Culture and Arts	2	0	0
Bisha Society for Culture and Arts	8	0	0
Abha Society for Culture and Arts	0	2	500
Arar Society for Culture and Arts	4	0	0
Tabuk Society for Culture and Arts	4	1	27
Al-Ahsa Society for Culture and Arts	9	0	0
Al-Jawf Society for Culture and Arts	0	3	750

Branch	Number of theatrical productions, 2019	Number of theatrical productions, 2020	Approximate number of attendees to all theatrical productions, 2020
Madinah Society for Culture and Arts	12	2	100
Al-Bahah Society for Culture and Arts	3	2	250
Hail Society for Culture and Arts	9	2	3,500
Jeddah Society for Culture and Arts	27	13	910
Dammam Society for Culture and Arts	33	22	2,500
Total	125	53	9,637



general public put on by local groups or groups from Egypt and Kuwait. In the first quarter, there was a notable increase in the attendance of the twelve plays organized by the GEA, for which there were 45,159 attendees, compared to 57,000 attendees at all GEA productions in the first two quarters of 2019.⁽³⁾

After preventative health measures were put in place to stop the spread of Covid-19 in mid-March 2020, theatrical productions were suspended for the majority of the year. This suspension continued until it was announced that restrictions would be eased, and events were gradually allowed to return. This allowed a number of groups to hold theatrical activities in compliance with social distancing regulations.

As in 2019, the General Entertainment Authority (GEA) presented plays and performing arts productions in 2020, especially commercial theater and performances targeting the

Distribution of theater groups in the Kingdom of Saudi Arabia (map)

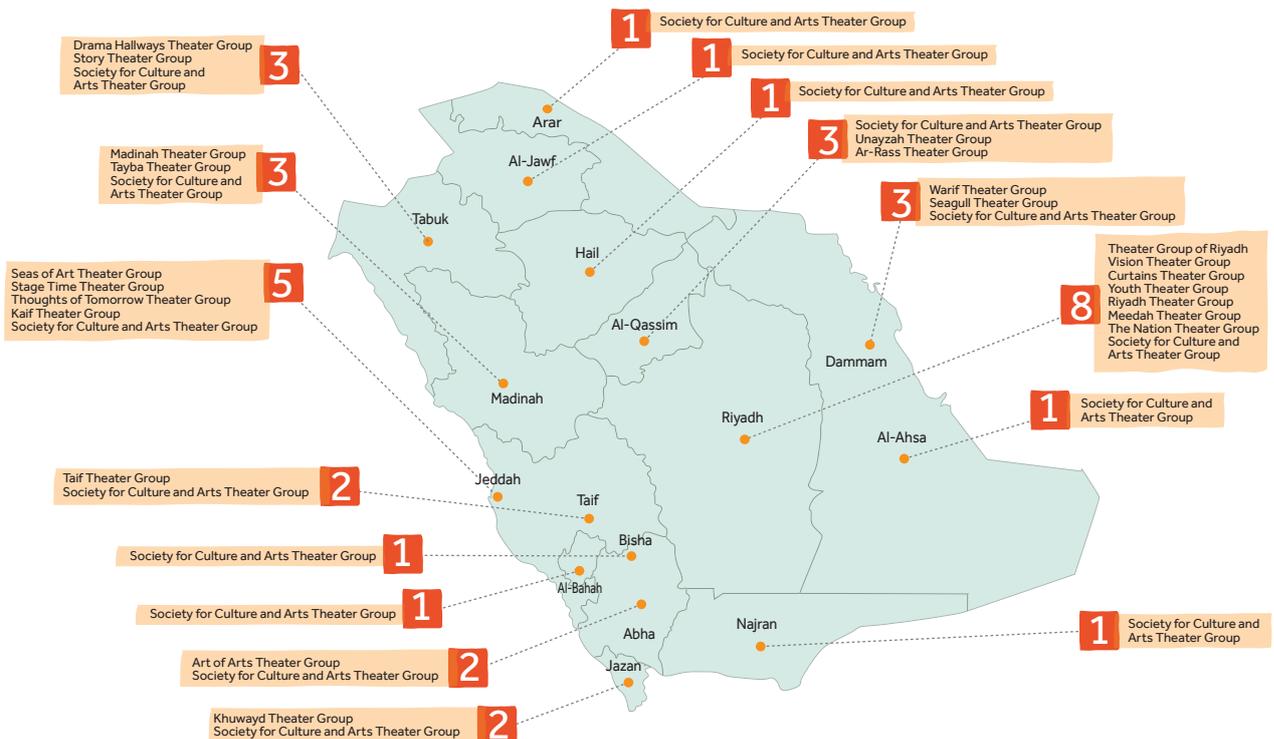


Table 5-2: Theatrical productions organized by the General Entertainment Authority in the first quarter of 2020⁽⁴⁾

Play	City	Date	Venue	Number of attendees
Antar, Filtered	Tabuk	January 2–3	Prince Sultan Cultural Center	2,073
Do Not Follow in the Devil's Footsteps	Al-Ahsa	January 2–4	Al-Makan Hotel	2,676
Zuaytar and Shararah	Anak	January 2–4	Alhedayah Club, Al-Jish	1,191
Snow White in Smurf Village	Al-Ahsa	January 2–4	Al-Ahsa Mall	2,025
The Wolf in the Well	Riyadh	January 2–18	Princess Nourah Bint Abdulrahman University	22,722
Owais the Voice	Jazan	January 4–10	Prince Sultan Cultural Center	5,201
An Awful Night (Laylah Ziftah)	Al-Ahsa	January 5–7	Al-Rashid Town Square Mall	5,626
Playing it Safe	Al-Ahsa	January 8–11	Al-Makan Hotel	2,994
A Technical Error	Riyadh	January 8–12	Riyadh Boulevard	3,700
Hazlaqum	Riyadh	February 5–8	Riyadh Boulevard	2,217
Antar, Filtered	Riyadh	February 6–7	King Fahd Cultural Center	3,241
An Awful Night	Riyadh	February 26 – March 1	Riyadh Boulevard	5,875



The decline in the number of theatrical productions was reflected in the number of visiting foreign shows throughout 2020. For example, King Abdulaziz Center for World Culture (Ithra) often holds these types of productions; it put on four theatrical shows in 2019 and the same number in 2018. This year, the center put on only one theatrical show in February, which 3,833 people attended.⁽⁵⁾

The National Theater Initiative

The Ministry of Culture was remarkably active in 2020 through the National Theater Initiative launched in January. The initiative seeks to develop the theater industry and kick off a series of theatrical productions. Veteran theater artist Abdulaziz Al-Samail was chosen as the initiative's president. The initiative's first production was presented at its launch ceremony, which included a performance of *Windows of Light* composed by Saleh Zamanan, written by Abbas Al-Hayek, Yasser Madkhali, and Thamiir Al-Harbi, and produced by Futais Bugnah, starring a number of experienced and rising actors.⁽⁶⁾ However, all National Theater shows were suspended due to the pandemic for the remainder of the year. Nevertheless, the initiative showcased commendable adaptability and shifted focus to training activities. The National Theater presented seven training workshops in the field of theatrical production in 2020, which were held remotely and attended by eighty-five people.

The National Awards Initiative

The Ministry of Culture announced the opening of nominations for the National Cultural Awards on June 30, 2020. These include the Theater Award for individuals or entities that contributed to the enrichment of the sector over the past two years. The winners will be announced in 2021.⁽⁷⁾



Performing Arts

The performing arts enjoy large audiences, surpassing the size of theater audiences given their artistic diversity, encompassing a wide array of genres such as dancing, singing, music, and circus performances. They depend on targeting various segments, including children and families. Entities that present this type of art notably differ by genre.

For example, private organizations like the Comedy Club in Jeddah, the Madinah Comedy Club, and the Comedy House in Dammam are explicitly dedicated to stand-up comedy. The GEA supports and organizes entertainment and family performances, putting on sixteen performances or events that included theatrical performances in the first quarter of the year, which 505,115 people attended.⁽⁸⁾

Table 5-3: Performances organized by the General Entertainment Authority in the first quarter of 2020⁽⁹⁾

Performance	Type	City	Date	Location	Number of Attendees
The Open-Air Theater	Performing arts, performances, children's theater	Khubayb Al Reem	January 1–18	Nofa Resort	44,803
Marvel Experience	Performances	Riyadh	January 1–March 8	Al-Ghadeer Land	Not available
Luna Cinema	Performances	Riyadh	January 1–March 8	Al-Ghadeer Land	Not available
Spooky City	Performances, children's theater	Riyadh	January 1–March 11	Riyadh Park Mall	8,955
The Italian Circus	Circus	Al-Huraydah	January 2–18	Asir Waterfront, Al-Huraydah	2,572
Comedy Club – Family Show	Stand-up comedy	Jeddah	January 3–February 7	Al-Shallal Theme Park	659
Comedy Club – Punch	Stand-up comedy	Jeddah	January 4–February 8	Al-Shallal Theme Park	1,510
Comedy Club – Comedy Star Night	Stand-up comedy	Jeddah	January 7–February 18	Al-Shallal Theme Park	2,564
Imagination Land	Performances	Riyadh	January 16	King Fahd International Stadium	12,934
Improv Game Shows	Performances	Sayhat	January 24–February 28	Al-Khalij Club	935
Comedy Club – Comedy Star Night	Stand-up comedy	Jeddah	February 20–March 5	Al-Shallal Theme Park	1,510
Comedy Club – Family Show	Stand-up comedy	Jeddah	February 21–March 6	Al-Shallal Theme Park	250
Comedy Club – Punch	Stand-up comedy	Jeddah	February 22–29	Al-Shallal Theme Park	530
The Italian Circus	Circus	Jeddah	February 23–March 8	Prince Nayef Street – Al-Zahra neighborhood	5,416
Pinkfong and Baby Shark	Children's musical theater	Riyadh	February 26–29	King Saud University	12,592
Super Showdown	Performances	Riyadh	February 27	Riyadh Boulevard	14,661



Apart from these various performances and performing arts, some groups specialize in specific types of performance arts related to cultural heritage, such as folk dances and traditional songs. These groups put on shows at national celebrations and social occasions like weddings, as they represent a part of social life and community culture and heritage. The SASCA branches include a number of groups that present this type of art and host their shows on a regular basis. In 2020, SASCA and its branches put on a total of forty-four shows attended by 7,655 people.

Table 5-4: Traditional arts shows presented by Saudi Arabian Society for Culture and Arts (SASCA)

Branch	Number of popular art shows	Approximate number of total attendees
Najran Society for Culture and Arts	3	300
Taif Society for Culture and Arts	3	535
Jazan Society for Culture and Arts	0	0
Bisha Society for Culture and Arts	2	100
Riyadh Society for Culture and Arts	0	0
Abha Society for Culture and Arts	3	1,400
Arar Society for Culture and Arts	2	120
Tabuk Society for Culture and Arts	0	0
Al-Ahsa Society for Culture and Arts	7	550
Al-Qassim Society for Culture and Arts	0	0
Al-Jawf Society for Culture and Arts	6	470
Madinah Society for Culture and Arts	2	100
Al-Bahah Society for Culture and Arts	3	1,500
Hail Society for Culture and Arts	2	600
Jeddah Society for Culture and Arts	4	480
Dammam Society for Culture and Arts	7	1,500
Total	44	7,655

Recognition and Dissemination

Theater Festivals and Competitions

Due to the Covid-19 pandemic, most of the year was devoid of theatrical events and festivals, as many were canceled both within Saudi Arabia and abroad. The only exception was events that were held before the pandemic spread worldwide in March, most prominently the 5th Gulf Theater Festival in Jeddah, in which more than 100 students representing twelve universities participated. The festival, which was held over four days in February, included theatrical performances, critical seminars on the works presented, and workshops. It concluded by announcing a group of prize-winning artists and works, listed in the table below.⁽¹⁰⁾

Table 5-5: Winners at the fifth Gulf Theater Festival

Prize	First Place	Second Place
Best theatrical show	Council of Justice (play), King Saud University	Murderers' Night (play), King Abdulaziz University
Best actor	Abdullah Hawsawi, King Abdulaziz University; Abdulaziz Al-Zurayq, King Saud University (tie)	Muhammad Balubayd, King Abdulaziz University, Mutaz Sabry, Umm Al-Qurra University (tie)
Best direction	Coffin (play), Taif University	-
Best scenography	Victory, Death, or Both (play), Jazan University	-

In response to the cancellation of performances and festivals, many turned their attention to holding alternative competitions in composition and theatrical criticism. Some of the most prominent competitions and prize-winning works are described below.

The Theatrical Composition Competition

The Ministry of Culture established the Culture in Isolation initiative that spanned several cultural sectors in reaction to the isolation resulting from preventative health measures due to Covid-19. This included the Theatrical Composition Competition organized by the National Theater, which offered two categories of competition. The first was for play scripts, and the second for children's play scripts. A total of 387 submissions were made, of which 233 were to the regular track, and 154 were to the children's track.⁽¹¹⁾

Table 5-6: Winners of the Theatrical Composition Competition

	Play scripts track	Children's play scripts track
First Place	Yasir Al Hasan, for Under the Rubble	Hasan Al-Rabih, for Soldiers of the Garden
Second Place	Siham Al-Abudi, for Didrah	Abdul Baqi Al-Bakhit, for The Mug is Fixed in Place (Al-Kouz Markuz)
Third Place	Sami Al-Jaman, for The Berry Leaf	Ali Mubarak Zayd, for Waste – Night (Hadr – Night)
Fourth Place	Fahd Ridah Al-Harithi, for Light	Talal Lubban, for The Marketplace
Fifth Place	Abbas Al-Hayek, for Ayoub's Seagulls	Munirah Al-Khashram, for The Field Guards

Theatrical Criticism Competition

The Theater Forum at the Jeddah Literary Club organized a theatrical criticism competition, which was exclusive to criticism of play scripts in this year's edition. Dr. Yusif Al-Bahri of Tunisia won first place, Fatima Al-Baradi of Saudi Arabia won second place, and Dr. Muhammad Al-Sayyid of Egypt won third place.⁽¹²⁾

Theater Outreach Initiatives

Several initiatives dedicated to publicizing both pioneering and prominent figures in Saudi theater emerged on social media in 2020. These included an initiative launched by the Theater Forum at the Literary Club of Jeddah on World Theater Day on March 27 over Facebook and Twitter. The initiative posts profile cards of figures in Saudi theater under the hashtag #FiguresOfSaudiTheatre. The cards include a brief account of their artistic work, including their most important theatrical productions and theatre awards they have won. This initiative joins other similar initiatives, like "Saudi Innovations" by the Communication and Media Center at the Ministry of Foreign Affairs and "Faces of Culture," on the Ministry of Culture's official social media accounts. These two initiatives highlight national cultural figures by creating profile cards for pioneers in various cultural sectors, including theater.

In addition to institutional activities, there have been individual cultural initiatives like the Tashakeel podcast,



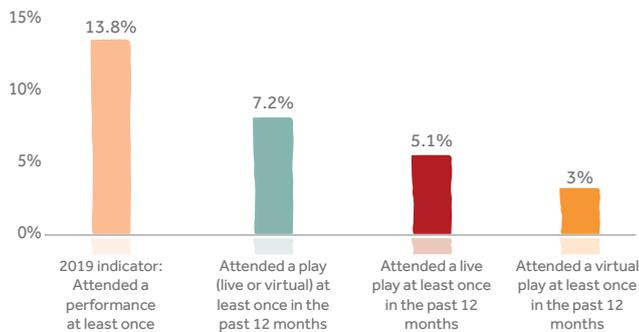
which has focused to a great extent on theater since its launch in April 2019. On the podcast, playwright Abbas Al-Hayek hosts prominent figures in Arab theater. Throughout 2020, he interviewed twelve theater artists from various Arab countries.

Participation

Attendance at Theatrical Productions

The number of attendees of theatrical performances decreased significantly this year in comparison to 2019. This decrease is primarily a result of the downturn in the number of theatrical performances put on in 2020 due to preventative health measures, which caused all public theatrical activities and events to be suspended for an extended period during the year. The exception is theatrical performances held in the first quarter of 2020, which were very popular, with 45,159 attendees compared to 57,000 attendees of theatrical performances put on by GEA in the first two quarters of 2019—that is, during a period twice as long. A total of 9,637 people attended theatrical performances put on by SASCA in 2020, paralleling the decrease in the number of shows to fifty-three theatrical performances compared to 125 in 2019. These figures are reflected in the 2020 Cultural Participation Survey, which was conducted in the last quarter of the year with a representative sample of 3,112 people from all areas of the Kingdom.⁽¹³⁾ The proportion of respondents who had attended at least one theatrical performance⁽¹⁴⁾ was 13.8% in the 2019 survey, but this dropped by about half to 7.2% in 2020. This percentage drops to 5.2% when only considering attendance at live theatrical productions (Figure 5-1).

Figure 5-1: Attendance percentage at theatrical productions



Digitalization in the Theater Sector

Virtual Theater

Theater's transition to the digital space—prompted by Covid-19 preventative health measures—sparked controversy around “virtual theater.” The controversy was rooted in the fact that such a rendition lacks an indispensable element of theater: the live audience. Theater artists differed in their opinions on the issue, with some accepting virtual theater as an extension of live theater and some rejecting it or hesitating to participate due to its similarity to visual art performances. The theatrical performance 1441, presented by a private theater group,⁽¹⁵⁾ was the first performance that could be considered “virtual theater.” It was broadcast over YouTube on June 6. Despite its rather low viewership compared to YouTube's overall audience—only about 1,000 viewers watched the 1441 performance live—it was larger than most live local performances. Viewers from many different countries watched, leading virtual theater enthusiasts to conclude that virtual theater may open up new opportunities for theater activities, both in terms of wider dissemination and achieving greater foreign recognition of Saudi theater. Saudi artists also participated in the virtually held International Sima Art Festival for Monodrama with the play *The Deceased*, which won Best First Performance.⁽¹⁶⁾

Theatrical performances needed to move online under the current circumstances, but this does not necessarily indicate a complete or permanent transition to virtual theater. Digital media, specifically live-streaming platforms, have created the opportunity to live stream theatrical performances online. For example, King Abdulaziz University Theater Club put on three theatrical productions in October and November 2020; these shows were performed live, in accordance with preventative health measures that limited the number of attendees and were simultaneously

streamed on YouTube. Organizers expect to continue live-streaming theatrical productions even after the end of the pandemic because it provides additional opportunities for dissemination.⁽¹⁷⁾

Digital Technology in Theater

Virtual theater and the use of digital technology to stream theatrical productions are just one aspect in which digitalization could transform the theater sector. Other aspects include introducing digital technologies into theatrical production work by utilizing technologies that blend reality with virtual reality, adding special effects like digital backgrounds and enhancements, and employing video technologies and direct online connectivity. These are in addition to introducing digitalization into narrative construction and the composition of theatrical stories.

These digital transformations have prompted questions among enthusiasts as well as in the global theater industry about the future of theater and the effects these transformations will have on it, especially that digitalization presents new options and choices, such as doing away with the physical stage and replacing it with interactive platforms or advanced technologies that rely on smart maps and the so-called “Internet of Things,” which could fundamentally change the concept of theater. During this time of change, some theaters worldwide have begun experimenting with or implementing digital strategies for creating virtual theaters and developing the necessary infrastructure to do so. There were effective experiments at some theaters that introduced these technologies into their work.⁽¹⁸⁾ However, except for the few examples mentioned in the previous paragraph, this trend in theater production is still absent from the Saudi theater scene because of insufficient technical infrastructure or hesitancy on the part of some theater artists, as indicated previously.⁽¹⁹⁾

Online Theater Events

After theater moved online, the digital sphere opened up new spaces for theatrical criticism, communication, and exchange, especially in light of the Covid-19 pandemic. Large-scale participation on electronic platforms provided many entities and artists with the opportunity to hold virtual events. In June, for example, SASCA in Dammam held the third Dammam Forum for Theater Play Scripts, with twenty-one playwrights participating from nine Arab countries over three days.⁽²⁰⁾ In July, the Theater and Performing Arts Commission organized two virtual interviews under the

title “New Voices of Theater,” intending to communicate directly with those who make up the local theater scene, especially youth and rising talent.⁽²¹⁾ The Literary Club of Al-Baha held the first session of the Virtual Theater Forum⁽²²⁾ in the following month, intending to hold it virtually every year, indicating the digital reality’s success and lasting appeal. The turn to virtual activities was not limited to official bodies; some private theater groups like the Riyadh Youth Theater group presented discussions on various theatrical experiences over Zoom. These meetings between experts and people active in theater provided opportunities to interact and exchange experiences, not exclusive to local or national levels, but also extending a global reach.

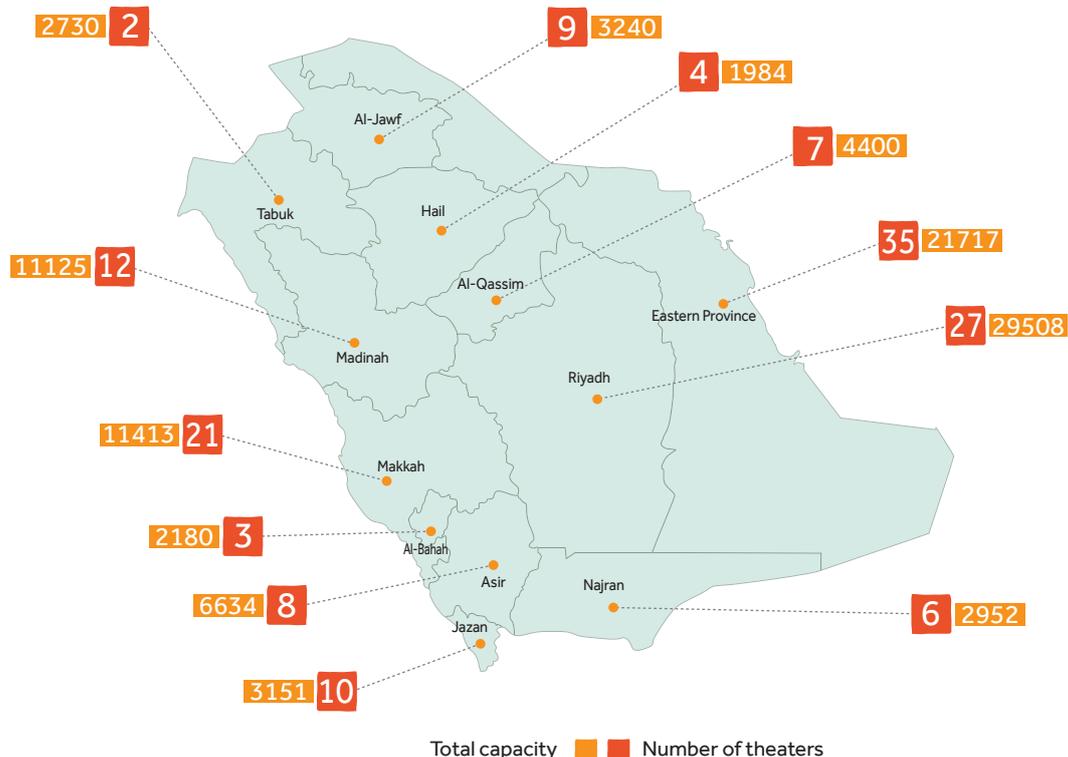
shows are held. Their capacity ranges from small theaters with about 200 seats to theaters with 3,000–4,000 seats. Most small theaters are at literary clubs in cities, schools, or universities, while larger theaters belong to cultural centers in cities. Universities have theaters of various sizes, but it should be noted that most of these theaters are not specialized and do not have special theater equipment. Instead, these theaters are used for different types of events, ranging from lectures and seminars to musical performances. The Eastern Province has thirty-five theaters with approximately 21,717 seats, while the Riyadh region, which has twenty-seven theaters, has the greatest capacity with 29,508 seats. Some of the other regions suffer from a lack of theaters and limited capacity at those theaters.⁽²³⁾ On a related note, the Guinness Book of World Records has certified the Maraya Theater located in Al-Ula governorate as the largest building covered in mirrors in the world. With its distinct architecture, the building accommodates approximately 500 people and is designed with the most modern sound systems available, which are appropriate for theatrical productions, performances, and especially operas.⁽²⁴⁾

Infrastructure and the Creative Economy

Theaters and Equipment

There are 144 theaters throughout all regions of the Kingdom in which theatrical performances and other

Distribution of theaters in the Kingdom of Saudi Arabia (map)



Source: National Theater, as of December 15, 2020.

Education and Training

In an effort to support educational and academic dimensions of the sector, King Abdulaziz University created a master’s degree program in Dramatic Literature. This is the first graduate academic program in this sector, created after signing the memorandum of understanding between the Ministry of Culture and the Ministry of Education in 2019 to develop educational programs in the arts at Saudi universities.⁽²⁵⁾

In the same vein, the Cultural Scholarship Program opened registration in January for theater and performing arts majors in a group of universities and classified art institutes worldwide. In addition to these efforts to improve professionalism in the sector and create a self-sustaining artistic ecosystem, many entities offer short courses in scriptwriting, acting, or theatrical production,

most prominently the SASCA’s Thaqqif Institute, in addition to private theater groups and individual theater artists.⁽²⁶⁾

Employment and Work Opportunities in the Sector

Cultural professions were added to the new Saudi Standard Classification of Occupations approved by the Council of Ministers in June 2020. This was one of the most important steps toward improving the professionalism of theater activities.⁽²⁷⁾ The professions “Theater Manager” and “Theatrical Production Manager” were added, but low numbers of workers in the sector were recorded, as it remains dominated by amateur artists. These small numbers are nevertheless a substantive first step toward greater professionalism in theater.

Table 5-7: Number of workers in theater professions, 2020⁽²⁸⁾

Profession	Total number in 2019	Number of Saudis in 2019		Total number in 2020	Number of Saudis in 2020	
		Males	Females		Males	Females
Theater Director	8	1	0	9	1	0
Costume or Studio Supervisor	108	9	81	106	10	91
Theater Manager	Added in 2020			3	0	0
Theatrical Production Manager	Added in 2020			6	0	2

Organizational Developments

The sector saw rapid organizational developments in 2020, as many initiatives were launched to improve the structure of the sector, professionalism, and quality of training available to theater professionals. The establishment of the Theater and Performing Arts Commission in February was the most important organizational development. The commission became the entity responsible for developing the theater and performing arts sector, as well as all its subsectors, including organizing events and competitions, encouraging investment, issuing permits, and supporting and training talent. This involves offering training programs or licenses to training and education entities within the sector, in addition to representing the

Kingdom at events, conferences, and related activities. Former SASCA president Sultan Al-Bazie was appointed as CEO of the commission, and in June, the formation of the commission’s board of directors was announced. The board is chaired by the Minister of Culture, Prince Badr bin Abdullah bin Farhan Al Saud, with Deputy Minister of Culture Hamed bin Muhammad Fayez as a vice-chairman. The other members are Dr. Malha Bint Abdullah, Dr. Maisa Al-Sobaihi, Abdulilah Al-Sinani, Simon Fuller, and Nidal Al-Achkar.⁽²⁹⁾ At the beginning of the year, the Ministry of Culture launched the National Theater Initiative, chaired by theater artist Abdulaziz Al-Samail, which aims primarily to support local theater productions by putting on shows throughout the year and offering training and qualification programs for workers in the sector.⁽³⁰⁾

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- (14) The percentage of those who attended at least one theatrical production, without the survey specifying virtual theatrical productions.
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Music

- Creation and Production
- Recognition and Dissemination
- Participation
- Digitalization of the Music Sector
- Infrastructure and Creative Economy
- Organizational Developments







As a byproduct of broader growth across culture and entertainment, the burgeoning music sector is witnessing unprecedented growth and budding strategic significance. This significance extends to the sector’s socio-economic efficacy, including: well-attended public concerts throughout the Kingdom, visits from international musical acts across genres, and the emergence of several independent local youth bands, performing live at public and private venues. However, despite these remarkable recent developments, Covid-19 and pandemic-induced disruption impacted the music sector. In-person musical activities ceased and were replaced by remote, virtual activities. Many live concerts were canceled, with some events being transferred to alternative, virtual platforms. Even after the easing of preventative health measures, attendance numbers at live events remained modest. This was due to pandemic-related concerns on the one hand and to audience capacity limitations on the other. Although virtual events found only limited success as an alternative to live concerts, the pandemic conditions did provide an additional impetus for the digital transformation of the recording, distribution, and consumption of music via international streaming platforms.

Creation and Production

Music Production

Some actors in the sector coped with the challenges of pandemic-related preventative health measures by producing songs remotely, which allowed artists to collaborate without physically being present in the same space. The most prominent example was the song “Salam From Saudi Arabia,” which featured thirteen Saudi singers and was produced during lockdown through a collaboration between the General Entertainment Authority (GEA) and Rotana Media Group. With lyrics by poet Abdullah Aburas, this patriotic song takes its inspiration from Saudi Arabia’s diverse heritage and geography.⁽¹⁾ It was just one of the many patriotic songs produced by Saudi artists in 2020 for the 90th National Day, which coincided with the gradual return to normal life (Table 6-1). As for overall music production indicators, Rotana Media Group produced 206 songs this year, 125 of which were sung by Saudi singers. The majority were released as singles, while some were part of complete albums.⁽²⁾



Table 6-1: Sample songs produced in 2020 for the 90th Saudi National Day

Song	Artist	Lyricist	Composer	Producer
“Hab Al-ghala”	Rashed Al-Majed and Abdulaziz El-Muanna	Prince Muhammad bin Abdulaziz bin Muhammad	Abdulaziz El-Muanna	Rotana
“Rule Belongs to God, Then the House of Saud”	Majid Al-Muhandis	Prince Abdullah bin Saad bin Abdulaziz Al Saud	Mishaal Al-Maliki	Rotana
“My Beloved”	Majid Al-Muhandis	Fahad Al-Mosaad	Majid Al-Muhandis	Rotana
“Two Swords and a Palm Tree”	Qusai Kheder, Reem Abdullah, Abdulaziz Alsharif, AMRAP, Shabah Bishah	Rap lyrics: AMRAP Song lyrics: Turki Alsharif	Ibrahim Al Ghanem	Multiple sponsors

Musical Ensembles and Practice

In March 2020, the Music Commission announced that it was accepting applications from performers to join the Saudi National Music Band, the founding of which was announced last year, under the supervision of musician Abdel Rab Idris.⁽⁵⁾ However, the ensemble's educational activities and rehearsals were suspended during the pandemic and are slated to resume in 2021.⁽⁴⁾ The National Music Band aims to develop Saudi musical talent in music fundamentals and train musicians, artists, and performers to professionalize. The program includes creating a musical ensemble that can participate in artistic activities held within the Kingdom and represent Saudi Arabia and its musical heritage internationally.⁽⁵⁾

Development of private studios and projects continued this year, creating opportunities for talented Saudis to practice and present their musical works in front of audiences. For instance, the Vocally app, an interactive platform, provides musical events, vocal training, and instrument lessons.⁽⁶⁾ Similarly, studio Syrup provides talent management services for singers and musicians through private artistic consulting, alongside a non-profit platform that allows them to perform their musical works.⁽⁷⁾ Syrup makes it possible for its community of 215 artists to perform their music for audiences of up to 250 people.⁽⁸⁾

Music Awards

This year, the Ministry of Culture celebrated Saudi creatives in different fields through its announcement of the National Cultural Awards, which seeks to honor creatives in all sixteen cultural subsectors, including music.⁽⁹⁾ Entries for 2020 were submitted through an electronic platform created by the Ministry, and the winners will be announced in 2021.

Recognition and Dissemination

Live Performances

Concerts

Musical events gained significant momentum in 2019, as many events in various styles were held in the Kingdom. In addition to local music, events included traditional Arabic Tarab, orchestral performances by famous international



ensembles, as well as various genres of contemporary Western music.⁽¹⁰⁾ This momentum continued through March of 2020, notably in the events for "Riyadh Winter," the concerts by Saudi and Arab artists during the International Golf Tournament in King Abdullah Economic City, and the local and global concerts that accompanied the "Winter at Tantora" festival in Al-Ula, which the Royal Commission oversaw for Al-Ula. In the Eastern Province, there were performances on the main stage of the King Abdulaziz Center for World Culture (Ithra) by local ensembles such as the Dhahran Big Band, which is made up of twenty-two Saudi musicians and others of various nationalities.⁽¹¹⁾

Riyadh Winter featured live musical performances distributed across nineteen sites, including restaurants and parks in the Boulevard zone and the historic Murabba Palace district.⁽¹²⁾ As part of the celebration, the GEA held the Riyadh Oud Festival for amateur and professional oud players from throughout the Arab world. Four hundred men and women participated, performing at the Abu Bakr Salem Theater in the Boulevard zone over two days. The festival included exhibitions for top oud makers to display their wares, as well as concerts by artists from across Saudi Arabia and the Arab world.⁽¹³⁾

As part of the Kuwait National Day celebration in February 2020, the Ministry of Culture organized performances of Saudi-Kuwaiti music accompanied by traditional music performances in Riyadh, Khobar, Khafji, Hafr Al-Batin, and Jeddah.⁽¹⁴⁾



The designation of Covid-19 as a global pandemic in March 2020 culminated into a lockdown that forced an abrupt cancellation of all events and performances across the board.⁽¹⁵⁾ This reality led to a massive curtailment in live musical performances, which can be seen, for example, in the plummeting number of live concert permits issued by the GEA, which totaled only twenty-four performances in 2020.⁽¹⁶⁾

Virtual Performances

The pandemic forced all events to move virtually, including musical events. Between digital platforms belonging to the events' organizers and social media platforms such as Instagram Live and YouTube Live, several Saudi and other Arab singers were able to perform. For example, during Eid al-Fitr celebrations, which typically include well-attended

concerts, singers gave performances from their homes or stages without audiences in a virtual celebration titled "Celebrating Together." The singers Mohammed Abdu, Rashed Al-Majed, Majid Al-Muhandis, and Najwa Karam each gave a concert from May 25–28. These events were organized by the GEA in collaboration with Rotana Media Group and the artistic office of MBC Group. It was aired exclusively by Shahid VIP for on-demand streaming.⁽¹⁷⁾

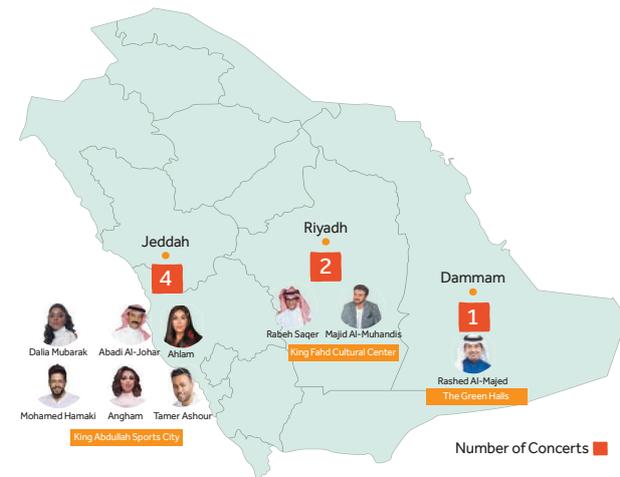
Additionally, as part of an initiative by Prince Badr bin Abdullah bin Farhan Al Saud called "Dayf Badr," a program allowing artists and intellectuals to communicate directly with the public through the prince's official Instagram account, Mohammed Abdu starred in a 90-minute session, singing a number of his well-known songs and premiering three new pieces.⁽¹⁸⁾

Virtual musical events hosted this year

Event	Date	Artists	Organizer	Platform
Musical Evenings	April 17 April 19 April 22	Mohammed Abdu, Majid Al-Muhandis, Abdulmajeed Abdullah, Assalah Nasri, Asma Lamnawar	Music Commission	Ministry of Culture Instagram account ⁽¹⁹⁾
Eid Al-Fitr Concerts ("Celebrating Together") ⁽²⁰⁾	May 25–28	Mohammed Abdu, Majid Al-Muhandis, Rashed Al-Majed, Najwa Karam.	General Entertainment Authority, in collaboration with Rotana and MBC Group	Shahid VIP
Summer Concerts ⁽²¹⁾ ("Keeping on Together") ⁽²²⁾	June	Mohammed Abdu, Abadi Al-Johar George Wassouf, Khalid Abdulrahman, Rashed Al-Majed, Majid Al-Muhandis, Hany Shaker, Najwa Karam, Aseel Abu Bakr, Waleed Al Shami, Wael Kfoury, ⁽²³⁾ Abdallah Al Rowaished	General Entertainment Authority, in collaboration with Rotana and MBC Group	Shahid VIP
"Dayf Badr"	December 9	Mohammed Abdu	Ministry of Culture	The Minister of Culture Prince Badr's Instagram account

After the gradual return of normal life, live concerts returned to Riyadh, Jeddah, and Dammam to mark the 90th National Day, September 22–26, organized by the Rotana Media Group and overseen by the GEA. These were hybrid events, with the in-person audience limited to fifty people abiding by preventative health measures, as well as virtual attendance free of charge and made possible by the app FannBox.⁽²⁴⁾ The Cairo Opera House also produced concerts for Saudi National Day, which were broadcast by MBC and made available on digital platforms.⁽²⁵⁾ For the same occasion, the Ithra Center organized musical events that included performances of “Alardah Alnajdiyah,” as well as a performance of original compositions by pianist Abeer Balubaid and Ameen Farsi with the band Al Farabi at the Ithra Theater on September 23 and 24.⁽²⁶⁾

Concerts for the 90th National Day, organized by the General Entertainment Authority



Source: General Entertainment Authority, as of December 21, 2020.

The implementation of preventative health measures for public events also impacted music venues inside cafes and restaurants. The GEA established health protocols allowing live performances on string instruments, but not singing, provided that the performer and audience members remained two meters apart and wore face masks throughout the performance.⁽²⁷⁾ These protocols were updated toward the end of the year with the return of live vocal performances as long as there are two meters of distance from the audience.⁽²⁸⁾

Music Competitions

Several competitions aimed at discovering new talent were held in 2020. On the final day of the Riyadh Oud Festival, a winner was chosen from among 400 contestants hailing from across the Arab world and crowned King of the Oud.⁽²⁹⁾ MBC also aired a competition called “Made in Quarantine” to highlight creative talent during quarantine, including vocal and instrumental music.⁽³⁰⁾ In honor of the 90th National Day, the Saudi Arabian Society for Culture and Arts (SASCA) held a contest called “Sumuw al-Watan” to encourage creative cultural production in Asir. The competition had six categories, including music, which Muhammad Al-Ali won.⁽³¹⁾

Table 6-2: Contests held to discover musical talent in 2020

Contest	Organizing Body	Winners
King of the Oud	General Entertainment Authority	“King of the Oud:” Faisal Al-Qahtani
Made in Quarantine	GEA and MBC	Omar Hafiz ⁽³²⁾



Global Music Events

Several performances of Arab and global music were held at the beginning of the year, including performances by ensembles from Vietnam in the gardens surrounding the Ithra Center as a part of the Vietnamese programming for Ithra Cultural Days in January.⁽³³⁾ The Chehade Brothers also gave live concerts at Ithra for three consecutive days in February.⁽³⁴⁾

However, the spread of Covid-19 in March and subsequent closing of borders, and suspension of international travel as preventative health measures impacted artists and performers' ability to come and go from the Kingdom. This explains the low number of Arab and global music events during the remainder of the year. Performances moved to a virtual format instead of being held live, including virtual performances of Arabic classical music by Lubana Al Quntar and Mai Farouk. They sang pieces by Umm Kulthum and Asmahan at the Ithra Theater without an audience in May. The concert was aired on Rotana's TV channels.⁽³⁵⁾

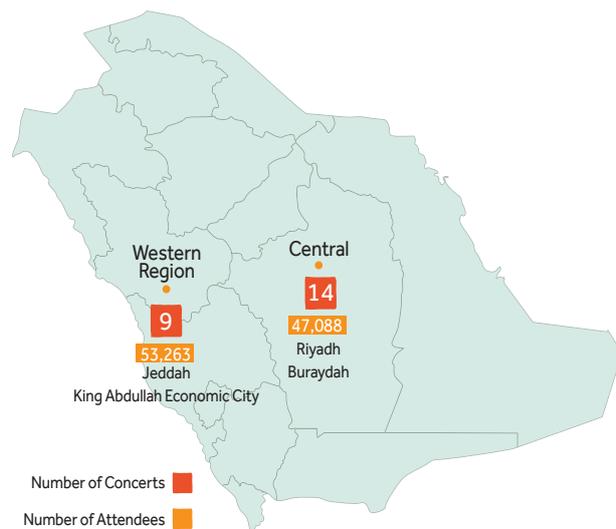
MDLBeast also took a different form this year. The event organizers hosted a virtual concert called "Freqways," which coincided with World Music Day on June 21. The concert lasted 12 hours, and the free live stream was available on the event website. It featured local and global DJs on a single platform as well as contributions from new artists.

Several Saudi artists participated in the live stream from various locations around the Kingdom. Cosmicat performed her set from a boat on the Red Sea, Baloo played from Thee Ain Heritage Village, Vinyl Mode performed in Al-Bahah, and SPCEBOI performed from Jabal Al-Qarah in the Al-Ahsa Oasis, a UNESCO World Heritage Site. DJ Steve Aoki, who participated in last year's inaugural event, performed a remix of global and Saudi popular music.⁽³⁶⁾

Participation

The total number of attendees at concerts organized by the GEA this year was 100,401 people across four cities, in addition to the concerts held in Dammam for Saudi National Day, where audiences were limited to fifty people in accordance with preventative health measures.⁽³⁷⁾ Alongside the mainstream music scene, concerts by independent bands at the Ithra Center found a relatively large audience of 5,156 people (Table 6-3).⁽³⁸⁾

Distribution of live concerts approved by the General Entertainment Authority in 2020, by administrative region, and attendance numbers⁽¹⁾



1) General Entertainment Authority, as of December 21, 2020.





Table 6-3: Concerts at the Ithra Theater in 2020⁽³⁹⁾

Performers	Number of Attendees
Al Farabi with Abeer Balubaid and Ameen Farsi	783
Dhahran Big Band	810
Majaz	356
The Chehade Brothers	1,995
Total	5,156

Virtual events in the music sector have brought about a new dimension of audience participation and interaction. Mohammed Abdu’s appearance on “Badr’s Guest” (“Dayf Badr”) on Instagram had 100,000 views within the first five minutes.⁽⁴⁰⁾ For National Day, the GEA launched an initiative called “For Our Homeland We Sing,” in which the public was invited to submit videos of themselves singing the national anthem to Enjoy Saudi,⁽⁴¹⁾ which then created a piece of music performed by Saudi citizens.⁽⁴²⁾ Despite these efforts, the pandemic had a noticeable effect, reflected in the available indicators of event attendance of any kind across the sector in general. The 2020 Cultural Participation Survey, which was carried out in the fourth quarter of 2020 with a representative sample that included 3,112 persons representing every Saudi province,⁽⁴³⁾ indicates that the percentage of people who attended concerts or live music events, whether in-person, virtually, or both, in the last 12 months, was only 15.2% (Figure 6-1). This is in contrast to the previous year when 18.9% of respondents reported attending concerts or

live music events, only counting in-person events.⁽⁴⁴⁾ The rate of in-person attendance at musical events in 2020 dropped to 12.7%. The survey data also indicated a relationship between age and concert attendance, with roughly 19% of people from 15–24 years old attending concerts, and the rate gradually declining with each older age group (Figure 6-2).

Figure 6-1: Attendance at concerts and musical events in 2020, last 12 months

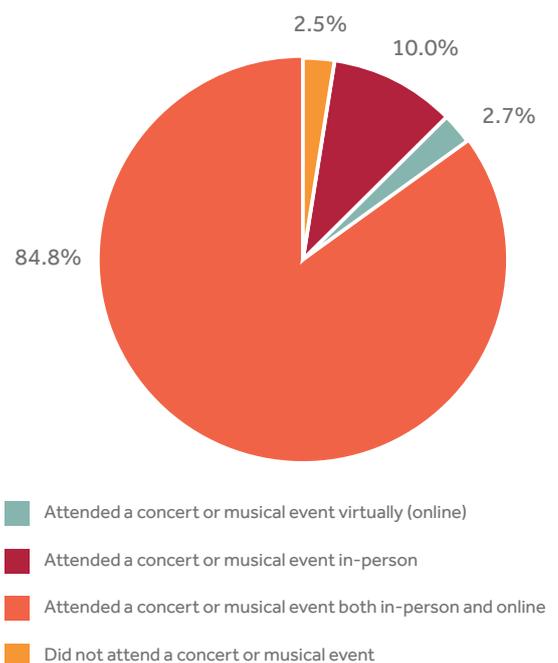
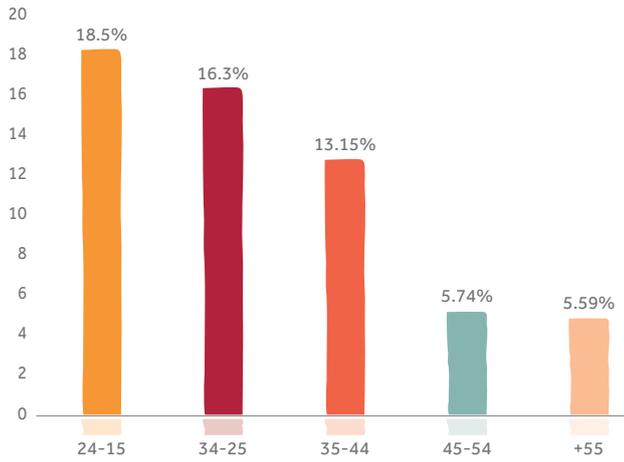


Figure 6-2: Percentage Distribution of individuals who attended at least one concert or musical event in the last 12 months, by age



Only 12.48% of survey respondents reported owning a musical instrument at home, with people ages 15–34 being more active than other age groups in this regard. This highlights the importance of strengthening this demographic’s interest in studying music and creating programs that can help them develop and reinforce their skills (Figure 6-3). As for the geographic distribution of interest in musical instruments, Table 6-4 shows that rates of instrument ownership are noticeably higher in Riyadh Province, Makkah Province, and the Eastern Province.



Figure 6-3: Percentage distribution of individuals who own musical instruments in the Kingdom, by age

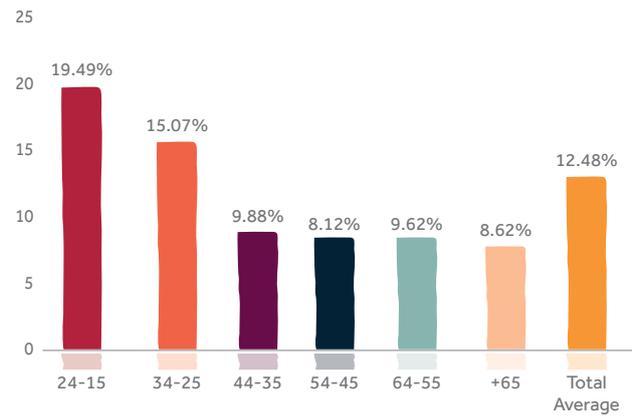


Table 6-4: Percentage distribution of musical instrument ownership by province

Province	Percentage
Riyadh	29.7%
Makkah	25.8%
Madinah	4.7%
Al-Qassim	4.4%
Eastern Province	17.3%
Asir	7.4%
Tabuk	3.3%
Hail	0.3%
Northern Borders	0.3%
Jazan	3.6%
Najran	1.4%
Al-Bahah	1.1%
Al-Jawf	0.8%



Digitalization of the Music Sector

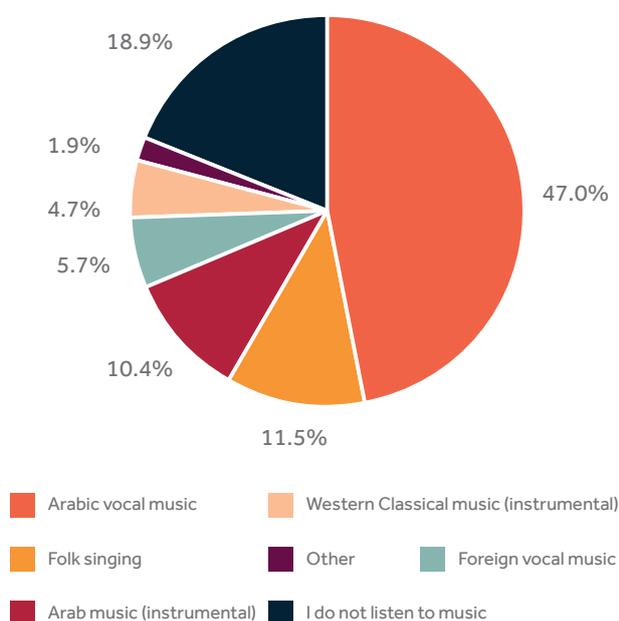
Virtual Concerts

Concerts and other live musical events occupy an important space in the music sector, both in terms of their proportion of the industry's revenues and their effect on performers and audience members' musical experience. The transformation of the majority of musical activities to a digital format in 2020 raised questions about the effectiveness of the experience.

From the perspective of audience members, virtual events being streamed on various platforms meant that it was much easier for the public to access performances online without having to pay for expensive tickets. Nevertheless, ease of access did not translate into widespread attendance, and while some events did draw large numbers of visitors and views, the Cultural Participation Survey revealed low rates of attendance at virtual musical events (2.5%), with rates of attendance of in-person or virtual events at only 2.7% (Figure 6-1). This trend can be attributed to the inexorable variance in experiential pleasure derived from virtual concerts versus in-person events.

From the performers' vantage point, these virtual experiences do not let them interact directly with the audience, a key pillar of live musical performance.⁽⁴⁵⁾ Furthermore, whereas virtual events provided a better source of income for artists than completely suspending their musical activities, industry experts and workers have indicated that they did not replace the lost revenue from live events supported by ticket sales. This means that virtual platforms might be employed as a marketing tool for events and musical enterprises. Still, it will be difficult for them to become an alternative to live concerts, which benefit from higher returns and greater interactivity. This is especially true for early-career

Figure 6-4: Percentage of individuals by most preferred musical genre



artists and the private sector companies that organize their concerts, with concert cancellations affecting their revenues.⁽⁴⁶⁾ Therefore, virtual concert formats may be an alternative in special circumstances, reflecting the sector's innovative adaptability. They may supplement live performances in hybrid settings where a live stream accompanies an in-person event. But it is highly unlikely that virtual performances will displace live concerts for the foreseeable future.

Live Streaming

While digital alternatives have not come close to disrupting the live concert industry, the situation is the exact opposite concerning the consumption of recorded music. In just a few years, music streaming platforms have taken over a large portion of the recorded music market, accounting for 56% of the global market by 2019.⁽⁴⁷⁾ Major global firms have been competing for dominance in this space, including Spotify, Apple, Amazon, and others. In the Arab world, Anghami remains the only licensed streaming platform, with a large swath of the Arab music market suffering from piracy.

In the Kingdom, music consumption numbers come from global international streaming applications. Music streaming revenues in the Kingdom were US\$69 million by the end of 2020. Even though Saudi Arabia is ranked 52nd globally in terms of dissemination (namely, the proportion of residents who depend on streaming to listen to music), the annual rate of streaming revenue growth in the Kingdom is 10.8%,⁽⁴⁸⁾ 71% of internet users listen to streamed music, and 41% of Saudi internet users use various music applications on their computers or smart devices.⁽⁴⁹⁾

This global transformation of the music industry and the concomitant growth in music streaming services in the Kingdom call for a response, represented by an effort to understand the possible effects on music production circles, in terms of artists' relationship to global firms as well as the impact on distribution networks and the sector's revenues. This is in addition to supporting the development of national platforms that will cater to the needs of the listeners in the Kingdom and offer them musical choices that include local content, in the same manner as other Arab ventures that have been able to secure a portion of the market alongside major global players.

Table 6-5: Music streaming revenues from 2017–2020 (in millions of US\$)⁽⁵⁰⁾

Year	Music Streaming Revenue (millions of US\$)
2017	35.5
2018	44
2019	55.5
2020	69.4

Infrastructure and Creative Economy

Infrastructure Projects

Work is in progress on the creation of a museum dedicated to the musician Tariq Abdul Hakim in the Manufi House in Historic Jeddah, with a planned completion date of 2023.



Alongside exhibitions featuring the late artists' life and the instruments he played, the museum will house a research center including the artists' diverse archive, making his musical legacy available to students and interested parties, as part of the larger effort to steward his legacy and associated research.⁽⁵¹⁾

Education and Skills

Cultural Exchange

At the beginning of the year, the Ministry of Culture unveiled the Cultural Scholarship Program designed to strengthen competency in the sixteen cultural subsectors, including music. A total of 1,033 students applied to study various musical disciplines at eleven educational institutions around the world.⁽⁵²⁾

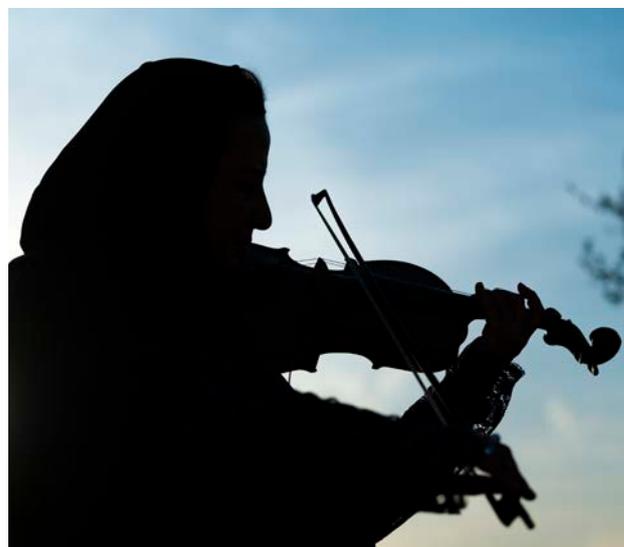
Training

The Saudi music sector remains largely dependent on amateurs and young independent bands, who in turn depend on autodidacticism, which is difficult to track. The establishment of the Amateur Clubs Association (Hawi) and the approval of its implementing regulations by the Ministry of Human Resources and Social Development to be an organizational entity for the development and registration of amateurs in the Kingdom marks a major development in the sector. It should allow an estimation of the size of the amateur musical community and help provide it with the necessary support for its development, especially since the approval was granted under the leadership of the Quality of Life Program and the participation of several governmental bodies, including the Ministry of Culture.⁽⁵³⁾

In July, the GEA also announced a new type of permit available through its online portal for groups interested in working in the field of arts and entertainment talent management and development.⁽⁵⁴⁾

In the context of organizational efforts and development in the Saudi music industry, on December 28, the Minister of Culture announced that permits had been issued for the first two music institutes in the Kingdom, as well as a special platform for this type of permit to be issued within 90 days of the announcement.⁽⁵⁵⁾

The Institute of Culture and Arts for Training (Thaqqif), a part of the SASCA, offers several training courses in subjects such as maqam music, vocal performance skills, instrumental techniques, and music notation, with a total of five courses this year.



Sector Workforce

The Ministry of Culture registered eighty new cultural occupations as part of the first stage of the new Saudi Standard Classification of Occupations in collaboration with the Ministry of Human Resources and Social Development. The Council of Ministers ratified the new classification, which will provide Saudi artists with recognition and increase opportunities for professionalization.⁽⁵⁶⁾

Organizational Developments

In February 2020, the Council of Ministers issued a decision creating specialized commissions for the cultural sectors, including the Music Commission.⁽⁵⁷⁾ In July, the commission's Board of Directors was announced, with the Minister of Culture as chairman, the Deputy Minister of Culture Hamid bin Mohammed Fayez as vice-chairman, and Prince Badr bin Abdul Mohsin, Dr. Barry Eve, Dr. Joseph Polisi, Nizar bin Hashem Naqro, and Mohammed bin Abdullah Al-Mulhim as members. In September, Mohammed Al-Mulhim was charged with managing the executive committee and coordinating the Music Commission, replacing Dr. Jihad Al-Khalidi, who was appointed as an adviser.⁽⁵⁸⁾ The Music Commission is concerned with developing the sector, designing future strategies, and generally increasing activity in the sector by providing training and education programs for gifted artists as well as providing funding and investment opportunities. The commission will also play a role in protecting intellectual property rights, licensing activities related to the commission's mandate, and establishing a database for the sector.⁽⁵⁹⁾

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Cultural Festivals and Events

- Creativity and Production
- Participation
- Digitalization in the Sector
- Infrastructure and Creative Economy
- Organizational Developments







The cultural festivals and events sector is one of the most popular cultural sectors. The sector’s diversity and ubiquitous presence and impact throughout the Kingdom sets it apart. It is also one of the sectors in which governmental and private agencies, both small and large, partake as organizers, supporters, and participants. With government support, the sector has grown and attracted investments over the last few years, highlighting regional cultural richness across the Kingdom.

However, the sector was particularly impacted by the Covid-19 pandemic, putting an abrupt halt to in-person activities until deemed safe. This led to a push toward finding alternative solutions, which included digitalization not only for marketing but also for event planning, execution, and management. Hybrid events combining various elements were also created for a broader appeal to a larger segment of the public. Even after the gradual return to normal life, the sector adhered to precautionary measures, holding small-scale events with limited public attendance. The sector’s contribution to domestic and inbound tourism was negatively affected compared to last year, as reflected in the data.

Creativity and Production

In 2020, the festivals and events sector enjoyed the same public enthusiasm witnessed in the previous year. Some sites for the Riyadh Season, such as the Boulevard and Winter Wonderland, continued to receive attention even after the end of the season in December 2019. Other festivals and events were held at the beginning of the year, such as the second “Winter at Tantora” festival, which began on December 19, 2019, and continued until March 7, 2020. However, with the announcement of Covid-19 as a global pandemic in March, many festivals such as the Red Sea International Film Festival that had been postponed to the following year were gradually canceled. Among the events that did not take place were the Saudi Seasons.⁽¹⁾ The sector entered a phase of gradual closure that eventually led to the

cancellation of all events previously licensed by the General Entertainment Authority (GEA), the Ministry of Sports, the Conventions and Exhibitions General Authority, and other entities.⁽²⁾

As normalcy began replacing pandemic-induced uncertainty, the Saudi Tourism Authority - established on March 10, 2020 - launched two tourist seasons— the Saudi Summer Season (“Breathe”) and the Saudi Winter season (“Winter Around You”)—both of which aimed to stimulate domestic tourism among citizens and residents. In addition, numerous events were held on the 90th Saudi National Day across the Kingdom, including air shows, fireworks, and concerts in Riyadh and Jeddah organized by Rotana Audio Visual and supervised by the GEA. Tickets for the concert were available for purchase online and for free via the Funbox application.⁽³⁾

Table 7-1: Seasonal and annual festivals and their status during 2020

Season/Festival	Date	Duration	Location	Organizer	Status in 2020
Eastern Province Season	March	15 days	Eastern Province	Emirate of Eastern Province	Did not take place
Ramadan Season	May 6–June 3	29 days	All regions	Saudi Tourism Authority	Did not take place
Eid Al-Fitr Season	June 4–8	4 days	All regions	Saudi Tourism Authority	Did not take place
Jeddah Season	June 8–July 18	40 days	Jeddah	Jeddah Municipality	Did not take place
Taif Season	July 1–31	1 month	Taif	Saudi Tourism Authority	Did not take place
Al-Sawda Season	July 1–31	1 month	Al-Sawda Province	Public Investment Fund	Did not take place
National Day Season	September 23–26	4 days	All regions	General Entertainment Authority	Took place with adherence to preventative health measures

Season/Festival	Date	Duration	Location	Organizer	Status in 2020
Riyadh Season	October 11–January 31	80 days	Riyadh	General Entertainment Authority	Did not take place
Al-Diriyah Season	November 22–December 21	1 month	Al-Diriyah	General Sports Authority	Did not take place
Hail Season	December 22–February 10	50 days	Hail	General Sports Authority	Did not take place
Al-Ula Season	December 19–March 3	100 days	Al-Ula Province	Royal Commission for Governorate of Al-Ula	Did not take place
Saudi Summer Season (“Breathe”)	June 25–September 30	98 days	Various regions	Saudi Tourism Authority	Took place
Saudi Winter Season (“Winter Around You”)	December 10–March 31	122 days	Various regions	Saudi Tourism Authority	Took place

Response to the Pandemic

During quarantine, the organizers set up virtual events across various digital platforms and media outlets, such as websites, social networking sites, and even television shows. These events varied in content, and they targeted audiences of different genders and ages. For example, the Ministry of Culture launched the “Culture in Isolation” initiative on April 13, 2020, which became an umbrella for several cultural initiatives, including the “Literature in Isolation” and the “Reading Marathon” initiatives. The public was encouraged to take advantage of the varied electronic content covering many cultural sectors such as theater, films, literature, and reading.⁽⁴⁾



Table 7-2: Examples of virtual events held in 2020 (with themed initiatives)

Event	Date	Details	Organizing Agency	Platform
“Culture in Isolation” Initiative	Commenced on April 13, 2020	Cultural activities and initiatives across multiple sectors, including theater, literature, reading, and film for society at large to participate in during quarantine	Ministry of Culture	Ministry of Culture’s website & various social media accounts
Musical Evenings	April 17–22, 2020	Musical evenings with different artists organized by the Ministry of Culture and shared via Instagram	Ministry of Culture	Ministry of Culture Instagram
Digital Lanterns	May 13, 2020	Continuation of the annual Lanterns event held by the Mecca Chamber during the month of Ramadan	Mecca Chamber	Digital Lanterns Platform

Event	Date	Details	Organizing Agency	Platform
"Who Are You?"	May 28–31, 2020	Virtual networking competition to win cash prizes	MBC + General Entertainment Authority	MBC Channel & VIP Platform
MDL Beast Freqways Music Festival	June 20, 2020	Virtual experience of the MDL Beast Freqways Music Festival ⁽⁵⁾	MDL Beast	Event website https://freqways.mdlbeast.com
Virtual Hackathon and Fashion Incubator Bootcamp	September 2020	Competitive program providing information and product development support in the fashion industry	Ministry of Culture	Digital Platform https://engage.moc.gov.sa/fashion_incubation
MiSK Art Week ⁽⁶⁾	September 3–7, 2020	Annual art event organized by the MiSK Art Institute, which held workshops, discussion panels, exhibitions, and specialized technical training	MiSK Art Institute	Prince Faisal bin Fahd Gallery for Fine Arts in Riyadh & online
Cultural Ideas Marathon	December 9, 2020	One-week virtual marathon providing design thinking support and training to spark creative ideas for cultural events and festivals, covering eleven cultural fields across all regions of the Kingdom	Ministry of Culture	Digital Platform https://engage.moc.gov.sa/ideathon



Festivals and events were not entirely absent throughout the rest of the year. With the gradual return to normal life, events with limited attendance were held in compliance with preventative health measures and set a cap on the total number of attendees based on the area of the site in which the event was being held. Furthermore, hybrid events that combined a virtual element with in-person participation were organized. These included the "Eid on Wheels" and "Explore Eid" events organized by the Ithra Center on Eid Al-Adha. The public could book appointments electronically to tour the Ithra Center building in a car and watch 3D shows. The Ministry of Sports launched the event ("Together We Move") to encourage physical exercise through running and walking. The event served as a virtual platform through which the Riyadh Marathon was held after the live event's cancellation. The virtual marathon employed innovative technology via programs and applications, enabling users to record and track their performance and then upload it to the competition platform. Other virtual events continued to be held on several different digital platforms.⁽⁷⁾ The GEA issued guidelines for the return of entertainment activities on June 19, 2020, which laid out protocols that promote health awareness, observe social distancing, and adhere to regulatory preventative health measures for amusement parks and entertainment centers.⁽⁸⁾

Table 7-3: Examples of in-person events held in 2020

Event	Date	Details	Organizing Agency	Location
Winter Night Festival in Saih ⁽⁹⁾	January 5–10, 2020	Live performances, heritage, and local products	Al-Kharj Tourism Committee	Al-Kharj
Vietnamese Cultural Days	February 3–15, 2020	Musical performances, traditional fashion, folklore, and live performances	Ithra	Dhahran
The Mask Carnival 2 ⁽¹⁰⁾	February 11–15, 2020	Musical performances, folklore, and art exhibitions	Al-Qaim Al-Awwal Est	Jeddah
Italian Circus	February 20–March 21, 2020	Live performances	Khayal Events and Exhibition Management Co.	Jeddah
Kuwait National Day	February 25–26, 2020	Traditional food, musical performances, singing, heritage, and popular fashion	Ministry of Culture	Riyadh, Jeddah, Al-Khafji, Al-Khobar, Hafr al-Batin
An Egyptian Tale	February 26–29, 2020	Traditional food and music, and live shows	Across Cultures	Jeddah
Jeddah 4 All Festival	February 28–March 8, 2020	Theatrical performances, competitions, and entertainment	OneStore	Jeddah
Tanween (Season of Creative Enrichment)	October 29–December 5, 2020	Season to encourage creativity and innovation in several fields, including visual arts and design	Ithra	Dhahran
Kharifina Ahla Festival ⁽¹¹⁾	September 23–December 21, 2020	For family and children	Mawasim AlQimmaH for Entertainment Events	Madinah
Kingdom of Cultures Exhibit ⁽¹²⁾	December 1–21, 2020	Art exhibition	Ithra	Dhahran
The Fifth King Abdulaziz Camel Festival ⁽¹³⁾	December 1, 2020–January 14, 2021	heritage sports festival focused on camels	Camel Club	Rumah Governorate
“After A While: Al Kaabi and His Students” Exhibition ⁽¹⁴⁾	February 2–March 11, 2020	Fine arts exhibition	Ministry of Culture	Riyadh
The 41st Unayzah Date Season ⁽¹⁵⁾	July 22, 2020	Dates and local produce Festival	Unayzah Chamber of Commerce and Industry in partnership with the municipality of Unayzah	Unayzah
Explore Eid	August 1–6, 2020	Cultural festival on the occasion of Eid Al-Adha	Ithra	Dhahran
Eid on Wheels	August 1–6, 2020	Cultural Festival on the occasion of Eid Al-Adha	Ithra	Dhahran
“Samra” Jarallah al-Adhaib Museum ⁽¹⁶⁾	November 15, 2020–January 16, 2021	Heritage exhibition	AFAD	Riyadh
Madinah Date Season ⁽¹⁷⁾	September 20, 2020	Dates and local produce Festival	Medina Municipality	Madinah
The 3rd King Abdul Aziz Falconry Festival ⁽¹⁸⁾	November 28–December 12, 2020	Cultural sports festival	Saudi Falcon Club	Riyadh

By the end of the year, the total number of in-person events approved by the GEA reached 162, the majority of which took place in the first quarter of the year before the outbreak of the pandemic. These events varied between festivals, live shows, musicals, theatrical performances, concerts, and other activities.⁽¹⁹⁾ As a result of the pandemic's impact on the sector and its activities this year, the GEA turned to the public to propose ideas for new one-time recreational activities through the Entertainment Ideas initiative, which was launched on December 2 to advance the affected sector.⁽²⁰⁾ As a result of the initiative, the "Riyadh Oasis" event was announced, which began in early 2021 for three months.⁽²¹⁾

Distribution of public events authorized by the General Entertainment Authority for 2020, by type.



1) General Entertainment Authority, December 21, 2020

As the official licensing body for entertainment events in the Kingdom, the GEA launched the entertainment portal, including three platforms that serve to manage the activity, licensing services, and supplier registrations of entertainment centers.⁽²²⁾

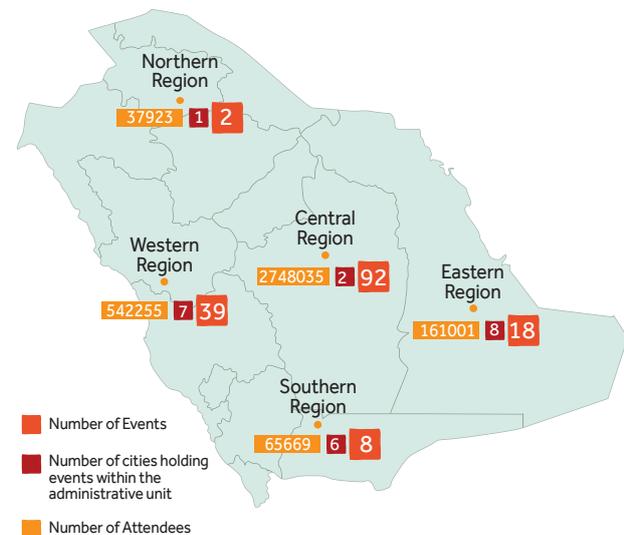


Participation

The pandemic posed a difficult challenge to the sector by limiting the activities and gatherings that could be held in both public and enclosed places. The preventative policies required organizers, be they governmental or private, to undergo a serial succession of procedures to obtain the necessary licenses. The Ministry of Health created the Tawakkalna App that provides several services, including allowing individuals, government agencies, and commercial agencies to readily obtain the necessary licenses to hold a gathering and issue special barcodes for attendees.⁽²³⁾

The impact of these policies translated into a major decrease in event and festival numbers, as reflected in the relevant data. Compared to statistics from 2019, the 2020 data demonstrate that the number of festivals and events decreased, as did their cultural dissemination and public turnout. The GEA granted 162 licenses from January to October 2020⁽²⁴⁾ compared to 502 licenses during the same period in 2019.⁽²⁵⁾ The total number of attendees to the 2020 events was 3,754,883. In contrast, in 2019, attendance estimates for just one event season in a single city, such as the Riyadh Season and the Jeddah Season, exceeded ten million.⁽²⁶⁾

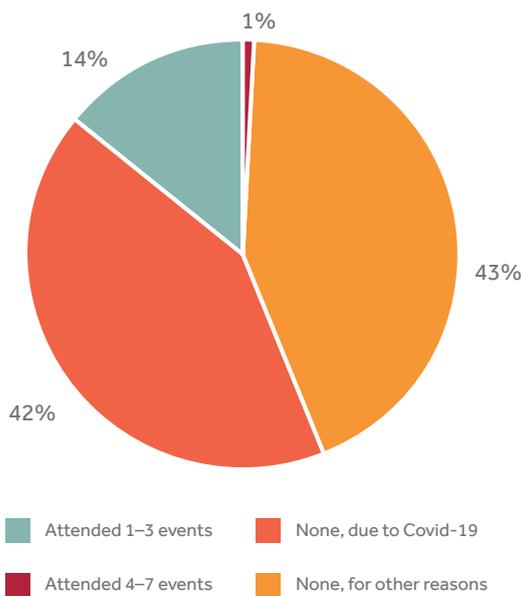
Distribution of public events authorized by the General Entertainment Authority from January to October 2020, by administrative unit and number of attendees.



Source: General Entertainment Authority, December 21, 2020.

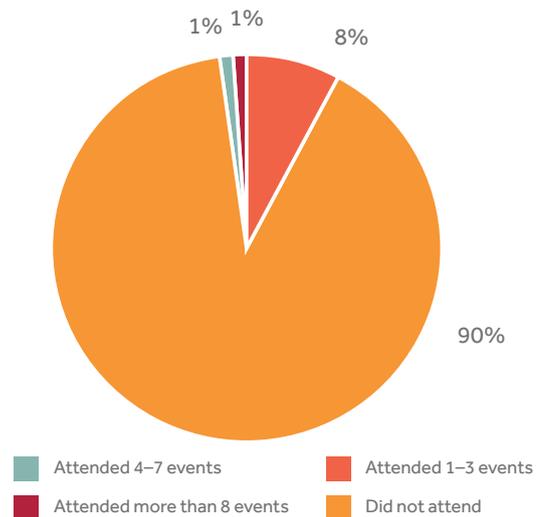
The 2020 Cultural Participation Survey, which was conducted in the last quarter of the year with a representative sample of 3,112 people from all regions of the Kingdom,⁽²⁷⁾ also provides data indicating that the pandemic was responsible for limiting attendance of festivals and events. In one question included in the survey, 15% of the sample stated that they had attended at least one heritage event during the past twelve months (15.2% of females and 16.10% of males), while 43% of those surveyed cited the outbreak of the pandemic as the reason for not attending any event or heritage festival in the past twelve months (Fig. 7-1).

Figure 7-1: Percentage of attendance of at least one heritage festival or event in the past 12 months



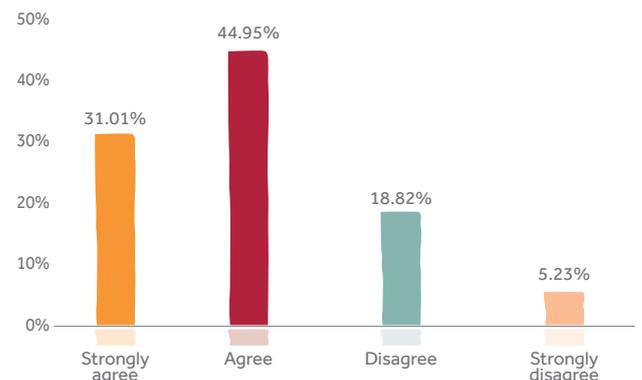
The Cultural Participation Survey identified a low demand for digital events by monitoring several indicators: (1) the traffic of digital spaces used for both community outreach and to host events, (2) the transfer of mass live events to virtual spaces, and (3) the emergence of many digital cultural initiatives. The data demonstrates that the percentage of those who reported attending a virtual event in 2020 does not exceed 10%, significantly less than the percentage of those who reported attending cultural events or festivals in 2019, which amounted to 55%.⁽²⁸⁾ This is consistent with the opinions of workers and professionals in the sector who believe that virtual activities are limited in their capacity to provide rich and enjoyable experiences to different segments of society compared to live activities⁽²⁹⁾ (Figure 7-2).

Figure 7-2: Percentage of individual attendance of cultural events held on digital platforms (past 12 months)



As shown in Figure 7-3, out of the small portion of those who attended virtual events, 76% expressed a desire to continue attending events beyond the pandemic itself. In contrast, less than half expressed their enthusiasm for this. Despite the overall positive reception of virtual events and a general desire for their continuation (69.28% of the total sample), only 17.52% of the total sample expressed a strong desire to continue attending virtual events post-pandemic, of which slightly more than half were females. The disparity between the high percentages of those enthusiastic about virtual events and the percentages of those who actually attended any of them may be explained by the desire to keep virtual events as an option, even if they are not attended regularly.

Figure 7-3: Percentage distribution of trends toward the continuation of virtual cultural events even after the end of the pandemic among those who have attended at least one virtual event in the past 12 months.



Digitalization in the Sector

Digitalization has played an important role in the sector long before the outbreak of the pandemic, particularly in the marketing and delivery of cultural products to the public. Many organizers rely on electronic platforms to market events, sell tickets, and grant the necessary licenses to hold events. With the onset of Covid-19, the use of digital platforms went beyond marketing. They started to be used as virtual spaces for hosting and organizing events. The sudden and rapid transition of activities to the digital space revealed a major challenge to the sector's success. The exigent need for digital adaptability was challenged by the inability of local platforms and custom websites to successfully broadcast events to their target audience. This has led many parties to fall back on established platforms such as Zoom and social media sites like Instagram Live and YouTube, among others.

These platforms are nevertheless problematic: revenue-generating schemes are largely absent, including the option to sell tickets for events, which is vital for the sector to remain sustainable. This deficiency has led some organizers to turn to television broadcasting platforms since they are seen as more stable in terms of access to an audience and as a way of generating revenues via advertisements. The GEA, for instance, organized concerts on the Rotana channel. In cooperation with MBC, the Authority also launched the "Made at Home" program, which ran May 28–31. The program invited the public to share their creative productions during the lockdown period and compete for cash prizes.

Interaction via available electronic platforms is limited to transmission and reception, which, according to experts and workers in the sector, poses challenges to the local digital experience. Among these challenges is the inability to cater to specific target audiences as well as restrictions on the types of events that can be held, especially those requiring interaction. For example, it was difficult to broadcast cultural and entertainments that target families and children and provide a rich and enjoyable experience without the need for parental supervision. This contrasts with in-person activities, which allow the family to spend time together. Furthermore, the virtual space remains unsuitable for events that rely on sensory experiences, such as food festivals, sports, and any activities requiring movement.

Hybrid Solutions

According to experts in the sector, the increase in the number of virtual activities oversaturated the audience.



This prompted some organizers to look for hybrid solutions after the ease of preventative health measures. By merging the in-person element with the digital experience, they were able to preserve the advantages of virtual activities while maintaining the benefits of in-person ones. One such example is the "Eid on Wheels" event held around the Ithra Center on Eid Al-Adha. Guests could book a travel route via a website dedicated to the event and then take a car ride to watch live and interactive shows that used 3D technology while complying with preventative health measures.

As such, the pandemic has shed light on opportunities to develop the sector through hybrid solutions that ensure the provision of diverse interactive experiences for the public while simultaneously developing innovative digital platforms that cater to the needs of the events and festivals market. Seizing such opportunities not only encourages innovation but also allows organizers to create activities that generate a steady stream of revenue.

Sustainability of Digital Events

Despite the obstacles that accompanied the virtual experience this year and its overall weak reception (Figure 7-2), the number of those who expressed a desire to continue virtual activities—even though it was not reflected in their consumption behavior—might be an indicator of potential consumer interest in the virtual alternative as an option, without necessarily affecting levels of in-person events negatively. Instead, it is possible that this potential consumer interest could stimulate the development of methods for organizing activities that provide an additional virtual element, which can wield its marketing advantages to attract audiences with digital preferences that the pandemic helped take shape. More importantly, the idea of having a choice to attend an event virtually or in-person reduces geographical and economic barriers of access and helps cultural events and festivals to cast a wide net, allowing them to convey their message to the largest possible segment of the public.

Table 7-4: List of online platforms for marketing, advertising, and sales services in the cultural festivals and events sector.

Platform	Link	Ticket Vendor
Enjoy Saudi	https://enjoy.sa/ar/	Official marketing platform of the General Entertainment Authority
Shubbaak	https://shubbaak.com/	General Entertainment Authority
Lammt	https://lammt.com/	Website
Virgin Megastore	https://www.virginmegastore.sa/ar/	General Entertainment Authority-certified ticket vendor
Easy Ticket	https://land.e-ticket.app/index.html	General Entertainment Authority-certified ticket vendor
The Comedy Club	https://tickets.comedyclub.sa/	General Entertainment Authority-certified ticket vendor
Meshini	https://www.meshini.com/ar	General Entertainment Authority-certified ticket vendor
MyTicketApp	https://myticketapp.net/	General Entertainment Authority-certified ticket vendor
GoTicket	https://www.goticket.com/	General Entertainment Authority-certified ticket vendor
7AJZ	https://www.7ajz.net/	General Entertainment Authority-certified ticket vendor
Ideative Box Office	https://www.idbo-sa.com/	General Entertainment Authority-certified ticket vendor
Hadathy	https://hadathy.sa/	General Entertainment Authority-certified ticket vendor
Bhive	https://bhive.app/	General Entertainment Authority-certified ticket vendor
Platinum List	https://platinumlist.net/ar/	General Entertainment Authority-certified ticket vendor
Evento	https://evento.sa/home	General Entertainment Authority-certified ticket vendor
Saudi Tickets	https://www.sauditickets.sa	Ministry of Sports
Sharek	https://www.sharek.sa/en	Ministry of Sports
Visit Saudi	https://www.visitsaudi.com/ar	Saudi Tourism Authority
Saudi Seasons	https://saudiseasons.com/	Website
Saudi Events	https://faaliat.sa/	Ministry of Media
Eye of Riyadh	https://www.eyeofriyadh.com/ar/	Website
Cultural Calendar	https://www.moc.gov.sa/ar/calendar	Ministry of Culture
Visit Saudi application	Smart Phone Application	Saudi Tourism Authority

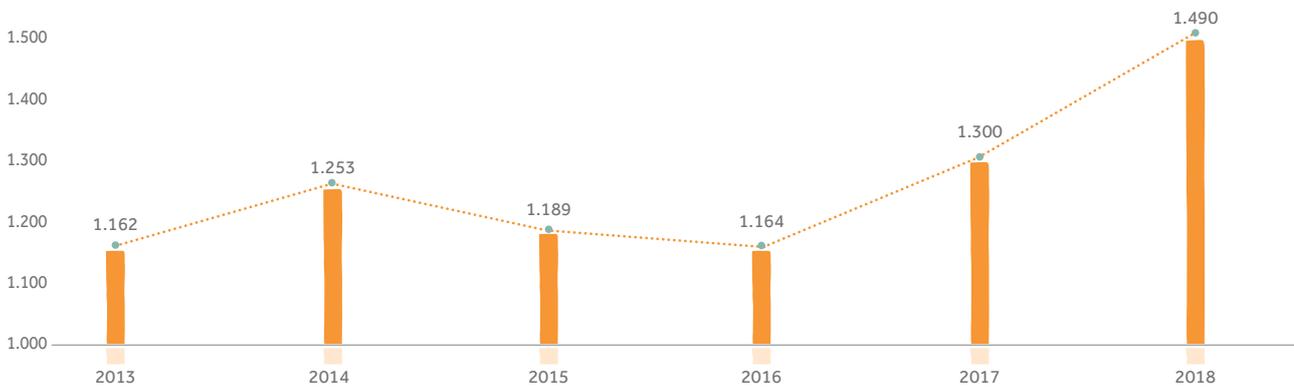
Infrastructure and Creative Economy

Sector Growth

The increased contribution of the arts as well as creative and entertainment activities to the GDP in recent years attests to the importance of the cultural festivals and events sector in diversifying the national economy. Furthermore, as one of the most important cultural activities attracting both local and inbound travel, the sector also contributes to the development of domestic and foreign tourism.



Figure 7-4: Percentage and size of contributions to GDP from arts, creative and entertainment activities (in millions of SAR)⁽³⁰⁾



The impact of the pandemic on cultural events and festivals is evident in the cultural tourism indicators. Out of the total cultural activities undertaken by domestic tourists, the share of attendance for in-person cultural events decreased from 44% in 2019 to 26% in the first nine months of 2020. In contrast to the over five million tourist trips that included attending cultural events in 2019, domestic tourists made

only 1,669,911 trips that included attending cultural events this year.⁽³¹⁾

Expenditures and Investments

The festivals and events sector plays a strategic role in diversifying the national economic base. The Council of Ministers issued a resolution to approve the Tourism Development Fund on June 16, 2020, seeking to develop dynamic tourism projects, attract investments from both inside and outside the Kingdom, provide financial facilities to the private sector, and encourage investment in the local tourism sector.⁽³²⁾ This will have a significant positive impact on the cultural festivals and events sector, being closely related to cultural tourism. An investment fund financed by the revenues of the Saudi Seasons and organizationally linked to the National Development Fund was also established for entertainment, culture, sports, and tourism events.⁽³³⁾ In addition, the municipal services sector and the health and social development sectors that serve the festivals, entertainment, and sports sectors have received financial allocations from the national budget for the year 2020 to finance several government agencies.



Table 7-5: Financial allocations from the 2020 budget for sectors related to events and festivals⁽³⁴⁾

Sector	Task	Number of Affiliated Government Agencies	Sector Allocations from the 2020 Budget
Municipal Services Sector	Urban infrastructure; development of Saudi cities; establishment of entertainment activities, festivals, and events; and raising the quality of life in cities.	295 agencies	54 million SAR (US\$14.4 million)
Health and Social Development	The health aspect includes research and legislation for health and ambulance services. The social aspect includes security services, social and cultural care, media, sports, entertainment, and the management of the Quality of Life Program.	17 agencies	167 million SAR (US\$44.5 million)

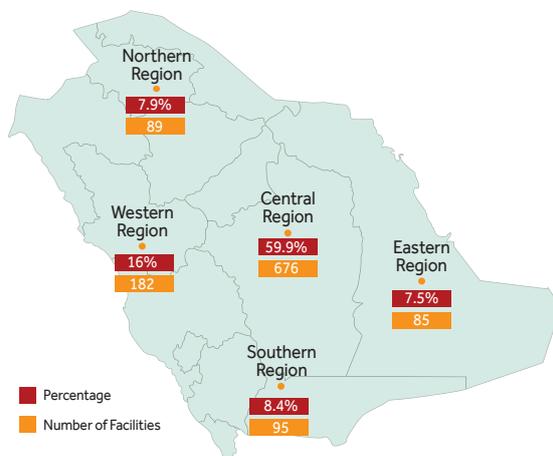
Supporting the Sector

The GEA sought to mitigate the negative impacts of the pandemic on private businesses. They signed agreements with a number of local banks to provide financing solutions to private sector companies in the field whose activities were severely disrupted⁽³⁵⁾ as well as waiving event licensing fees.⁽³⁶⁾

Infrastructure

There are a total of 1,128 registered sites with the GEA throughout the Kingdom. These include stadiums, theaters, public parks, exhibitions, schools, public squares, and others.⁽³⁷⁾

Facilities for holding events and festivals registered in the General Entertainment Authority database



Source: General Entertainment Authority, December 21, 2020.
 *According to the General Entertainment Authority, more than 80% of facilities in the southern region are located in Al-Bahah Province.

There are also 430 registered sites dedicated to hosting events under the supervision of various government agencies. Among these are 18 sites for the Ministry of Sports, 20 sites for the High Commission for the Development of Riyadh, 385 sites for Riyadh Municipality, and six sites for universities.⁽³⁸⁾ The Governorate of the Makkah Province announced the start of the Jeddah Super Dome project, which will cover an area of 308,000 square meters and will be used as a center for hosting exhibitions, conferences, and local and international events, and will serve as both an incubator and destination for cultural, artistic, and entertainment activities.⁽³⁹⁾ This is in addition to the Kingdom's other mega projects, including the Qiddiya project, the Diriyah Gate, and the Red Sea project.

Sector Workforce

The sector workforce comprises varied labor classifications: organization, design, operation, production, management, and the promotion of events, exhibitions, and conferences.



Table 7-6: Registered activities related to the sector and number of workers⁽⁴⁰⁾

Activity	Registered Activities	Number of Workers
Cartographic and spatial information activities	262	669
Operation of exhibition and conference centers and facilities	572	1,590
Organization, management, and promotion of trade fairs, meetings, conferences, and events	1,278	5,440

Organizational Developments

In the past few years, several different bodies have contributed to the sector’s development, including the Ministry of Culture, the GEA, the Ministry of Tourism, and provincial and city authorities. All these entities participate in and contribute to the sector by providing support and creating the appropriate regulatory environment for its activities. In addition, its most prominent festivals are now organized by specialized bodies.⁽⁴¹⁾ In 2020, the trend toward specialization in the management of cultural sectors continued when on February 25, the Saudi Commission for Tourism and National Heritage was transformed into the Ministry of Tourism, and Mr. Ahmed bin Aqeel Al-Khatib was appointed as its minister.⁽⁴²⁾ Heritage affairs were shifted to the Ministry of Culture and the Heritage Commission. This was followed by the establishment of the Saudi Tourism Authority on March 10, its first initiative being the Saudi Summer Season (“Breathe”).⁽⁴³⁾

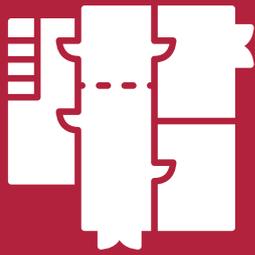


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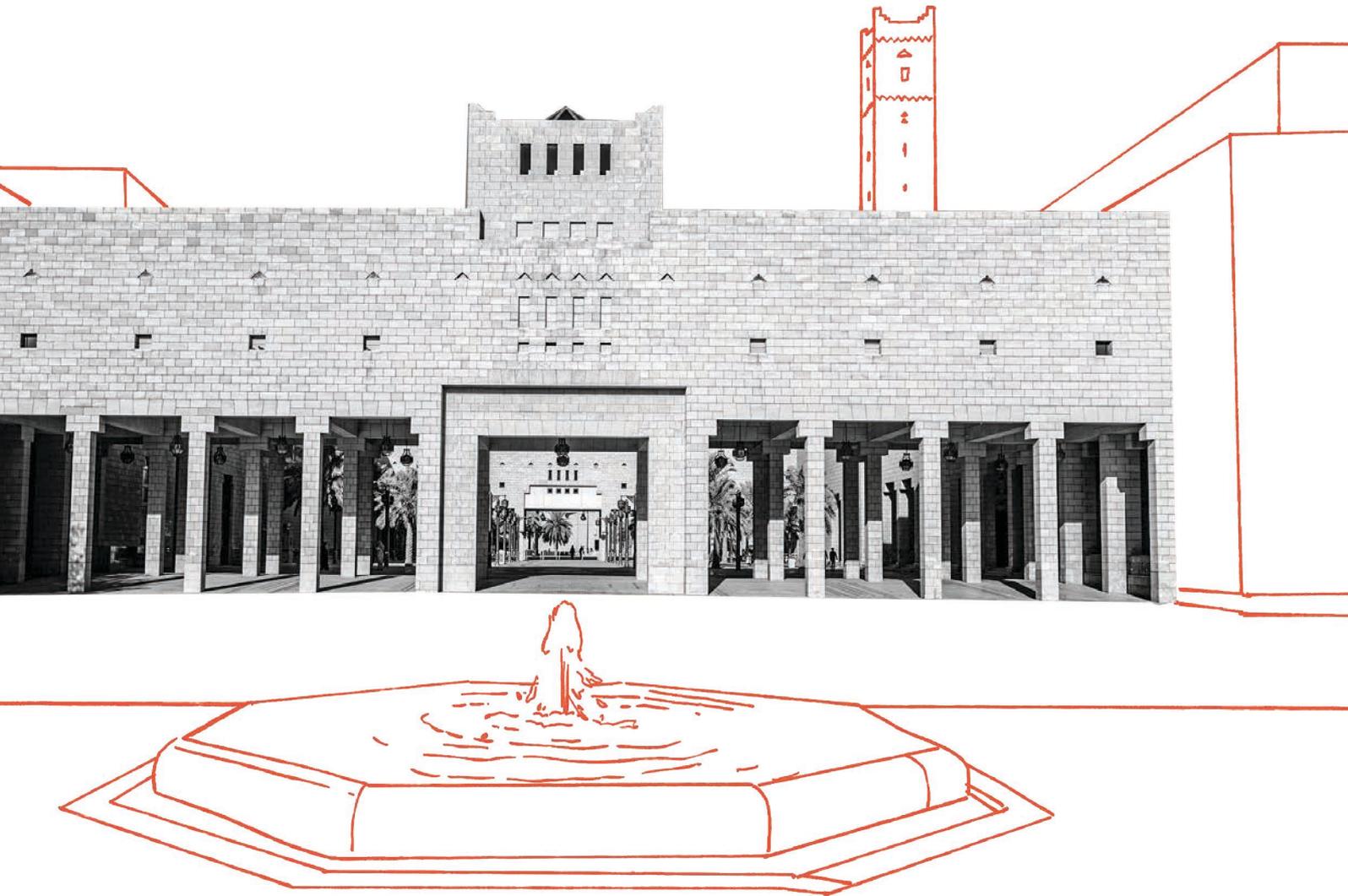


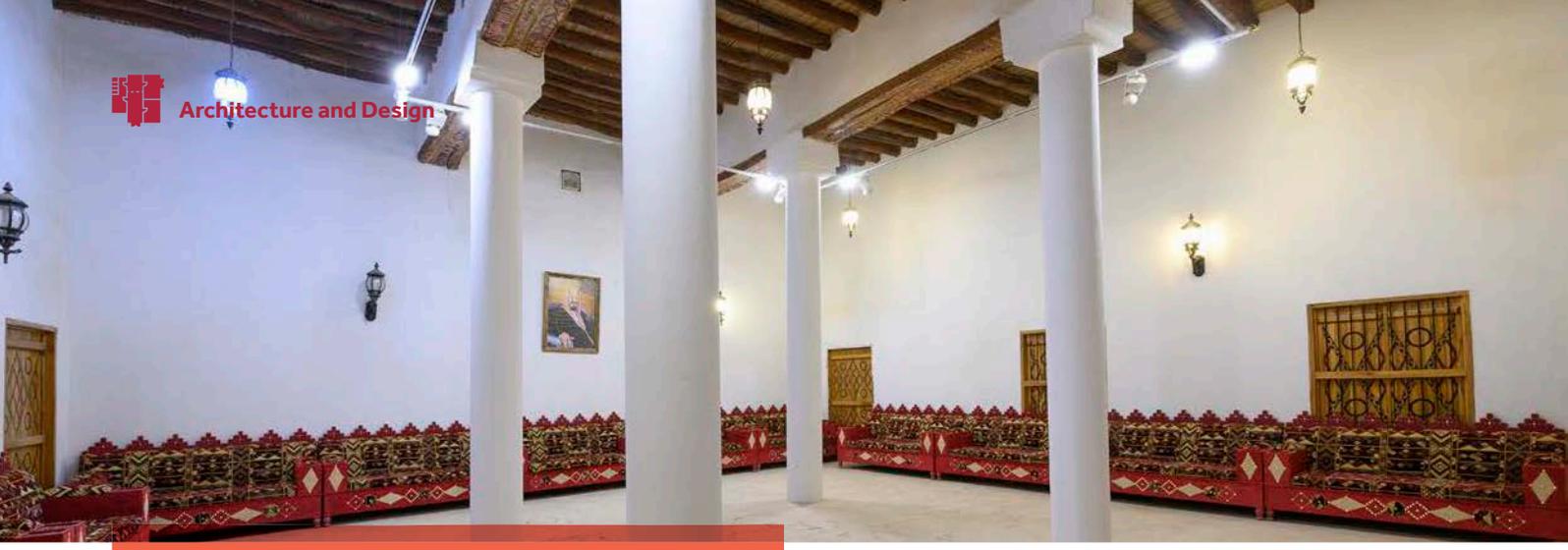


Architecture and Design

- Creativity and Production
- Recognition and Dissemination
- Architecture and Design Arts
in Virtual Space
- Infrastructure and Creative Economy







The Covid-19 pandemic has prompted many segments of society to rethink both the concepts and priorities of residential and commercial design. Notwithstanding the impact of the pandemic, major architectural and urban projects announced during 2020 proved resilient, proceeding at a pace similar to the year prior. The lockdown period and its corresponding preventive health measures saw the organization of virtual activities and digital exhibitions. There was also a marked demand for online education and training programs, indicating the boundless potential that comes with a shift towards greater digitalization.

On the creative front, several urban and architectural designs won local and international awards. Competitions were also held to support talent in the field of architecture and design at every level—including amateurs, professionals, and students—through connections with the production market. Organizationally, the sector made great strides: the establishment of the Architecture and Design Commission, as well as the launch of several urban code projects are clear cases in hand.

Creativity and Production

Architectural Production and Urban Planning

The pandemic posed several challenges to major architectural and urban development projects.⁽¹⁾ However, it also came with equally exciting opportunities. The pandemic allowed several commissions and ministries—including the Ministry of Housing, the Ministry of Municipal and Rural Affairs, and regional and city development authorities—to take advantage of pandemic-induced lockdowns to facilitate and accelerate the completion of several services projects.⁽²⁾ They also reviewed and developed strategic documents and converted them to action plans ready for implementation following the end of the lockdown period. Furthermore, the pandemic did not halt the announcement of prominent architectural and urban projects, nor did it force the suspension of major projects—such as the Red Sea, NEOM, AMAALA, and Diriyah projects, among others. These projects and their developmental arc successfully navigated the pandemic, and will help sustain sector-wide progress, collectively contributing to the realization of Vision 2030.

While both experts and workers in the sector are optimistic about recovery after the pandemic, it is nevertheless expected to be gradual. This is especially due to the estimated 20–40% decline in government contracts for new construction projects in 2020, despite the abundance of government support programs for the sector, particularly small-and-medium-sized businesses.⁽³⁾

The Pandemic and Rethinking Architectural and Design Concepts

The pandemic saw the concepts and priorities of design were significantly reshaped for a large segment of Saudi society confined to home for months on end. Many were compelled to reassess their home design choices, which had previously prioritized large guest spaces and privacy concerns. Increased attention to living spaces, patios, and windows for light and ventilation has seen new trends in home design and furniture preferences emerge. The result has been more economical and practical design concepts in line with functionalism, which seeks to optimize the use of space and design products.⁽⁴⁾ Likewise, the enforcement of social distancing guidelines prompted a reconsideration of the design of public, commercial, and workspaces to make high-traffic and seating areas more compatible with preventive health measures.

Some design fields—such as game design and manufacturing—experienced a remarkable increase in demand that led to the depletion of warehouse stocks for the first time in some companies, even amid a slowdown in production and manufacturing operations.⁽⁵⁾ However, that success in the individual consumer market stood apart as design offices in various fields faced challenges due to the private-sector downturn, forcing many private businesses into cost-cutting to mitigate the adverse economic effects of the pandemic. Additionally, the restrictions imposed on travel and mobility throughout the pandemic made it difficult for design firms to manage projects remotely, especially those in their final stages. However, some firms have grasped that remote working can make communication between designers and clients faster and more effective, saving a lot of time and effort.⁽⁶⁾

Architecture and Design Awards

In 2020, several outstanding works received local and international awards underscoring the creativity in the field. Maraya, the famous concert hall in Al-Ula, won the 2020 Architizer A+ Award—a distinguished international architectural award organized by the Architizer Society in New York City—in the popular choice category.⁽⁷⁾ The building also earned the Royal Commission for Al-Ula a Guinness World Records title as the largest mirrored building in the world, measuring 9,740 square meters.⁽⁸⁾ Similarly, the design of the King Salman Park in Riyadh - which is expected to be completed by 2024 - won the 2020 International

Architecture Prize in the urban planning and landscape architecture category.⁽⁹⁾ The King Abdullah Financial District Grand Mosque, completed in 2017, won the same award in the religious buildings category.⁽¹⁰⁾ Azaz Architects, founded by rising architectural talent Shahad Al-Azaz, won the 2020 International Restaurant and Bar Design Award for its design of the Elixir Bunn Coffee Roasters in Riyadh.⁽¹¹⁾ To encourage and support creativity in the cultural sector, the Ministry of Culture launched the National Cultural Awards initiative on June 30, 2020, which includes a special award for architecture and design arts. The award accepted nominations through the end of September 2020, with winners set to be announced in 2021.⁽¹²⁾

Local and international award-winning urban, architectural, and interior designs

<p>Architizer A+ Awards</p>  <p>Popular vote Maraya Concert Hall, Al-Ula</p>  <p>GIÓFORMA</p>	<p>International Architecture Award</p>  <p>Urban planning and landscape architecture - King Salman Park, Riyadh</p>  <p>Omrania عمرانيا</p>	<p>جائزة العمارة الدولية</p>  <p>Religious buildings - King Abdullah Financial District Grand Mosque</p>  <p>Omrania عمرانيا</p>
<p>American Institute of Architects Middle East Design Awards⁽¹⁾</p>  <p>Successfully Completed Architectural Designs – Merit Award - Maraya Concert Hall, Al-Ula</p>  <p>GIÓFORMA</p>	<p>American Institute of Architects Middle East Design Awards</p>  <p>Conceptual Architectural Designs – Honorary Award - Seaside Resort, Al-Ula</p>  <p>Studio Tawakkul</p>	<p>International Restaurant & Bar Design Awards</p> <p>Restaurant & Bar Design Awards®</p> <p>Cafés Elixir Bunn Coffee Roasters, Riyadh</p>  <p>Azaz Architects</p>

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Recognition and Dissemination

Architecture and Design Competitions

Several competitions were launched in 2020 to support creative artists at all levels—including amateurs, professionals, and students—in the field of architecture and design. The competitions were organized by various governmental, private, and community organizations. For example, as part of the Culture in Isolation initiative, the Ministry of Culture launched a design art competition on Twitter seeking innovative designs for the five national sites inscribed on the UNESCO World Heritage List.⁽¹³⁾ Likewise, the National Housing Company launched an architectural design competition among its own employees and the employees of the Ministry of Municipal and Rural Affairs and Ministry of Housing. The objective is to present new designs and ideas to improve housing units and quality of life in the Kingdom.⁽¹⁴⁾ The Saudi Post also organized a “Make Your Stamp Ours” contest to motivate artists to design postage stamps for the Saudi G20 presidency.⁽¹⁵⁾ Similarly, in partnership with the Council of Cooperative Health Insurance, the Ministry of Health launched the fourth Wa’ai Award competition, which encouraged citizens and residents of Gulf Cooperation Council countries to develop health awareness content through creative works across several streams (i.e. animation, infographic design).⁽¹⁶⁾

There were also several local and private-sector competitions. Among the most prominent was the “Tanween Creative Challenge,” organized by the King Abdulaziz Center for World

Culture (Ithra) in partnership with several creative design agencies, such as Inaya Products, the Qormuz Shop, and the Shorfaa e-learning platform.⁽¹⁷⁾ Ithra also launched the “Visualizing the Data of Culture” challenge in cooperation with Imam Abdulrahman bin Faisal University for students in Graphic Design and Multimedia. The challenge consisted of creating infographics for the cultural data published in the “Report on the State of Culture in the Kingdom of Saudi Arabia, 2019,” such as interactive posters and models.⁽¹⁸⁾ Student Fatima Abu Al-Saud won first place, and student Manar Alshulah’s project was exhibited at the Ithra Idea Lab.⁽¹⁹⁾

In the same vein, the Red Sea Development Company (TRSDC) organized the Sustainable Architecture Competition for architecture students and recent graduates of Saudi universities. Participants were tasked with designing a community center in the residential neighborhood for TRSDC employees.⁽²⁰⁾ Similarly, the second national “Mujassam Watan Competition,” an annual Al-Fozan Social Foundation initiative, was launched this year to mark Saudi National Day. The competition encourages creative design by implementing winning submissions as monuments in the cities of Khobar and Dammam.⁽²¹⁾ Likewise, the second edition of the Abdullatif Al-Fozan Award for Mosque Architecture launched the International Competition for Mosque Accessories, concerned with designing innovative solutions that serve mosques and worshippers in five areas: prayer chairs, Quran holders, ablution spaces, shoe racks, and sensory accommodations for those with visual or auditory difficulties. Last year’s winners were presented with their awards in July 2020.⁽²²⁾

Table 8-1: Competitions in the field of architecture and design art held this year

Competition	Organizing Entity	Categories	Winners
Sustainable Architecture	The Red Sea Development Company		First place: Nayef bin Fahd Al-Ghannam
			Second place: A team of architects led by Abdullah Al-Nahdi, Firas Kushari, Abdulaziz Al-Saqqaf, Abdulrahman Al-Jilani, and Muhammad Damanhour
			Third place: Hassan Al-Hindi and Muhammad Al-Ghazi
Design Art	Ministry of Culture		The winning Twitter handles were announced on Twitter
“Make Your Stamps Ours”	Saudi Post	Empowering people	Zian Sheikh
		Safeguarding the planet	Muhammad Omari
		Shaping new horizons	Muhammad Abu Isha
Mujassam Watan	Al-Fozan Social Foundation	Roundabouts	“Our Ambition is Sky High” roundabout by Fatima Al-Abed, Masoud Al-Zennifer, and Maha Al-Essawi
		Pedestrian walkways and public spaces	Al-Ardha Square by Meshaal Bateyour, Abdul Qadir Al-Suwaidan, and Abdullah Al-Ansari

Competition	Organizing Entity	Categories	Winners
Tanween Challenges	King Abdulaziz Center for World Culture (Ithra)	Cardboard Furniture Challenge	Group 1: Shahd Bafqih and Moudi Al-Hur Group 2: Fatima Al-Naimi and Azahir Al-Shamaa Group 3: Nura Al-Sheikh and Ali Abu Sareer
		A New Outdoors Challenge	Maryam Al-Uwa
		Creativity Needs You Challenge	Yasmin Al-Zahrani
		The Future of Creative Placemaking Challenge	Raghad Al-Ahmad Nur Qari Maysam Bintun and Rabia Al-Tala
		Reimagining the Crafts of Saudi Arabia Challenge	First place: Marwa Bamshmus (Araka) Second place: Asmaa Al-Saad (Ajwadi) Third place: Al-Hanuf Al-Shamsan (Samra)
International Competition for Mosque Accessories	Al-Fozan Social Foundation	Prayer chairs	Maryam Al-Mutairi – Kuwait
		Quran holders	Bitar Consultants Engineers Office – Jordan Samer Al-Sayyari – Lebanon Yamina Ahmed Zaid – Algeria
		Ablution spaces	Group: Alaa Yousef Al-Khatib, Sarah Saleh Al-Qahtani, Hadil Ziyad Morshed, Hadil Majid Al-Rakhimi and Wajid Al-Muallim
		Shoe racks	Rawan Mohammed Ali
Jabal Abu Makhruq Design Competition	Riyadh Municipality	Offices and Companies	First place: "Together We Can" Architectural Engineering Office Second place: Abdulqadir Ahmed Al-Omari Firm Third place: SIDQ for Advanced Enterprise Engineering
		Work teams	First place: Architectural Innovation Team Second place: Abdullah Al-Fahd team Third place: The Three Planners Team
		Students and academic bodies	First place: Group A, King Saud University Second place: Effat University Third place: Group B, King Saud University
Ventilator Design and Manufacturing (Open-Source)	Genius Valley and other entities		First place: Sami Asali, Dhaif Allah Al-Khudidi, and Hassan Al-Thamali Second place: Mustafa Khalaf, Ziad Abu Ayyash and Anas Subha Third place: Manufacturing Club team, King Abdulaziz University
Wa'ai Award Competition	Ministry of Health in partnership with the Council of Cooperative Health Insurance	Animation – Individuals	First place: Hamza Jamal Asiri (Chronic depression) Second place: Salma Omar Al-Zaid (Career burnout) Third place: Abdullah bin Ahmed Al-Salim (Autism) Fourth place: Fahd Said Al-Ghamdi (Domestic violence as a gateway to bullying) Fifth place: Sarah Mansour Al-Jalil (Color blindness)
Wa'ai Award Competition	Ministry of Health in partnership with the Council of Cooperative Health Insurance	Animation – Students	First place: Maram Salem Bawazir (Staying on medication) Second place: Reem Nayef Al-Otaibi (Structuring) Third place: Raghad Meshaal Al-Harithi (Nafad) Fourth place: Tamim Abdulaziz Al-Abd Al-Jabbar (Harms of smoking hookah) Fifth place: Rasha Mishary Al-Rasheed (Using the internet for illness diagnosis)

Competition	Organizing Entity	Categories	Winners
Wa'ai Award Competition	Ministry of Health in partnership with the Council of Cooperative Health Insurance	Infographic – Individuals	First place: Shahd Muhammad Al-Abaih (Benefits of daily walking) Second place: Reem Al-Masari (Keto diet) Third place: Lulwa Ibrahim Al-Jethil (Premature aging) Fourth place: Husein Nasser Al-Hamad (Children's car safety) Fifth place: Muhammad Abboud Salem Dahman (Video game addiction)
Wa'ai Award Competition	Ministry of Health in partnership with the Council of Cooperative Health Insurance	Infographic – Students	First place: Badra Hamad Al-Otaibi (Do you use your contact lenses properly?) Second place: Mohammed Salman Ali bin Ahmed (Alzheimer's disease) Third Place: Maha Abdullah Al-Farhan (Nervous system – headache) Fourth place: Sarah Fayez Al-Thubaiti (Dehydration and not drinking enough water) Fifth place: Faisal Muhammad bin Hilal (Online video game addiction)

Architecture and Design Exhibitions During the Pandemic

The sector witnessed a commendable number of exhibitions across various fields of architecture and design in the first quarter of 2020. These took place before March 13th, after which all scheduled exhibitions through the remainder of the year were suspended due to the pandemic and nation-wide efforts to curb its spread-(23) the cancellation of the Saudi Design Week is a clear case in hand.



Table 8-2: Exhibitions in the field of architecture and design art held this year

Exhibition	Field	Location	Date
"21, 39 I Love You Urgently" ⁽²⁴⁾	Miscellaneous–Architecture and Design	Saudi Art Council and the Jeddah historic district	January 28–March 13, 2020
INDEX Saudi ⁽²⁵⁾	Architecture and engineering design	Riyadh International Convention & Exhibition Center (RICEC)	February 3–5, 2020
IDG 2020 ⁽²⁶⁾	Interior design	Princess Nourah University, Riyadh	February 12–13, 2020
Cinema Build KSA Forum	Miscellaneous–Architecture and Design	Fairmont Hotel, Riyadh	February 19–20, 2020
Saudi Build	Architecture and design	Al Harthi EXPO Center, Jeddah	Rescheduled for November 15, 2021

Publishing in the Architecture and Design Field

Data from the King Fahd National Library indicates that fourteen titles were published in the architecture and design

field this year, ten of which were related to architecture and urban planning, while the other four covered other design arts, such as industrial and graphic design.⁽²⁷⁾ The Abdullatif Al-Fozan Award for Mosque Architecture organization is active in publishing various works on mosque architecture.⁽²⁸⁾

Table 8-3: Examples of Saudi magazines on architecture and design art

Magazine	Publisher	Description
Albenaa ⁽²⁹⁾	Ibrahim Abdullah Abalkhail, Engineer	Architecture magazine with a total of 362 issues as of the end of 2020.
Design ⁽³⁰⁾	Kholoud Abdulrahman Attar Publishing House (KAAPH)	Magazine covering various types of design art with a total of 66 issues as of the end of 2020.

Architecture and Design Arts in Virtual Space

Virtual Architecture and Design Through Digital Media

Digital technologies are an essential part of modern architecture and design. They have become fundamentally integrated into the early stages of designers' and architects' workflows. New technologies allow design professionals to transform their creative visions into reality in a way that traditional design tools—paper, pens, and other engineering instruments—could not. Today, the presence of architecture and design in the digital space is no longer considered novel or unconventional.

The sector has seen signs of digitalization beyond the design process. During the Covid-19 pandemic, digitalization accelerated and expanded to encompass education and training, thereby providing space to successfully conduct virtual activities and create digital galleries. Even though the pandemic has adversely affected production processes during the lockdown due to restrictions to on-site work and difficulties accessing needed materials, creative activities and educational and training programs have not ceased. On the contrary, the sector saw remarkably resilient activity in virtual spaces. Several Saudi universities held well-attended virtual exhibitions displaying the works of architecture and design students, in addition to many conferences, training programs, and workshops.

Perhaps the most prominent virtual event was the Arab Architecture Week, a cultural initiative organized by Archinet in the form of a conference to support and encourage creative individuals and specialists in the field. Hosting the conference virtually allowed an elite of architects, designers, and academics from different parts of the Arab world to



network and share their experiences and expertise with one another. The conference included fifty-three meetings and lectures. Participants ranged from individuals to institutions, including Arab organizations and several official bodies representing the architecture and design sector.⁽³¹⁾

The industrial design division of the Saudi Umran Society, in cooperation with Archinet, launched a weeklong event for Saudi industrial design. The week consisted of a recorded public conference to introduce developments in the field of industrial design to the Kingdom, as well as several discussions, educational sessions, and lectures given by local and international specialists.⁽³²⁾ The King Abdulaziz Center for World Culture (Ithra) also held specialized design workshops as part of its annual Tanween Creativity Season.

Digital Training Programs: Opportunities and Challenges

Design art workshops and online training programs have been well-attended throughout the Covid-19 pandemic. Some companies specializing in providing training courses in the design arts, such as the Shorfaa e-learning platform, recorded increases in program sales of up to 100% during the months of quarantine.⁽³³⁾ Similarly, the College of Design at Imam Abdulrahman Bin Faisal University launched the Virtual Design School initiative. The initiative offered several free, professional lectures held via Zoom through August 2020 to help those interested in design develop sector-specific skills and expertise.⁽³⁴⁾ Despite the boost in accessibility provided by digital space both locally and globally, there remain several challenges associated with the digital learning experience. The most prominent of these are substandard outputs from the virtual workshops and programs – with several factors at play. For one, virtual workshops lack a hands-on training



component, and it is challenging for instructors or peers to provide constructive feedback to participants. In addition, due to the prevailing belief that online programs should be provided free of charge, instructors are seeing declining financial returns from the programs they are teaching. Furthermore, the pandemic has seen enrollment numbers double, putting a heavier burden on instructors and program providers. This, in turn, adversely affects the quality of the educational output.⁽³⁵⁾

It is hoped that the pandemic will contribute to a new, sustainable hybrid reality that combines the best that digital technologies have to offer without sacrificing the benefits that only face-to-face interaction makes possible. Indeed, the hope is that incorporating digital technologies and the digital space as permanent mediums will enrich creative, educational, and production process, amplifying positive trends while transcending pre-pandemic limitations.

Infrastructure and Creative Economy

The Institutional Structure of the Sector

The adoption of the Kingdom's building code has been a long-standing issue in the architecture and urban planning sector. Specialists and stakeholders interested in developing the urban and structural landscape of the Kingdom went through a long period of anticipation before the Saudi Building Code (SBC) was finally approved in 2018. The code is defined as a set of regulations and requirements for building and construction to ensure public health and safety in all aspects and at all stages of construction.⁽³⁶⁾ The first two phases of the SBC began with a gradual application to public buildings and facilities. However, with the launch of the Saudi Code for Residential Buildings at the end of 2020, the SBC system is witnessing the start of a new phase of expansion in its application. The Saudi Building Code National Committee announced the implementation of the residential building code from 2021, which will serve as a guide through the middle of the year.⁽³⁷⁾

Regional Urban Code Projects

Various regions of the Kingdom began announcing their urban code projects in 2019. First, the Asir Development Authority (ASDA) adopted an urban code project for the region⁽³⁸⁾ in tandem with the Humanization of Cities initiative launched by the Ministry of Municipal and Rural Affairs in 2018 to improve the urban landscape and the overall quality

of life. Perhaps the most prominent effort witnessed this year regarding the urban code was its adoption in Wadi Hanifa, its tributaries, and the surrounding lands. The Royal Commission for Riyadh City (RCRC) launched the new code in cooperation with the Riyadh Municipality authority and the Diriyah Gate Development Authority (DGDA).⁽³⁹⁾

The Al Madinah Region Development Authority (MRDA) also announced its plan to prepare an urban code unique to Madinah in addition to conducting a comprehensive study of the urban and architectural identity of the city.⁽⁴⁰⁾ It is expected that the remaining regions of the Kingdom will follow in launching their own urban codes to ensure that the requirements of the SBC are being met and to preserve and accentuate the unique architectural and urban identity of each region.

To support urban code projects that have accelerated their pace this year, the DGDA, in cooperation with specialized architectural and engineering firms, launched the Design Studio intending to provide consultations to beneficiaries and property owners in the region to ensure compliance with the regulations and standards of the urban code.⁽⁴¹⁾ Similarly, the Royal Commission for Al-Ula launched the Al-Ula Design Studio, which will provide a range of community services as well as architectural models and designs for those wishing to draw inspiration from the patterns and styles of traditional Arab architecture characteristic of the region.⁽⁴²⁾ In line with these efforts, the Ministry of Housing—in partnership with several architectural firms and designers—launched an engineering design service for do-it-yourself construction. This service, available online through the Sakani platform, aims to provide citizens and beneficiaries access to first-rate designs for residential units that meet quality and safety standards for a low cost.⁽⁴³⁾ In the same vein, the Ministry of Municipal and Rural Affairs launched a unified construction license service through the Baladi platform to facilitate and automate building permit procedures. By offering access to a host of services without having to go in-person to the municipality headquarters, the platform has raised the percentage of online beneficiaries by 60%.⁽⁴⁴⁾

Workforce

The number of architects registered with the Saudi Council of Engineers, which is used as an indicator for estimating the total number of workers in the field of architectural design, reached 1,404 this year, most of whom are concentrated in the main regions of the Kingdom (Figure 8-2). Of that number, 1,064 were males, and 340 were females. Thus, women represented a mere 24% of the total number of architects in 2020.

Examples of prominent architectural and urban projects and their status (in the form of a map)

Project	City	Status/Stage	Owner	
	Al-Ula	Announced	Royal Commission for Al-Ula	
	Riyadh	Announced	Saudi Heritage Hospitality Company (NUZUL)	
	Jeddah	Announced	General Authority of Civil Aviation	
	Jeddah	Announced	Ministry of Culture	
	Riyadh	Announced	Ministry of Sports	
	Al-Ula	Announced	Royal Commission for Al-Ula	
	Amaala	Announced	Public Investment Fund	
	Al-Diriyah	Announced	Diriyah Gate Development Authority	
	Red Sea Project	Announced	Public Investment Fund	
	Riyadh	Announced	Public Investment Fund	

1) Architectural and Design Commission, as of February 1, 2021.

Figure 8-1: Number of architects registered with the Saudi Council of Engineers over the past five years⁽⁴⁵⁾

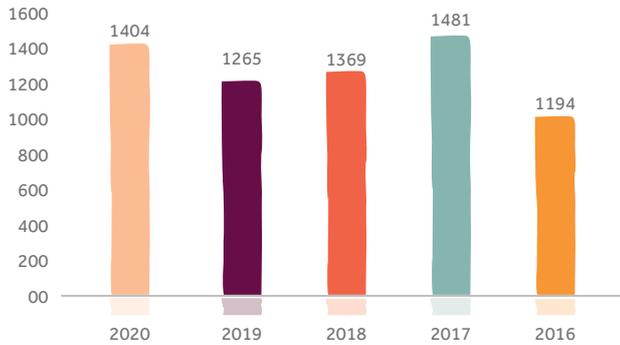
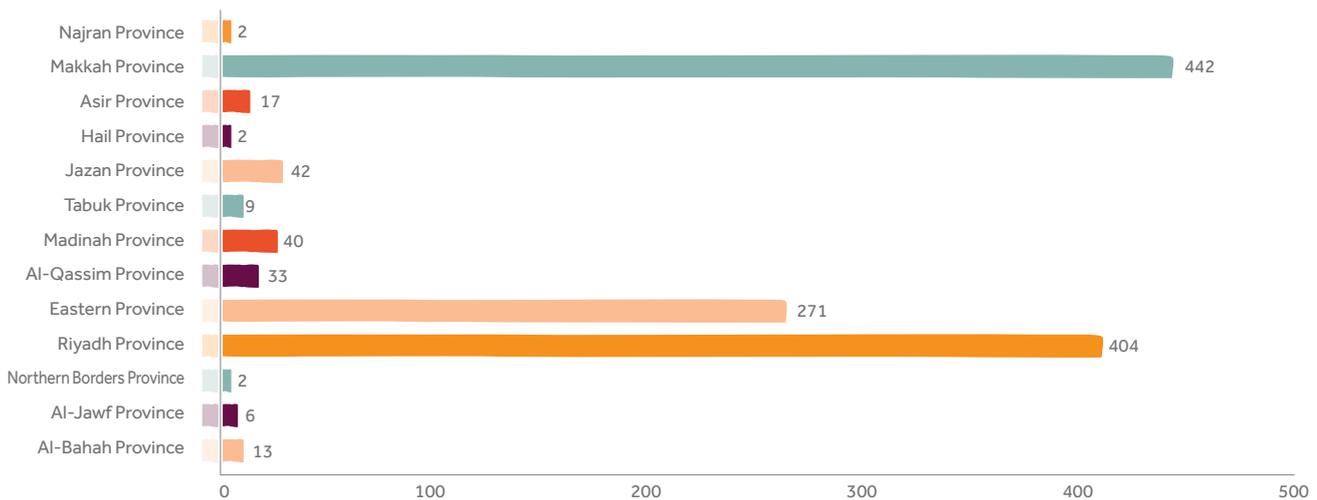


Figure 8-2: Distribution of architects registered with the Saudi Council of Engineers for 2020 according to region⁽⁴⁶⁾



According to data collected in 2020 from the Ministry of Human Resources and Social Development, the number of Saudis working in other design fields is as follows: 819 interior designers, 1,801 decorators, and 674 industrial and commercial product designers.⁽⁴⁷⁾ These numbers, however, should be considered estimates, especially for those working in the field of graphic design. Most graphic designers work as freelancers rather than registered professionals. This is reflected in the number of freelance graphic designers—currently at 8,872—enrolled in the Bahr platform of the Human Resources Development Fund (Hadaf), which links freelancers working in various fields to people with incomplete projects.⁽⁴⁸⁾

Organizational Developments

The most important organizational development for the sector this year was the establishment of the Architecture and Design Commission and the appointment of Dr. Sumaya Al-

Sulaiman as its CEO.⁽⁴⁹⁾ The decision was an important step in affirming and strengthening both the cultural and civilizational aspects of the arts of architecture and design, which have suffered for years due to their dispersion between the fields of engineering and commerce. In accordance with its strategic vision and responsibilities, the commission will actively take on a number of organizational roles, which will focus on supporting and empowering workers in the sector and providing training courses and professional programs as per the nuances and requirements of each field of architecture and design.⁽⁵⁰⁾

At the end of July 2020, the Ministry of Culture announced the formation of the commission's board of directors, with Minister of Culture Prince Badr bin Abdullah bin Farhan Al-Saud as chairman and Deputy Minister of Culture Hamid bin Mohammad Fayez as vice-chairman. The board members include Prince Faisal bin Abdulaziz bin Ayyaf, Dr. Khaled Omar Azzam, engineer Basim bin Subhi Al-Shihabi, Jawahir bint Ziyad Al-Sudayri and Carlo Rati.⁽⁵¹⁾

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Heritage

- Tangible Cultural Heritage:
Discovery and Documentation
- Tangible Cultural Heritage:
Rehabilitaion and Development
- Intangible Cultural Heritage:
Preservation, Documentation, and Archiving
- Recognition and Dissemination
- Participation
- Sustainable Heritage Management
- Infrastructure and Creative Economy
- Digitalization in the Sector
- Organizational Developments







The heritage sector has garnered great interest in the Kingdom. Efforts to develop, preserve, and invest in the sector signal its importance as an integral component of Saudi identity and stand as a testament to its diverse history. The Kingdom's ongoing excavation missions—reflected in the number of important archaeological discoveries announced in 2020—have been accompanied by efforts to monitor the documentation and development work taking place at heritage and historical sites. On the international front, the Kingdom has made significant strides in its heritage-management portfolio and in inscribing its heritage on international lists. These efforts culminated in the successful inscription of the traditional weaving of Al Sadu onto UNESCO's Representative List of the Intangible Cultural Heritage of Humanity and obtained membership in UNESCO's Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage.

In line with sector-wide trends, heritage activities were particularly impacted by pandemic-induced disruption and the corresponding halt to in-person site visits. However, this did not unduly limit excavation and restoration projects, which adhered to preventative health measures. Domestic tourism grew despite covid-induced cancellations and delays. With ubiquitous open and well-ventilated spaces that allow for social distancing, heritage sites could serve as a respite for visitors. Likewise, heritage was present in most virtual activities carried out by cultural sectors through digital media. As such, the pandemic highlighted the importance leveraging electronic means to document intangible cultural heritage and broaden the level of community participation in these efforts.



Tangible Cultural Heritage: Discovery and Documentation

Archaeology: Discovery and Excavation

News that a joint Saudi–international team had discovered traces of both humans and animals in the outskirts of Tabuk province dating back over 120,000 years received a great deal of attention from scientists and the media. In a September 2020 press conference, the Heritage Commission announced that the research team had found evidence of human footprints and animal tracks from elephants, camels, and various species of goats and cattle, as well as 233 fossilized elephant and antelope remains.⁽¹⁾ This finding is significant as it is likely the oldest scientific evidence for the presence of humans and animals in the region and for migratory patterns, which are themselves indications of the vegetation density that once characterized the Arabian Peninsula. This is also significant because it reinforces the likelihood that many archaeological sites exist, still waiting to be discovered.

This discovery was made by the Green Arabia Project, which was developed over more than ten years by a team composed of national and international institutes and universities.⁽²⁾ In addition, a scientific team made up of the Heritage Commission, and Germany's Max Planck Society discovered stone structures in the Kingdom's Nefud Desert. The hunting instruments found within these archaeological

structures are among the oldest stone hunting tools in the world, dating back more than 7,000 years.⁽³⁾

In December 2020, pivotal discoveries were also announced in Al-Qassim region, where a site in Shuaib Al-Adgham was discovered and notably dated back to the Stone Age. It is considered one of the most important sites of that era discovered in the Kingdom—this significance is attributable to the distinctive and rare stone tools found there that may date back to the Paleolithic period (the Acheulean civilization). These include stone axes, which are unique in their precise and intensive production. Moreover, stone tombs and circles were also discovered at the site.⁽⁴⁾

Efforts at Exploration and Surveying Within the Kingdom

There is a group of missions engaged in archaeological surveying and excavation currently active in Al-Ula Governorate under the supervision of the Royal Commission for Al-Ula. These missions work in cooperation with several local and international universities and international research centers. In 2020, the commission also launched the first phase of the digital survey project for the main heritage sites in Al-Ula, including Al-Hijr, Dadan, Jabal Ikmah, and Abu Oud. This first phase began with the Hegra tombs in partnership with the Spanish Factum Foundation. Archaeological surveying and excavation efforts were also initiated in the Khaybar Oasis area in partnership with the French National Centre for Scientific Research. These efforts contribute to aerial archaeological surveying that began last year in the Khaybar Oasis in cooperation with the University of Western Australia.⁽⁵⁾



Nation-wide, four archaeological sites have been excavated this year, including historic Jeddah in Makkah Province and three sites in Riyadh Province. There were thirteen active local and international excavation missions in 2020, eight of which were local. Previous seasons produced forty archaeological missions, of which thirty-six were ongoing missions, and four were new. The fallout from the Covid-19 pandemic caused much of this work to come to a standstill. Relatedly, a total of sixty-four artifacts were restored from within the Kingdom.⁽⁶⁾

Table 9-1: Active excavation missions and associated sites in 2020⁽⁷⁾

Excavation Mission	Site
The Joint Saudi-French Mission at Al-Hijr Archaeological Site (Mada'in Salih)	Al-Ula Governorate, Madinah Province
The Joint Saudi-French Mission at Al-Khuraiba in Cooperation with King Saud University	Madinah Province
The Joint Saudi-French Mission at Khaybar Oasis	Madinah Province
The Joint Saudi-French Mission at Thaj	The Eastern Province
The joint Saudi-Japanese mission at Al-Hawra	Tabuk Province
The Joint Saudi-German Mission at Tayma	Tabuk Province
The Joint Saudi-French Mission at Wadi Matar and Wadi Shami	Jazan Province
The Joint Saudi Mission at Al-Battaliyah Mosque	Eastern Province
The Saudi Mission at the Ajwad bin Zamil Palace	Eastern Province
The Archaeological Excavation at Historical Fid in Cooperation with the University of Hail	Hail Province
The Archaeological Excavation at Darin	Eastern Province

Table 9-2: Active survey work and associated sites in 2020⁽⁸⁾

Surveying Mission	Site
Archaeological Survey of the Sites in the Al-Quraina Center	Riyadh Province
Archaeological Survey of the Sites in Al-Hait Governorate	Hail Province
Archaeological Survey of the Dhat Araq Site	Makkah Province
Archaeological Survey of the Site of Jabal al-Lawz	Tabuk Province
Archaeological Survey of the Al-Ula Governorate Site	Madinah Province
Archaeological Survey of Khaybar Oasis	Madinah Province
Archaeological Survey of the Old Town (Al-Dirah)	Madinah Province
Archaeological Survey of Hegra, Dadan, Jabal Ikma, and Abu Oud	Madinah Province

Table 9-3: Distribution of new and ongoing archaeological excavation seasons by the Heritage Commission according to province

Province	Number of Excavation Seasons
Tabuk Province	14
Hail Province	2
Asir Province	2
Jazan Province	3
Najran Province	2
Makkah Province	6
Riyadh Province	5
Al-Jawf Province	2
Eastern Province	2
Northern Borders Province	1
Madinah Province	1

Efforts to Document Archaeological and Urban Heritage Sites

The Covid-19 pandemic did not halt efforts to preserve and document tangible heritage in the Kingdom. The number of archaeological sites registered in the National Antiquities Register totaled 8,268 by the end of 2020, 85 of which were fenced off with a total of 67 kilometers of fencing.⁽⁹⁾ In December, the Heritage Commission celebrated the inclusion of the defunct Trans-Arabian Pipeline or “Tapline”—the construction of which had begun in 1948—in the National Industrial Heritage Register. This was the Kingdom’s first heritage site officially registered as part of the Industrial Heritage program launched in 2020.⁽¹⁰⁾

The Urban Heritage Building Codification Project, which began in the third quarter of 2020, is a continuation of systematic efforts to document the Kingdom’s national urban heritage. The project, which His Royal Highness, the governor of Riyadh, Prince Faisal bin Bandar bin Abdulaziz Al Saud inaugurated, is jointly supervised by the Ministry of Culture and the Heritage Commission. It provides data, geographical coordinates, and images of the Kingdom’s urban heritage sites through descriptive panels accompanied by QR codes. This is meant to facilitate digital access to the information in these panels by linking them to the National Digital Registry of Urban Heritage. This registry provides a comprehensive and coherent database for the documentation of the Kingdom’s urban heritage. It aims to evaluate, classify, and manage the Kingdom’s urban heritage according to internationally approved standards.⁽¹¹⁾

Efforts to Preserve Underwater Heritage

The Ministry of Culture, represented by the Heritage Commission, launched the Center for the Protection of Underwater Cultural Heritage in the Red Sea and Arabian Gulf as part of its drive to strengthen national heritage-preservation efforts. The center will serve as an international hub for studying, protecting, and investing in underwater heritage while training and certifying specialized personnel.⁽¹²⁾

Research and Publications

Heritage-related research and publishing in the Kingdom vary from general to specialized. The Adumatu magazine is considered one of the oldest semi-annual refereed journals in this field. It is published by Abdul Rahman Al-Sudairy

Cultural Center in both Arabic and English. The magazine, which has been in publication for over twenty years,⁽¹³⁾ covers archaeological research in the Kingdom and the Arab world and published its 41st issue in 2020. *ATLAL: The Journal of Saudi Arabian Archaeology*, which is published annually and specializes in Saudi Arabian archaeological research, surveys, and excavations in the Kingdom, was issued in 2020.⁽¹⁴⁾

In the first quarter of 2020, the General Administration of Archaeological Research and Studies and the College of Tourism and Antiquities at King Saud University issued a series of volumes documenting the Al-Faw civilization entitled *Qaryat al-Faw: A Portrait of Arab Civilization Before Islam*. These included results from archaeological excavations carried out at the site over forty years ago.⁽¹⁵⁾ In terms of specialized journals, Al-Madinah Al-Munawwarah Research & Studies Center published Issue 49 of its peer-reviewed scientific journal, which aims to support and publish research related to the history and heritage of the city of Madinah.⁽¹⁶⁾

The Heritage Commission has also contributed published works in the field by preparing four archaeological studies. These studies were dedicated to excavating the Thaj site, the settlement area at the Al-Hijr archaeological site, the Wadi Matar site in the Farasan Islands, and the excavation in Tayma. In addition, as part of the Islamic History Sites Care Program, the commission published two books in the field of Islamic heritage this year entitled *The Homes of Bani Sa'ad*, and *This Is Khaybar*. This year, the commission also published several other books, studies, and research papers. Among these works are *The Economic and Political Role of the Ports of the Arabian Gulf and Egypt on the Red Sea, c. 300 BCE-300 CE*, *The Place in the Poetry of Jamil Buthayna*, and *Surveying and Excavation Works of the Joint Saudi-French Mission at the Mada'in Salih Archaeological Site in its Fifth Season: 2014 CE*.⁽¹⁷⁾

Tangible Cultural Heritage: Rehabilitation and Development

The pandemic put an abrupt—albeit temporary—halt to various heritage restoration and development projects. This is exemplified by the closure of heritage sites during the lockdown. Despite these challenges, sector-based work on strategic planning and infrastructural investment models did not stop altogether—contracts centered around developing and reviving heritage sites continued to be signed.



Restoration and Development Efforts

Several development projects were undertaken at archaeological sites in the Asir Province in 2020, including signing agreements to develop several archaeological villages there. This effort is part of the Humanization of Heritage Villages Project in the Asir Province, which includes plans to develop the Akkas village in western Abha, Al-Qariyah village in the Tanomah Governorate, Al-Khalaf village in Sarat Abidah Governorate, and Al-Yanfa village in Tamniah Center. These plans constitute some of the efforts to revive archaeological sites by investing in aspects of their culture and social life in cooperation with local communities to make them viable tourist destinations.⁽¹⁸⁾ Ancient buildings in downtown Riyadh that are valuable in terms of cultural and urban heritage were also rehabilitated and restored. The Riyadh restoration and rehabilitation project, which was launched in September under the auspices of the Heritage Commission in collaboration with the Royal Commission for Riyadh and the Riyadh Municipality, will eventually transform these buildings into dynamic social and cultural centers.⁽¹⁹⁾ As part of the initial phase in this process, a comprehensive survey of the area took place, and immediate structural reinforcement for twelve palaces and 192 heritage buildings was completed.⁽²⁰⁾

The Heritage Commission restored the western wall of the historical Sahoud Palace in the Al-Ahsa Oasis after a section of it partially collapsed in November. The commission prepared thirty-six surveys and technical plans for rehabilitating and developing several villages, towns, and archaeological and heritage structures with a three-dimensional surveying technique used in the Kingdom's various provinces under the supervision of the Urban Heritage Center (Table 9-4). A comprehensive preliminary survey of all the archaeological and heritage sites which can be restored, developed, and transformed into tourist destinations found thirty-seven total sites. Initial work on these sites should take place from 2021–2022 (Table 9-5).⁽²¹⁾

Table 9-4: Notable archaeological and urban heritage site rehabilitation efforts in 2020

Site	Province	Site	Province
Audat Sudair Heritage Village	Riyadh	Historical Port of Umluj	Tabuk
Ushaiqer Heritage Village	Riyadh	Historic Port of Yanbu	Madinah
Historical Badr	Medina	Rijal Alma'a Heritage Village	Asir
Rawan Heritage Village	Madinah	Zee Ain Heritage Village	Al-Bahah
Al-Dar Al-Hamra Heritage Village	Makkah	Historical Al Dar'i District in Dumat Al-Jandal	Al-Jawf
Al-Khabra Heritage Village	Al-Qassim	Al-Hidn Center	Najran
Al-Askar Palace	Riyadh	Al-Atawilah Heritage Village	Al-Bahah
Historical Jawatha Mosque	Eastern Province	Historical Farasan Center	Jazan
Princes' School in Al-Ahsa Oasis	Eastern Province	Al-Qamrah Heritage Village	Jazan
Historical Uqair Seaport	Eastern Province	Dar Al-Nassir Castle	Jazan
Ibrahim Palace	Eastern Province	Sayyir Heritage Village	Jazan
Sahud Palace	Eastern Province	Al-Saqid Heritage Village	Jazan
Ain Najm	Eastern Province	Abu Tuq Heritage Village	Jazan
Khuzam Palace	Eastern Province	Al-Qessar Heritage Village	Jazan
Mehaires Palace	Eastern Province	Shaqra Heritage Village	Riyadh
House of Allegiance	Eastern Province	Subaie Heritage House	Riyadh
Historical Port of Al-Wajh	Tabuk	Thurban Palace	Asir
Historical Port of Duba	Tabuk	Ben Rakosh Palace	Al-Bahah





Table 9-5: Archaeological and heritage sites in the Kingdom that are viable for rehabilitation and development (Shortlisted in 2020)

Site	Province
Al-Hamra Palace in Tayma, Hadaj Well in Tayma, Duba Center, Tabuk Castle	Tabuk Province
Al-Bassam Heritage House, Shinanah Archaeological Tower	Al-Qassim Province
Qishlah Palace, Fayd City, Jubbah	Hail Province
Rijal Alma'a Village, Jerash Site, Shamsan Castle	Asir Province
Al-Adarisah, Turks Castle, Al-Rifa'i House, The Ottoman Fort	Jazan Province
Al-Akhud Archaeological Site, Historical Castle of the Emirate	Najran Province
Shubra Palace, King Saud Palace	Makkah Province
Zee Ain Heritage Village, Ben Rakosh Palace	Al-Bahah Province
Al-Faw Village, King Abdulaziz Palace in Al-Kharj, Al-Ghat Heritage Village	Riyadh Province
Dumat Al-Jandal Center, Rajajil Columns, the Archaeological Area in Sakaka, Zaabal Castle, Sisira Well	Al-Jawf Province
Tarout Castle, Ibrahim Palace, The Historical Uqair Seaport, Archaeological Site of Thaj	Eastern Province
Zubala Archaeological Site, the Historical King Abdulaziz Castle in Linah	Northern Borders Province
Al-Sour Historical District, the Hejaz Railway Museum	Madinah Province
Sadus Historical Village	Riyadh Province
The Princes' School, Al-Hofuf, Ibrahim Castle, Al-Hofuf	Al-Ahsa

Efforts to Preseve Islamic Heritage

The Mohammed bin Salman Project for Historical Mosque Renovation—launched in 2018 and concluded its first phase during the first quarter of 2020—is part of the Kingdom’s ongoing efforts to protect and preserve Islamic heritage. This project also affirms the centrality of Islam to the Kingdom’s identity and vision.⁽²²⁾ This year, the Heritage Commission created an inventory of 118 mosques, thirty-eight of which are in Madinah Province and eighty in Riyadh Province. This brings the total number of historical mosques inventoried by the commission to 1,548. Restoration and rehabilitation plans have been prepared for 148 historic mosques located throughout the Kingdom, and thirty-eight of the Kingdom’s historic mosques were restored in 2020.⁽²³⁾

Table 9-6: Total number of historical mosques restored and rehabilitated as of 2020, according to province ⁽²⁴⁾

Province	Total Number of Historical Mosques Restored
Al-Qassim Province	6
Hail Province	3
Asir Province	5
Jazan Province	1
Najran Province	1
Makkah Province	2
Al-Bahah Province	3
Riyadh Province	7
Al-Jawf Province	3
Eastern Province	2
Madinah Province	5



As part of its program to preserve Islamic history, the Heritage Commission inventoried fifty Islamic historical sites deemed ready to receive visitors: nineteen sites in Makkah Province, twenty-seven in Madinah Province, two in Riyadh Province, and one in both the Eastern Province and Al-Qassim. In addition, twelve studies were conducted documenting the Kingdom’s Islamic history sites. These included the sites of the battles of Khaybar, Tabuk, and Hunayn as well as the sites of Tuwa Well, the Badr site, the Ruma Well, Usfan and its historic well, and, finally, Al-Hudaybiyyah and its historical monuments.⁽²⁵⁾

Intangible Cultural Heritage: Preservation, Documentation, and Archiving

As an organization representing local communities and seeking to inventory and document intangible cultural heritage, the Saudi Heritage Preservation Society (“We are Our Heritage”) launched an initiative to involve local communities in compiling lists of the Kingdom’s intangible cultural heritage in their provinces in cooperation with the Ministry of Culture.⁽²⁶⁾ As part of this initiative, the society set up virtual workshops to introduce community members to the tools used to document intangible cultural heritage and include them in creating a national database for the Kingdom’s unique and shared intangible cultural heritage, which is at risk of disappearing. Over 170 participants attended these workshops as of October 2020.⁽²⁷⁾ The Heritage Commission also developed and documented over 100 new designs of various traditional handicraft products such as bisht, weaving, embroidery, ceramics, and printing.⁽²⁸⁾



New designs of traditional handicrafts



Source: Heritage Commission, as of December 21, 2020.

Institutional Efforts to Document the Kingdom's Intangible Cultural Heritage

There are several specific projects to document intangible cultural heritage in the Kingdom, which are discussed in the "Report on the State of Culture in the Kingdom of Saudi Arabia, 2019."⁽²⁹⁾ Two new projects for documenting oral heritage have been added to the list this year. The Diriyah Gate Development Authority is carrying out the first of these efforts to document the oral history of Al-Diriyah. This effort is a historical research program to record the oral history of the province based on the memories of elderly residents and former officials of the Diriyah Historical Program. The program is split into four sections that document the oral histories of Al-Diriyah, Ghasibah, Samhan, and Arda, respectively.⁽³⁰⁾ The second project is an initiative of Prince Faisal bin Salman for the oral documentation of the history of Madinah ("Their Stories"), which was launched by the Al-Madinah Al-Munawwarah Research and Studies Center in 2017 to document and record the province's prominent social and intellectual figures.⁽³¹⁾ The King Abdulaziz Foundation for Research and Archives also published a three-volume encyclopedia, Oral Literature and Traditional Medicine in



Al-Bahah Province, based on qualitative interviews that rely on the popular memory of provincial storytellers, elderly residents, and others interested in preserving heritage. This took place in cooperation with the local branch of the Saudi Arabian Society for Culture and Arts (SASCA) in Al-Bahah, which conducted fieldwork in several cities and provincial centers over four years.⁽³²⁾

Table 9-7: Selection of projects concerned with the study and documentation of the Kingdom's intangible cultural heritage

Entity	Project
King Saud University	The Dialects and Popular Heritage Society
King Fahd National Library	The Saudi Oral History Project
King Abdulaziz Foundation for Research and Archives	Center for Oral History
King Saud University	Chair of Saudi Heritage
King Faisal Center for Research and Islamic Studies	The Saudi Memory Studies Unit
Diriyah Gate Development Authority	Documentation of Oral History in Al-Diriyah
Al-Madinah Al-Munawwarah Research and Studies Center	Oral Documentation of the History of Madinah ("Their Stories")



Recognition and Dissemination

Festivals

Festivals Held at Heritage Sites

The wide-open spaces of culturally valuable archaeological sites provided an outlet for residents and visitors after the lockdown was lifted in the middle of the year. However, the majority of annual festivals held in these archaeological

sites were postponed or canceled due to preventative health measures to combat the Covid-19 pandemic. The most prominent of these festivals is the National Festival of Heritage and Culture (Janadriyah Festival). After becoming responsible for organizing this festival, the Ministry of Culture announced it would be rescheduled to the first quarter of 2021.⁽³³⁾

Table 9-8: Seasons and festivals held at archaeological and cultural sites and their status in 2020

Festival	Site	Organizing Entity	Status
Winter at Tantora Festival	Al-Ula	The Royal Commission for Al-Ula	Postponed until 2021
Historical Jeddah Festival	Historical Jeddah	Jeddah Governorate	To be announced
MiSK Festival in Historic Jeddah	Historical Jeddah	MiSK Foundation	To be announced
Flowerman Festival	Rijal Alma'a Village in Asir	Ministry of Culture	Postponed until further notice ⁽³⁴⁾
Souk Okaz Festival	Taif	Ministry of Culture	To be announced

Intangible Cultural Heritage Festivals

During the first months of 2020 and the lockdown which followed, some festivals related to intangible heritage were held. The most prominent of these were the King Abdulaziz Camel Festival and the King Abdulaziz Festival of Falconry. The King Abdulaziz Center for World Culture (Ithra) also celebrated the 90th Saudi National Day by organizing the "Kingdom of Cultures" exhibit. This exhibition highlights the Kingdom's cultural and civilizational legacy and takes visitors on a tour where they can actively experience and interact with the Kingdom's heritage, the stories of artisans, and their relationship with the surrounding environment.⁽³⁵⁾



Table 9-9: Festivals and events dedicated to intangible heritage in 2020

Festival	Site	Organizing Entity
King Abdulaziz Camel Festival ⁽³⁶⁾	Riyadh	Camel Club
King Abdulaziz Festival of Falconry ⁽³⁷⁾	Riyadh	Saudi Falcon Club
Al-Hanini Festival ⁽³⁸⁾	Al Musawka Market in Unaizah	Unaizah Chamber of Commerce and Industry
Najd Doors Exhibit ⁽³⁹⁾	Dhahran	Saudi Heritage Preservation Society, in cooperation with King Abdulaziz Center for World Culture (Ithra)
MiSK Art Week ⁽⁴⁰⁾	Riyadh	MiSK Foundation
Kingdom of Cultures Exhibit	Dhahran	Ithra

Programs and Events

Many sector-wide heritage-related events were successfully held in the digital space this year during quarantine. Several associations and institutions held live and virtual seminars ranging from educational and scholarly subjects to technical training sessions, such as the Saudi Society for Urban Heritage, the Herfah Association,⁽⁴¹⁾ and the Jood Charity for Women in Dammam.⁽⁴²⁾ The Saudi Heritage Preservation Society additionally held discussions nearly every week in the dewaniya of the society, which periodically hosts experts and specialists in cultural heritage and promotes talks via Twitter.⁽⁴³⁾ The MiSK Foundation also played a role in promoting the revival of historic sites. This was a significant part of MiSK Art Week, which took place in December 2020. Two important events were a dialogue session entitled "How can the heritage sector revive historic regions, and in what ways can this sector be developed into a sector of social and economic development?" and a workshop entitled "Textile and Traditions," which presented textiles as a part of the Kingdom's culture following their adoption of traditional Saudi styles.⁽⁴⁴⁾

Specialized centers also contributed to enriching the scene. For example, the Al-Madinah Al-Munawwarah Research



and Studies Center held several seminars on the history and heritage of Madinah. These included the Historic Wells in Madinah seminar and training workshops on some of the historical features of Madinah.⁽⁴⁵⁾

The sector also benefited from unique promotional competitions on social media platforms to promote popular participation. These included the “Our Heritage through Your Lens” competition held by the Heritage Commission in September. Professional and amateur photographers participated via Twitter and were encouraged to share their creativity in celebration of Saudi National Day by snapping a unique photo linking the date palm with the Kingdom’s heritage in two possible ways: 1) the date palm and artifacts or 2) the date palm and architecture.⁽⁴⁶⁾ The date palm is the seventh element that the Kingdom, along with fourteen other Arab countries, was able to inscribe on UNESCO’s Representative List of the Intangible Cultural Heritage of Humanity.⁽⁴⁷⁾ Given its central role in supporting and encouraging local creatives and cultural actors, the Ministry of Culture launched the National Cultural Awards Initiative on June 30, 2020, which includes a heritage-specific award. Nominations for this award remained open until the end of September—the winners are set to be announced in 2021.⁽⁴⁸⁾

International Presence

Despite the fallout from the Covid-19 pandemic, Saudi heritage maintained an international presence throughout the year owing to the G20 Summit, which took place in the Kingdom this year. Al Sadu embroidery adorned the logo of the G20 countries, in a gesture to the historical depth of the Kingdom’s heritage and the diversity of its culture, of which the traditional weaving of Al Sadu is an ancient part since it is one of the oldest traditional handicrafts practiced by residents of the Arabian Peninsula.⁽⁴⁹⁾

The G20 Summit also incorporated Saudi heritage through several events in Riyadh and Jeddah. The Ministry of Culture

also held several cultural events in conjunction with the G20 Summit that spanned the whole year, intended primarily to introduce the participating delegations to the Kingdom’s heritage and history.⁽⁵⁰⁾ These events included cultural tours and visits to historical sites and pillars of heritage. During the events, souvenirs inspired by the Kingdom’s heritage were also distributed to introduce Saudi traditions and crafts, which were provided by several non-governmental organizations, such as the Heritage Arts company, which is affiliated with the Alnahda Society, and the Princess Norah Bint Abdulrahman Al-Faisal Social Center, which is affiliated with the Al-Salihia Charitable Society in Unaizah.⁽⁵¹⁾

In addition to its activities at the G20 Summit, the Ministry of Culture participated in the 59th Kuwait National Day celebrations in February 2020, as Saudi Arabia and Kuwait have much shared cultural heritage. The Ministry held live cultural and artistic events in several commercial centers and public places in the Kingdom’s various regions, including Al-Arda (dancing), traditional Kuwaiti handicrafts, and Kuwaiti popular music. The events also exhibited a variety of dishes from Kuwaiti cuisine.⁽⁵²⁾

Display Outlets for Artisans’ Work

According to the 2019 report, the Kingdom’s events, festivals, and popular markets constitute the oldest and most used forum for the occasional exhibition and sale of artisanal products.⁽⁵³⁾ However, institutional regulatory efforts have recently emerged to create sustainable platforms for displaying and selling artisanal products in addition to such annual events. This is now the case, even more so considering the disruptions experienced by the handicraft industry due to event cancellations this year



due to the Covid-19 pandemic. The Creative Handicraft Centers launched by the Saudi Handicrafts Program (Bari') two years ago represent the most notable official effort to provide sustainable display outlets for artisans. The Creative Handicraft Center of Al-Ahsa Governorate is operational as of this year and efforts are underway to open other Creative Handicraft Centers in eight of the Kingdom's provinces and one of its governorates: Riyadh, Makkah, Qassim, Madinah, Asir, Jazan, Tabuk, Al-Jawf, and the Al-Ahsa Governorate. In addition to these centers, the Sougha Store in Riyadh, which was opened by the Saudi Authority for Tourism and National Heritage (now the Ministry of Tourism) last year in the Radisson Blu Hotel in the Diplomatic Quarter of Riyadh, was the first store for selling the traditional products of the Kingdom's artisanal craftsmen and craftswomen.⁽⁵⁴⁾ This year, the store displayed heritage products from the Herfah Association, the Art of Heritage Company, and the Princess Norah Bint Abdulrahman Al-Faisal Social Center.⁽⁵⁵⁾

Participation

Historical and archaeological sites provided an outlet for tourism because their openness and wide spaces readily facilitated social distancing. As a result, they became an alternative to other cultural and tourist activities, which were canceled in light of the Covid-19 pandemic and the preventative health measures implemented to limit mass gatherings. The heritage sector has helped revitalize cultural tourism in the Kingdom in conjunction with an increase in domestic tourism this year due to restrictions on international travel meant to limit the spread of Covid-19. The Saudi Commission for Tourism launched two national seasons to strengthen domestic tourism and revitalize the sector. The first of these was the Summer Season ("Breathe") which took place June 25–September 30 across ten tourist destinations that exemplify the Kingdom's cultural, historical, and natural richness.⁽⁵⁶⁾ The second was the Saudi Winter Season



("Winter Around You"), held between December 10, 2020, and the end of March 2021. It featured seventeen tourist destinations throughout the Kingdom, including historical and heritage sites.⁽⁵⁷⁾

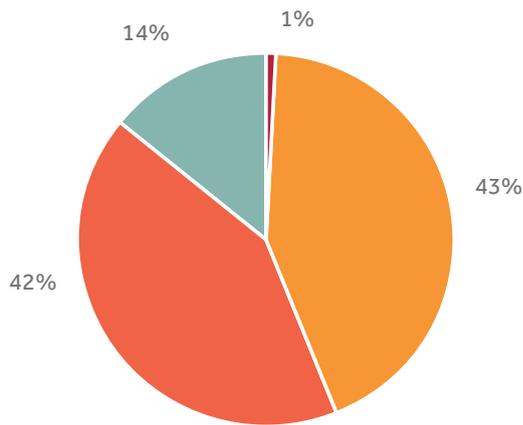
The role played by heritage sites becomes apparent in the cultural tourism data. Despite a slight reduction this year in the number of trips that included heritage-related cultural activities, the sector has maintained a level of participation close to that of 2019. There was also a clear increase in the total number of domestic tourism trips with visits to historical and heritage sites as a percentage of the total cultural tourism between January and September 2020 and as a percentage of the total domestic tourism trips (Table 9-10).⁽⁵⁸⁾

Table 9-10: Domestic trips with heritage-related activities by domestic tourists 2019–2020 (January–September) ⁽⁵⁹⁾

	Historic Archaeological Sites		Archaeology Sites		Forts	
	2019	2020 (through September)	2019	2020 (through September)	2019	2020 (through September)
Number of trips	1,698,529	1,293,914	1,698,529	1,293,914	204,339	297,689
Percentage of total trips that included cultural activities	15%	20%	15%	20%	2%	5%
Percentage of total tourist trips	3.6%	4.6%	3.6%	4.6%	0.4%	1.1%

Conversely, the 2020 Cultural Participation Survey conducted in the last quarter of the year, which included a representative sample of all the Kingdom's provinces,⁽⁶⁰⁾ showed a different reality in terms of participation within an important part of the sector which was most affected by the pandemic repercussions: heritage festivals and events. The 2019 report monitored the crucial role they played in strengthening the social presence of heritage and linking it with various segments of society.⁽⁶¹⁾ Only 14% of participants reported attending cultural events related to heritage over the past twelve months, while the majority (85%) reported not having visited any heritage festival or event in the same period, with 43% of them attributing that to the Covid-19 pandemic (Figure 9-11).

Figure 9-11: The percentage of those who attended at least one heritage event in the past 12 months



- Between 1 and 3 events
- Between 4 and 7 events
- No visits because of COVID-19
- No visits for other reasons



Sustainable Heritage Management

Al Sadu weaving was inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity in December 2020. This took place in partnership with Kuwait and by the efforts of a joint national team headed by the Ministry of Culture, the National Commission for Education, Science and Culture, the Permanent Delegation of the Kingdom of Saudi Arabia to UNESCO, and the Saudi Heritage Preservation Society, which was commissioned by the Ministry of Culture to prepare the file. The Kingdom's culminating event of the year was the celebration of Al Sadu weaving as a symbol for the G20 Summit. Al Sadu marks the Kingdom's eighth cultural element to be registered with UNESCO as part of its effort to record, safeguard, and sustain the national intangible cultural heritage.⁽⁶²⁾

Safeguarding and Managing Heritage: Sustainability Checklists

International Heritage Lists

In an effort that parallels the UNESCO World Heritage Lists, sixteen of the Kingdom's world heritage sites were included on the Islamic World Heritage List (IWHL) published in 2019 by the Islamic Educational, Scientific and Cultural Organization (ISESCO). The heritage sites were registered on two subsidiary lists corresponding to the UNESCO lists, which also contain these heritage sites. They are included on ISESCO's final list of heritage sites in the Islamic world and the tentative list of heritage sites in the Islamic world.⁽⁶³⁾



Table 9-12: Sites inscribed on the UNESCO's World Heritage List ⁽⁶⁴⁾

Site	Inscription Year
Al-Hijr Archaeological Site (Mada'in Salih)	2008
At-Turaif District in ad-Dir'iyah	2010
Historical Jeddah, the Gate to Makkah	2014
Rock Art in the Hail Region of Saudi Arabia	2015
Al-Ahsa Oasis, an Evolving Cultural Landscape	2018


Table 9-13: Saudi heritage inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity as of 2020⁽⁶⁵⁾

Element	Inscription Year	States Registered
Traditional weaving of Al Sadu	2020	In cooperation with Kuwait
Date palm	2019	In cooperation with Bahrain, Egypt, Iraq, Jordan, Kuwait, Mauritania, Morocco, Oman, Palestine, Sudan, Tunisia, the United Arab Emirates, and Yemen
Al-Qatt Al-Asiri, female traditional interior wall decoration in Asir, Saudi Arabia	2017	Kingdom of Saudi Arabia
Falconry, a living human heritage	2016	In cooperation with Germany, Austria, Belgium, the United Arab Emirates, Spain, France, Hungary, Italy, Kazakhstan, Morocco, Mongolia, Pakistan, Portugal, Qatar, Syrian Arab Republic, the Republic of Korea, and Czechia
Almezmar, drumming and dancing with sticks	2016	Kingdom of Saudi Arabia
Alardah Alnajdiyah, dance, drumming, and poetry in Saudi Arabia	2015	Kingdom of Saudi Arabia
Arabic coffee	2015	In cooperation with the United Arab Emirates, Oman, and Qatar
Majlis, a cultural and social space	2015	In cooperation with the United Arab Emirates, Oman, and Qatar

National Lists

The Ministry of Culture, the Heritage Commission, and the National Center for Urban Heritage, in cooperation with the civil society institutions like the Saudi Heritage Preservation Society, are still in the preparation and development phase for national lists that recognize and document heritage. This year, the Heritage Commission has registered 464 archaeological sites from across the Kingdom in the National Antiquities Register.⁽⁶⁶⁾ The total number of urban heritage sites was narrowed down to 135, bringing the total number of urban heritage sites in the National Antiquities Register to 1,023.⁽⁶⁷⁾ As part of the Ministry of Culture's efforts,



the Saudi Heritage Preservation Society helped prepare preliminary lists of intangible cultural heritage. As a result of workshops held in 2020 by the society and the Ministry of Culture to involve local communities in identifying elements of intangible cultural heritage, about 400 elements from various provinces were identified.⁽⁶⁸⁾

Digitalization in the Sector

Heritage in Digital Space

The 2019 report indicated that social media platforms proved integral to successful heritage promotion in recent years. Individuals—particularly young people—have fervently shared various elements such as music, Nabati poetry, and traditional fashion.⁽⁶⁹⁾ This year, digital space provided a viable and crucial alternative to in-person festivals and heritage events - many of which were canceled due to the Covid-19 pandemic. This further affirms the indispensable role of digitalization in reviving and sustaining heritage in connection with contemporary social life.

In response to the rise in virtual tours of tourist destinations, museums, and historical areas during the stay-at-home period, the Royal Commission for Al-Ula launched an initiative for 360-degree virtual tours through its website, Discover Al-Ula. These tours allow visitors from anywhere in the world to explore heritage zones, historical regions, and archaeological sites in the Al-Ula Governorate, such as Dadan, Al-Ula Old Town, and Jabal Al-Ahmar.⁽⁷⁰⁾ These tours use three-dimensional imaging techniques and benefit from the ongoing documentary surveying projects that the commission has undertaken in the province.⁽⁷¹⁾



The importance of virtual space is not limited to providing space for general circulation and community participation. It is also potentially helpful in documenting various aspects of cultural heritage. The sector has experienced this to some degree. The Saudi Heritage Preservation Society, for example, launched an initiative to involve local communities in documenting elements of intangible cultural heritage.

Although it has potential, using digital space in this way also raises questions about the necessary balance between expanding community participation in documenting elements of intangible cultural heritage through social media platforms such as Twitter, YouTube, and Instagram, on the one hand, and maintaining methodological standards for documentation on the other. This is an issue over which specialists differ. Some of them see these digital platforms as opportunities for spreading content and making it more accessible. Others highlight traditional and reputable methods that give greater credibility to documentation and ensure its methodological integrity.⁽⁷²⁾ This is important because the social groups active on social media platforms do not necessarily reflect the diversity of society, and relying on them neglects some segments of society that do not use these platforms or do not interact with them in the same manner.

Digital Archiving of Cultural Heritage

Projects to digitally archive heritage are a crucial metric to assess sector-based sustainability. Due to the sector's newness and the sheer number of actors involved in it before the sector's unification under the Heritage Commission, several digital archiving projects are still under development and are being transferred to the relevant agencies. Efforts are being made to transfer all of the databases in the National Antiquities Registry and the National Heritage Registry from the Ministry of Tourism, which used to be responsible for them, to the Heritage Commission,⁽⁷³⁾ which has digitally archived 95% of its records.⁽⁷⁴⁾ The commission aims to further develop this aspect of its work in cooperation with its strategic partners in the sector, including the General Authority for Survey and Geospatial Information in Saudi Arabia, King Abdulaziz City for Science and Technology (KACST), and the King Abdulaziz Foundation for Research and Archives (Darah) with which the commission coordinated efforts to launch the "Tadwin" project to digitize sites of rock art and inscription. The goal is spatially re-documenting, photographing, and transcribing all of the sites with rock art and ancient Islamic Arabic inscriptions, which have been registered in the Kingdom's National Antiquities Registry.⁽⁷⁵⁾

Despite these efforts, digital databases remain mostly specialized and inaccessible to the public. Accessible sources, like the Saudi Digital Library, which contains a selection of heritage-related photographs from the Kingdom, and the YouTube channel for the Custodian of the Two Holy Mosques Cultural Heritage Program, which has several short introductory clips on Saudi cultural heritage and archaeological sites, remain limited in number.⁽⁷⁶⁾

Infrastructure and Creative Economy

Institutional Attention to Heritage

Saudi Vision 2030 has played a pivotal role in ensuring dedicated institutional care of the heritage sector in recent years. The goal is to equip the sector to become a sustainable economic resource and a steady stream of local and international cultural tourism. This requires that infrastructure which supports the sector be established, beginning with training, education, and certification programs for the human resources needed and eventually injecting investments and funding into the sector. The Tourism Development Fund, founded in 2020 under the leadership of the Minister of Tourism, is expected to play a particularly instrumental role in this regard.⁽⁷⁷⁾

Cultural Assets Projects

As part of its efforts to develop cultural assets and cultural centers in the Kingdom, the Ministry of Culture is cooperating with specific cultural entities on projects aiming to make several historically valuable national heritage structures operational by transforming them into live cultural centers and designing them to facilitate various cultural activities and sectors in the Kingdom. The projects, a portion of which were announced in the third quarter of 2020, include the Red Sea Museum in historical Jeddah's Al-Bant Museum, which will specialize in subjects that have shaped the region, such as pilgrimage, architecture, trade, and navigation,⁽⁷⁸⁾ and the Tariq Abdul-Hakim Museum for Music in historic Jeddah's Manufi House, which should be inaugurated by the end of 2022.⁽⁷⁹⁾

Workforce

The new Saudi Standard Classification of Occupations includes eighty cultural occupations, which elevates the cultural sector's level of professionalism. This includes the heritage sector, which has gained some of this classification's cultural occupations, including monument restoration technician and document and manuscript restoration



specialists. A total of ten occupations have been categorized in the craft registry, with 4,415 practitioners registered therein, of which 3,195 craftsmen and craftswomen from this list are classified according to a specific occupation, while 1,220 are still lacking a specific classification. Likewise, 136 total commercial registrations involved in the activities of heritage hotels are active today, in addition to eighty-eight in the activities of heritage villas, which brings the total number of commercial registrations involving heritage-related activities to 224 throughout the Kingdom.⁽⁸⁰⁾

Total number of craftsmen and craftswomen categorized within the artisanal register up to 2020



Source: Heritage Commission, as of December 21, 2020.

Education and Training

Cultural Exchanges

A total of 1,554 students have applied to cultural exchange programs hoping to study archaeology before this year.⁽⁸¹⁾ The Custodian of the Two Holy Mosques Cultural Heritage Program has launched several majors related to archaeology such as history, geography, tourism, hospitality, and tourism administration as part of its Path of Excellence for Scholarships program.⁽⁸²⁾

Training

Training programs are a crucial foundation for developing the heritage sector, much of which is based on mastering crafts through practice. They are also vital to empowering both the sector itself and its artisans. This year, the Heritage Commission launched the second phase of its digital marketing skills program for artisans in cooperation with Google Skillshop and the Saudi Handicrafts Program (Bari'). The program included four workshops in which 109 artisans participated. These workshops aimed to train the participants to market their products electronically. This included a training session entitled, "Steps to create a digital marketing plan for artisanal products made from wood."⁽⁸³⁾

Support for the Sector

The handicrafts sector was especially hit hard by pandemic-induced ramifications, which disrupted the work of artisans by prompting the closure of various outlets used to showcase and market their products. To lighten the burden imposed by the pandemic, the Saudi Heritage Preservation Society

launched a campaign called "Don't Stop" in the middle of the year to support artisans negatively affected by the pandemic. The society also provided support for 300 beneficiaries during the pandemic,⁽⁸⁴⁾ in cooperation with several entities such as the Saudi Handicrafts Program (Bari') and the Herfah Association. In a similar effort, the Saudi Human Resources Development Fund (HADAF) provided material assistance to 300 artisans over a three-month period during the pandemic.⁽⁸⁵⁾ In terms of institutional support, from its inception, the Heritage Commission has supported projects to preserve and safeguard the Kingdom's heritage by cooperating with the relevant ministries, commissions, and institutions. The total expenditure for these projects during the year was 107 million SAR (around US\$29 million).

The Al-Bahah Province obtained contracts valued at over 2 million SAR to support several projects as part of the Our Heritage Company for Social Responsibility initiative. The projects aim to diversify and develop projects related to Al-Bahah's tangible and intangible cultural heritage in line with national development projects and with the support of the governor of the Al-Bahah Province.⁽⁸⁶⁾ Because of its role in creating a robust investment climate for the cultural sector and the tourism sector, the Tourism Development Fund has signed a set of agreements with local banks such as Al-Rajhi Bank, Albilad Bank, Riyad Bank, and Banque Saudi Fransi to support the financing of tourism projects in the Kingdom's provinces.⁽⁸⁷⁾

Organizational Developments

Pursuant to the decision of the Council of Ministers of Saudi Arabia issued on February 4, 2020, to establish specialized commissions for the cultural sectors and to authorize the Minister of Culture to take responsibility for the boards of these commissions until each of them has formed its own board of directors,⁽⁸⁸⁾ the Minister of Culture issued a decision in April to appoint Dr. Jasir Al-Harbash as CEO of the Heritage Commission.⁽⁸⁹⁾ The formation of the commission's board of directors was then announced in July, chaired by the Minister of Culture, Prince Badr bin Abdullah bin Mohammed bin Farhan Al Saud with Hamed bin Mohammed Fayez acting as vice-chairman. Board members include Princess Najla bint Ahmad bin Salman bin Abdulaziz Al Saud, Dr. Fahd bin Abdullah Al-Samari, Sulaiman Bin Abdulrahman Al-Theeb, Dr. Laila bint Saleh Al-Bassam, and Francesco Bandarin.

The commission's tasks include advancing national heritage and protecting it from disappearing; stimulating financing and investment within the sector; encouraging private-



sector entities to invent and develop content related to heritage; developing training, rehabilitation, and educational programs in cooperation with relevant entities; supporting efforts to protect intellectual property rights; and finally, creating a database for the heritage sector.⁽⁹⁰⁾ From its inception, the Heritage Commission has worked with the relevant entities to transfer all of the responsibilities relevant to this sector with which it has been tasked according to the new reforms. These responsibilities had previously been under the purview of the General Authority for Tourism and National Heritage, which became a separate ministry — the Ministry of Tourism — in September 2020.⁽⁹¹⁾

The Kingdom's Heritage in UNESCO

In September, for the first time in Saudi history, the Kingdom successfully gained membership in UNESCO's Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage. As such, the Kingdom became a member of three foundational UNESCO committees at the same time. In addition to membership in the Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage, it became a member



of UNESCO's executive board, and a member of the Intergovernmental Committee for the Protection of the Cultural and Natural Heritage of Outstanding Universal Value, called "the World Heritage Committee".⁽⁹²⁾ The Saudi Heritage Preservation Society was also simultaneously approved as an official advisory body to UNESCO. This reflects the international efforts being made to celebrate and safeguard the Kingdom's cultural heritage.⁽⁹³⁾



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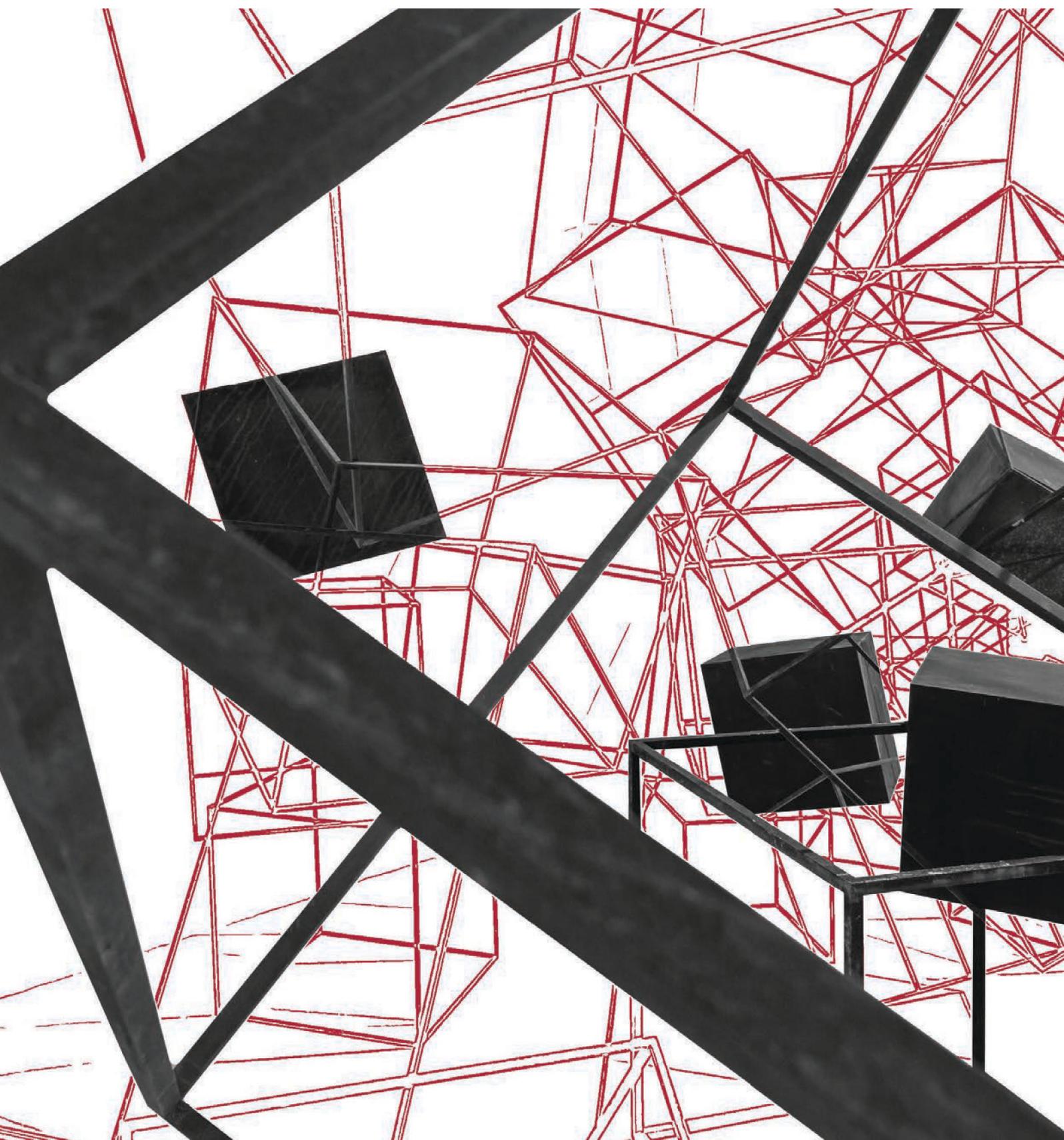
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Visual Arts

- Creativity and Production
- Recognition and Dissemination
- Participation
- Digitalization in the Visual Arts Field
- Infrastructure and Creative Economy
- Organizational Developments





The visual arts sector in the Kingdom is characterized by institutional attention and vibrant artistic activity. In recent years, interest in the arts and the celebration of art in public spaces has experienced a substantive uptick. A lively art scene has also emerged, leading to a rise in both production and exhibitions. Although there has been a relative decline in art exhibitions and events due to the Covid-19 pandemic, the artistic community has proved resilient by utilizing lockdown periods to dedicate themselves to their work, and to develop new ideas for projects that offer creative responses to these unprecedented circumstances. Beyond creatively leveraging lockdown, artists have used the circumstances to amplify the size and magnitude of cross-discipline collaboration, yielding novel sector-wide intersections.

As far as exhibitions are concerned, a select number of institutions and galleries offered virtual exhibitions as a temporary alternative to adapt to pandemic-induced disruption. These attempts were only partially successful in utilizing the full range of possibilities for virtual exhibitions. Nevertheless, some organizations continued to integrate virtual elements into their activities by organizing hybrid events that offered in-person exhibitions in conjunction with virtual ones.

Due to the restrictions that the pandemic placed on events and activities, the Ministry of Culture announced that its well-received Year of Arabic Calligraphy 2020 initiative would be extended to 2021. Another noteworthy initiative this year was the founding of the Prince Mohammad bin Salman Global Center for Arabic Calligraphy.

Creativity and Production

Artistic Production and Noteworthy Exhibitions

The year 2020 is no ordinary year by any stretch of the imagination, and the year’s impact on the arts is no exception. The Covid-19 pandemic had a severe and abrupt impact on a rapidly growing, vibrant art scene inundated with forums, exhibitions, and programs.⁽¹⁾ Although the pandemic slowed the momentum of these art events, the sector’s creative response—finding alternative virtual spaces for artistic activity, utilizing the downtime to refocus on artistic work, and increasing displays of solidarity and support—serves as a testament to the vigor of the Saudi art scene.

At the beginning of the year, the art scene continued to offer high-quality exhibitions. On the last day of 2019, MiSK Art Institute held Space: A Tale, an exhibition to celebrate the reopening of the Prince Faisal bin Fahad Fine Arts Gallery. The exhibition included 100 works by a generation of Saudi artists whose art had been exhibited on its walls over the

course of three decades. From January 31–March 7, the 2020 edition of the Desert X Al-Ula exhibition⁽²⁾ was held in collaboration with artistic director Neville Wakefield and curators Raneem Farsi and Aya Alireza. The exhibition blends contemporary artworks, the desert environment, and Al-Ula’s historic landmarks. It was held outdoors and featured contributions from artists around the globe.

In Jeddah, the seventh edition of the 21,39 exhibition, organized by the Saudi Art Council, was titled “I Love You, Urgently.” The exhibition’s works, produced by twenty-two artists from the Kingdom and abroad, were personal artistic experiments that dealt with the global environmental crisis and human interaction with the environment. The exhibition was curated by Maya El Khalil⁽³⁾ and opened to visitors on January 28, 2020. Although the exhibition closed in mid-March when preventative health measures were first imposed, and public events and activities were canceled, it reopened virtually until its planned end date. Some exhibitions that were planned for the future were also converted into virtual exhibitions.

Table 10-1: Noteworthy Exhibitions in 2020

Exhibition	City	Duration	Organizer	Type
Space: A Tale	Riyadh	December 30, 2019–February 13, 2020	MiSK Art Institute	In-person
Love Your Heritage (6th Edition) ⁽⁴⁾	Riyadh	February 11–March 2	L’Art Pur Foundation, in collaboration with the King Abdulaziz Foundation for Research and Archives (Darah)	In-person

Exhibition	City	Duration	Organizer	Type
Desert X	Al-Ula	January 31–March 7	The Royal Commission for Al-Ula and Desert X	In-person
21,39 (7 th edition)	Jeddah	January 28–April 18	The Saudi Art Council	In-person and virtual
Ozla Art	-	May 8 (no specified end date)	The Mayadeen Group, with support from the Ministry of Culture and sponsorship from STC	Virtual
Imprint	Riyadh	October 4– January 28, 2021	MiSK Art Institute	In-person and virtual
Safouh Alnaamani	Riyadh	December 3– January 10, 2021	MiSK Art Institute, in collaboration with the Red Sea Film Festival	In-person and virtual

After preventative health measures were eased, the lockdown was lifted in June, granting public activities the ability to resume while following requisite health guidelines.⁽⁵⁾ Subsequently, in-person exhibitions were back to business—albeit with capacity-related limitation—and advance registration was required to ensure social distancing. Several exhibitions held in the second half of the year utilized a hybrid model—namely, virtual exhibitions offered in conjunction with in-person ones. MiSK Art Institute, for example, organized the hybrid exhibition *Imprint: Re-imagining Identity*. The exhibition was held in the Prince Faisal bin Fahad Fine Arts Gallery and was curated by Latifa Abdulrahman Al-Khalifa. It featured artists from the Arabian Gulf whose works utilize digital arts, video, and photography as mediums to explore the question of identity in ways that challenge stereotypes about the Gulf.⁽⁶⁾

Several exhibitions in 2020 reflected the pandemic's impact on the content of artworks, like the virtual exhibition *Art in Isolation*, which Mayadeen Group held with support from

the Ministry of Culture.⁽⁷⁾ Its six virtual galleries featured works by professional and amateur artists and even talented children expressing the shared experience of the pandemic.⁽⁸⁾ *Mukooth* (or "Dwell"),⁽⁹⁾ an exhibition held by MiSK Art Institute from December 3, 2020–February 28, 2021, featured works from five artists who received MiSK Art Grants. Their works documented the time that artists spent "dwelling" in their homes during the pandemic and how this helped them to rediscover themselves and affected their artistic style.

Branches of the Saudi Arabian Society for Culture and Arts (SASCA) also organized a number of exhibitions on topics related to the pandemic, like the exhibition *Art and the Pandemic* organized by SASCA's branch in Abha in August.⁽¹⁰⁾ In the same vein, the Ministry of Culture announced on May 10 that it would begin to accept submissions of artworks inspired by this period and by tools available at home. The submissions will be evaluated, and some will be selected to appear in the second edition of the *From Within* exhibition in 2021.⁽¹¹⁾

Galleries on the Ozla Art Platform (Images of the platform's exhibitions)



Source: "Home," Ozla Art Exhibition, <https://ozla.art>

The Artistic Community and its Response to the Pandemic

The quarantine period granted some practitioners an opportunity to devote themselves to their creative endeavors—free from the rapid pace of normal work life—by engaging in deep rumination and creative introspection. Some leveraged the extra time to develop new projects and refine their portfolios.⁽¹²⁾ However, the cancellation of public events and the activities of galleries and studios posed logistical challenges: shortages of needed artistic tools and materials, interruption to shipments of artwork, and the cancellation of scheduled appearances.⁽¹³⁾ Despite these challenges, the pandemic inspired solidarity initiatives to promote networking between artists, curators, and investors through virtual studios and regular meetings to exchange ideas and discuss the new reality.⁽¹⁴⁾ Some of these initiatives were launched by institutions like the Maan Grant, launched by Athr Gallery in collaboration with seven Saudi artists: Manal Al Dowayan, Ahmed Mater, Nasser Al Salem, Dana Awartani, Ayman Yossri, Sultan Bin Fahad, and Muhannad Shono. These artists agreed to donate a portion of the proceeds from sales of their work to the fund, which supports the work of emerging artists who were negatively affected by the Covid-19 pandemic as well as art research.⁽¹⁵⁾

Art Prizes

The National Cultural Awards: The Visual Arts Award

The Visual Arts Award—which is part of the National Cultural Awards—honors distinguished Saudi artists who



have either nominated themselves or been nominated by others. The award aims to offer both tangible and intangible support to artists. The Ministry of Culture announced that it would accept nominations from June 30, 2020, until the end of September. The winners will be announced in 2021.⁽¹⁶⁾

Ithra Art Prize

In partnership with Art Dubai, the annual Ithra Art Prize was launched to support artists in Saudi Arabia. The winners receive financial support of up to US\$100,000, and the winning artwork joins Ithra's permanent collection.⁽¹⁷⁾ The winner of the 2020 prize was the artist Fahad bin Naif for his artwork Rakhm ("Incubation").

Recognition and Dissemination

The Geographic Distribution of Art Exhibitions

Art Exhibition Numbers, 2020

Although the pandemic did lead to a decline in the number of art exhibitions held in 2020 compared with 2019, non-profit institutions and art galleries managed to hold 187 in-person art exhibitions compared to 255 in 2019. A majority (60%) of the exhibitions were held in either Makkaah Province (especially in the city of Jeddah) or Riyadh, which held 58 and 59 exhibitions, respectively.⁽¹⁸⁾

Art Institutions

Although many major institutions in the sector hold most of their events in the Kingdom's large cities, exhibitions held by SASCA, the art field's oldest institution, stand out due to their wide geographic distribution and their ability to reach more diverse segments of the population through SASCA's sixteen branches throughout the Kingdom. SASCA held seventy-four exhibitions in 2020,⁽¹⁹⁾ a decline of about a half from the number of exhibitions held by SASCA in 2019.⁽²⁰⁾ This decline offers an indication of the extent of the pandemic's influence on the sector's activities.

The exhibitions were held at SASCA's sites, at festivals, or in public places. Some of them were organized via partnerships with galleries or other institutions, like the 30x30 Exhibition that was held by the society's branch in Dammam in November in partnership with Dawi Gallery.⁽²¹⁾ Virtual exhibitions were limited in number this year. No more than nine were held, six of which were group exhibitions organized by several SASCA branches.⁽²²⁾

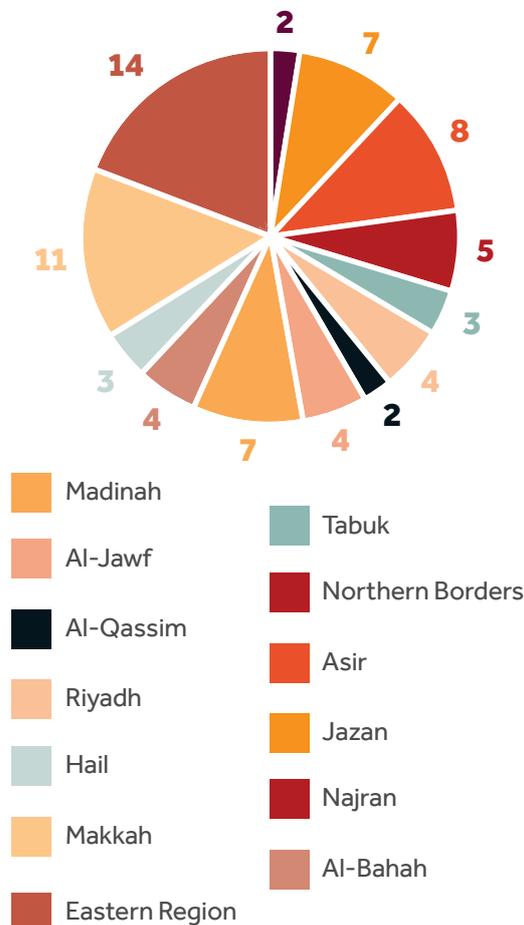
Table 10-2: Virtual group exhibitions organized by branches of the Saudi Arabian Society for Culture and Arts in 2020.⁽²³⁾

SASCA Branch	Exhibition Title	Exhibition's Opening Month
Bisha	The Art We Share Virtual Exhibition	March
Al-Bahah	The Visual Arts Exhibition in partnership with Al-Bahah Youth Council	May
Jeddah	Windows of Light in the Time of the Pandemic Exhibition	May
Jazan	Jazan Summer Remote Art Exhibition	June
Hail	Art and Culture of Hail Exhibition	July
Abha	Art and the Pandemic	August



In addition to SASCA, other art institutions played a key role in supporting the arts and holding exhibitions in the Kingdom's regions. The Madinah Art Center in Madinah, for example, hosted the I Am Madinah exhibition, which was organized by the Saudi Art Association (SAA) in February. The center also held four other exhibitions.⁽²⁵⁾ The SAA's main branch in Riyadh alone held fifteen in-person exhibitions in 2020, including one titled Treasures of the Kingdom, which accompanied the opening of SAA's new site on September 15, 2020. The SAA's other branches also held several exhibitions.⁽²⁶⁾

Figure 10-1: Number of in-person exhibitions organized by SASCA branches in 2020, by province.⁽²⁴⁾



Art Galleries

From November 18–26, 2020, the Saudi Art Council in Jeddah organized the 6th edition of the Shara Art Fair with support from the Al-Mansouria Foundation for Culture and Creativity. Eleven galleries participated in this edition of the fair, which aimed to support local galleries and artists and to strengthen the connections between them.⁽²⁷⁾ A partial survey of art galleries' activities⁽²⁸⁾ found that even after nearly a third of all planned exhibitions for 2020 were canceled - the galleries surveyed held sixty-seven in-person exhibitions. In addition, the galleries surveyed canceled thirty-two art exhibitions, and only seven out of nineteen galleries offered virtual exhibitions, amounting to a total of thirteen virtual exhibitions.

These numbers reveal the magnitude of the impact Covid-19 had on this particular dimension of the sector. Nearly a third of all art exhibitions planned by art galleries for 2020 were canceled. Virtual exhibitions were not an attractive alternative to many galleries that rely on selling artworks to generate revenue, as indicated by the fact that less than half of the galleries surveyed held virtual exhibitions. This may be because virtual exhibitions offer a low return on investment, as they do not allow potential buyers to connect directly with the artwork or to examine its dimensions and the materials used to produce it.⁽²⁹⁾



Table 10-3: A sample of gallery exhibitions held in 2020.

Gallery Name	Exhibition Name	Dates Held	Overview
Abstract ART Gallery, Riyadh	Home Confinement Art Competition Exhibition	August 24–29	An in-person exhibition held at the Abstract ART Gallery in Riyadh with the collaboration of Professor Abdullah Humoud Al-Rashid
Adham Art Center, Jeddah	Madad Art Workshop Exhibition	September 23	Heritage art exhibitions to celebrate the 90 th National Day organized by Madad Art Gallery in Adham Art Center
Adham Art Center, Jeddah	Art in Lockdown Exhibition	August 8–12	An art exhibition that displayed works produced by sixty-four artists during the lockdown
Athr Gallery	Durational Portrait Exhibition on Video Art in the Kingdom	January 28–April 18	A virtual group exhibition on the history of video art in the Kingdom of Saudi Arabia
Athr Gallery	Still Life and Plastic Dreams	January 29–April 18	Art exhibition by artist Mohammed Alfaraj that coincided with the 21,39 exhibition in Jeddah
Naila Art Gallery	Finger Painting Exhibition	January 19–23	Exhibition by the Indian artist Vini V who utilizes finger painting
Naila Art Gallery	WRD Art Exhibition	March 8–10	An exhibition of the works of more than thirty Saudi female artists to celebrate International Women's Day
L'Art Pur Gallery	Siyagha Art Exhibition	January 8–March 31 (extended until December 27 due to the pandemic)	An art exhibition held in the King Abdullah Financial District that covers three art fields: printing and calligraphic art, drawing and graphic design, and novels/narrative
L'Art Pur Gallery	The Place I Call Home Exhibition	February 9–29	Photography exhibition held by the British Council in collaboration with L'Art Pur Gallery to display the works of artists who utilize modern photography methods to explore the idea of "home" among young people
Saudi Center for Fine Art	Twentieth Exhibition	February 13–(two weeks)	An art exhibition held in the Abdullah Al-Qasabi Hall in Jeddah Province in which thirty-nine artists from the Kingdom participated

The Year of Arabic Calligraphy 2020

On December 8, 2019, the Minister of Culture launched the Year of Arabic Calligraphy 2020⁽⁵⁰⁾ to showcase the art of Arabic calligraphy, promoting its practice, and supporting both professionals and amateurs in the field. Interested individuals—and both governmental and non-governmental institutions—were invited to submit projects in service of Arabic calligraphy, with total or partial logistical, financial, or media support from the ministry to the winning projects.⁽⁵¹⁾



Submissions to the Year of Arabic Calligraphy 2020 Initiative

Number of recorded submissions for the Year of Arabic Calligraphy Initiative:



Source: Ministry of Culture database, December 10, 2020

The “Al-Khattat” platform—which offers recorded lessons by professional calligraphers to individuals interested in learning the art of calligraphy—launched the Mandala Letters Competition during the quarantine period. The competition involved home-friendly activities to ensure sector-based initiatives innovatively navigate the pandemic. However, given pandemic-induced limitations on public activities, the Ministry of Culture announced that it would extend the Year of Arabic Calligraphy initiative to include 2021 as well.⁽⁵²⁾

Other entities answered the Ministry of Culture’s call to celebrate the art of calligraphy beyond competition frameworks. In collaboration with the Ministry of Sports, calligrapher Fahad Al-Majhadi created a calligraphic design

to decorate players’ shirts in the new season of the Prince Mohammed bin Salman League Cup, which began in the last quarter of the year.⁽⁵³⁾ The King Abdulaziz Public Library also launched a competition for Arabic calligraphy.⁽⁵⁴⁾ On December 18, 2020, 17 winners in three categories (the Naskh, Diwani, and Thuluth scripts) were announced.⁽⁵⁵⁾

Art in Public Places

Displays promoting the Year of Arabic Calligraphy appeared on walls and in public spaces in several of the Kingdom’s cities thanks to the Arabic Calligraphy Murals initiative. The initiative was launched in February 2020 in three cities:

Riyadh, Al-Khobar, and Jeddah. Murals were installed in Al-Futa Park in Riyadh, Diriyah Bridge, Al-Khobar Arts Neighborhood,⁽³⁶⁾ and Alexandria Beach in Jeddah.⁽³⁷⁾ These works blend the aesthetics of Arabic calligraphy, fine art styles, and graffiti and were accompanied by live events held with the cooperation of municipalities that allowed interested people to watch Saudi artists create the murals.⁽³⁸⁾ Celebration of visual art in 2020 was not limited to the events mentioned above. Other events unrelated to Arabic calligraphy were held, including Riyadh Municipality's installation of art murals in a tunnel to celebrate National Day.⁽³⁹⁾ In addition to murals, events and festivals in public places that included art activities were held in 2020, despite the pandemic. These included an event on the Jeddah Corniche in which SASCA's local branch participated and the date market season in Madinah, which was accompanied by an art exhibition organized by SASCA's Madinah branch.⁽⁴⁰⁾

Events and Art Weeks

MiSK Art Week

The fourth edition of MiSK Art Week, titled "Culture Re-cultivated," was held from December 3–7. It offered discussion groups, workshops, and film screenings both online and at MiSK Art Institute's home, the Prince Faisal bin Fahd Fine Arts Hall in Riyadh. It was accompanied by a number of exhibitions, including one for the winners of the MiSK Art Grants, the exhibition Imprint, and the Safouh Alnaamani exhibition, in addition to an artwork by designer Nawaf Al-Nassar. The week's program also included a digital showcase of fifty-one works of art by young artists in different art fields, specialized courses, and workshops. A total of thirty-eight events were attended by 420 participants.⁽⁴¹⁾ The week



also included an exhibition of the works of the late artist Saad Al-Obied -⁽⁴²⁾ one of the most promising artists from the pioneering generation. His passing in September 2020 came after a prolific career spanning over three decades.

Virtual Events

Social media played a particularly influential role across cultural sectors and creative arts this year. Cultural institutions were quick to turn to social media platforms, the only outlets for interactive art events during periods of isolation. Social media platforms offered wide segments of the general population and art enthusiasts the chance to experience art during quarantine when there was more time to view content on these platforms. The Ministry of Culture and several cultural commissions launched a series of competitions titled "Culture in Isolation" to promote cultural engagement on Twitter. The Heritage Commission organized one of these competitions, titled "Our Heritage in Your Lens,"⁽⁴³⁾ for the best photograph depicting date palms in a heritage setting. Several SASCA branches held similar competitions on social media platforms, like the Qur'an Verse and Gift Competition and the 2020 Taha Sabban Competition for Promising Female Artists, which was held on the social media accounts of SASCA's Jeddah branch.⁽⁴⁴⁾ The SAA also utilized its social media accounts to launch an event titled "Create with the Saudi Art Association," which invited artists and amateurs to share their works on social media during the preventative isolation period.⁽⁴⁵⁾

In 2020, many art events—including lectures, discussions, and workshops—were available online via streaming services and video communication platforms as part of a global phenomenon that saw art institutions everywhere increasingly rely on virtual alternatives to navigate the pandemic and bypass geographical barriers. For example, SASCA branches held twenty-three art workshops between March and July,⁽⁴⁶⁾ and the MiSK Art Institute held a series of conversations with artists titled "From the Studio" on its Instagram account.⁽⁴⁷⁾

Global Recognition

The Covid-19 pandemic had a disproportionate impact on the ability of artists to participate in international exhibitions—affected not only by domestic preventative health measures, but also by restrictions on travel and a plethora of logistical challenges besetting artwork transportation. Although artists were precluded mainly

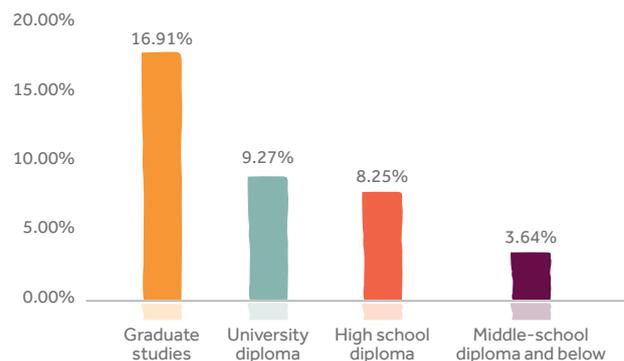
from participating in international events, the exhibition that accompanied the engagement group Think20 (T20)—a working group for the G20 summit that was held in the Kingdom—offered several Saudi artists the opportunity to exhibit their artworks to a diverse audience from all continents of the world. The exhibition was planned as an in-person event, but it was held virtually along with the rest of the G20’s working groups. During the event, artworks linked to the group’s eleven themes were exhibited on its website, along with a video in which each artist discussed his or her work.⁽⁴⁸⁾

Participation

Attendance estimates from some art exhibitions indicate that their popularity is in line with the past two years.⁽⁴⁹⁾ The six art exhibitions held by the MiSK Art Institute in 2020 recorded more than 75,000 visitors, both in-person and virtually. The art exhibitions held by SASCA branches attracted an average of 610 visitors each.⁽⁵⁰⁾

However, a look at the overall number of exhibition visits—considering that fewer exhibitions were held this year due to pandemic-related challenges—indicates that attendance rates have fallen compared with 2019, based on the 2020 Cultural Participation Survey.⁽⁵¹⁾ Only 7.8% of those surveyed in 2020 answered that they had visited an in-person art exhibition during the last twelve months. Other cultural events have witnessed a similar decline, as the other chapters of the 2020 report shows. Although the survey did not find a significant difference in attendance rates by age group, it does reveal that art exhibition attendance is strongly correlated with individual educational level (see Figure 10-2).

Figure 10-2: Percentage of those who visited at least one in-person art exhibition in the last 12 months, by educational level



The 2020 Cultural Participation Survey measures another indicator of participation in the visual arts field—namely, owning artwork. It is clear artwork owners are limited to a small group of art enthusiasts and collectors—just 3.9% of those surveyed responded that they own an artwork. Nevertheless, a further 21.7% of those surveyed expressed some interest in owning artworks (see Figure 10-3). This percentage increases somewhat among younger age groups. Although this age group may not have the financial means to translate their desire into actual purchases, expressing a desire to own artworks indicates that the younger generation appreciates the value of art. This is a positive indicator that the culture of owning artworks is generally on the rise (see Figure 10-4).

Figure 10-3: Percentage of those who own an original artwork

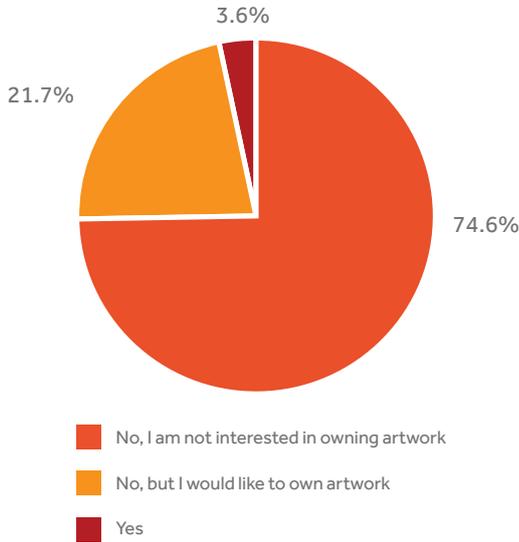
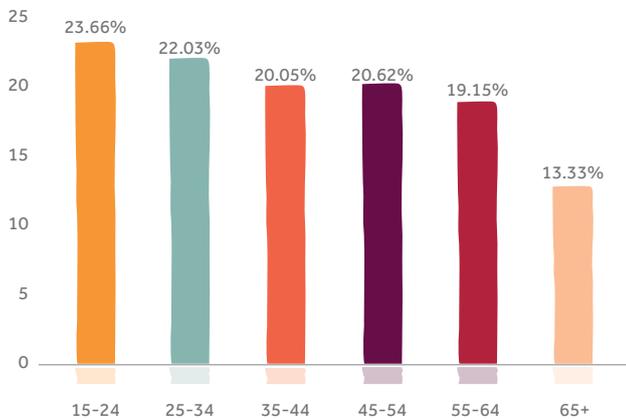


Figure 10-4: Percentage distribution of those who responded that they do not own artwork but would like to, by age group



Digitalization in the Visual Arts Field

Digital technologies interact with the arts across a plethora of strategic intersections. The use of technology to preserve, archive, or produce copies of artwork is one of the simplest ways technology can supplement and enhance sector-based development. The National Register for Artistic Works, a Ministry of Culture initiative, is working on this vital task.⁽⁵²⁾ The inclusion of digital technology in the production of artwork, in artistic methods, or even in art fields (like digital art), which is both produced and viewed on digital mediums, are some examples of a deeper connection between the content of art and digital technology.⁽⁵³⁾

Digital art is certainly not new to the Saudi art scene. The "Report on the State of Culture in the Kingdom of Saudi Arabia, 2019" noted the presence of mature efforts and exhibitions in this field. However, it also underscored the field's need to establish concrete definitions of its key terms and further develop its practices.⁽⁵⁴⁾ As mentioned prior, a number of key developments this year stand out, including Imprint, an exhibition which featured artists who used digital mediums to explore the complex nature of identity, and Athr Gallery's exhibition Self Portrait on the history of video art in the Kingdom. Global interest in digital art has recently centered on artificial intelligence (AI) art, in which machines and human beings work together to produce an artwork. In this type of art, digital technology can move beyond its established, functional role. In 2020, the Artathon Exhibition was held to display winning works alongside the virtual Artificial Intelligence Summit. To increase the visibility of digital art, in November 2020, construction began on the Diriyah Art Oasis, a site intended to become a global center for digital arts and AI art.⁽⁵⁵⁾ TeamLab, a specialized team from Japan, was also brought in to design a contemporary digital art museum in the city of Jeddah by 2023.⁽⁵⁶⁾

Artificial Intelligence Artathon Stages



Source: "Artathon," The Global Artificial Intelligence Summit, <https://theglobalaisummit.com/artathon/?lang=ar>

The year 2020 drew attention to a third role that digital technology can play within the domain of arts: the use of digital technology to display interactive artworks and the adoption of new, virtual spaces for artwork exhibition. Although the idea of virtual exhibitions preceded the pandemic, it nevertheless brought the function of online exhibiting into sharp relief, ensuring it became widespread in the arts throughout the Kingdom and the rest of the world.

The Virtual Exhibition Experience

Artworks were exhibited on the internet in various ways in 2020. Some exhibitions utilized digital applications that transmitted an exact image of the exhibition through a video recording or live streaming on digital platforms like Zoom or Instagram, including several exhibitions held by SASCA branches.⁽⁵⁷⁾ Other exhibitions displayed images of the artworks accompanied by short videos in which the artist spoke about the work and the experience of making it, like the T20 engagement group's exhibition at the G20 summit. Other exhibitions, like the 21, 39 exhibition and the Safouh Alnaamani exhibition, utilized 3D photography to create a digital copy of the exhibition, offering visitors an immersive, interactive experience when viewing the artworks.

Although virtual exhibitions demonstrate the sector's flexibility and ability to adapt to pandemic circumstances, they did not utilize the full range of possibilities for virtual exhibitions. Digital exhibitions are not mere imitations of in-person exhibitions; they are an entirely different way of interacting with artwork. Designing a special experience for an exhibition allows this interaction to become even more dynamic.⁽⁵⁸⁾

The digital version of the Forming Outlines exhibition—prepared by the Fikra Design Studio based in Sharjah in the United Arab Emirates and the MiSK Art Institute—was held from June 30 to September 30. It was a noteworthy attempt to offer a memorable exhibition experience. The exhibition displayed participants' works on a site designed especially for the exhibition, making the website itself part of the exhibition's artworks. The website included content in various mediums, including images, sound, and 3D designs, in accordance with the artwork.⁽⁵⁹⁾

Virtual Exhibitions: Connection Versus Accessibility

Holding virtual exhibitions—with all the diversity they entail—allowed art institutions and galleries to explore and gain experience with using this mode of exhibiting art, amplifying sector-based development in the process. This does not necessarily mean that this kind of exhibition will remain widespread after the pandemic since the 2020 Cultural Participation Survey indicates that virtual exhibitions are not very popular. Only 2.5% of those surveyed indicated that they had visited a virtual exhibition in the last twelve months, which is just one-third of the number who reported visiting an in-person exhibition this year. This figure is in keeping with



generally low participation rates in virtual cultural events compared to in-person events, as the other chapters of the "Report on the State of Culture in the Kingdom of Saudi Arabia, 2019" indicate.

The higher participation rates for in-person events were supported by the speed with which art institutions and galleries resumed in-person activities as soon as preventative health measures on events were eased. To both organizers and attendees, virtual exhibitions lack an important feature of in-person exhibitions: social interaction. In-person exhibitions play an important role in promoting personal connections between artists, organizers, enthusiasts, and the public. These exhibitions offer opportunities for side conversations and the exchange of ideas and even facilitate the sale of artwork. Virtual exhibitions cannot provide these opportunities as effectively or intensely as in-person exhibitions, even when they utilize chat applications or are accompanied by electronic forums. In-person interaction with some kinds of artwork allows the viewer to examine the dimensions and the materials used, which cannot occur in the same way at virtual exhibitions.⁽⁶⁰⁾

Although these exhibitions offer few opportunities for interaction, virtual exhibitions do have the advantage of being readily accessible and open to visitors without regard to geographic barriers. Practitioners in the art field note that the flexibility offered by virtual exhibitions enables them to follow developments in the field in other cities, both locally and around the globe, at a time when in-person visits are unfeasible.⁽⁶¹⁾

It is superfluous to compare virtual and in-person exhibitions as if they were substitutes for one another. As the second half of 2020 showed, virtual exhibitions can act as an equivalent alternative to in-person exhibitions and allow art enthusiasts

to connect with art and have the full experience of being present in the gallery. At the same time, virtual options are available to a wider potential audience even if they are poorly attended. Virtual exhibitions also allow the exhibition to attract more attention and recognition from larger segments of the population.

Infrastructure and Creative Economy

Institutions and Infrastructure

The year 2020 witnessed two important developments pertaining to art institutions. The first was the announcement on May 31 of the establishment of the Thunaiyat Ad-Diriyah Foundation and the appointment of Aya Habib Al-Bakri as its CEO. The Foundation took on the responsibility of organizing an annual global art exhibition in Al-Diriyah. This event will be a biennale, which will offer contemporary and Islamic art exhibitions in rotation every two years. The biennale will begin with a contemporary art exhibition in 2021, which will be followed by an Islamic art exhibition in 2022.⁽⁶²⁾ Thunaiyat Ad-Diriyah is another addition to the many activities and institutions hosted by Al-Diriyah Province, like the From Within exhibition that will hold its second edition in 2021 and the Al-Diriyah Art Oasis project, which is dedicated to digital arts.

Another important institutional development—related to the Year of Arabic Calligraphy—was the royal decree to change the name of Dar Al-Qalam Institute in Madinah to the Prince Muhammad Bin Salman International Center for Arabic Calligraphy. The Ministry of Culture will oversee the center in coordination with the King Abdul Aziz Foundation for Research and Archives and will work to develop it into a global hub for Arabic calligraphy. As both a calligraphy institute and museum, the center will play a variety of roles.⁽⁶³⁾ It is anticipated that it will be instrumental in filling in the gaps in the institutional and educational infrastructure for Arabic Calligraphy described in the “Report on the State of Culture in the Kingdom of Saudi Arabia, 2019.”⁽⁶⁴⁾ The sector’s upcoming projects also include the Hayy Jameel complex, which the institution Art Jameel plans to open in 2021,⁽⁶⁵⁾ and the development of Al-Muftaha Village.⁽⁶⁶⁾

Support

On July 25, 2020, a royal decree was issued in which Prince Mohammed bin Salman directed “government agencies to display artworks and handicrafts made by Saudi artists in their offices.”⁽⁶⁷⁾ The royal decree provides important

support to Saudi artists in several ways. It offers implicit recognition of the significance of their art, gives their works greater visibility—which is of great symbolic value—and provides them with material support, as executing the decree will lead to a substantive increase in demand for their works.

Albalad Art Residency in Jeddah 2020

The Ministry of Culture held the first edition of the Albalad Art Residency program. Although the initial plan was to hold them in Jeddah’s historic district, program events began virtually.⁽⁶⁸⁾ The program included forty-two artists, writers, and curators, twenty-three from various regions of the Kingdom, and nineteen worldwide.

The MiSK Art Grant

The MiSK Art Institute offers an annual art grant in various fields to support young artists who work on “visual art, sculpture, installation art, documentary film, documentary photography, creative writing and criticism, and art research.” The grant covers the production costs of the artworks in addition to providing the winners with artistic support.

In 2020, the winners of the different grant categories were: Ayman Zedani, Muhannad Shono, Alaa Alghufaili, Hmoud Alattawi, and Saad Alhowede. Their artworks all dealt with the theme “dwelling,” which was inspired by the circumstances of the Covid-19 pandemic.⁽⁶⁹⁾ The MiSK Art Institute also decided to launch the Masaha Residency program in Spring 2021, which will be held in the Prince Faisal bin Fahad Fine Arts Gallery in Riyadh.⁽⁷⁰⁾

The Sector’s Workforce

The Council of Ministers announced on January 16, 2020, that the Saudi Standard Classification of Occupation had added eighty cultural occupations.⁽⁷¹⁾ These included a group of occupations in the visual arts field, like Art Gallery Manager, Art Researcher, Exhibition Design Technician, Expressive Painter, and Paintings Restoration Specialist. Adding these occupations will help raise the level of professionalism in the sector and offer pathways toward professionalization for amateurs.

Education and Skills

Culture Scholarship Program

The Culture Scholarship Program launched by the Ministry of Culture has attracted 19,958 applicants, 1,688 of whom

were applying to major in the visual arts sector.⁽⁷²⁾ Candidates are evaluated according to the program's standards and criteria and are restricted to the program's list of accredited universities, including one public university and other private universities in each cultural field.

Training Developments

The MiSK Art Institute launched three courses for the Fundamental Creative Program, each lasting four weeks, on September 3, 2020. Due to social distancing measures, the courses are held online and give trainees from all over the Kingdom the chance to benefit from the program. The program also attracted instructors from other countries.⁽⁷³⁾

In May 2020, the institution Art Jameel launched a fellowship program in curatorial studies with the intention of bolstering professional skills related to curating art exhibitions. The program includes 12 months of training by international specialists. Three participants were selected for the program: Abdullah Al-Mutairi, Tara Emad Al-Dughaiter, and Wejdan Reda.⁽⁷⁴⁾ Before the end of 2020, the MiSK Art Institute announced that an intensive training program for art curators would be offered by the two founders of the Art Reoriented platform, Sam Bardaouil, and Till Fellrath. During the program,

curators work on improving the methods and techniques of their work and discovering professional tracks for themselves. The program also devotes a lot of attention to the foundational steps needed to build and organize an exhibition, as well as models for institutional and non-institutional work.⁽⁷⁵⁾

Organizational Developments

In July 2020, the Minister of Culture appointed Dina Muhammad Amin as CEO of the Visual Arts Commission.⁽⁷⁶⁾ The commission, which was founded in February 2020, is in charge of developing the sector.⁽⁷⁷⁾ The commission's board of directors includes Minister of Culture Prince Badr bin Abdullah bin Farhan Al Saud as chairman and Deputy Minister of Culture Hamed bin Mohammed Fayez as vice-chairman. The board has five other members: Fady bin Mohammed Jameel, Dr. Nada Muhsin Shabout, Faisal bin Farouk Tamer, Chris Dercon, and Fahad bin Adil Almandil.⁽⁷⁸⁾ The commission has taken on a number of responsibilities, foremost among them being implementing a strategy for the sector, supporting talented practitioners, and investing in and licensing activities related to the visual arts sector and the tools needed to organize them.



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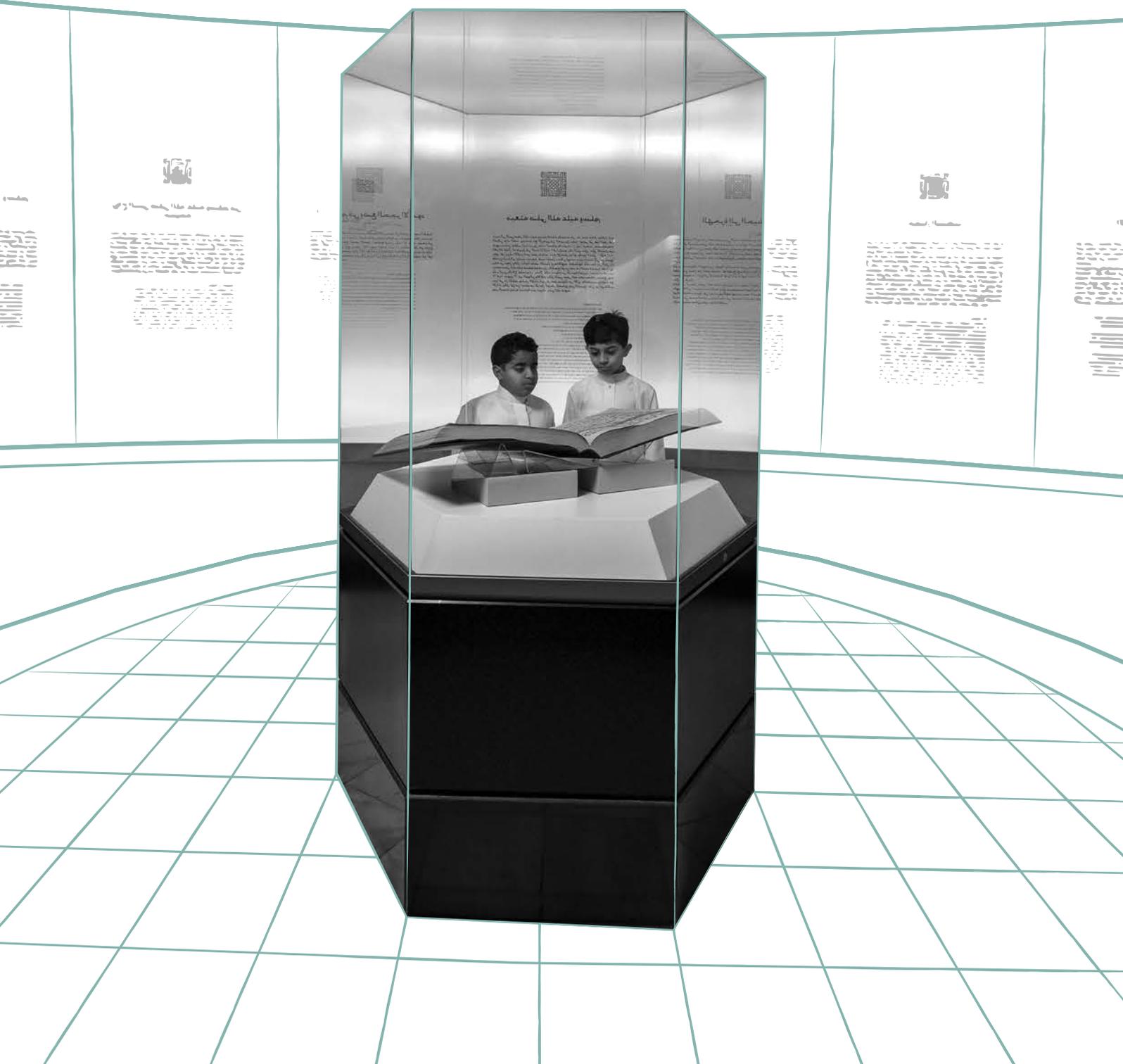




Museums

- Recognition and Dissemination
- Digitalization in the Museum Sector
- Infrastructure and the Creative Economy
- Organizational Developments







Covid-induced lockdowns and corresponding preventative health measures forced museums to abruptly close their doors until further notice — a harsh reality that brought about a set of sector-wide ramifications. The sector’s response was embodied by a few museums with the technological and financial prowess to launch some online activities and virtual tours. Small private museums bore the brunt of the pandemic more than expansive public museums, particularly given the fact that operating revenues form an indispensable lifeline. Fundamentally, the pandemic and the digital response it spurred highlighted the vital importance of digital transformation in the sector, not only for operations and public outreach but also for preserving and archiving collections. Digital archiving of the Kingdom’s museum collections is still in its early stages and has a long way to go to achieve adequate levels of digitization. To address these challenges, the Museums Commission is working to develop a strategy to support and develop the sector and to establish several quality museums.

Recognition and Dissemination

Operations and Exhibitions

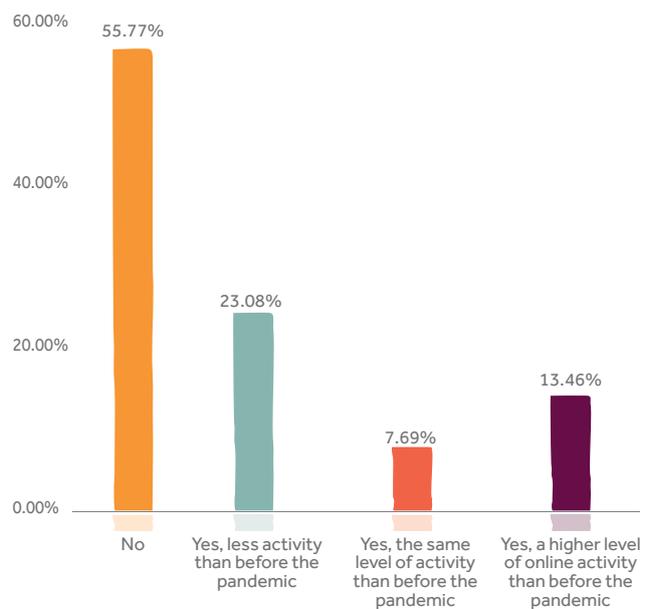
According to UNESCO, 90.9% of the world’s museums closed by mid-2020 due to the preventative health policies put in place to combat the Covid-19 pandemic. In the Arab world, including the Kingdom, this percentage reached 100% by mid-March to comply with the preventative policies, and all scheduled exhibitions were either canceled or postponed. Everyday work life also changed as work shifted to various online digital platforms through the period of lockdown.⁽¹⁾

By May 2020, the Kingdom was among eleven Arab and seventy-five other nations around the world who managed to resiliently respond to the precautionary health measures of the pandemic by organizing alternative activities via the internet.⁽²⁾ The pandemic period afforded some government and private museums with technological and financial capabilities the ability to utilize museum closures as an opportunity to implement digital alternatives and upload their special collections onto their websites, in addition to reviewing and redesigning museum halls, planning for interactive exhibitions, and preparing financial plans to anticipate future emergencies. However, government museums with limited resources did not enjoy the same opportunities; they were unable to develop virtual programs to the same degree as other museums with deeper pockets and resilient operational management.⁽³⁾

Unsurprisingly, small-private museums appeared most underprepared to develop virtual programs. A survey of fifty-two private museum owners⁽⁴⁾ with no more than five

employees on average was conducted at the end of the year.⁽⁵⁾ Of the fifty-two owners surveyed, 55.77% expressed that their museum did not host any virtual activity during the pandemic, and around 13% were able to raise the level of electronic activity and utilize virtual spaces amidst the crisis.

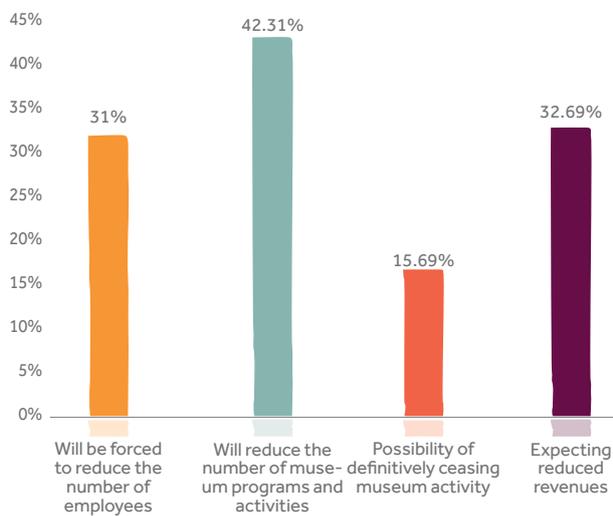
Figure 11-1: Percentage of small privately-owned museums by level of online activity during the Covid-19 pandemic



The pandemic’s effect on the small private museum exceeded its inability to keep up with digital alternatives as a way of compensating for their inactivity. More than 15% of those surveyed expressed concern about the possibility

of ceasing museum activity after the pandemic, a level near the 12.8% of museums across the globe that expressed the same concern, according to a survey of a large sample of the world's museums conducted by the International Council of Museums (ICOM) in May. The concern may be due to the pandemic's disproportionate impact on the revenues of private museums since museum activity remains the primary source of revenues for 63.46% of the sample of owners of private museums in the Kingdom. Nearly half of the sample saw a decline in the rate of revenues in the period after the pandemic as probable, that is, approximately 33% of all those surveyed. The survey results provide an image of the types of risk facing private museums with limited resources projected by their administrators (see Figure 11-2).

Figure 11-2: Percentage of small private museums facing potential risks after the pandemic, according to administrators' projections



Local Community Outreach

By 2019, more than 900 school field trips have been made to the National Museum in Riyadh.⁽⁶⁾ Museum visits were not confined to the National Museum as regional museums saw school field trips to temporary exhibitions such as those in Hail, Asir, Al-Jawf, and Tabuk.⁽⁷⁾ Such visits strengthen the relationship between museums and society by activating the museum's indispensable cultural and educational role. School field trips—and others like them—to attend activities



hosted and organized by museums were limited to the first two months of the year. The National Museum, for example, hosted five events in January and February, ranging from workshops and educational programs to public lectures. But with the implementation of the preventative health measures to combat the pandemic, two of the scheduled lectures planned in March were canceled.⁽⁸⁾

Digitalization in the Museum Sector

The digital transformation of the museum sector is not the result of a response to the conditions imposed by the Covid-19 pandemic. Indeed, throughout the past two decades, digital practices have gradually served as a primary activity for the museum institution, whether globally or locally. This is true, not only within the broad modernizing framework but also as digitalization pertains to the core functions of the museum, including archiving and preserving through databases and storing digital copies of collections. Further, digitalization is increasingly important for fulfilling the cultural and educational role of museums through digital media. The pandemic was a catalytic shock exposing the gap between digital reality and prospects and raising the priority of digitalization in the sector.

Digital Communication

Digital activity plays a role in community outreach with society and fills a crucial role across cultural and educational lines. This takes several different forms: (1) virtual tours and access to digital collections stored online; (2) social media outreach; and (3) holding specially designed online exhibitions tailored for the internet and browsing the museum's calendar of activities. In light of the preventative health measures, some museums scrambled to spread their activity across social media. Within a week of the lockdown, the National Museum launched the #MuseumAtHome

hashtag on Twitter,⁽⁹⁾ linking images and details about its holdings. That was consistent with the global response to the pandemic, as an estimated 47.5% of museums proposed growing their activity on social media.⁽¹⁰⁾ However, the Kingdom's smallest museums (by size) did not see an increase in online activity, and they were unable to work remotely, and the overall interaction was limited at the sector level.⁽¹¹⁾ The limited activity is one of the most significant challenges related to the groundwork of digital communication, as is evident in the absence or poor quality of government museum websites exhibiting digitized copies of their collections. There is an absence, too, of smartphone applications for government museums, except for the National Museum.⁽¹²⁾ The survey conducted on privately-owned museums indicates that 75% of small private museums have a social media account on one of the social media platforms, compared to just 48.8% with a website since establishing a website is more technologically and financially demanding than setting up a social media account. Most small private museums, as stated previously, had no activity during the period of the pandemic.

Although social media engagement is significant for museums, its impact remains limited in creating and sustaining a digital presence by offering an integrated virtual experience for museums. To augment their digital presence, several museums in the Kingdom offer 360-degree virtual tours of their exhibition halls, including the National Museum, the Ithra Museum at the King Abdulaziz Center for World Culture, which opened virtual tours of its exhibitions at the end of March,⁽¹³⁾ and the Al-Masmak Museum, which launched its virtual tours in 2016. At that time, the Saudi Commission for Tourism and National Heritage offered a smartphone application, allowing users to visit and walk around the museum using 3D technology.⁽¹⁴⁾ However, absent from the sector was the launch of specially designed exhibitions for a more integrated digital experience, which only a limited number of active global museums managed to provide during the period of the pandemic.⁽¹⁵⁾

Digitization of Museum Collections

The most vital level of digital transformation is achieved through the employment of digital technologies in internal processes, such as in inventory mechanisms, the archiving of collections, and the storage of digital copies in databases; that is, to fulfill the fundamental role of the museum to preserve national and human heritage. The first steps in this direction began with the efforts of the Commission for Tourism and National Heritage (now Ministry of Tourism), which documented 30-35% of items in the database of

its museums at that time. This indicates the paramount importance of the documentation process since collections that are not registered risk being lost.⁽¹⁶⁾ In cooperation with other responsible bodies, the Ministry of Culture and the Museums Commission are working to undertake this effort, establish a national digital registration system, and build a permanent database for museum collections.

Digitization requires the concerted efforts of volunteers, students, and sector employees, as well as the cooperation of other cultural sectors.⁽¹⁷⁾ In view of the experience in other countries, the processes of digitizing heritage may take many years. The United Kingdom, for example, has digitized only 20% of the collections of its museums despite digitization policies dating back to more than two decades ago.⁽¹⁸⁾ This transformation of the museum sector requires a national digitization policy to set standards and put mechanisms in place to ensure the integrity and regulation of databases, while keeping up with latest technologies, such as 3D scanning and storage and recovery applications.

Digitizing museum collections should not be limited to major national institutions. The firm implementation of this practice across various levels helps create a professional sector capable of preserving the valuable cultural heritage it contains, either in public or private holdings. The survey of private museums illustrates that one-third of those sampled do not have any record of their collections, including digitized images (see Figure 11-3). In contrast, around 44% of these museums have databases containing images of pieces in their collection.

Figure 11-3: Percentage of small private museums with databases of their holding

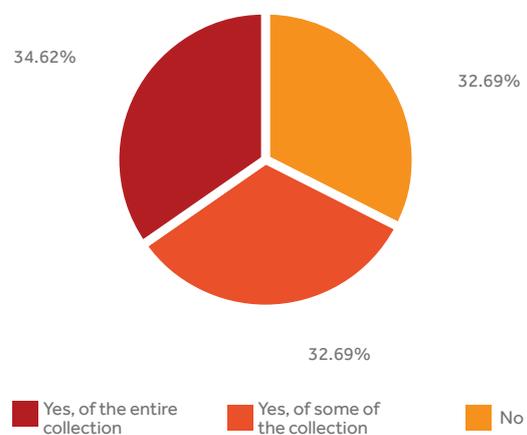
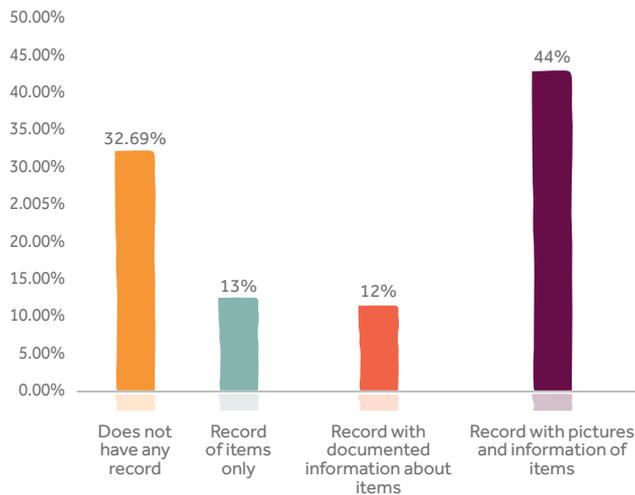


Figure 11-4: Types of records of small private museum collections



The acceleration of the digital transformation in preserving and archiving collections and the firm implementation of its practices at different levels of the sector will not only preserve national heritage but also generate robust infrastructure for digital programs and activities. If realized, this would make it possible for museums to perform their cultural role and offer citizens, interested persons, and researchers the tools to access the wealth of knowledge stored within museums.⁽¹⁹⁾

Infrastructure and the Creative Economy

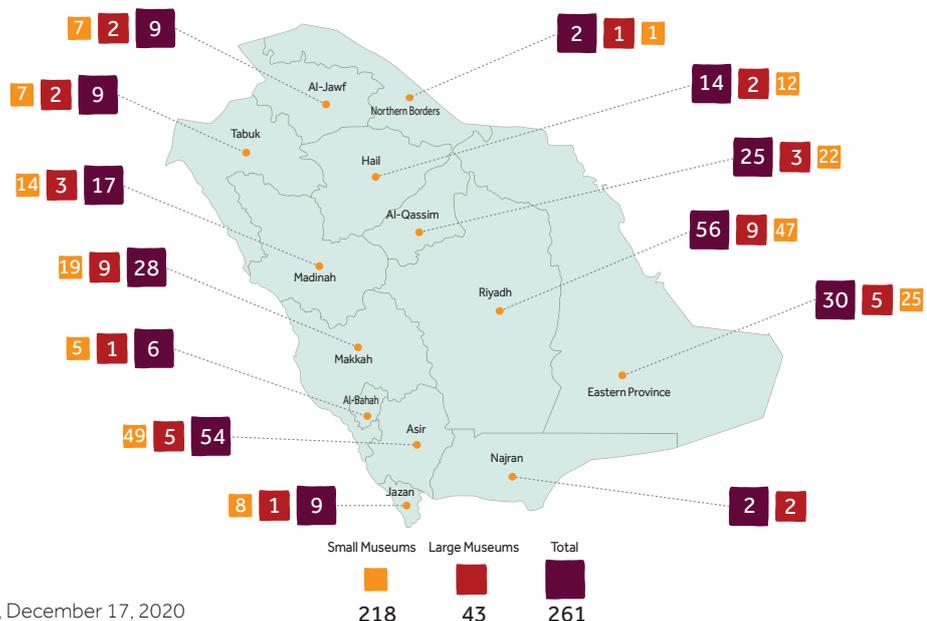
Classification of Museums

General museums at the national, regional, and local levels are known for containing various collections from different fields. They may offer a specialized collection in additional museum spaces. As for specialized museums, they are known for collections specific to fields, such as science, music, or military museums, among other types.⁽²⁰⁾

At a regulatory level, the Kingdom’s museums are classified into several categories: large public museums, small public or local museums, large private museums, and small private museums.⁽²¹⁾ Public museums fall under the regulatory authority of the Museums Commission or another government agency. Their content might be considered general, such as the collections of the National Museum and regional museums, or more specialized, like the Saudi Central Bank’s Currency Museum.⁽²²⁾

Private museums are cultural institutions owned by individuals, local entities, or independent bodies that receive government support and licensing through programs developed as part of the strategy to be launched by the Museum Commission, which oversees the whole sector. In 2020, the total number of private museums across all regions reached 261, with the largest numbers concentrated in the Riyadh Province, Makkah Province, Asir Province, and the Eastern Province. Around 20% of private museums are classified under the category of a large museum.

Distribution of private museums in the Kingdom



Source: Museums Commission, December 17, 2020

Projects and Construction

Plans and preparation for the construction of new museums are among the most important developmental features of the museum sector. The announcement of several future plans in

Future projects for large private museums

5 Museums King Salman Park



6 Museums Diriyah Gate Development project

- 1 **The Al Saud House** – a museum narrating the personal life of the royal family.
- 2 **The Saudi State Museum** – a museum focused on the history of the three Saudi states.
- 3 **The Arabian Peninsula Museum** – a museum offering the history of the Arabian Peninsula in 3 different eras up to the present.
- 4 **The Journey of 100 Stories** – a museum displaying the 100 most important stories in the history of Al-Diriyah.
- 5 **Al-Diriyah Art Center** – an art museum.
- 6 **Misk Museum for Heritage** – a museum concerned with heritage collectibles and handicrafts.



1 Museums The Downtown Jeddah project

1 Museums AMAALA project on the Red Sea coast

various museum sectors—both public and private—was seen in 2020 and is projected to be carried out within the next three years. As for museums classified as specialized, the Ministry of Culture announced preparations to establish four high-quality museums within the framework of the Specialized Museums initiative. This initiative aims to establish a number of museums in several fields as part of the Quality of Life Program’s targets to achieve Saudi Vision 2030.

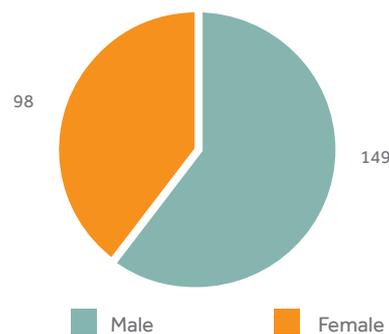
Workforce in the Sector

There are approximately 300 workers in professions directly related to the museum sector. This number, however, is not inclusive of all employees whose jobs are secondarily related to the sector. While this number does not fully capture the reality of sector-based employment—considering the organizational and structural transformations currently underway—it indicates the strong representation enjoyed by Saudis in the sector, shaping more than 90% of those registered in the following three professions: museum director, museum guide, and exhibition guide. Women constitute approximately 40% of the Saudi workforce in these professions. The Saudi Standard Classification of Occupations, approved by the Council of Ministers in mid-2020, lists 80 new cultural professions, including Museum Curator.

Table 11-1: Number of workers in museum-related professions, by nationality⁽²³⁾

Occupation	Saudis	Total Registered Employees
Museum Director	5	7
Museum Guide	13	15
Exhibition Guide	247	265

Figure 11-5: Distribution of Saudis working as exhibition guides, by gender



Source: Diriyah Gate Development Authority, December 27, 2020

Organizational Developments

The “State of Culture Report 2019” reviewed aspects of the structural transformations the museum sector has undergone over the past few years. The most recent development is the establishment of the Museums Commission in February 2020. Today, the Commission is responsible for developing the sector and is headed by Dr. Stefano Carboni, the Museum Commission CEO. The Board of Directors was formed on July 22, 2020, and is led by Prince Badr bin Abdullah bin Mohammed bin Farhan Al Saud and Deputy Minister of Culture Hamed bin

Mohammed Fayez as vice chairman, along with Dr. Markus Hilgert, Rifaat Medhat Sheikh El Ard, Jennifer Stockman, Mona Khazindar, and Chris Dercon as members.⁽²⁴⁾ Before this, on January 24, 2020, the Council of Ministers had issued a decree to transfer supervision of the National Museum at the King Abdulaziz Historical Center to the Ministry of Culture. The decree authorized the Ministry to form a Board of Trustees for the National Museum as part of its role to organize the sector and its affiliated entities.⁽²⁵⁾ The Board of Trustees announced the appointment of Laila Alfaddagh as the general director of the National Museum on December 28, 2020.⁽²⁶⁾

Future Plans for specialized museums

Black Gold Museum

An art museum about oil, to be held in Riyadh in partnership with King Abdullah Petroleum Studies and Research Center (KAPSARC). The museum aims to creatively document the role of oil in shaping societies. Scheduled to open in 2022.⁽¹⁾



Tariq Abdul Hakim Museum



A music museum in historic Jeddah. The museum is dedicated to the life and career of the late Tariq Abdul Hakim and documents the musical heritage of the Kingdom. Scheduled to open in late 2022.⁽²⁾

Red Sea Museum

A heritage museum to be held in the Bab Al-Banat building in historic Jeddah. The museum will contain rare manuscripts, images, and books. Artwork will tell the story of the cultural riches of the Red Sea and the identity of its cities, which developed alongside global cultures through trade and pilgrimage. Inauguration set for the end of 2022.⁽³⁾



A teamLab museum

An interactive museum in Jeddah. The museum will offer an innovative experience through the combination of art and digital technology. The Ministry of Culture commissioned the Japanese teamLab to open it up by 2023.⁽⁴⁾



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- (4) Except for three museums where the interview was conducted with directors, not the owners. See the Appendix for more information.
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Libraries

- Library Activities and Events
- Collection Preservation and Archiving Efforts
- Digitalization in the Library Sector
- Organizational Developments







The library sector in the Kingdom fills a pivotal role in preserving cultural heritage, disseminating knowledge, and providing resources through public, university, and specialized libraries, such as the King Fahd National Library. In 2020, the Libraries Commission was established to serve as a point of reference for the sector's organization and development. The commission's first initiative, announced by the Minister of Culture, was to establish 153 libraries across the Kingdom to act as cultural and civilizational centers, thereby enriching knowledge production throughout the country.

Preventative health measures taken to confront the spread of the Covid-19 pandemic inexorably impacted the sector, as libraries were forced to close their doors to visitors and patrons, and major changes took place in the sector-based project execution. The pandemic also posed itself as an opportunity to host events and activities in virtual space, thereby accelerating an already existing trend of digitalization within the sector. Those libraries that had taken steps toward digitalization in previous years were not only able to provide electronic services to overcome the barriers posed by quarantine, but to continue resiliently with their content digitization and development projects.

Library Activities and Events

Library Activities in Light of the Covid-19 Pandemic

The Covid-19 pandemic and the exceptional circumstances of 2020 affected most library services, including the ability to receive visitors, provide reading rooms, and lend books, among others. All libraries ceased welcoming visitors in mid-March and remained closed for varying periods. For example, the Ithra Library was closed for nearly three months,⁽¹⁾ the King Fahd National Library was closed for almost six months,⁽²⁾ and the King Fahd Public Library in Jeddah remained closed for the remainder of the year.⁽³⁾ After the lockdown was lifted and activities resumed alongside preventative measures, some libraries reopened their doors to visitors. The number of visitors was limited to facilitate social distancing, and advance appointments were required ensure a safe environment within libraries.

These measures led to a natural decrease in the number of visitors and patrons utilizing lending services, even after accommodations were made to facilitate lending during the closures. In many cases, the shutdown did not halt libraries' cultural and societal activities. Some public and university libraries fulfilled their cultural role by utilizing digital media for communication, holding activities and events, and providing several electronic services. They provided activities to a wide range of audiences in various forms across a range of content in the virtual space.

Public Activities

Libraries organize programs and events like meetings, seminars, and training courses for the general public. Although the pandemic disrupted the ability to continue to provide these services, a number of libraries were able to continue offering cultural activities on digital platforms as an alternative space for communication and virtual events. The activity of some libraries was noticeably affected. Still, others could continue hosting activities and events online, increasing their activities during home confinement by offering more programs and taking advantage of the excess free time people had. For example, the King Fahd Library in Jeddah started a series of courses on developing personal and professional skills before the start of the pandemic at the library building, and they continued to offer those courses via Zoom after precautionary measures were put in place. In total, the library offered 104 courses this year.⁽⁴⁾ The library of the Great Mosque likewise offered open access programs to the public, ranging from lectures and seminars to cultural broadcasts during the month of Ramadan 1441 AH (April – May 2020), including eight cultural meetings on Zoom and similar programming during the Hajj and Summer Seasons.⁽⁵⁾

Libraries often provide a wide array of content appealing to various segments of society, with a particular emphasis on activities promoting reading and books. The King Fahd Public Library in Jeddah, for example, hosts a club focused on books and reading activities. The club organized several important sessions throughout the year to discuss a book selected

in advance by vote. The club held two sessions before lockdown and six virtual sessions subsequently to discuss a group of literary, fictional, and philosophical works.⁽⁶⁾ The King Abdulaziz Public Library offers a similar activity in which an author is invited to discuss his work with participants. As a part of this activity, the library hosted several prominent thinkers from within and outside the Kingdom to present and discuss their recently published works.⁽⁷⁾ Additionally, libraries organized a number of reading competitions and festivals.⁽⁸⁾

Library activities were not limited to just meetings, training courses, and discussions. Libraries hosted exhibitions of their valuable collections, providing knowledge and cultural materials to visitors. For example, the King Fahd National Library held an exhibition entitled "Saudi Arabia in 90 Years" for the 90th National Day celebration. The exhibition documents the history of the Kingdom through rare pictures, documents, and books.⁽⁹⁾ The King Abdulaziz Public Library organized thirteen exhibitions throughout the year, including a virtual exhibition entitled "Features and Places of Saudi Arabia."⁽¹⁰⁾ However, only a limited number of libraries held exhibitions owing to the exceptional circumstances imposed by the pandemic.

Some libraries organized activities to coincide with the Year of Arabic Calligraphy 2020.⁽¹¹⁾ These activities took different approaches. Some activities were designed as competitions and training courses to encourage and develop amateur calligraphers' skills, such as the "Write Proudly" event, held by King Fahd Public Library in Jeddah,⁽¹²⁾ and the Basics of Arabic Calligraphy course organized by the Library of the Great Mosque of Makkah.⁽¹³⁾ There were also activities on the use, development, and utilization of modern technology in Arabic calligraphy, such as the two workshops organized by Ithra on digitizing Arabic fonts and Arabic typography,⁽¹⁴⁾ as well as activities on the history and rich heritage of calligraphy, such as the exhibitions held by the Ithra Library and the King Abdulaziz Public Library.⁽¹⁵⁾

Activities for Children and Adolescents

Some libraries offer activities and events specially curated for children and adolescents. A number of these libraries continued to hold digital events and activities online for this demographic despite the conditions of the pandemic. The creation of these programs has proved their effectiveness



as they were met with an overwhelmingly positive response and frequency of engagement from children. For example, the King Fahd Public Library in Jeddah and the Dar Al-Uloom Library in Al-Jawf aired weekly readings of children's stories on their Instagram and YouTube accounts.⁽¹⁶⁾ The King Abdulaziz Public Library held virtual events on virtual platforms, including eighty-nine broadcasts for children, which led to a notable increase in the number of subscriptions to the library's Children's Book Club. This growth in club membership reflects the extent of demand for these programs. In 2020 alone, 1,762 new members joined, bringing the total number of subscribers to 15,000 from all parts of the Kingdom.⁽¹⁷⁾

In addition to virtual programs, libraries were able to hold some live events both before the implementation of the preventative health measures and post-lockdown. For example, the King Abdulaziz Public Library hosted several plays and live shows for children, totaling 126 performances throughout the year.⁽¹⁸⁾ Early in the year, the Library of the Holy Mosque in Mecca hosted library orientations for fifteen girls' schools, with 281 girls of various ages and 320 boys from five boys' schools participating. These events experienced an abrupt halt as preventative measures were implemented.⁽¹⁹⁾

Scholarly Activities

Besides their general cultural activities, some libraries undertake academic and research activities related to libraries, information, and archiving. These activities aim to develop the library sector, improve its performance, and evaluate projects promoting these endeavors. This year saw proactive scholarly efforts by some libraries. One such effort was the issuing of the inaugural edition of the Journal of



Archival Studies, the establishment of which was announced by the National Center for Archives and Records in 2019. The inaugural issue included four peer-reviewed papers. Other projects in this field include a joint guide by the King Abdulaziz Complex for Endowment Libraries and the Arab Federation for Libraries and Information (AFLI), entitled “Job Specification Guide for Libraries, Information, Archives, and Manuscripts,” which is slated to be published soon.⁽²⁰⁾

Some libraries organized scholarly seminars and meetings. Throughout the year, the Arabic Union Catalog at King Abdulaziz Public Library organized a semi-weekly series of meetings to host specialists in library, information, and archival sciences. These meetings were broadcasted across multiple electronic platforms, including Zoom and YouTube.⁽²¹⁾ The forum at King Abdulaziz Foundation for Research and Archives (Darrah) held similar scholarly meetings focusing on historical themes, including archiving, such as “Archiving in the Face of Corona,” and another meeting on archiving digital documents.⁽²²⁾

Training Programs

Throughout 2020, specialized training programs were offered in the use of libraries, their databases, and information systems. University libraries were particularly active in the field: new students were offered designated programs geared towards sector-specific education. For example, the Umm Al-Qura University Library organized a course entitled “Information Services” in October 2020 to introduce students

to information systems and databases in the library. Earlier in February, King Faisal University organized “Knowledge Week,” a one-week program to introduce students to the library and its services through lectures and workshops.⁽²³⁾ In addition to training offered by university libraries, the National Center for Archives and Records offered training programs on document preservation and archival practices geared toward employees of government agencies.

The year 2020 saw the establishment of the Arabic Union Catalog Academy—a platform that aims to provide professional programs specializing in libraries and information. Its formation dubbed a key development in sector-specific education, the academy specifically targets recent graduates without experience in the field. Through its newly established website, the academy has launched five educational programs and is preparing additional ones.⁽²⁴⁾

Collection Preservation and Archiving Efforts

Library Holdings and Special Collections

One of the main responsibilities of libraries is preserving and documenting knowledge and cultural heritage. Several libraries and centers in the Kingdom undertake this task by collecting, preserving, and maintaining collections of books, documents, manuscripts, special collections, and other corpora of knowledge.

Table 12-1: The numbers of holdings in select libraries in the Kingdom⁽²⁵⁾

Library	Book Titles	Manuscripts	Documents
King Abdulaziz Foundation for Research and Archives Library ⁽²⁶⁾	95,762	9,536	2,808,677
King Faisal Center for Research and Islamic Studies Library ⁽²⁷⁾	188,000	28,506	40,000
King Fahd National Library ⁽²⁸⁾	1,445,796	5,099	8,407
King Abdulaziz Complex for Endowment Libraries ⁽²⁹⁾	125,000	15,722	—
National Center for Archives and Records ⁽³⁰⁾	—	—	2,500,000
King Salman Library at King Saud University ⁽³¹⁾	470,900	11,414	4,861
Prince Sultan Library for Science and Knowledge at Imam Muhammad bin Saud Islamic University ⁽³²⁾	2,508,494	8,000	—
Umm Al-Qura University Library ⁽³³⁾	1,085,098	12,492	—
Ithra Library ⁽³⁴⁾	270,000	—	—
King Fahd Public Library in Jeddah ⁽³⁵⁾	101,084	—	—
King Abdulaziz Public Library ⁽³⁶⁾	591,000	7,630	123,760

Special Collections

Some of the Kingdom's libraries acquire special collections of rare materials, privately donated, and endowed collections. The King Abdulaziz Complex for Endowment Libraries in Madinah, established in 2016, leads the effort to preserve and maintain these rare materials. The complex received all the holdings from King Abdulaziz Library and includes approximately thirty-five endowed libraries,⁽³⁷⁾ providing a safe environment for the holdings and protecting them from damage and erosion. The complex is temporarily housed at the Islamic University.



Endowed libraries can be found in mosques across the Kingdom and are overseen by the Ministry of Islamic Affairs, Dawah, and Guidance. The Ministry provided an inventory of libraries and their holdings in December, as shown in the following table.⁽³⁸⁾

Table 12-2: Endowed libraries overseen by the Ministry of Islamic Affairs

Region	Number of Endowed Libraries	Number of Books and Manuscripts
Makkah	5	25,000 books and manuscripts
Riyadh	1	5,400 books and manuscripts
Jazan	4	12,000 books
Northern Borders	1	10,000 books
Al-Bahah	1	1,150 books
Al-Qassim	5	15,000 books
Hail	4	24,000 books and manuscripts

In addition to endowed libraries, there are several rare personal collections preserved in public and university libraries. King Salman Central Library at King Saud University is one of the most important libraries maintaining collections of this type. It holds twelve personal libraries, including those of prominent figures in the Kingdom's history, including Sheikh Hamad Al-Jassir, among others.⁽³⁹⁾ Umm Al-Qura University maintains sixteen personal libraries, including the libraries of Sheikh Muhammad Suoor Sabban and Sheikh Abdullah bin Hassan Al-Sheikh.⁽⁴⁰⁾ The Islamic University maintains a number of personal libraries of prominent scholars, such as Sheikhs Al-Albani, Obaid Madani, and Saleh bin Humaid.⁽⁴¹⁾

Digitalization in the Library Sector

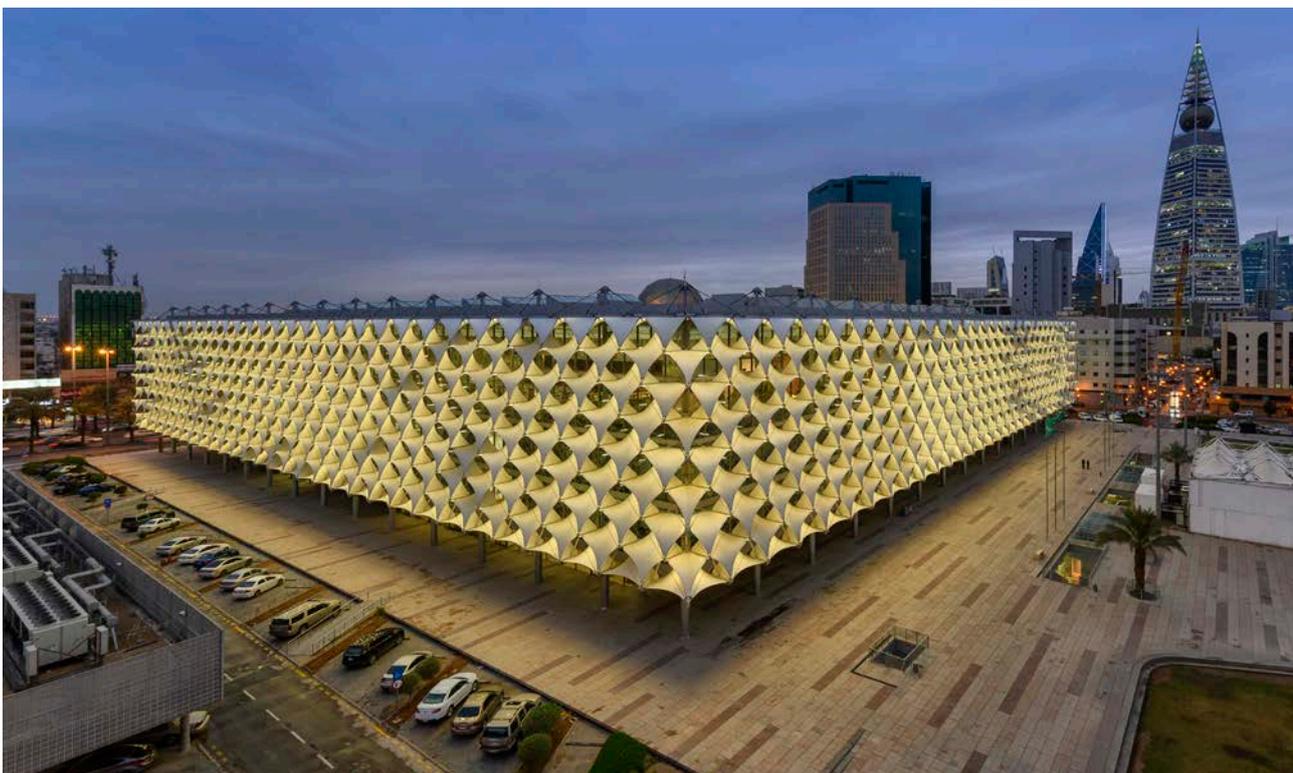
When compared to other cultural sectors, the library sector is exceptionally dependent on digital technologies. By virtue of its relationship to digital transformation, the prerogative of the library is digitization of the management and organization of information. The simplest form of digitalization in the sector is the use of electronic indexing functions of library content, which has become standard practice in all libraries, whether large or small. These libraries advanced beyond this simple function and pushed the boundaries of digitalization

with complex projects that network libraries and their information databases and standardize classification and archival practices. The "2019 Report on the State of Culture" discussed such projects in its overview of the infrastructure of digital transformation in the sector and its prospective projects in the Kingdom.

The present report reviews the features of two other dimensions of digital technologies in the library sector. The first is the digitization of content—namely, creating copies of the library's holdings (books, periodicals, documents, manuscripts, and the like) stored as digital media. This practice helps the library sector preserve its holdings and publish them on a larger scale. It also enables the sector to tap into the second dimension of utilizing digital technologies—namely, offering electronic services. These allow libraries to transcend the limits of physical time and space, as digitized information and services are available around the clock and outside of working hours.

Digital Content Development

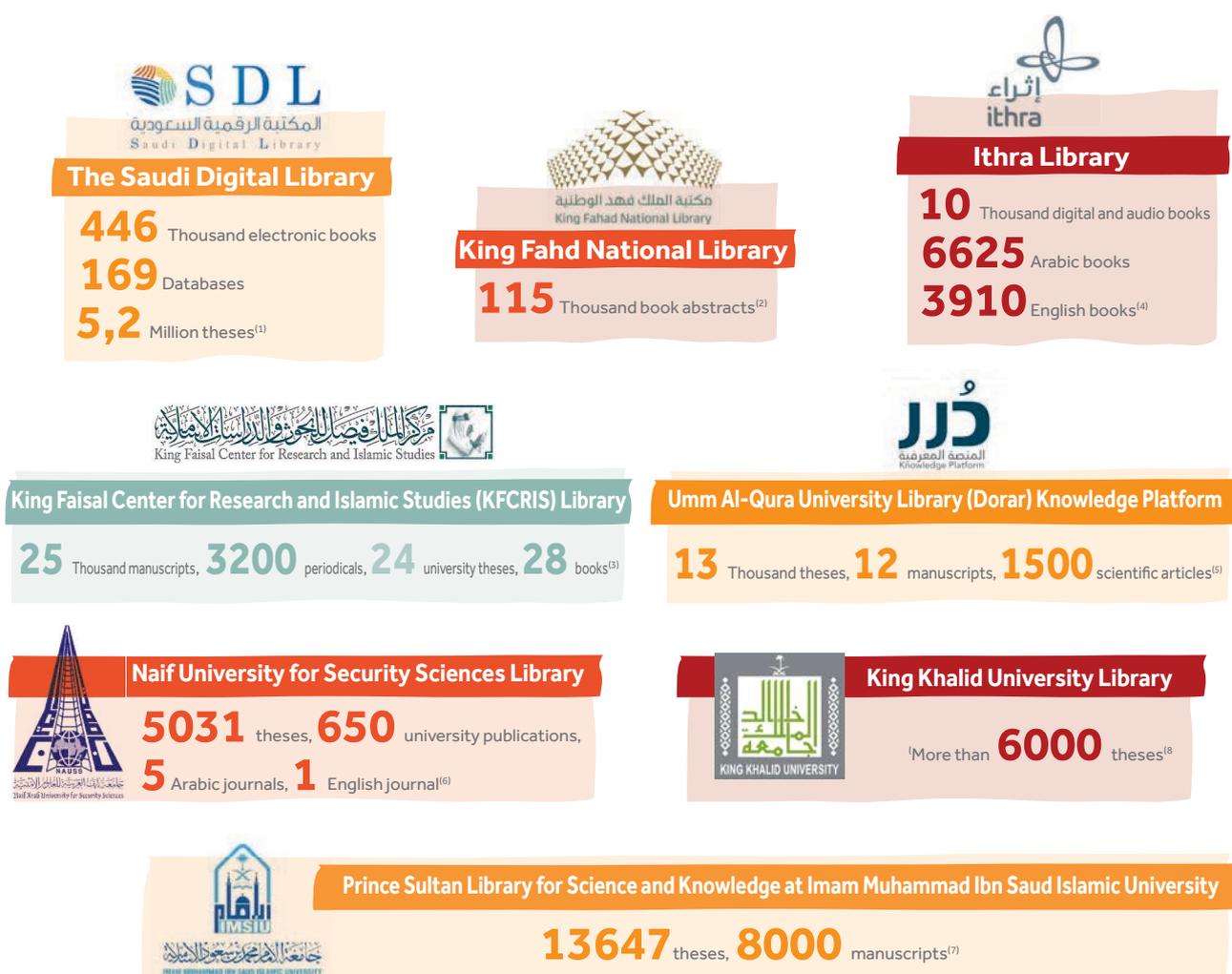
In addition to the Saudi Digital Library, which was established in 2010 to provide information services to educational institutions in the Kingdom,⁽⁴²⁾ several public and university



libraries have developed digital content in recent years. They have done so not only by subscribing to information databases but also by converting their private holdings into digital formats. Many university libraries have also established special digital repositories for their intellectual production,

including university theses, journals, and research projects. In 2020, one of the most prominent developments was the launch of Umm Al-Qura University's Knowledge Platform (Dorar), aimed at making the university's scientific production and resources available online.⁽⁴³⁾

Examples of the contents of digital repositories of libraries across the Kingdom



1) Saudi Digital Library (online), <https://portal.sdl.edu.sa/arabic/>.

2) King Fahd National Library (@kfnl.gov), "Abstracts of Saudi intellectual works system includes more than 150,000 book and scientific theses abstracts from Saudi scholars: <http://abstracts.kfnl.gov.sa>," Twitter, June 30, 2020, <https://twitter.com/KFNLGOV/status/1277885896872931328?s=20>.

3) King Faisal Center for Research and Islamic Studies, 2020.

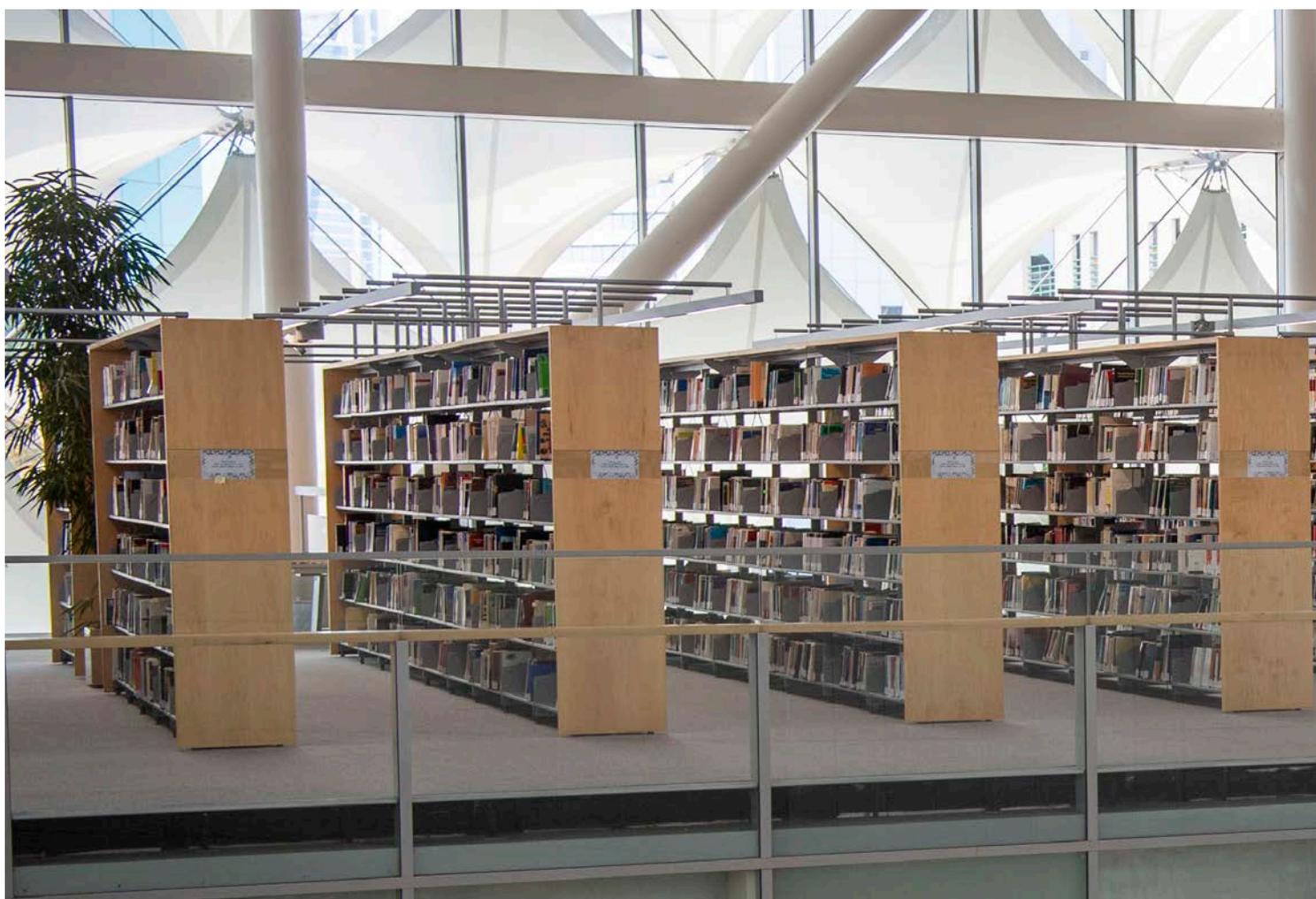
4) "About us," Ithra, <https://www.ithra.com/ar/about-us/library/>.

5) Saudi Press Agency, "Launching of the Dorar Knowledge Platform and the King Abdullah Library Museum at Umm Al-Qura University," February 18, 2020, <https://www.spa.gov.sa/viewstory.php?lang=ru&newsid=2035978>.

6) "Main," Naif Arab University for Security Sciences, <https://repository.nauss.edu.sa/>.

7) King Saud University, Performance Indicators for the Deanship of Library Affairs 1441/1440 AH.

8) King Khalid University, Deanship of Library Affairs: Information and Achievements 2014/2015.



The King Fahd National Library began a project to display digital book summaries in digital format and has recently completed summaries of 115,000 books.⁽⁴⁴⁾ Similarly, the King Abdulaziz Foundation for Research and Archives digitized various materials and corpora from its holdings, such as digitizing 556 film reels from its archive of photos and films in 2020.⁽⁴⁵⁾

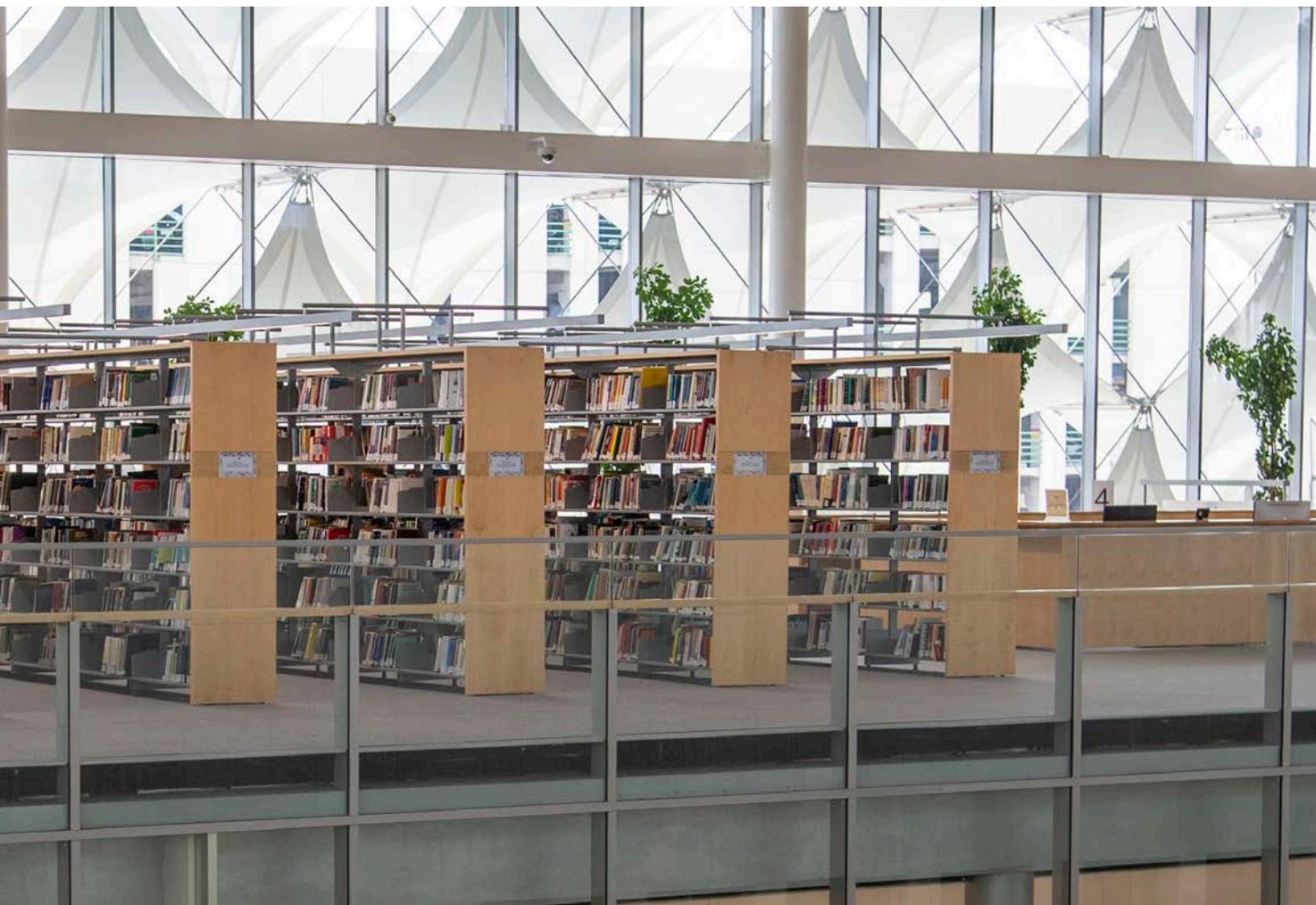
There is a marked interest in digitizing the knowledge content of rare collections and manuscripts in the library sector, especially since digitally preserving content is a necessary step if the originals are more vulnerable to damage. Maintaining them and making them available for digital viewing increases those document's accessibility to the broader public. The library of the King Faisal Center for Research and Islamic Studies (KFCRIS) is distinguished for its efforts in this regard, as it has so far converted 90% of the original manuscripts in its possession into digital formats.⁽⁴⁶⁾ Recently, the Libraries Commission launched the Digitization and Access to Manuscripts project to establish a unified platform for preserving and accessing digitized manuscripts in the Kingdom. The first step of the project has already begun in cooperation with the King Fahd National Library.⁽⁴⁷⁾

The outbreak of the Covid-19 pandemic and the preventative health measures that resulted from it underscored the

importance of developing digital content. By virtue of possessing digitized content, many libraries overcame many obstacles throughout the period when precautionary measures were enforced to offer their collections to a broad segment of the population.⁽⁴⁸⁾ For example, the Ithra Library and the King Fahd Public Library in Jeddah made their digital content available for subscribers and the general public during this period.⁽⁴⁹⁾ The King Fahd Library in Jeddah likewise created a mini electronic library of free books through its "Knowledge is Giving and Growth" initiative, which made it possible for users to download books through its website while preventative health measures were being undertaken.⁽⁵⁰⁾ Likewise, the King Abdulaziz Foundation for Research and Archives made eighty-three books related to the history and geography of the Kingdom available for free browsing during the global Free Access Week.⁽⁵¹⁾

Electronic Services

Some libraries in the Kingdom recently began providing multiple electronic services to patrons. For example, the King Fahd National Library provides sixteen different electronic services through its website. The King Abdulaziz Foundation for Research and Archives, the National Center for Archives and Records, the KFCRIS, and some university



libraries offer electronic services, such as fielding requests to photocopy manuscripts, documents, and reference lists. Electronic services are not limited to photocopying and delivery of knowledge content alone but include facilitating communication between authors and publishers. The King Fahd National Library, for example, allows authors and publishers to electronically request the registration of their publications. Several initiatives were launched in response to the pandemic, including the “Anwar Al-Ma’refa” initiative launched by the library at Princess Nourah bint Abdulrahman University. This initiative uses communication media applications to provide information services, including reference, automatic index searching, digital resources and databases, book suggestion, and guidance and counseling services. The library won an Honorary Shield from the AFLI for its distinguished efforts.⁽⁵²⁾

Organizational Developments

The establishment of the Libraries Commission in February was the most prominent organizational development in 2020. Dr. Abdulrahman bin Nasser Al-Asim heads the commission. Its board of directors was formed under the chairmanship of the Minister of Culture, Prince Badr bin

Abdullah bin Farhan Al Saud, with the Deputy Minister of Culture, Hamed bin Mohammed Fayez, as vice-chairman. Other members include Mr. Faisal bin Abdulrahman bin Muammar, Dr. Noha Adly Attia, Dr. Faisal bin Abdulaziz Al-Tamimi, Dr. John Van Oudenaren, and Mr. Mohammed bin Abdulaziz Al-Rashid.

In June, the Minister of Culture announced the launch of the Commission’s first initiative to develop the library sector, which includes establishing 153 new libraries in various regions of the Kingdom by 2030, the first thirteen of which are slated to be completed by 2022.⁽⁵³⁾

The initiative aims to reinvigorate the role of public libraries in various regions of the Kingdom as proactive cultural centers. Their role is especially important given the limited number and regional reach of pioneering libraries across the Kingdom—the commission is set to inclusively expand the presence and impact of libraries far beyond major regions in the Kingdom. The 2019 Report discussed the state of public libraries in the Kingdom’s regions and described the reasons for their limited role. The Ministry of Culture’s initiative is an attempt to address this situation and restore the library to its proper place in society, especially in regions where the library’s role is faced with unmet potential.

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Natural Heritage

- Organizational and Scientific Structure of the Sector
- Recognition and Dissemination
- Participation and Ecotourism
- Sustainable Management of Natural Heritage Landmarks
- Digitalization in the Sector
- Organizational Developments







The Kingdom's natural heritage is one of rich geographical, climatic, and biological diversity—widely spread out across the country, covering most of the Arabian Peninsula and its coasts. Global warming and desertification are among the global environmental challenges that have led to an increased interest in the environment and wildlife. This interest has led to institutional and organizational developments in the Kingdom, such as the inauguration of specialized environmental centers and the introduction of cooperative agreements between relevant government agencies and research centers. The work of the latter provides the scientific foundation for the activity within the natural heritage sector. Concerning the cultural aspects of the sector, special attention was given this year to preparing the nomination file for the 'Uruq Bani Mu'arid Reserve for the UNESCO World Heritage List, the first natural heritage site nominated by the Kingdom.

Although the Covid-19 pandemic has prompted sector-wide ramifications, biological diversity in some parts of the Kingdom rebounded during the lockdown period due to prevalent preventative health measures. Despite the lockdown-induced decrease in visits to reserves and natural parks—which affected public places and caused exhibitions and festivals to be canceled—local tourists gradually returned to domestic ecotourism sites after the lockdown was lifted and borders remained closed.

With the emergence of digital options as alternate solutions for the circumstances brought about by the pandemic, the sector remained active via virtual activities. It continued to celebrate natural heritage through various electronic means. In addition, digital technologies were employed for wildlife protection and preservation.

Organizational and Scientific Structure of the Sector

"The Report on the State of Culture in the Kingdom of Saudi Arabia, 2019" indicated that the institutional structure of the natural heritage sector has undergone many changes in recent years. Institutional development commenced with the National Environment Strategy, followed by the restructuring of the sector into five specialized environmental centers, and ended with the approval of a new environmental regime. Some of these institutions became active after their inauguration in December 2020.⁽¹⁾ The environmental centers—the National Center for Wildlife Development, the National Center for Vegetation Cover and Combating Desertification, the National Center of Meteorology, the National Center for Environmental Compliance, and the National Center for Waste Management—alongside the Environment Fund at the Ministry of Environment, Water, and Agriculture, constitute the new institutional framework for the environment sector. This framework builds on the recommendations of the National Environment Strategy, which includes more than 60 initiatives in various environmental fields and is considered blueprint to achieving the Kingdom's environmental protection goals.

Research Centers and Scientific Activities

Scientific research is fundamental to the natural heritage sector, as it provides the foundational work needed for exploring, documenting, preserving, and rehabilitating natural heritage landmarks. There are several research facilities in the natural heritage sector, including specialized environmental centers and educational institutions. These centers produce both qualitative and quantitative work. The most productive among them is the Red Sea Research Center, established in 2009 by the King Abdullah University for Science and Technology. This year, the center produced nearly 100 research papers on biodiversity and vegetation cover in the Red Sea region.⁽²⁾

Several cooperation agreements were also signed in 2020 by specialized government agencies and environmental research centers. For example, a cooperation agreement was signed between the Ministry of Environment, Water, and Agriculture and the King Abdulaziz City for Science and Technology in mid-August to establish a technical innovation center for water and agricultural research to develop the sector.⁽³⁾ In addition, the National Center for Vegetation Cover Development and the Center for Desert Agriculture at King Abdullah University of Science and Technology started a collaborative project in October for the genetic mapping of threatened plants in the Kingdom to facilitate their preservation, repopulation, and cultivation.⁽⁴⁾

Table 13-1: The most prominent environmental research institutions in the Kingdom

Specialized Research Centers	Centers Affiliated with Educational Institutions
King Khalid Wildlife Research Center	Center of Excellence in Environmental Studies, King Abdulaziz University
Prince Muhammad Al-Sudairy Center for the Breeding of Reem Gazelles in Al-Qassim	Avian Research Center, King Faisal University
Prince Saud al-Faisal Wildlife Research Center	Camel Research Center, King Faisal University
Prince Sultan Institute for Environmental, Water, and Desert Research	Center for Research and Environmental Studies, Jazan University
Water Research Center	Center of Excellence in Biotechnology Research, King Saud University
Environmental Security and Sustainability Research Program at the Gulf Research Center	Center for Environment and Water, King Fahd University of Petroleum & Minerals
Center for Desert Agriculture	Red Sea Research Center, King Abdullah University of Science and Technology
National Center for Research on Agricultural and Livestock	Unit of Ecology and Environmental Biology of Arabian Gulf and Desert – Prince Muhammad bin Fahd Center for Research and Medical Studies, King Faisal University
	Fish Resources Research Center, King Faisal University

Education and Skills

In June 2020, the Scientific Endowment at King Abdulaziz University launched the License for Environmental Leadership Program to equip national cadres with the necessary tools to promote environmental awareness and protection. The University's Center of Excellence in Environmental Research partnered with the Saudi Society for Environmental Sciences and Taif University to create the program, the fourth edition of which was held online for eight days.⁽⁵⁾ At the end of December 2020, the Training Center for Natural Resources Conservation at the National Center for Wildlife established a program to provide leaders of the Special Forces for Environmental Security with foundational knowledge of and skills in nature preservation.⁽⁶⁾

A memorandum of understanding was signed between the Ministry of Environment, Water, and Agriculture and the Ministry of Education in 2020 to promote environmental education in school curricula.⁽⁷⁾ This represents great progress in raising environmental awareness in education and highlights the meaning and value of natural heritage and the importance of preserving it.

Recognition and Dissemination

Natural Heritage and Environmental Awareness Initiatives

Several environmental initiatives focused on increasing environmental awareness were launched in 2020. The most prominent of them was the Let's Make Them Green campaign— spearheaded by the Ministry of Environment, Water, and Agriculture in cooperation with public security and environmental security forces—to raise awareness regarding the danger of illegal logging on vegetation cover.⁽⁸⁾ The campaign received local support through the efforts of voluntary associations and groups that initiated afforestation campaigns and promoted environmental awareness, especially after preventative health measures were relaxed. At the beginning of December, the Jeddah Breathe volunteer group signed a cooperation agreement with the Saudi Society for Environmental Sciences to increase achievement in the field of afforestation and combating desertification in Jeddah.⁽⁹⁾ As a result of this cooperation, 22 volunteers were trained in afforestation, and the Al Faisaliya Welfare Society was provided with 130 seedlings for cultivation.⁽¹⁰⁾ In the wake of the preventative health measures put in place

as a result of the Covid-19 pandemic, the National Center for Wildlife launched awareness programs on social media sites, including the “Do Not Kill or Capture Them” campaign, which aims to raise awareness about the importance of wild animals and their role in maintaining ecological balance. The campaign exposed the criminal practices that these animals are subjected to through the practices of unjustified killing and poaching, and illicit wildlife trade.⁽¹¹⁾

Global Recognition

The Kingdom participated in the National Biodiversity Week from May 18–22, 2020. The event was launched by the United Nations under the theme “Our solutions are in nature” to raise awareness about the ongoing negotiations over the post-2020 Global Biodiversity Framework, which follows on from the United Nations Convention on Biological Diversity. The Kingdom is keen to implement its requirements, including preparing a national strategy for preserving biodiversity and forming the National Committee for Biodiversity headed by the Saudi Wildlife Authority.⁽¹²⁾ In addition, the Kingdom’s presence in the international environmental scene was established this year through the entry of Al-Ahsa Oasis into the Guinness Book of Records as the largest oasis of palm trees. The oasis covers more than 8,540 hectares (85.4

square kilometers) and has close to 3 million date palms fed by a water system of hundreds of kilometers of water channels from a vast aquifer and 280 artesian springs. The Heritage Commission was tasked with raising awareness about the importance of preserving the oasis in the name of both natural and cultural heritage. The oasis was inscribed on the UNESCO World Heritage List in June 2018.⁽¹³⁾

Virtual Activities

Public awareness initiatives were moved to digital platforms due to the preventative health measures taken in light of the Covid-19 pandemic. Some entities also set up activities for specialists and other interested parties throughout 2020, including virtual meetings, workshops, and forums. These events varied, from celebrations of international days related to the elements of natural heritage to discussions of environmental challenges (see Table 13-2). Some were focused on the overlap of natural heritage and cultural heritage. For example, in cooperation with the Saudi Heritage Preservation Society (We are Our Heritage), the National Center for Wildlife organized a virtual forum entitled “Wildlife in Folklore.” The forum’s topics included the concept of intangible heritage and its preservation, biodiversity in the Kingdom, and wildlife as a critical part of Saudi identity.⁽¹⁴⁾

Table 13-2: Select virtual events about natural heritage in 2020

Host Organization	Virtual Event
Saudi Wildlife Authority	Migratory birds and the environment: Protecting their migration paths ⁽¹⁵⁾
	Scientific forum for World Oceans Day ⁽¹⁶⁾
	Scientific forum for the International Day of Shark Awareness ⁽¹⁷⁾
Ministry of Environment, Water, and Agriculture	Virtual international workshop on the role of plant health in enhancing food security ⁽¹⁸⁾
	A virtual forum to raise awareness of the importance of sustainable afforestation ⁽¹⁹⁾
G20 Summit	International workshop on land degradation ⁽²⁰⁾
	International workshop on coral reef degradation ⁽²¹⁾
Center of Excellence in Environmental Studies	Health, Environment, and Covid-19 ⁽²²⁾
	Hand-in-hand to Achieve Sustainable Environmental Development ⁽²³⁾
	Concepts and principles of environmental leadership
	Humans, pollution, and environmental protection
	License for Environmental Leadership
Saudi Geographical Society	Underwater cultural heritage and earth sciences ⁽²⁴⁾
	Sustainable environmental development in the Kingdom of Saudi Arabia ⁽²⁵⁾
Saudi Geographical Society in collaboration with King Khalid University	The cultural and biological diversity of the mountains in the Asir region ⁽²⁶⁾

Participation and Ecotourism

Ecotourism was inexorably impacted by the national lockdown, prompting the closure of Saudi natural reserves by the Saudi Wildlife Authority in line with national efforts to fight the pandemic and contain its spread.⁽²⁷⁾ Ecotourism programs were also affected, especially after the banning of public gatherings, which resulted in the postponement and cancellation of several tourist events and programs scheduled to be held during 2020. The cancellation of events, activities, and festivals negatively affected owners of small and medium-sized enterprises (SMEs) as 80% of the tourism sector in the Kingdom is composed of private SMEs and non-governmental institutions.

However, the flow of local tourists temporarily returned from the beginning of June and until the end of August as lockdowns were gradually lifted, while international borders remained closed. Natural parks, especially those located in the southwest of the Kingdom, where the weather tends to be cooler in the summer, were popular tourist destinations.⁽²⁸⁾ This was reflected in the increased share of domestic tourist trips that included visits to natural or mountainous areas, which went up from 3.3% of total tourist trips in 2019 to 4.2% in the first nine months of 2020.⁽²⁹⁾

The Ministry of Tourism executed commendable efforts to stimulate ecotourism with initiatives such as the Saudi Summer Season ("Breathe"), launched by the Saudi Tourism Authority. This initiative promoted areas of biological diversity, natural parks, and environmental destinations in the Kingdom as essential domestic tourism destinations.⁽³⁰⁾ At the start of December, the Saudi Tourism Authority also launched the "Winter Around You" season to promote activities in nature throughout the Kingdom through tourism programs, including mountain walks and rural and marine activities.⁽³¹⁾ The Authority - in cooperation with the National Center for Wildlife - also stimulated ecotourism in the Farasan Reserve, Saja and Umm Al-Ramth Reserve, and the 'Uruq Bani Mu'arid Reserve.⁽³²⁾ Non-profit organizations also participated in supporting ecotourism. For example, the Reafana Society—established in 2020—collaborated with the Tourism Makers company to launch tourist programs to the Jazan region in early 2021, including excursions to banana and Khawlani coffee plantations and honeybee farms.

Despite international border closures and the general interest in domestic ecotourism, the pandemic had a clear, negative impact on environmental tourism activity. The Cultural Participation Survey shows a substantive decrease in the rates of visits to reserves and natural parks compared to last year (see Figure 13-1).

Figure 13-1: Percentage of individuals who visited nature reserves or parks in 2019 and 2020

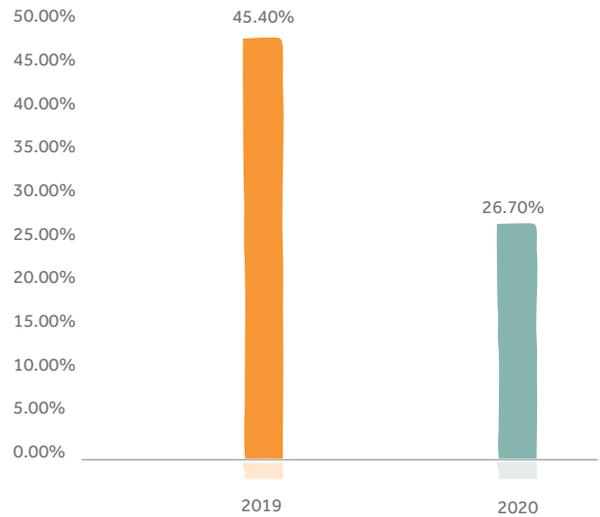
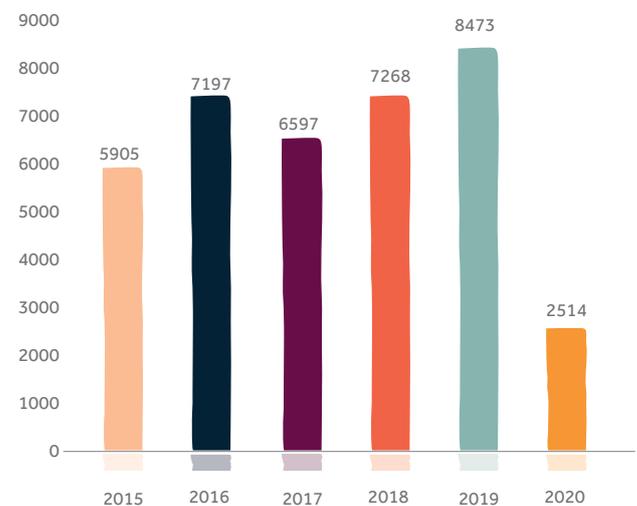


Figure 13-2: Number of visits to wildlife reserves⁽³³⁾



A similar trend holds regarding in-person visits to wildlife reserves specifically, where visits fell to a five-year low during the Covid-19 pandemic (see Figure 13-2). To combat this, the National Center for Wildlife is collaborating with the Ministry of Tourism to include a selection of the center's reserves within tourist routes. To formalize efforts to activate ecotourism in wildlife reserves, ecotourism rules and procedures were adopted to regulate tourist activities and the requirements for entities investing in environmental tourism sites. These efforts will shape both the future of ecotourism and domestic tourism more generally. Other noteworthy efforts include the creation of the Tourism

Development Fund and the National Tourism Development Strategy, which aim to make nature reserves part of tourism development and investment projects.⁽³⁴⁾ The Farasan Islands

Reserve and the Saja and Umm Al-Ramth Reserve received tourism investments in 2020, and the 'Uruq Bani Mu'arid Reserve received investments in 2021.

Latest developments in ecotourism growth projects for 2020



The Asir waterfront was inaugurated in January 2020⁽¹⁾



The Asir Region Development Authority offered investment opportunities for the development of eight dam lakes



Work continued on the largest parks in Al-Jawf, near the King Abdulaziz Cultural Center⁽²⁾



The designs of the Shara'an resort in Al-Ula were unveiled⁽³⁾



Work on the park and industrial lake project in the Masaif Al-Faqra area of Madinah began⁽⁵⁾



Work began on the King Salman Park project in Riyadh



90% of the work to develop and environmentally rehabilitate Al-Aqeeq Valley and transform it into a tourist park in Medina was completed



The Al-Nahda Park rehabilitation project in Riyadh was announced, to begin in 2021⁽⁴⁾



Work began to rehabilitate the ecological resort in the 'Uruq Bani Mu'arid reserve⁽⁶⁾

1) Asir Province Municipality (@asirmunicipal), "Opening of the Asir waterfront, January 2, 2020," Twitter, December 28, 2020, <https://twitter.com/asirmunicipal/status/1210972500097748992?s=20>.

2) Saudi Projects (@SaudiProject), "Ongoing work in the project to establish a park adjacent to the King Abdulaziz Cultural Center located west of #Sakaka in Al-Jawf," Twitter, July 9, 2020, <https://twitter.com/SaudiProject/status/1331903149062447105?s=20>.

3) Saudi Projects (@SaudiProject), "#AlUla reveals Shara'an Resort designs," Twitter, November 4, 2020, <https://twitter.com/SaudiProject/status/1323915273318109185?s=20>.

4) Saudi Projects (@SaudiProject), "#Riyadh Municipality intends to rehabilitate Al-Nahda Park. Work will start in 2021 as part of the Municipality's efforts to increase green zones," Twitter, November 1, 2020, <https://twitter.com/SaudiProject/status/1322980266000998400?s=20>.

5) Saudi Projects (@SaudiProject), "Work begins on the park and the industrial lake located in the Masaif Al-Faqra area in Madinah," Twitter, October 21, 2020, <https://twitter.com/SaudiProject/status/1318844202252369920?s=20>.

6) National Center for Wildlife, as of February 7, 2020.

Developments in Ecotourism Destinations

Among the tourist destination development projects announced in 2019 that were completed in 2020 was the Asir waterfront, which was inaugurated at the beginning of the year. New projects were also announced in 2020, including the rehabilitation project of Al Nahda Park in Riyadh. Saudi Aramco completed the mangrove eco-park project in Rahima Bay in Ras Tanura, which houses two million mangrove seedlings, as well as a research center devoted to the study of mangroves.⁽³⁵⁾

Sustainable Management of Natural Heritage Landmarks

Developments in Nature Reserves

The Kingdom is set to establish its largest marine reserve, spanning 5,373 km² off the western coast of the Kingdom, including nine islands in the Red Sea. The nine islands, which will be nature reserves, will run on 100% renewable energy and prohibit the use of non-recyclable plastic, on-site waste burial, and sewage runoff into the sea.⁽³⁶⁾

Table 13-3: Wildlife reserves in the Kingdom⁽³⁷⁾

	Protected Area	Administrative Region	Area (km ²)	Notes	
1	Al-Tubayq	Tabuk	12,105	King Salman Royal Reserve	
		Al-Jawf			
2	Harrat Al-Harrah	Al-Jawf	13,775		
		Northern Borders Province			
3	Al-Khunfah	Tabuk	19,339		
		Al-Jawf			
		Hail			
5	Al-Taysiyah	Hail	4,272.2		Imam Turki bin Abdullah Reserve
		Northern Borders Province			
6	Nafud Al-'Urayq	Al-Qassim	2,036.1		-
		Riyadh			
7	The Ibex Reserve	Riyadh	1,840.9		-
8	Mahazat Al-Sayd	Makkah	2,553		Imam Saud bin Abdulaziz Reserve
9	Saja and Umm Al-Ramth	Makkah	6,528.2		-
		Riyadh			
10	Raydah	Asir	9.33		-
11	Majami al-Hadb	Riyadh	2,256.4	-	
12	'Uruq Bani Mu'arid	Najran	12,787	-	
		Riyadh			
13	Shada Mountain	Al-Bahah	68.62	-	
14	Al-Jubail Marine Wildlife	Eastern Province	2,410.69	-	
15	Farasan Islands	Jazan	5,408	-	
16	Umm al-Qamari Islands	Makkah	4.03	-	
Total Area: 85,393.47 km²					

Natural Heritage Sites Eligible for Nomination to the UNESCO World Heritage List

As part of the efforts made to document and develop the natural heritage in the Kingdom, the Saudi Wildlife Authority (National Center for Wildlife) announced on January 3, 2019, the inclusion of the two of the Kingdom's reserves— 'Uruq Bani Mu'arid and the Farasan Islands—on the UNESCO World Heritage tentative list of natural heritage sites. In early September 2020, the center announced the start of work on the 'Uruq Bani Mu'arid Reserve's nomination file for the UNESCO World Heritage List, the first natural heritage site the Kingdom has nominated.⁽³⁸⁾ The center also announced a group of projects as part of the pilot project for the reserve, which will serve as a model. These projects aim to develop the reserve following a set of standards and objectives that will ensure that it is considered one of the best-protected areas in the world.

The center is also working to implement the standards of the IUCN Green List program for the development of its reserves. The program is considered the international standard for best practices in natural reserves.⁽³⁹⁾

As part of the Kingdom's ongoing efforts to inscribe its cultural and natural sites onto the World Heritage lists, efforts have continued to register the Farasan Islands Reserve—with all of its rich environmental diversity, and rare wildlife spread across its islands and beaches—as the first Saudi nature reserve in the UNESCO Man and the Biosphere Programme. These efforts would allow the local community

Nature Reserves in the Kingdom of Saudi Arabia



to benefit from its natural heritage in a sustainable way that preserves the environment and highlights the heritage, culture, environmental diversity, and the biosphere of the reserve.⁽⁴⁰⁾

It is also expected that several other natural sites will be nominated for the Kingdom's Tentative List if they meet the requirements of the World Heritage Committee. These include Umm al-Qamari Island in the southwest of Al Qunfudhah Governorate, and Harrat Kishb, Al Wahbah Crater (Tamaya Quarry) in Taif Governorate.⁽⁴¹⁾

Programs and Initiatives for Environmental and Wildlife Protection

The preventative health measures put in place in response to the Covid-19 pandemic had a positive impact on the environment and wildlife. As has occurred elsewhere in the world, biological diversity in some parts of Saudi Arabia rebounded during the stay-at-home period. Experts from the National Center for Wildlife have observed many species of birds and wild animals in areas where these animals were not previously seen. Furthermore, there has been a recovery of biodiversity in many natural areas due to a decrease in logging, hunting, and off-road driving in areas of plant growth.⁽⁴²⁾

A great many initiatives and activities for environmental protection that were diverse and varied in nature also occurred in 2020. The most prominent of these was the Let's Make Them Green campaign launched by the Ministry of Environment, Water, and Agriculture in October with the aim of planting ten million trees within six months.⁽⁴³⁾ Likewise, the National Center for Wildlife made great strides in its program to resettle wildlife in reserves and national parks, successfully relocating many of them to various regions of the Kingdom (see Table13-4).

The Royal Commission for Al-Ula continued its efforts to restore the natural balance of the Shara'an Reserve by implementing its third major plan as part of the strategy adopted by the commission in 2019. Part of the strategy is to restore the Arabian leopard to its natural environment. Work to prepare the surrounding environment for the leopards' resettlement has already begun.⁽⁴⁴⁾

Table 13-4: Reintroduced Wildlife within the National Program for Wildlife Reintroduction

Sanctuary	Province	Number and Types
Shara'an Reserve	Al-Ula	25 head of Nubian Ibex, 50 head of Reem gazelles, 20 head of Idmi gazelles, 10 head of Arabian oryx (al-Wudaihi) ⁽⁴⁵⁾
Al-Qassim Natural Park ⁽⁴⁶⁾	Al-Qassim	7 head of Reem gazelles
Al Jara'a Natural Park ⁽⁴⁷⁾	Shaqraa	20 head of Reem gazelles
Abqaiq Nature Reserve ⁽⁴⁸⁾	Abqaiq	10 head of Reem gazelles, 3 head of Arabian oryx
Marat Natural Park ⁽⁴⁹⁾	Marat	15 head of Reem gazelles

To preserve wildlife and support ecological balance, the Saudi Falcon Club launched the (Hadad) program in mid-November to return falcons to their natural habitat and

protect them from extinction. Several citizens voluntarily donated nearly 130 falcons to support the goals of the program.⁽⁵⁰⁾

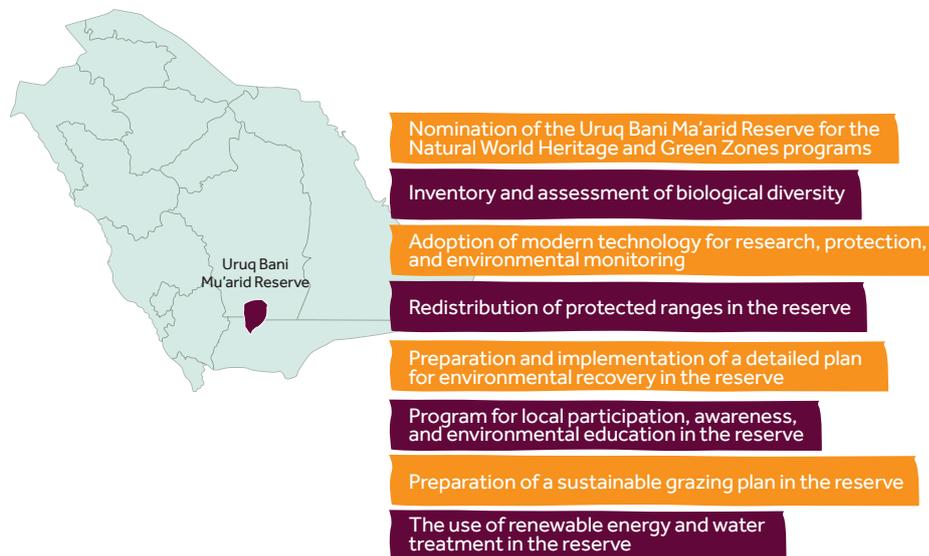
As part of the seasonal efforts to combat locusts and migratory pests, the Ministry of Agriculture and Environment cleared 23,620 hectares of desert locusts in Riyadh, Asir, and Al-Qassim.⁽⁵¹⁾ The National Center for Vegetation Cover Development has also begun preparing an environmental plan to restore vegetation cover in the forests affected by the fire that broke out in Tanuma Governorate.⁽⁵²⁾ Specialized security companies have also been contracted to safety and security activities, as well as the protection and monitoring of nature reserves, forests, fields, and parks.⁽⁵³⁾ Additional collaborations were formed with the private sector to control pollution and manage waste. Furthermore, the National Center for Environmental Compliance and the STC Group signed an initiative to establish a central unit to monitor air quality and emissions and identify sources of pollution.⁽⁵⁴⁾

Digitalization in the Sector

Digitalizing Protection and Documentation Processes

Digital technologies play a significant role in nature conservation policies and processes in what is called "the digital preservation of nature." At the forefront of these

A group of projects launched as part of the pilot project for the model reserve ('Uruq Bani Mu'arid Reserve) (In the form of an infographic)



policies is the digitization of protection processes and monitoring of natural reserves, alongside related studies, surveys, and geographic documentation. This has led to the use of social media platforms and other mediums to introduce and raise awareness regarding natural heritage.⁽⁵⁵⁾ Despite the relative recentness of these digitalization applications globally, the 'Uruq Bani Mu'arid Reserve is a leading example of what the sector can achieve in the Kingdom. Preparing the reserve for digitalization required modern technologies for monitoring and evaluation, such as drones and satellite images, which connect with GIS technologies and other applications. The success of such practices may allow for the replication of these efforts in the Kingdom's other reserves and the expanded application of such technologies.⁽⁵⁶⁾

The expansion of the use of digital technologies for documenting heritage extends to natural heritage landmarks. The Royal Commission for Al-Ula has launched the most extensive project for digital 3D documentation. It is collaborating with Factum Foundation to design models with 3D technology to document and preserve national heritage. Photographic survey work began in the Al-Hajar region, followed by the Kingdom of Dadan, Mount Ikma, and Abu Oud.⁽⁵⁷⁾ Their archaeological and historical richness and natural appeal set these areas apart as unique and indispensable cultural assets.

Digital Archiving and Defining Natural Heritage

Digitalization is not limited to the role of protection and monitoring. Recently, with the use of technology to transform natural heritage into materials that can be exchanged and shared virtually, digitalization has come to play a fundamental and prominent role in the revival, protection, and documentation of natural heritage. During the period when travel restrictions were imposed as part of the preventative health measures put in place to curb the pandemic, the Royal Commission for Al-Ula launched a digital exhibition employing 3D technology to allow tourists from around the world to take a virtual tour of the landmarks of Al-Ula and learn about their natural and cultural heritage from the comfort of their homes.⁽⁵⁸⁾ In addition, the King Abdulaziz Center for World Culture (Ithra) celebrated the 90th National Day by inaugurating the Kingdom of Cultures Exhibit, in which visitors engage in a virtual interactive experience that takes them between the Kingdom's heritage landmarks. The exhibition highlights each region's numerous environmental and cultural landmarks and provides stories of the land and its history.⁽⁵⁹⁾

The Royal Commission for Al-Ula also expressed an interest in introducing and documenting natural landscapes and

archaeological sites by announcing the launch of a photography competition for the residents of Al-Ula. Participants must submit photographs that tell the governorate's stories. The pictures will then be used for marketing as part of the commission's program to reopen the Al-Ula Season.⁽⁶⁰⁾

Digital applications in the fields of photography, storage, and display are indispensable for building a natural heritage archive that documents the features of the physical landscape and makes this information accessible to the general public. The importance of this work has led to the emergence of several projects. Foremost among them is a project to build a database of wildlife in the Kingdom, which the National Center for Wildlife hopes to launch during 2021.⁽⁶¹⁾

Organizational Developments

A new environmental system was implemented in mid-July as part of ongoing efforts to protect the environment and reduce the Saudi carbon footprint. The system aims to develop, preserve, and enhance the sustainability of the environment and regulate the environmental sector and its related activities and services. Furthermore, the system requires the acquisition of a permit or license before undergoing any activity that can have environmental impacts and prohibits all activities or practices that pollute or harm the environment or water resources.⁽⁶²⁾

The launch of the Environment Fund by the Ministry of Environment, Water, and Agriculture in December of 2020 is a quantum leap forward, as the fund will be a significant contributor to the financial sustainability of the environment sector by supporting and enabling programs, studies, and technological developments therein. In addition, the Ministry has launched five environmental centers to preserve the environment, wildlife, and biodiversity of the Kingdom. They are: (1) the National Center for Meteorology, (2) the National Center for Vegetation Cover and Combating Desertification, (3) the National Center for Environmental Compliance, (4) the National Center for Wildlife, and (5) the National Center for Waste Management.⁽⁶³⁾ These centers embody the Kingdom's commitment to and interest in the environment and natural heritage.

With regards to international agreements, the Kingdom acceded to The Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilization to the Convention on Biological Diversity, following Cabinet Resolution No. (675) dated 11/2/1441 AH.⁽⁶⁴⁾

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Culinary Arts

- Creativity and Production
- Recognition and Dissemination
- Participation
- Sustainable Preservation of Traditional Foods
- Digitalization in the Culinary Arts Sector
- Infrastructure and Creative Economy
- Organizational Developments







Despite the deep-rootedness, richness, and diversity of food culture in the Kingdom, attention to the cultural contributions of the culinary arts—and corresponding institutional developments—remain nascent. The sector has experienced a plethora of organizational developments, starting with the Ministry of Culture’s robust and consistent support from the time of its inception. The Culinary Arts Commission was established at the beginning of 2020 to develop the sector through several specialized programs. Throughout the year, efforts to document and inventory local food were undertaken in both the public and private sectors, including several documentary and promotional initiatives for local dishes.

In line with global trends, the Saudi culinary arts sector faced its respective set of pandemic-induced challenges that necessitated nimble adaptability and innovative resilience. The pandemic also brought about a rapid digital transformation, including the development of home delivery applications, a growing number of so-called “cloud kitchens,” and the creation of products suitable for cooking at home as a response to rising interest in the culinary arts during quarantine and lockdown. One of the most prominent impacts of the pandemic on the sector was the cancellation and postponement of various culinary arts-related events, festivals, and competitions. This, in turn, led to alternative, digital initiatives, including competitions and virtual panel discussions among culinary specialists. However, these virtual events were no substitute for in-person activities, such as live cooking and taste testing. The absence of these activities—which form the heart and vibrancy of the sector—was glaringly clear in 2020.

Creativity and Production

Culinary Associations and Clubs

Some institutions and local associations—such as the Saudi Chefs Club, the Saudi Society of Chefs, and the Saudi Arabian Chefs Development Society (ARTISTIC)—organized events, training courses, and cooking competitions throughout the year. This is in addition to the individual efforts of chefs, many of whom are part of these culinary institutions or civil associations. These efforts are indicative of the growing activity and burgeoning interest in the sector. For example, ARTISTIC has experienced a steady increase in membership in recent years—the association had nearly 600 registered members by the end of 2020, compared to 521 members in

2019 and 498 in 2018. This incremental yet notable increase in membership is partly a result of the expansion of the Kingdom’s chef community in the cities of Riyadh and Madinah.⁽¹⁾

The Impact of Covid-19 Precautionary Health Measures on Production

The impacts of the pandemic on the sector varied in size and magnitude, encompassing challenges and unexpected opportunities at once. The acceleration of sector-specific digital transformation is a clear positive, both in terms of home delivery services and the emergence of so-called “cloud restaurants.” Additionally, the precautionary health measures meant new safety procedures, such as safe packaging for delivery orders, producing novel ways for products to comply with regulations. For example, some popular foods—such as rice dishes like kabsa—were served in novel ways, such as in small boxes similar to fast food. Many restaurants have started to sell raw ingredients for their dishes in response to growing interest in home cooking. This service gained popularity due to limited shopping times during lockdown. On a larger scale, the pandemic underscored the importance of food security. The Kingdom has taken necessary measures to strengthen the food security system and reduce the impact of the pandemic by providing support packages through the Agricultural Development Fund, amounting to 2.45 billion SAR (approximately US\$653 million).⁽²⁾



Awards in the Culinary Arts

With many culinary arts-related festivals and events worldwide being canceled due to the pandemic, there was a dearth of local and international awards in 2020. One exception was the Top Chef of the Arab World competition, won by a Saudi chef at the beginning of the year. Despite the commercial nature of the eponymous TV program, its wide viewership has increased the visibility of Saudi cuisine and chefs in international forums and programs. With her fourth season victory, Chef Sama Jaad became the first Saudi woman to win Top Chef. Her winning dish included a mixture of coffee and chestnuts.⁽³⁾

National Awards Initiative

The Ministry of Culture announced a call for nominations for the National Cultural Awards on June 30, 2020. This included the Culinary Arts Award for individuals or entities that have contributed to the enrichment of the sector over the past two years. The names of the winners will be announced in 2021.⁽⁴⁾



important, with food forming an integral part of many entertainment and heritage festivals. This is in addition to events directly related to food and the culinary arts.

Recognition and Dissemination

Culinary Arts Events and Exhibitions

Food and culinary events and exhibitions present an opportunity to promote Saudi dishes and openness to different experiences in the sector. While the majority of the events held throughout the year focused heavily on entertainment and tourism, culinary arts proved equally

The attendance numbers show one measure of the impact of the pandemic on events in the sector. In January and February, before the outbreak of the pandemic, 38,000 people attended the Pop-Up Park, and 8,885 attended the Juthoor Market events. However, only 1,198 people attended the Secret Garden event held in November. This decline results from the extended enforcement of precautionary health measures -including social distancing rules and a limit on the number of attendees at public events – rather than a decline in interest in the sector itself.

Table 14-1: Select food and culinary art events held during 2020⁽⁵⁾

Event	Organizing Body	Date	Location
Culinary Carnival	Al-Muhammadiyah District Center	January 2020	Jeddah
Madinah Food Festival	College of Tourism and Hospitality	January 2020	Madinah
Pop-Up Park	General Entertainment Authority	January 2020	Riyadh
Juthoor Market	General Entertainment Authority	January–February 2020	Dhahran
Bite on the Go	ZADK Saudi Culinary Academy	September 2020	Al-Khobar
Taste Festival	Taste	October 2020	Al-Khobar
The Future of Food	Ithra Center	October 2020	Dhahran
The Secret Garden	General Entertainment Authority	November 2020	Riyadh

Cooking Competitions and Their Documentary Role

Various events were either canceled or postponed due to pandemic-induced disruption. This included the Star Chef competition, held annually by the Faculty of Tourism at King Abdulaziz University.⁽⁶⁾ To continue holding competitions, many institutions in the sector looked for virtual alternatives to in-person events. In this regard, the most prominent initiative is the “Our Culinary Legacy” competition, which was launched by the Culinary Arts Commission in April 2020 and received widespread popularity on social media platforms. The goal of the competition is to preserve the heritage of Saudi cuisine. Participants were tasked with combining innovation and tradition by updating an authentic Saudi recipe from one of the regions of the Kingdom, which must contain at least 70% local ingredients, reflecting the richness and diversity of Saudi dishes. The winning recipes will be documented in a book titled *Sufra*.⁽⁷⁾ A total of twenty-two winners were announced across the competition’s two tracks.

Blogging and Publishing in the Culinary Arts Sector

Blogging on the internet and social media is the most popular way of publishing, receiving, and exchanging culinary information and experiences. The “Report on the State of Culture in the Kingdom of Saudi Arabia, 2019” indicated that word-of-mouth and internet sites were the primary

sources for sharing Saudi recipes due to a lack of specialized cookbooks.

However, in 2020, a number of documentary projects and initiatives emerged to successfully fill the foregoing information gap. In addition to the aforementioned “Our Culinary Legacy” initiative, a book titled *A Taste of Al-Ula*, put together by the French Ferrandi School of Culinary Arts with support from the Royal Commission for Al-Ula, was added to the Saudi kitchen library this year. The book contains thirty recipes that combine local cooking methods with French cuisine techniques. Several Saudi and international chefs helped put the book together, including the CEO of the Culinary Arts Commission, Chef Mayada Badr.⁽⁸⁾

Commercial Experimentation at Restaurants Serving Fine Saudi Food

Commercial efforts to create an upscale Saudi cuisine experience are an emerging phenomenon. A number of tourism events have taken part in these efforts, such as the Saudi Seasons, which presented traditional dishes in novel and contemporary styles while still preserving the identity of the dishes and the authenticity of their ingredients. Several restaurants that opened at the beginning of 2020, such as Takya Restaurant and Suhail Restaurant, have also embraced efforts to innovate.⁽⁹⁾ These restaurants have updated local dishes by introducing some new ingredients and presenting them in innovative ways that draw inspiration from other cuisines.

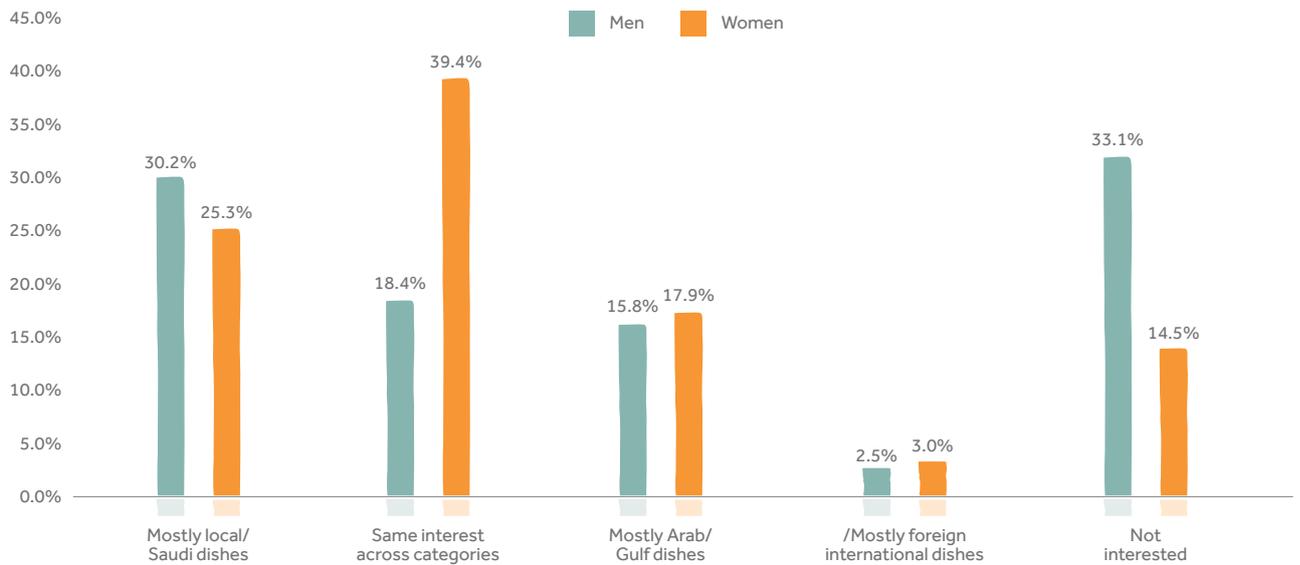
Participation

Culinary Arts Practice

According to the 2020 Cultural Participation Survey, which was conducted in the last quarter of the year with a representative sample of 3,112 people from all regions of the Kingdom,⁽¹⁰⁾ respondents are most interested in cooking local and Arab dishes, and only 3% of respondents were interested in just cooking foreign or international dishes. The survey also indicated a discrepancy between the cooking preferences of men and women. While local Saudi dishes are most popular amongst men, over 40% of women indicated proficiency or interest in cooking various types of dishes, reflecting an openness to varied culinary experiences. Women are more interested in or knowledgeable about the culinary arts, with 85.5% of female respondents indicating such knowledge and interest compared to only 66.9% of men.



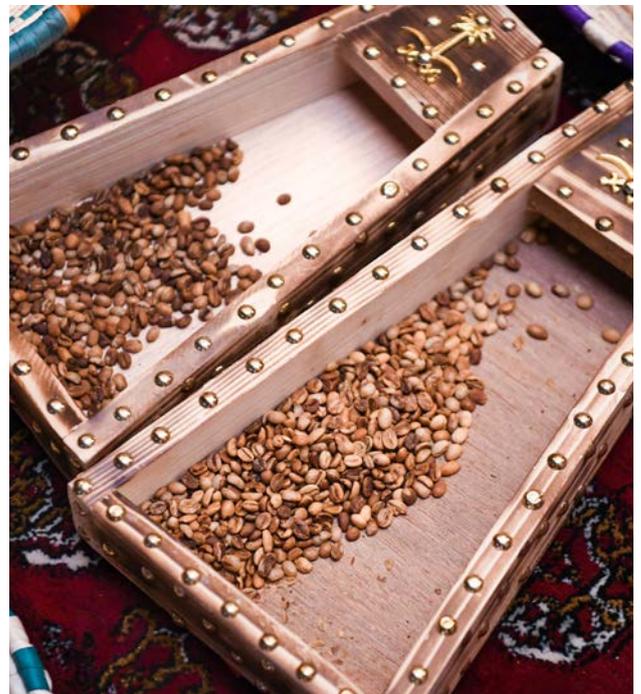
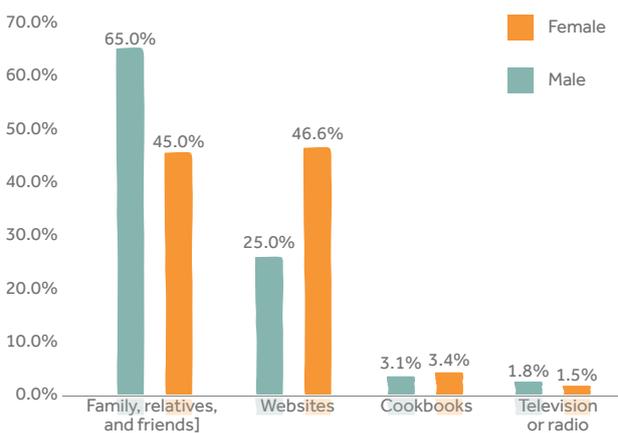
Figure 14-1: Percentage distribution of individuals who are proficient or interested in cooking and the type of dish, by gender ("Are you proficient or interested in cooking?")



Learning and Receiving Local Food Recipes

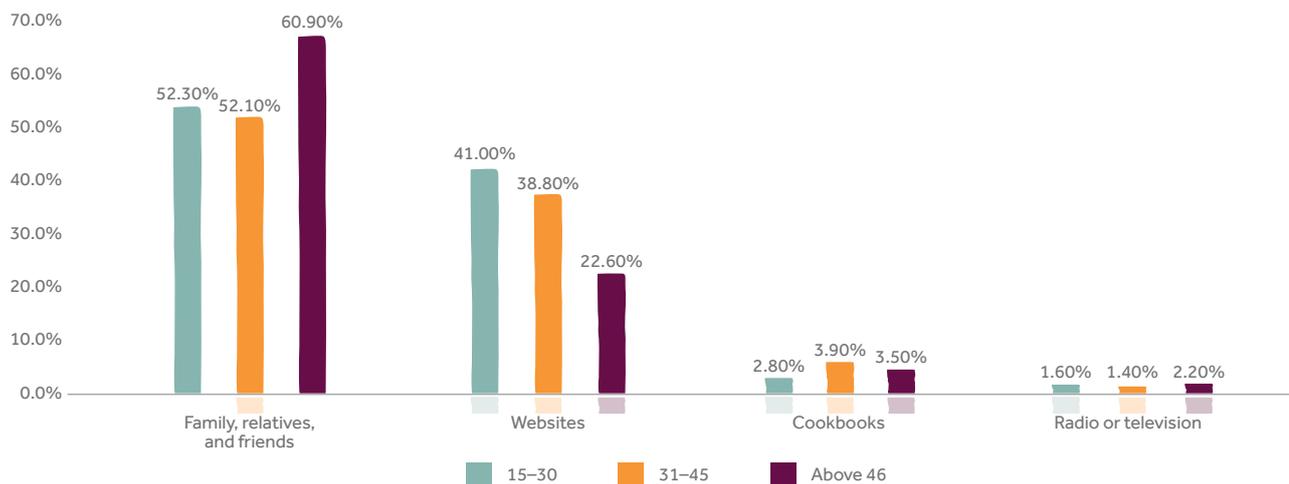
In line with the findings of the "Report on the State of Culture, 2019," the 2020 Cultural Participation Survey found that word-of-mouth between friends and family is the main source for sharing recipes of Saudi dishes. Among those who are proficient or interested in cooking, 53.5% said that they mostly rely on this source, while 37.4% rely on the internet primarily for recipes. The survey also shows a gender-based variance in recipe transmission. Word-of-mouth was the main source for recipes for 65% of men but only 45% of women. The internet is the preferred source of recipes for women, with 46.6% obtaining recipes online compared to just 25% of men.

Figure 14-2: Percentage distribution of sources for Saudi dish recipes by gender



The survey also indicates an age-based difference in preferences for recipe sources. There is an inverse relationship between using the internet and age. While 41% of individuals between the ages of 15–30 use the internet to source recipes, the share of those aged 46 and over searching the internet for this is approximately half as large (22.6%).

Figure 14-3: Percentage distribution of those who are proficient or interested in cooking different types of dishes, by recipes sources and age group



Sustainable Preservation of Traditional Foods

Public Markets and Festivals

The various hunting and harvesting seasons throughout the regions of the Kingdom form part of the Kingdom's cultural heritage. These seasons are often associated with traditional foods that are prepared using seasonal crops. Many local festivals revolve around certain types of crops, such as the 5th annual Honey Festival held this year in Al-Aydabi governorate in the Jazan region, the 7th annual Coffee Festival that was held in the Al-Dair governorate - also in the Jazan region- and the 12th Klija Festival in Buraidah in the Qassim region. Each of these festivals is estimated to attract around 100,000 visitors,⁽¹¹⁾ and most provide an opportunity to develop products and dishes based on seasonal crops.

Table 14-2: Some public food markets in the Kingdom⁽¹²⁾

Market	City
Vegetable Market	All cities
Chefs Market	Madinah
Coffee Market	Riyadh
Date Festival	Abha
Tuesday Market	Buraidah
Al-Musawkaf Market	Unayzah
Allabbanah Market	Jeddah
Farmers' Market	Al-Ula

Productive Families Specializing in Traditional Food

There are a total of 206 productive families specializing in traditional foods registered with the Culinary Arts Commission.⁽¹³⁾ These businesses are scattered across most regions of the Kingdom, and they cook famous local dishes that are rarely served in other restaurants. Given the scarcity of restaurants specializing in Saudi dishes, these productive family businesses are all the more vital. Many initiatives from both the public and private sectors have emerged to provide support programs for these businesses and to establish marketing partnerships. Among these is the "Maroof" initiative launched by the Ministry of Commerce in cooperation with Thiqa Company, which provides productive families and other small businesses with cost-free logistical, marketing, and other services. The platform enables entrepreneurs to register and provide their services through the platform without having to obtain a commercial license.⁽¹⁴⁾





Documentation of Traditional Food

Food-related elements inscribed on the UNESCO Lists of Intangible Cultural Heritage



1) Culinary Arts Commission, as of December 16, 2020.

Inventory Lists

The Culinary Arts Commission launched several local documentation initiatives in 2020. So far, it has recorded 191 traditional dishes from across the Kingdom. The commission has also documented 115 traditional food ingredients in the Madinah region as part of the Kingdom's culinary arts documentation project.⁽¹⁵⁾

Institutions concerned with preserving and promoting traditional foods⁽¹⁾



1) Culinary Arts Commission, as of December 16, 2020.

Digitalization in the Culinary Arts Sector

Digital Transformation and Cloud Kitchens

The Covid-19 pandemic prompted unprecedented disruption to restaurants' operating activities worldwide. Lockdown policies and the imposition of preventive health measures to mitigate the effects of the pandemic necessitated significant changes, with discernable impact on sector functionality. According to a special report on the impact of the pandemic on the private sector issued by the Council of the Chambers of Commerce, cafes, restaurants, and the hospitality sector were heavily affected.⁽¹⁶⁾ Although some restaurants suffered significant losses, others succeeded in compensating for the sharp decline in sales by focusing on home delivery services by leveraging digital applications.⁽¹⁷⁾

Digitalization not only impacted food purchasing habits, but also led to the development of new models that challenge the inherent definition of a restaurant. This is most evident through the emergence of so-called "cloud kitchens"—delivery-only restaurants where food is prepared in special areas with no dine-in spaces.

Culinary Arts in Virtual Space

The virtual space is the largest platform for blogging and exchanging culinary knowledge for both amateur and professional cooks. According to the "Report on the State of Culture, 2019," while websites provide many recipes for Saudi dishes and methods for their preparation and presentations, they offer little information about the historical roots and



the cultural dimensions of Saudi cuisine. Addressing the shortcomings in this type of blogging will require resources and institutional efforts— some of which are included in the programs announced by the Culinary Arts Commission as part of its strategy. One example is the program to develop stories and an audiovisual library of culinary arts, which is based on one of the commission’s five major objectives— namely, promoting traditional local narratives and stories related to the culinary arts.⁽¹⁸⁾

Beyond blogging, the virtual space has provided a suitable alternative for live conferences and their accompanying panel discussions. Of course, the same does not apply to culinary events and festivals—a large portion of which rely on in-person interaction and the use of the senses to engage with dishes⁽¹⁹⁾—the absence of which was perhaps the most notable feature of the sector in 2020. Some of these alternative virtual initiatives were established on various social media platforms, such as the previously mentioned “Our Culinary Legacy” initiative.

Some of the challenges and opportunities presented by the pandemic were reflected in the topics and themes of workshops and panel discussions. These included the Future Food workshop held by the King Abdulaziz Center for World Culture (Ithra) and the panel discussion presented by the King Faisal Center for Research and Islamic Studies, entitled “Sustainability in the Gulf Region after the Corona Virus: Changing Consumption Patterns in the Fashion, Food, and Transportation sectors.” The latter dealt with food as one of the most important consumable goods throughout the pandemic.

Infrastructure and Creative Economy

Workers

The number of Saudi chefs registered in the category of general chef reached 1,532 by the end of 2020, accounting for just 2.44% of the total workers in the sector. The indicator reflects an annual decrease in the number of general chefs reported, while by contrast, an increase in the number of Saudis working as head chef was reported.

Table 14-3: Number of registered workers in the culinary arts⁽²⁰⁾

Profession	2017	2018	2019	2020
General chef	2,047	2,009	1,776	1,523
Head chef	20	22	27	31



E-marketing Opportunities for Saudi Chefs

E-marketing services have allowed Saudi chefs to share their experiences with one another, connect with the public, and advertise their skills and products. Some private institutions have also offered support for national cadres, such as the “Who is the Restaurant’s Owner?” initiative launched by the Jahez Company in partnership with the General Authority for Small and Medium Enterprises (Monsha’at) to support distinguished, productive family businesses. The competition, with 60,000 contestants, was judged via popular vote, and the winner was presented with their own fully equipped restaurant.⁽²¹⁾

Traditional Food and Drink

Restaurants and cafes serving traditional foods can be found in all regions of the Kingdom. By the end of 2020, 3,444 entities were registered to sell traditional foods, and 2,374 were registered as traditional cafes.⁽²²⁾ In addition to restaurants and cafes, the businesses of productive families are popular for traditional foods. The online businesses of the productive families have also recently grown, as indicated by the number of stores registered on the “Maroof” platform, which exceeded 12,568 stores in the kitchen and baked goods sector by the end of 2020.⁽²³⁾ Of these shops, no less than 206 specialize in serving traditional food. To support and encourage productive families’ business, the “9/10ths” platform collaborates with the Jahez Company to enable these businesses to present their dishes and products for review and deliver them to consumers through food delivery apps.⁽²⁴⁾

Education and Training

While some universities offer culinary arts as part of their hospitality curriculum, several institutions offer alternative courses. For example, Princess Nourah Bint Abdulrahman University offers an academic program in the culinary arts. The Technical and Vocational Training Corporation offers culinary diploma programs within respective hotel, tourism, and hospitality tracks. The various branches of the Higher Institute for Tourism and Hospitality located in Riyadh, Al-Baha, and Jazan,⁽²⁵⁾ as well as ZADK Saudi Culinary Academy,⁽²⁶⁾ also offer diploma courses and programs in culinary or food-related specialties.

In pursuit of sector-based professionalization and self-sustenance, the Ministry of Culture launched the Cultural Scholarship Program at the end of 2019, which included scholarships in the culinary arts. Over 1,732 students applied for these scholarships.⁽²⁷⁾ The Ministry of Education also launched the Path of Excellence scholarship in October 2020, adding the culinary arts specialization as an eligible category.⁽²⁸⁾

Training Programs

In addition to the aforementioned courses offered by accredited academic bodies, several entities offer culinary training courses. For example, the Ministry of Tourism launched a number of training program modules, which included workshops on basic principles of the culinary arts, drink preparation, and an introduction to food safety.⁽²⁹⁾ In the private sector, both specialized culinary arts institutions and local establishments are also offering training programs. Among the former are Blend Culinary and the Ferrandi School of Culinary Arts in Paris, which has partnered with the Royal Commission in Al-Ula to train twenty-four Saudi cooks in a four-month program which qualifies them to work in Al-Ula.⁽³⁰⁾ An example of efforts made by local establishments is the Saudi Arabian's Chefs Development Society, which provides short training courses in culinary arts throughout the year.⁽³¹⁾

Distance Learning and Training

Although cooking is an interactive activity and cannot be taught through digital media alone,⁽³²⁾ some entities have temporarily shifted to digital alternatives due to the direct impact of the Covid-19 pandemic and the accompanying precautionary health measures. These include the ZADK Saudi Culinary Academy, which completed its lessons via virtual training.⁽³³⁾ The Ministry of Tourism also organized some virtual training programs in the field of culinary arts and hospitality. In addition, the Saudi Arabian Chefs Development Society offered several short virtual courses throughout the year.



Organizational Developments

The most prominent organizational development in the sector was the establishment of the Culinary Arts Commission in February 2020. The commission is responsible for planning, strategizing, and building the legislative system for the sector. In July, the Ministry of Culture announced the formation of the Commission Board of Directors, with the Minister of Culture Prince Badr bin Abdullah bin Farhan Al Saud as chairman and Deputy Minister of Culture Hamid bin Muhammad Fayeze as vice-chairman. Members of the board include Dr. Diane Dodd, Badr bin Zuhair Fayeze, Eric Wolf, Louisa Sierra, and Hani Bin Hussein Al-Attas. Saudi chef Mayada Badr was named CEO of the Commission.⁽³⁴⁾

In November, the commission announced its new, five-pillar strategy: 1) preserving and documenting culinary heritage; 2) promoting local stories and narratives about food culture; 3) supporting and developing the culinary profession in the Kingdom; 4) aiding culinary-related production and services; and 5) providing world-class dining experiences for citizens, residents, and visitors. To achieve their goals, the commission announced the launch of twelve scientific programs - all of which are rooted in the five aforementioned pillars. These programs aim to develop, recognize, and preserve the culinary arts and preserve culinary heritage. Initiatives also extended to developing stories and an audiovisual library of culinary arts, not to mention strengthening the local sector by various means including standardized menus and sector-specific knowledge development. Additional programs included promotion of international exchange, and food diplomacy and market food tourism in the regions of the Kingdom, as well as support Saudi culinary arts events and advance community participation and cooking festivals in the regions. Furthermore, several initiatives are dedicated to developing and promoting culinary professions, including innovative Saudi concepts to improve food and quality of cooking products and their distribution. Finally, the commission launched a program to promote research, innovation, and develop Saudi culinary services and products.⁽³⁵⁾



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- (31) "Home," Blend Culinary, <https://blendculinary.com/>.
- (32) Focus group, Culinary Arts, November 30, 2020.
- (33) Focus group, Culinary Arts, November 30, 2020.
- (34) Saudi Press Agency, "Chair of the Culinary Arts Commission: Saudi kitchen culture deserves worldwide access," February 13, 2020, <https://www.spa.gov.sa/2034312>.
- (35) Saudi Press Agency, "The Culinary Arts Commission finishes building its strategy to develop the culinary sector in the Kingdom," November 1, 2020, <https://www.spa.gov.sa/viewstory.php?lang=ru&newsid=2150349>.



Publishing and Translation

- Creativity and Production Publishing and Books
- Translation
- Recognition and Dissemination
- Participation
- Digitalization in the Sector
- Online Marketing of Books
- Infrastructure and the Creative Economy
- Organizational Developments







The sector has witnessed remarkable growth in recent years —a marked uptick in the number of published titles, the revival of the translation industry, and the emergence of electronic projects to translate and publish educational work and present it in a modern way. Although publishing numbers increased in 2020 according to legal registration numbers, the exceptional circumstances of the Covid-19 pandemic affected the industry in various ways. Events central to the sector’s success—like book fairs— were canceled, and online sales could not make up for the overall decline in sales. The adverse situation presented a major challenge to the publishing industry. Digital alternatives, from e-books to online book marketing, are being embraced and suggest future prospects hold bright yet unmet potential worth tapping into. Online platforms have also allowed various literary and translation activities to continue during quarantine. At the same time, they provide unconventional channels for the spread of written and translated content, thus strengthening the sector’s strategic positioning.

Creativity and Production Publishing and Books

The State of Publishing

While statistics on legal deposits at the King Fahd National Library are still incomplete for 2020, 8,497 titles were registered,⁽¹⁾ a similar amount to 2019 (Figure 15-1).⁽²⁾ These statistics include works published by private publishing houses, university presses, research centers, and self-publishing, in addition to educational curricula and publications by ministries, governmental entities, and community organizations. The advances seen in publishing in 2020 occurred despite limited production capacity due to pandemic-induced financial and logistical challenges.⁽³⁾ The pandemic has had no apparent effect on deposit statistics, but the extent of its impact on publishers’ ability to release new titles may not be immediately apparent.



Statistics indicate that about 40% of titles registered in 2020 were by new authors and publishers, with 3,422 titles coming from new authors. Over the past five years, there has been a noticeable decrease in books by new authors as a percentage of total deposited books (Figure 15-2 and 15-3), which can be attributed to the generally high production rate, indicating more continuous activity among authors.

The absolute growth in titles by new authors indicates—as highlighted in the 2019 report—greater interest in writing and the participation of a larger segment of the population in the industry, whether as writers or producers. However, this interest has not expanded enough to close the gap between men and women in writing; women’s participation remains limited as they account for less than 4% of all authors. This is inconsistent with the high-quality contributions of female Saudi writers in numerous fields⁽⁴⁾ (Table 15-1). With the expansion in the output of established writers—as indicated by the decrease in books by new authors as a percentage of total books—challenges have emerged for new authors, especially women.

Consequently, it is very likely that many quality contributions have not been published, which underscores the importance of finding ways to connect talent with the publishing market and open new paths for professionalization. This includes strengthening the role of literary agents, who remain absent from the publishing and book industry in the Kingdom but can link creative authors with commercial publishers by publicizing and promoting their work and protecting their rights.⁽⁵⁾ The Literature, Publishing, and Translation Commission intends to begin issuing licenses for literary agents in 2021.

Figure 15-1: Number of titles legally deposited at King Fahd National Library⁽⁶⁾

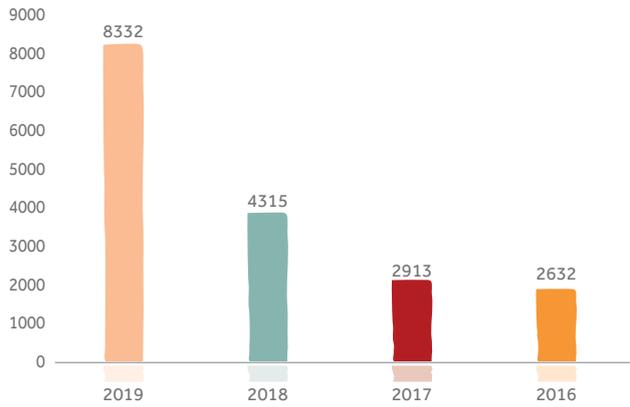


Figure 15-2: Number of books by new authors legally deposited at King Fahd National Library⁽⁷⁾

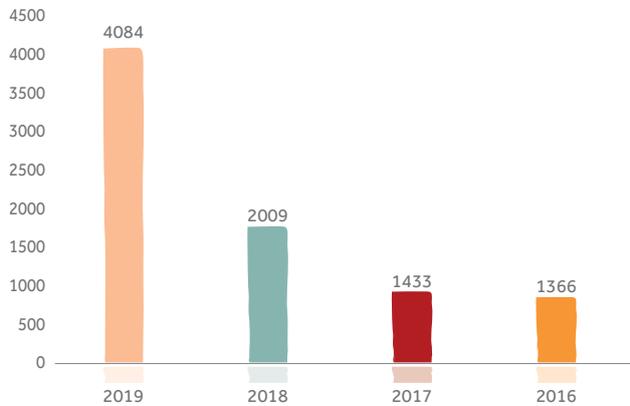


Figure 15-3: Deposited books by new authors as a percentage of total deposited books⁽⁸⁾

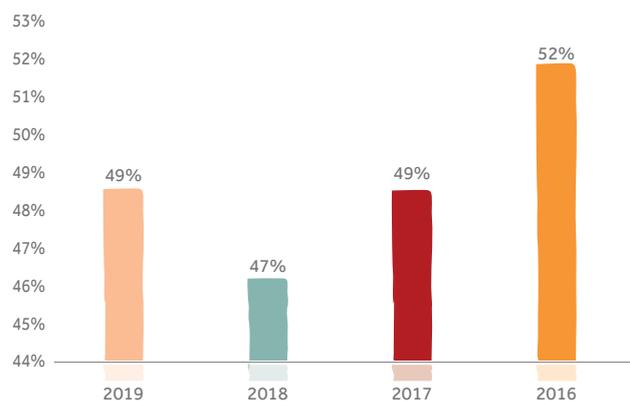


Table 15-1: Number of books registered at King Fahd National Library in 2020, by gender and author type⁽⁹⁾

Gender		Author type	
Male	Female	New author	Previously published author
8204	293	3422	5075

Children’s Books

According to King Fahd National Library statistics, children’s books still make up only a small share of book production, with twenty-four titles released in 2020.⁽¹⁰⁾ This small number⁽¹¹⁾ reflects the necessity of building a comprehensive market in this area. The production and writing process for children’s books is complicated and costly because of the many stages involved, from hiring consultants specialized in children’s thought processes to identifying intended age groups and choosing methods for illustration, printing, and special binding.⁽¹²⁾

Cultural and Educational Institutional Activity in the Book Publishing Field

The contributions of universities, cultural organizations, and research centers specializing in publishing are a vital part of the sector, alongside specialized books and works that possess significant cultural value that is not entirely subject to supply and demand mechanisms in the publishing market. According to legal deposit numbers, Saudi university presses contributed 319 titles in 2020, about half of which were published by King Saud University. Literary clubs published fifty-seven titles throughout the year.⁽¹³⁾

Table 15-2: Saudi universities and colleges most active in publishing in 2020, according to legal deposit statistics⁽¹⁴⁾

Educational Institution	Number of Books
The Islamic University	52
King Saud University	155
King Abdulaziz University	37
Imam Muhammad Ibn Saud Islamic University	10
King Fahd Security College	34

Table 15-3: Publishing activity at several cultural institutions and research centers in 2020, according to legal deposit statistics⁽¹⁵⁾

Institution	Number of Books
King Abdulaziz Foundation for Research and Archives (Darah)	3
Center for Research and Intercommunication Knowledge	9
King Abdullah International Center for Arabic Language	2
King Faisal Center for Research and Islamic Studies	16
Al-Madinah Al-Munawwarah Research & Studies Center	4
King Abdulaziz Public Library	3
Arabic Magazine	10

Translation

Translation of Books

Although there was significant activity in translation initiatives across the Kingdom,⁽¹⁶⁾ the number of translated books has not kept pace with the overall rise in book production, remaining comparable to the average number of published titles in previous years (1435-1439 AH). In 2020, the number of translated books legally deposited at the King Fahd National Library was 538,⁽¹⁷⁾ down from 600 translated books on average in previous years.⁽¹⁸⁾

These low rates indicate that translation projects have not kept up with the vast influx of knowledge production worldwide, thereby underscoring the importance of investing in translation to strengthen the Kingdom's contribution to knowledge content in Arabic. With this in mind, on September 30, the Literature, Publishing, and Translation Commission announced the "Tarjim" ("Translate") initiative⁽¹⁹⁾ to support the translation of the most important academic journals in the humanities in record time after publication. The initiative also provides book translation grants.⁽²⁰⁾

Translation at Saudi Universities and Research Centers

Saudi universities house around twenty-three centers, institutes, and units in the publishing and translation field (Table 15-4). In terms of production, King Saud University published seventeen translated books in 2020, the most of any institution, followed by the Institute of Public Administration with seven translated titles and King Abdulaziz University with six.⁽²¹⁾ Research centers contributed to the output of translated books by launching a series of books specializing in translation, such as the Translated Books series published by the King Faisal Center for Research and Islamic Studies, with a total of nine books translated and published by 2020.⁽²²⁾



Table 15-4: Centers, institutes, and units specializing in translation at Saudi universities⁽²³⁾

Center/Institute/Unit/Division	Parent Institution
Translation Center	King Saud University
Scientific Publishing Center	King Abdulaziz University
Translation Unit	Center for Social and Humanities Research at King Abdulaziz University
King Abdullah Institute for Translation and Arabization	Imam Muhammad Ibn Saud Islamic University
Deanship of Scientific Research	Imam Muhammad Ibn Saud Islamic University
Center for Language Sciences and Literature	Umm Al-Qura University
Journal for Language Sciences and Literature	Umm Al-Qura University
Center for Translation, Writing, and Publishing	King Faisal University
Arabization and Translation Unit	Scientific Publishing Center at Taibah University
Translation Committee	English Language Center at Jazan University
Permanent Committee for Scholarly Research	Jouf University
Translation Unit	English Language Center at Tabuk University
Center for Islamic, Educational, and Humanities Research	Najran University
Center for Research and Studies	Public Administration Institute
Program to Support Academic Translation	Scientific Research Deanship at Princess Nourah Bint Abdulrahman University
Publishing and Translation Unit	Promising Research Center at Princess Nourah Bint Abdulrahman University
Translation Unit	College of Languages at Princess Nourah Bint Abdulrahman University
Scientific Publishing Center	Imam Abdulrahman Bin Faisal University
Program to Support Writing and Translation	Deanship of Scientific Research at Prince Sattam Bin Abdulaziz University
Writing and Translation Department	Shaqraa University
Publishing and Translation Center	Majmaah University
Translation Center	Saudi Electronic University
Languages and Translation Division	King Fahd Security College
Translation and Writing Center	Prince Sultan University

Literary Translation

Novels have dominated the literary translation scene in the Kingdom in recent years—similar domination is seen across literary publishing⁽²⁴⁾ and readers' preferences. Several Saudi novelists have risen to prominence and won international awards, so most translations tend to be of award-winning works or works that enjoy global media recognition. Some authors have resorted to translating their own works into other languages.

Over the last three years, the total number of works by Saudi novelists translated into other languages and other novels translated by Saudis was thirty-five, including nine novels in 2020. Poetry is the second-most translated genre, with six volumes translated in 2020. Short stories and essays are the next most published, while other literary genres like travel literature, biographies, and literary studies and criticism make up the smallest share of literary translation. A bibliography documenting the translation and literature movement since its beginnings in the Kingdom and until the time of its publication was published this year by the Jeddah Literary Club under the title *Translation into and From Other Languages in Saudi Literature*.⁽²⁵⁾

Table 15-5: Number of literary titles translated from and into other languages⁽²⁶⁾

Year	Novels	Poetry	Short stories	Essays
2018	15	5	2	-
2019	11	11	4	3
2020	9	6	2	4



The Ithra Content Commissioning Program

On September 10, 2020, the King Abdulaziz Center for World Culture approved fourteen projects to produce cultural and creative content. The initiative aims to offer support for cultural projects that enrich Arabic content.⁽²⁷⁾ Two translation projects were among the winners.

Table 15-6: Winning translation projects in the Ithra Content Commissioning Program presented by the King Abdulaziz Center for World Culture⁽²⁸⁾

Project name	Owner	Project concept
Translation ("Tarjamah")	Adab (institution)	Translation of several intellectual, scientific, and cultural works from various fields into Arabic
Bridges ("Jusur")	Noon Art (company)	Translation of the most important works of ancient and modern Arabic literature into French

Other Translation Activities

The field of translation is not limited to books. This creative practice includes oral interpreting and subtitling, and translation of electronic content. These creative practices have seen remarkable activity in the past several years, as documented in the "Report on the State of Culture in the Kingdom of Saudi Arabia, 2019."⁽²⁹⁾

There are non-profit digital platforms that translate and publish diverse content, some of which depend on the work of volunteers for support with editing, review, and, occasionally, training.⁽³⁰⁾ Most of the work done by these organizations is dedicated to the translation of articles and audiovisual content through the subtitling of talks and lectures. Regardless of their sustainability or limitations, these efforts reveal interest in—and growing awareness of—the importance of translation and exchanging knowledge globally, especially among young people.

The non-profit electronic translation scene also makes valuable institutional contributions, most notably a project to translate the Stanford Encyclopedia of Philosophy, taken up by the Hekmah platform. Approximately 2,700 of the Encyclopedia's articles have been translated since the project began. Another contribution was Mana's translation of the journal *The New Philosopher*. A total of nineteen translators translated four issues of the journal published in 2020.

Books by Saudi authors nominated for the Sheikh Zayed Book Prize



The Image of the Woman in Westerners' Voyages to the Central Arabian Peninsula, From the Beginning of the 19th Century to the Mid-20th Century

Long list:
Development and State Building
Saudi author **Dalal Mukhlid Al-Harbi**,
King Faisal Center for Research
and Islamic Studies, 2020



Faces of the Courtyard (novel)

Long list: Literature

Saudi novelist **Husayn Ali Husayn**,
Cultural Book Center, 2020



Seferberlik (novel)

Long list: Literature

Saudi novelist **Maqbul Al-Alawi**,
Dar Al-Saqi, 2019



Maqam of Oblivion (anthology)

Long list: Literature

Saudi poet **Muhammad Ibrahim Yacub**,
Arab Dissemination Institute, 2019



An Excursion in the Courtyard of Doubt

Long list: Youth Authors

Saudi poet **Hasan Abdu Sumayli**,
Tashkil for Publishing and
Distribution, 2019.



Problems of the Narrating Self in Saudi women's novels - A Critical study

Long list: Youth Authors

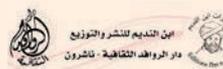
Saudi researcher **Dr. Asmaa Muqbil Awad Al-Ahmadi**, Arab Scientific Publishers, Inc., 2020.



The Problem of Logical Universalities: A Study in the Truth of Universality and its Effects, From Greek Roots to Contemporary Philosophy

Long list: Youth Authors

Saudi researcher **Dr. Mahir bin Abdulaziz Al-Shibl**, Dar Al-Rawafid Al-Thaqafiya Publishers, Dar Ibn Al-Nadim for Publishing and Distribution, 2020



Should Robots Replace Teachers? AI and the Future of Education by Neil Selwyn

Long list: Translation

Saudi translator **Faisal Hakim Al-Shamri**, Dar Al-Rawafid Al-Thaqafiya Publishers, Dar Ibn Al-Nadim for Publishing and Distribution, 2020

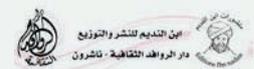


Table 15-7: Active online projects in the field of translation

Project	Date established	Specialization	Number of translators	Project production in 2020
Hekmah	2015	Philosophy and culture	700 volunteer translators	350 articles
Mana (platform)	2019	Knowledge and the arts	88 translators	249 articles
Athra (platform)	2020	Knowledge and the arts	55 translators	30 articles

To enhance volunteer activity in the field of translation, the Saudi Center for Digital Content at the King Abdulaziz Foundation for Research and Archives (Darrah) - with the support of the Ministry of Education - launched the Wikidowen initiative. This initiative focuses on enriching Arabic content on Wikipedia using volunteers at educational institutions to translate various articles.⁽³¹⁾ In November 2020, for example, female students in the Languages and Translation Department of King Khalid University in Abha succeeded in translating approximately 400 articles on Wikipedia, under the supervision of faculty members and review by Wikipedia editors.⁽³²⁾

Awards in the Publishing and Translation Field

The National Cultural Awards

The Ministry of Culture announced the opening of nominations for the National Cultural Awards on June 30, 2020. These include the Publishing and Translation Prizes for individuals or entities that contributed to the enrichment of these two sectors in the past two years. The winners will be announced in 2021.⁽³³⁾

List of nominations by Saudi publishing houses in the Etisalat Prize for children's books





I Caught the Moon

General Children's Books
Written by **Arwa Khamis**
and illustrated by **Isra Haydari**,
Arwa Al-Arabiya Publishing House



Deeply, Toward My Heart

Best Illustration and Best Production
Written by **Husayn Al-Mutawwa**
and illustrated by **Lina Nadaf**,
Arwa Al-Arabiya Publishing House



Best Friends

Best Text/Children's Book of the Year
Written by **Rand Adel Saber** and
illustrated by **Basmah Husam**,
Kadi and Ramadi Publishers

International Awards

Saudi Arabia had the highest participation rate of any Arab country at the 15th Sheikh Zayed Book Award. Numerous Saudi titles and individuals were nominated for the long- and short lists for various types of awards. There is no doubt that these nominations are a positive indication of Saudi books' visibility and their spread and impact throughout the Arab world.⁽³⁴⁾

Children's Book Awards

Some children's book titles by Saudi authors received preliminary and final nominations for the Etisalat Award for Arabic Children's Literature, organized by the UAE Board on Books for Young People and sponsored by the Emirati company Etisalat.⁽³⁵⁾

Recognition and Dissemination

Book Fairs

Due to the Covid-19 pandemic, there were no local or international book fairs throughout 2020, with the exception of the Al-Qassim Fair, which held its third annual event at the beginning of March before the outbreak of the pandemic and the preventive measures taken to combat it. The fair inspired a large turnout of visitors and the participation of 250 local publishing houses.⁽³⁶⁾

The postponement or cancellation of all local and international book fairs in the Kingdom due to preventative health measures was the most significant blow to the sector this year. Many publishing houses rely significantly on these fairs for marketing, sales, and dissemination. This is especially true of the Riyadh and Jeddah international fairs, which see significant participation from publishing houses every year.⁽³⁷⁾ Saudi publishing houses were unable to attend most international book fairs for the same reasons, as border closures hindered participation, and many such fairs were postponed.

Table 15-8: International book fairs in Saudi Arabia

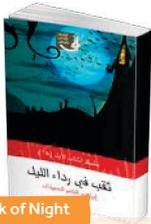
Fair	Previously planned date	Rescheduled date
Riyadh International Book Fair	April 2020	TBA
Jeddah International Book Fair	December 2020	TBA

Reading Events and Book Clubs During the Covid-19 Pandemic

Some independent reading activities were organized in the first few months of 2020, including regular in-person events, such as the Independent Reading Festival, which is hosted

Books in the first phase of the project to translate Saudi books into Uzbek (Center for Research and Intercommunication Knowledge)

مركز البحوث والتواصل المعرفي
Center for Research & Intercommunication Knowledge



A Tear in the Cloak of Night
Ibrahim Al-Nasir Al-Hamidan – Novel



The Sheltered Quarter
Hamza Muhammad Bogary – Novel



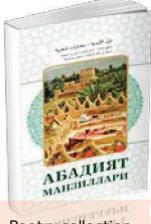
The Price of Sacrifice
Hamid Damanhuri – Novel



Novels in the Kingdom of Saudi Arabia
Dr. Sultan Saad Al-Qahtani – Critical study



Desert Culture
Dr. Saad Al-Bazii – Critical study



Eternal Abode
Saleh Zamanan – Poetry collection



annually by the King Abdulaziz Public Library in February to strengthen the practice of reading among schoolchildren.⁽³⁸⁾ However, when preventative health measures and lockdown were imposed and public activities suspended, reading events became popular online as a way to deal with isolation and social distancing. There were both new initiatives focused on the pandemic, like the Reading Marathon initiative (Readathon) launched by the Ministry of Culture as part of the “Culture in Isolation” initiative, in which 2,577 readers participated in adult and children’s groups⁽³⁹⁾ and continuations of annual reading events. The King Abdulaziz Center for World Culture organized its 6th annual reading competition, which attracted 13,300 participants on three different tracks.⁽⁴⁰⁾

Alongside the initiatives and activities organized by institutions, numerous bottom-up community-level initiatives arose to organize reading events over social media, especially book clubs—a particularly popular dimension of the sector. Virtual meetings for book clubs like My Book Club, the Friends of Reading Club, and the Flying Book Club were held during the lockdown. Some of their activities were oriented toward children, mirroring activities organized by private libraries, such as Hikayat Al-Qamar Library in Qattif, Yuhka Anna Library in Jeddah, and the Banoon platform.⁽⁴¹⁾

Translation Events

Numerous academic institutions and educational entities held lectures and conferences on translation. For example, King Khalid University in Abha held its third academic forum in February under the title “Translation is Cultural Dialogue.” A total of thirteen research papers were discussed over two days at the conference.⁽⁴²⁾ The Literature, Publishing, and Translation Commission announced that the Translation Forum would be held on March 19–21 to highlight the integral role of translation in intercultural communication. However, this forum was postponed due to Covid-19.

The Commission ran numerous virtual activities aiming to take advantage of the lockdown period. One of these was an interactive translation initiative launched on Twitter with the hashtag #TheArtOfTranslation. Several tweets were posted weekly with quotations from maxims, proverbs, and philosophical, literary, and other texts for translation from and into Arabic as part of the initiative.

Several translation institutions were active online, holding remote forums and training sessions. For example, the King Abdulaziz Institute for Translation and Arabization at Imam Muhammad Ibn Saud Islamic University launched a program for faculty members that covered the foundations of academic translation.⁽⁴³⁾ To mark International Translation Day 2020, the College of Languages and Translation at King Saud University announced a set of virtual seminars under the title “Problems in Translation.”⁽⁴⁴⁾ The Traajim platform celebrated the day in cooperation with the College of Humanities at Prince Sultan University, presenting “The Forum on Translation: Culture and Profession,” which covered several themes, including the most significant trends in translation in light of Vision 2030, how translation affects cultures, and translator training.⁽⁴⁵⁾ The King Abdullah Bin Abdulaziz International Center for Arabic Language organized virtual interviews, one of which touched upon machine translation and Arabic.⁽⁴⁶⁾ Community organizations and individuals had a significant role in organizing specialized programs like the Athra platform, set up by the Graduate Studies in Translation Program, and the Translation Error training program. Virtual interviews also discussed the translation of Islamic topics into English and how reading and film are related to translation.⁽⁴⁷⁾

Translation of Saudi Works into Other Languages

Several Saudi government entities and educational institutions contribute to translation from Arabic into other languages. These include the Ministry of Islamic Affairs,

Dawah and Guidance, as well as the Imam Muhammad Ibn Saud Islamic University, which had previously translated thirteen books into nine languages.⁽⁴⁸⁾

In 2020, in cooperation with the Center for Research and Intercommunication Knowledge, the Uzbek magazine Jihan Adabiyati (“World Literature”) published an Uzbek translation of the novel *A Tear in the Cloak of Night* by Saudi novelist Ibrahim Al-Nasir Al-Hamidani. The translation appeared in the May, June, and July issues of the magazine.⁽⁴⁹⁾ This was part of a project to translate Saudi books into other languages launched by the Center in 2019 in cooperation with publishing houses and cultural institutions in Uzbekistan. By the end of 2020, the project had successfully translated six works of literature by Saudi authors.⁽⁵⁰⁾

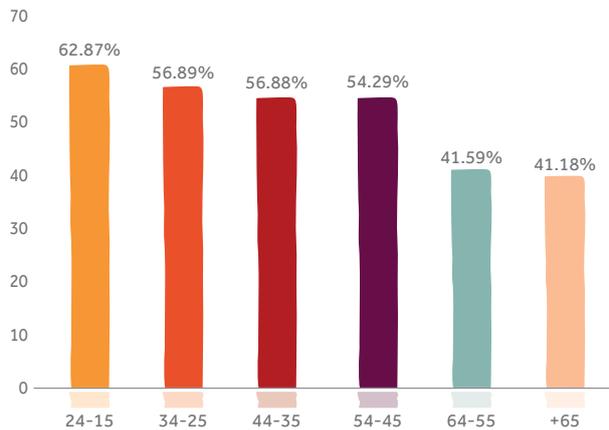
Participation

The 2020 Cultural Participation Survey was conducted in the last quarter of the year and used a representative sample from throughout the Kingdom. The survey reveals a notable disparity in the amount of independent reading for purposes that transcend outcome-dependent work or study across different various age groups. The percentage of people who had read at least one book in the past twelve months was highest among 15–24-year-olds and dropped gradually for older age groups. These results support the observations gleaned from the “Report on the State of Culture in the Kingdom of Saudi Arabia, 2019” regarding the effectiveness of independent reading activities and emerging signs of interest in these activities among young people.

While the overall percentage of independent reading declined since the 2019 report, the 2020 survey indicates a gender disparity for interest in reading consistent with the 2019 survey. Sixty-one percent of female respondents answered that they had read at least one book in the past twelve months, compared to 55.13% of males.



Figure 15-4: Percentage of people who read at least one book in the past twelve months, by age-group



As for reading themes, novels top the list as survey respondents' most-preferred book type, followed by religious books, literature and poetry, and, finally, history and politics. These genres garnered the most interest, which is consistent with the results of other studies. For example, the Reading Attitudes Survey conducted by the Ithra Center in 2014 showed similar interests among readers,^[51] indicating that these attitudes are relatively stable. The 2020 survey also shows a gender disparity in reading interests. For example, approximately around 29% of women identify novels as their top genre for reading. In comparison, only 14.7% of men listed novels as their preferred option, making them the third most popular genre for the group.

Figure 15-5: Most-preferred reading

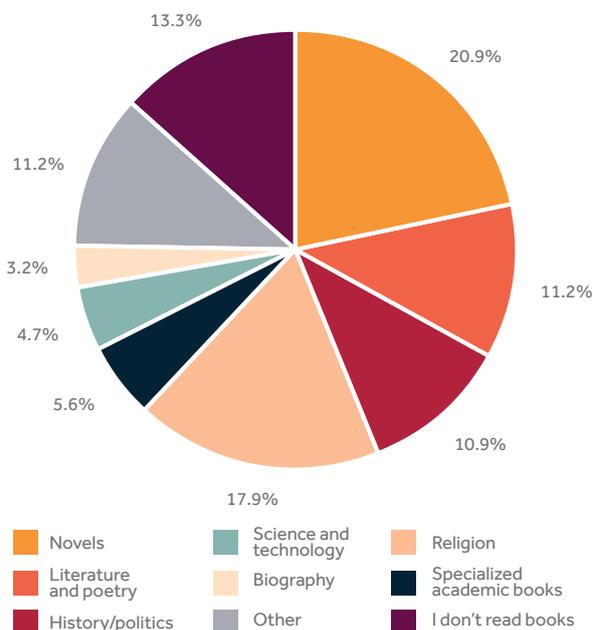


Figure 15-6: Most-preferred genres of books among females

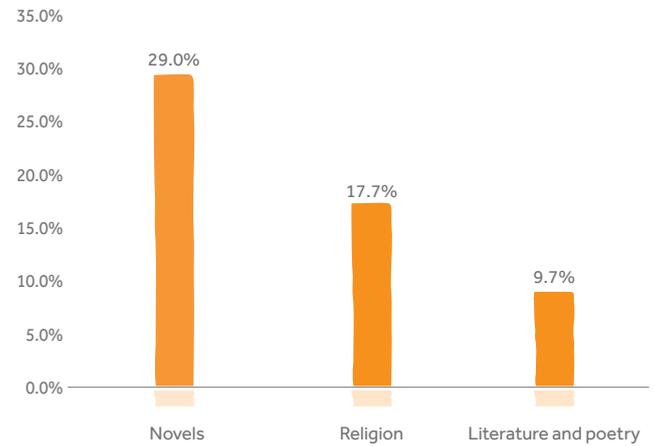
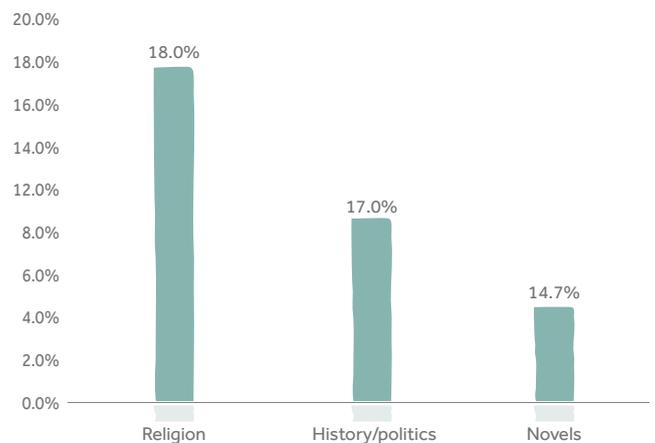


Figure 15-7: Most-preferred genres of books among males



Digitalization in the Sector

E-books and Audiobooks

The digitalization of the sector is accelerating on many fronts, beginning with the production of e-books and audiobooks and the physical transformation of paper books into digital formats. Since 2000, e-books have gradually become more widespread, ultimately accounting for more than one-quarter of book publishing revenues in some markets by 2018. However, dissemination in the Kingdom has not matched global trends, accounting for merely 6% of book sales revenue in the Kingdom.^[52]

Commonly cited difficulties, including the pirating of e-books, explain this decline. This situation is not limited to Saudi Arabia but applies regionally to the Arab book market as a whole. Some of the most significant challenges are technical ones related to book reader software, which does not function well with the Arabic language. These programs and formats and the large, advanced companies that own them are not especially concerned with Arabic, leading to gaps in the technology supporting Arabic digital publishing. Naturally, this has also led to an increase in the monetary costs of producing Arabic e-books, so that the only option for avoiding high costs is to use common formats like PDF, trading off technological capabilities for the increased likelihood of intellectual property rights violations.

Some e-book projects in the Kingdom have spent as much as 60% of their budget on the technical aspects of production, an investment that most publishing houses cannot afford in the absence of a third party that provides a safe and effective platform.⁽⁵³⁾ These challenges justify some publishing houses' (especially smaller ones) unwillingness to enter the e-book industry.

Despite these challenges, the e-book industry has recently encountered a positive environment that may push this aspect of the sector toward growth. Concerns about low or absent demand have seen publishers reluctant to branch out into e-books, but the Cultural Participation Survey shows positive indicators for e-book reading. One-quarter of the participants in the sample reported that they had read an e-book in the past twelve months (Figure 15-7). This is also reflected in buying behavior, where 80.64% of those who had read e-books stated that they had bought an e-book on an online store, indicating that reading e-books is not necessarily related to pirated copies, as was commonly believed. Among the percentage of the sample that had bought an e-book in the last 12 months, a disparity appears between age groups, as acceptance of e-books is wider and more pronounced across younger age groups.

However, there is no indication that physical books will face an imminent decline. Looking at leading countries in e-book production and marketing, we see that paper books have maintained their position in the market. Many publishers see e-books as a way to market and disseminate physical books more widely. Some academic studies indicate a preference for physical books for long and dense texts.⁽⁵⁴⁾

Figure 15-8: Percentage of people who read an e-book in the past 12 months

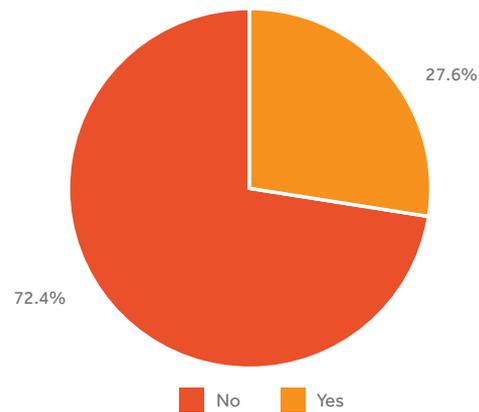
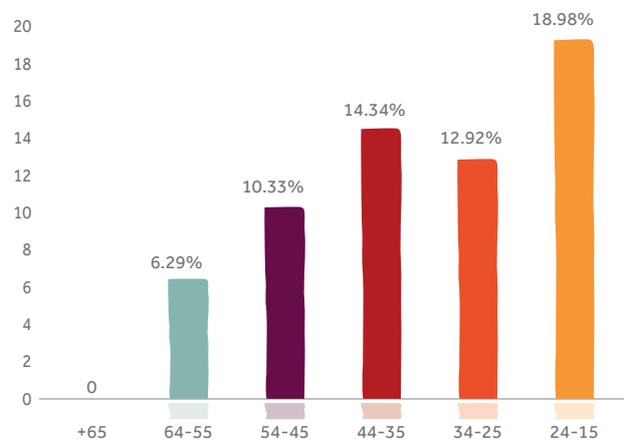


Figure 15-9: Percentage of people who bought an e-book from an online store in the past 12 months, by age-group



Online Marketing of Books

Aside from the digitization of book content per se, the future of digitalization at the point of sale—namely, buying books from online sellers—seemed promising even prior to the pandemic. The result has been an acceleration in digitalization in all sectors. There were indicators of growth in e-commerce in Saudi Arabia, including in the book business. According to 2017 statistics from the Communications and Information Technology Commission, 51% of people who bought books or audiobooks disks would only buy them from stores, indicating that 49% accept the idea of purchasing over the internet and have previously done so. This positive attitude

toward buying books online seems likely to increase in size and magnitude. As corroborated by the General Authority for Statistics' surveys, the share of people who had purchased a product or service over the internet jumped by around 50% in 2018–2019 (Figure 15-9). This growth also applies to book purchasing, as the share of all purchasers who had bought books over the internet rose from around 12% to 25.18% among women, a growth rate of over 100%. The same figure rose from 17% to 21.7% among men (Figure 15-10).

These numbers do not necessarily suggest the end of traditional booksellers. They rather highlight the capability of the Saudi publishing market to expand into new options for marketing and distribution. This change seems to have truly been accepted by a segment of consumers, especially as some publishers find out from experience that online sellers have connected them with a new group of consumers, which did not affect the traditional book market.⁽⁵⁵⁾

Figure 15-10: Percentage distribution of purchase methods for books and audiobook disks, of total people who buy books and audiobook disks⁽⁵⁶⁾

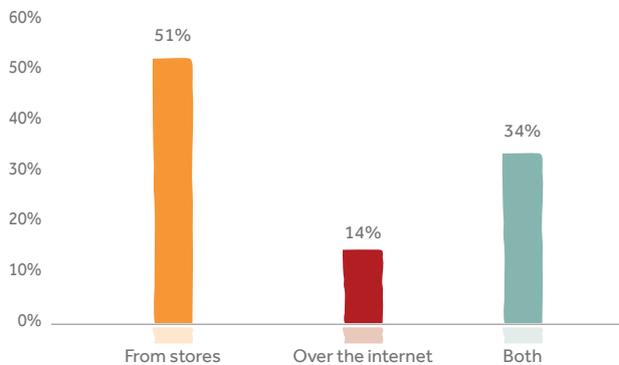


Figure 15-11: Percentage of people who bought products or services over the internet in the past three months, by gender

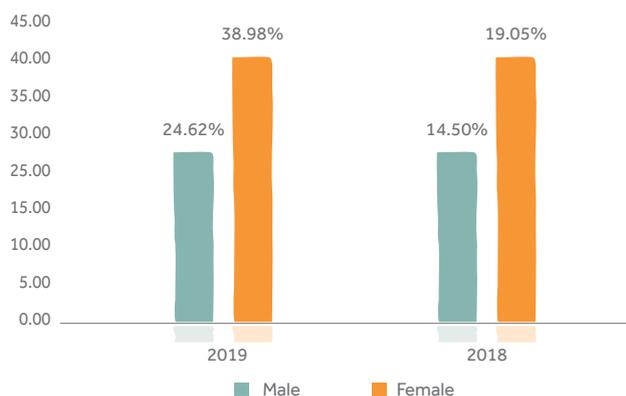
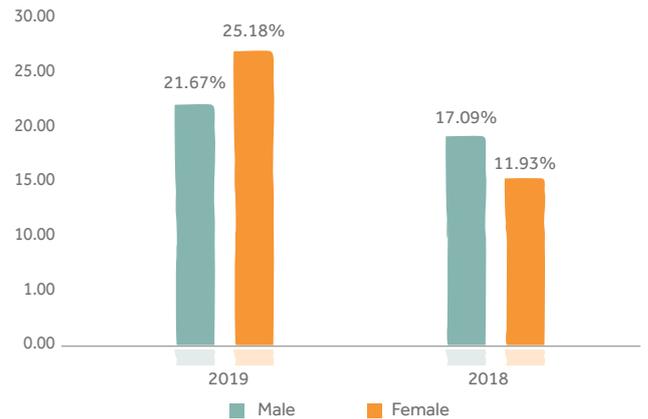


Figure 15-12: Percentage of individuals who bought books over the internet of the total number of those who bought products or services in the past three months, by gender⁽⁵⁷⁾

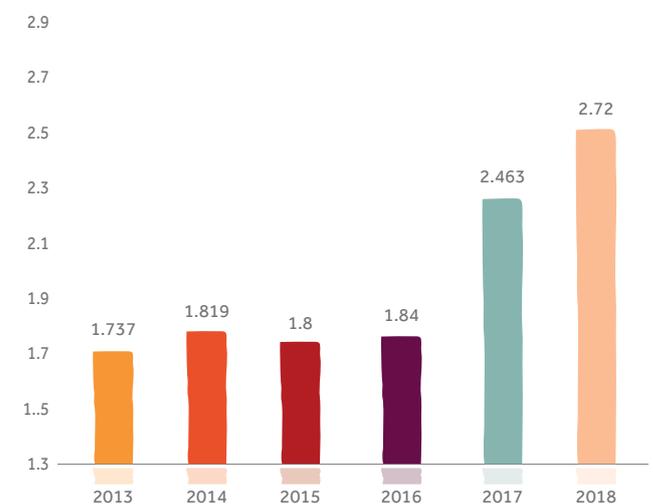


Infrastructure and the Creative Economy

The Publishing Market

The publishing sector is one of the cultural sectors that contributes the most to the national economy. It is a locally integrated industry formed over several decades, and according to statistics from the General Authority for Statistics, the sector contributed over 2.72 billion SAR to Saudi GDP in 2018.⁽⁵⁸⁾

Figure 15-13: Contribution of publishing sector to GDP (billions of SAR)



The Publishing Sector and the Impact of the Covid-19 Pandemic

Like most economic sectors, the publishing sector was affected by the closure of points of sale in stores in 2020. Publishers took advantage of high levels of activity on social media during the lockdown and the resulting uptick in e-commerce penetration to market and sell their products online. This was part of a global trend toward activating online selling options in response to the preventative measures necessitated by the pandemic. But the rise in online sales did not make up for insufficient cash flow at publishing houses due to the sharp decline in traditional sales,⁽⁵⁹⁾ both regionally and globally. According to the Arab Publishers Association, preliminary data on the pandemic's effects on the Arab publishing market show a 30–35% rise in online sales but a drop of more than 74% in overall sales in the first two quarters of 2020.⁽⁶⁰⁾ These preliminary figures are comparable to the decline that the sector experienced in other regions of the world, ranging from 75% to 95% in some European countries during the pandemic.⁽⁶¹⁾

In addition to the decline in sales at stores, there was the impact of international book fair cancellations in Saudi

Arabia and abroad. According to some publishers, this was the most significant impact of the pandemic on the sector.⁽⁶²⁾ This is because book fairs are the leading venue for publishers to market their products as they give publishers access to international markets and the opportunity to sell their products directly to consumers. Because of this, publishing houses gain a large share of their income from book fairs,⁽⁶³⁾ and publishers lost this share when book fairs were canceled throughout 2020.

Labor and Professionalism in the Translation Sector

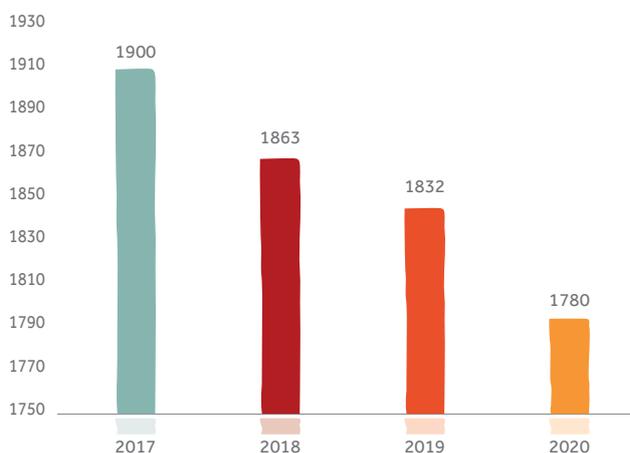
On June 16, 2020, the Council of Ministers approved the Saudi Standard Classification of Occupations, which included more than eighty occupations specific to the cultural sectors.⁽⁶⁴⁾ Included in the classification were several occupations in the field of translation, including "Dubbing Technician" and "Literary Translator." It is expected that this will improve professionalism in the field, a central plank in the Literature, Publishing, and Translation Commission's strategy. The strategy seeks to build the translation services market and develop career paths for translators.





According to the Ministry of Human Resources and Social Development statistics, 1,780 Saudi translators are working professionally in Saudi Arabia. The figure represents 29% of the total number of translators working in the Kingdom.⁽⁶⁵⁾ This percentage is higher than the private sector average but has declined in the last four years by an average of 3% annually. It is important to point out that these numbers do not include people who work as freelancers offering translation services, who make up a wide swath of the sector's workforce. Therefore, considering the number of freelancers registered as translation service providers on the Bahr platform (an initiative of the Human Resources Development Fund), the number of freelance translators offering translation services as of early January 2021 increased by 9,700.⁽⁶⁶⁾

Figure 15-14: Number of translators working in the private sector in Saudi Arabia⁽⁶⁷⁾



Organizational Developments

The Literature, Publishing, and Translation Commission

The most significant development in the publishing and translation sectors was the establishment of the Literature, Publishing, and Translation Commission, headed by Mohammed Hasan Alwan, in February 2020. The Commission is responsible for developing and organizing the publishing and translation sector in the Kingdom. It launched a strategy to work on multiple fronts in February to develop the subsectors under its purview. In the publishing field, its strategy is to support the local and global dissemination of Saudi books, organize the local publishing market, and improve the capabilities of Saudi publishing houses. The translation field likewise aims to build the local translation market, open professional career paths for Saudi translators, and develop those translators' skills. This is in addition to enriching translated Arabic content and enhancing the Saudi role in cultural exchange through translation.

The Saudi Authority for Intellectual Property

The Saudi Authority for Intellectual Property made significant efforts this year to document authors' intellectual rights, spread awareness of these rights, and protect them through legal avenues. It organized several informational courses and workshops and published a handbook on suggested contract formats to protect the rights of all parties.⁽⁶⁸⁾ It also used its executive authority to combat copyright violations by running inspections and giving fines to violators at shops where books and student notes are copied.⁽⁶⁹⁾

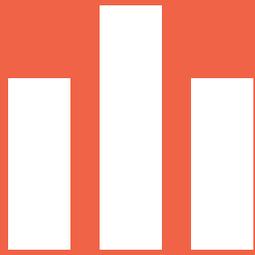
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Cultural Indicators

- Cultural Production
- Infrastructure
- Cultural Participation



مملكة الثقافات Kingdom of Cultures

Abia is a land of kind people, diverse
the crossroads of many civilizations,
mixed with its profound history, and
find a broad range of welcoming
customs.

as exhibit presents stories about
and its lands. The inhabitants share
facts so you can see the Kingdom as

المملكة العربية السعودية أرض الناس الطيبة ومهد الحضارات، امتزجت
في تماريسها المتباينة أعمق الأثقافات وتلوت بين أهاليها أعذب
العادات وجاء معرض المملكة (الثقافات) لسروي حكايات أرض المملكة
المتناجزة للزوار على أسننة تأسسها وجمع تشكيلات البيئة المذهلة في
نخارب عامرة ليستثنائية.

سيأخذ المعرض زواره في رحلة تتقاطع فيها شمال المملكة بجنوبها
وستنتهي جبالها مع بحارها، حيث ستروي أهاليها حكاياتهم ودرؤهم
وؤدثهم عبر محتوى تزي يعاك تزي المملكة كما لم تراها من قبل.



Cultural Production

	(2020)	(2019)	
Number of films released, by year	21	-	
Number of feature films	12	-	
Number of short films	9	-	

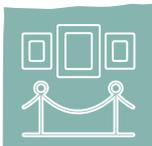
Source: General Commission for Audiovisual Media.

	(2020)	(2019)	
Number of theatrical performances, by year*	68	169	

Source: *This statistic only includes data from the General Entertainment Authority, the Saudi Arabian Society for Culture and Arts, the National Theater, and the Ithra Center.

	(2020)	(2019)	
Number of titles legally deposited	8497**	8318*	

Source: King Fahd National Library
*number of books deposited **number of books registered.

	(2020)	(2019)	
Number of art exhibitions	187	255	

Source: *According to a partial survey of art galleries. For more, see the Methodology Appendix.

Infrastructure

Cultural Facilities	(2020)	(2019)
Number of movie theaters (cinemas)*	32	12
Number of Theaters**	144	-



Source: *General Commission for Audiovisual Media.

Source: **National Theater.

**According to the General Entertainment Authority, there are 91 theaters.

	(2020)	(2019)
Open spaces for cultural activities (squares)	271	-
Open spaces for cultural activities, medium-size (squares)	22,467 square meters*	-



Source: General Entertainment Authority.

*Average space of 232 squares.

	(2020)	(2019)
Protected Areas	85,393.47 km	-



Source: National Center for Wildlife.

	(2020)	(2019)
Number of World Heritage sites registered with UNESCO	5	-
Number of heritage and archaeological sites	8268	-



Source: *World Heritage List, UNESCO.

**Heritage Commission.

Cultural Participation

Cultural Activity Attendance	(2020)	(2019)
Number of cinema entries, by year*	6,620,502	4,000,000
Percentage attending concerts (in-person)**	12.70%	18.90%
Percentage attending poetry nights (in-person)**	2.70%	5.30%
Percentage attending art exhibitions (in-person)**	7.80%	-
Percentage attending theatrical performances (in-person)**	5.10%	13.80%



Source: *General Commission for Audiovisual Media.
Source: **Cultural Participation Survey.

Visits to Cultural Sites	(2020)	(2019)
Visits to archaeological sites*	2514	8473
Percentage of visits to protected areas or national parks**	26.70%	45.40%
Number of visits to reserves	34.47%	34.80%



Source: *National Center for Wildlife.
**Cultural Participation Survey.

Digital Reception of Culture	(2020)	(2019)
Percentage of reading e-books	27.60%	-







Conclusion

The foregoing report offers a comprehensive account of the state of the cultural sector and its various subsectors in the exceptional year that was 2020. As such, the report does not offer a mere celebration of the emergence of virtual activity nor neglect the urgency of digitalization and its unmet potential. Rather, the report describes how digitalization has manifested on various levels and how these manifestations differ in terms of priority, how long they have existed, how rooted they are in local contexts, and the kinds of challenges they present. Manifestations of digitalization include using technology as part of the cultural infrastructure—including, for instance, the process of digitally archiving analog content—and aspects pertaining to the final consumer, such as attendance at virtual events.

On the one hand, several chapters in the report relay the fact that consumption of culture on digital platforms was growing

even prior to the pandemic. This is likely to become a well-established trend, as evidenced by the growth of online shopping for books and clothing, for example. This growth could create more extensive opportunities to distribute cultural products efficiently and improve producers' profit margins. On the other hand, virtual alternatives seem limited in their ability to substitute for in-person events. They may not be economically viable for certain sectors, such as cultural festivals and events - therefore, to treat traditional and digital mediums as sharp alternatives is inherently reductive and fails to consider the opportunities that the digital transformation may offer to supplement antecedent progress. Moreover, to approach digitalization in the cultural sector as a goal in itself is also futile, for the same reasons.

The limits of digitalization are reflected in even the most basic questions, like whether virtual cultural activities are



viable as stand-alone options. As various chapters make clear, the Cultural Participation Survey indicated that the percentage of people who reported attending virtual cultural events—including concerts, poetry evenings, and virtual exhibitions—was consistently and significantly lower than the percentage reporting attendance at in-person events. As detailed throughout the report’s chapters, this data is supported by the personal experiences of practitioners, who expressed that they miss in-person cultural experiences. This includes artists missing a sensory connection with artwork at live exhibitions or musicians missing direct interaction with a live audience.

When it comes to digitalizing cultural products, the paths toward digital transformation appear to be fraught with challenges. The film and music chapters, for example, discussed a shift toward digital streaming services, which is leading to fundamental changes in the processes of supply and distribution. Although this transformation makes cultural products more accessible, it also disrupts sector-based production cycles. Moreover, it harms local producers, especially since production is dominated by a limited number of international companies in the absence of national competitors.

One promising aspect of digitalization that some of the report’s chapters discussed is its role in preserving heritage. The digitalization of heritage not only involves circulating digitized copies of cultural products and using digital technologies as mediums for cultural communication but also preserving digital copies of cultural heritage and archiving them effectively. As the chapters on heritage, libraries, and museums indicated, earnest efforts are being made to invest in this aspect of digitalization through new initiatives and pre-existing projects that undertake this work and understand its importance. These efforts appreciate that digital storage methods are not only safe ways to preserve heritage; they also allow heritage to be accessed and consumed by practitioners, researchers, and the general public. Equally important is linking language and artificial intelligence, which is required to create effective digital applications specific to Arabic content.



The report cites several experiences drawing attention to the possibility of investing in holding virtual cultural activities alongside in-person activities. Efforts to do so benefit from the fact that virtual events have become a familiar practice during the pandemic when live streaming events and offering virtual participation methods alongside in-person events were common. This hybrid format that combines virtual elements with the typical, in-person format of cultural activities demonstrates the sort of flexible models that the pandemic has encouraged. These models may persist even after the exceptional circumstances of 2020 come to an end, neither completely replacing in-person activities nor disappearing after they resume.

These wide-ranging observations, which the report’s chapters detail, encourage a specific approach to digital transformation in the cultural subsectors that does not see modern technologies as inherently superior or their adoption as inevitable, but instead considers them as one of a variety of options, many of which offer promising, complementary opportunities. Despite the circumstances of this exceptional year, the cultural subsectors seem ready to transcend the foregoing challenges and capitalize on the wide-ranging, boundless opportunities.

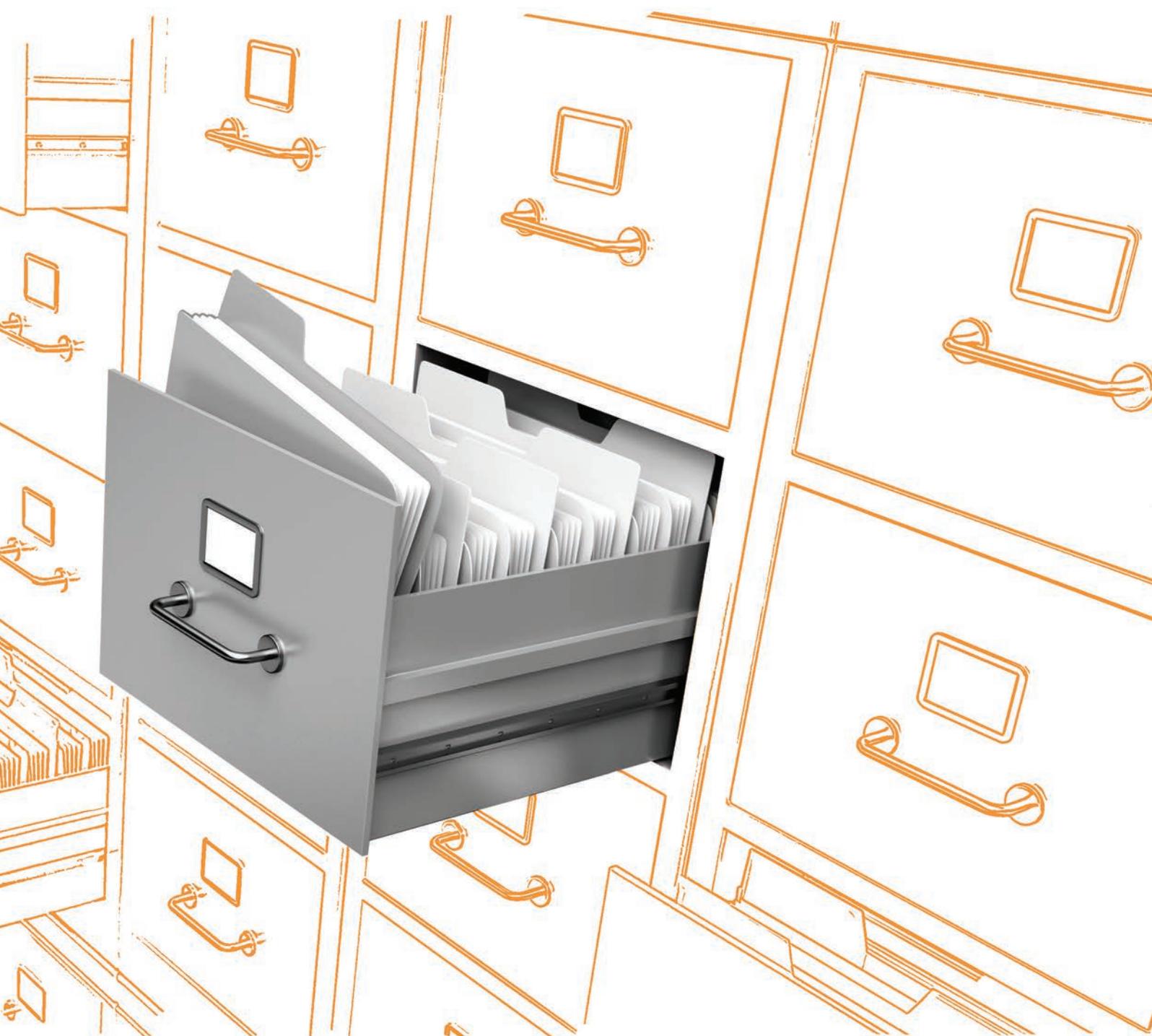


Appendices

- Methodological Framework and Sources
- 2020 Cultural Participation Survey
- Glossary



Appendices





Appendix (1): Methodological Framework and Sources

Building on the groundwork laid in the 2019 State of Culture Report, this second edition adopts the same general framework as the first. In addition, this year's report aims to monitor and document the various cultural sectors while also including some new areas of development. The most significant development is the selection of an overarching theme for the report and its various chapters. Given the exceptional circumstances of 2020, the selected theme is "The Digitalization of Culture," as most public life and activities moved to virtual spaces due to the Covid-19 pandemic. Each chapter includes a subchapter dedicated to digitalization. Following its first edition, this year's report consulted a wide range of sources from government and private entities, the general survey, in addition to focus groups that involved experts and practitioners.

I. Methodology

At its foundation, the second edition proceeds by adopting the concept of the "cultural cycle" as laid out in the UNESCO Framework for Cultural Statistics (2009 revision). The second edition not only embraces the concept of a cultural cycle as an analytical frame but also as an organizing principle. This is clearly reflected in the organizational structure of each chapter. The methodology separates the cultural cycle into three core processes (rather than UNESCO's five), as follows:

1) Creation and Production

This component combines the creation and production processes of the cultural cycle. As for production, the term connotes any element related to the process of cultural production as deemed by the framework of the report, including the availability of infrastructure for empowering production (e.g., film production studios); sponsoring institutions, clubs, and arts groups (e.g., culinary art groups); and quantifying production levels (e.g., number of titles published). As for creation (presented in the chapters as "creativity"), the term connotes any element related to innovating and composing ideas and content in the cultural sector—that is, the core of innovative and creative work with its artistic and subjective aspects. The report does not seek to include an artistic evaluation of the content or the state of

creativity but is content to make general observations about the emergence of creative practices throughout the year. By contrast, local and international cultural awards serve as indicators of creative excellence.

2) Recognition and Dissemination

Recognition and dissemination refer to all local or international activities related to (1) distributing the cultural product and its presentation and delivery to the audience, or (2) providing a live cultural experience. It also includes disseminating such products and activities, whether through publication or attendance at (in-person or digital) events. This component is the product of merging two stages of the cultural cycle (dissemination and exhibition) in which all the processes belonging to the two stages are considered.

3) Participation

Participation refers to public activities, including receiving or consuming cultural products and engaging in cultural events. It is measured by the individual behaviors and attitudes (e.g., the number of visitors attending exhibitions or the percentage of those owning artwork).

The report's chapters are organized according to these three processes, each of which is allocated a section alongside four other components.

4) Infrastructure and Creative Economy

This component assesses the reality and development of fixed assets, including facilities and institutions supporting the sector, as well as the qualifications (e.g., skills and competencies) those institutions recognize and regulate. It also presents key indicators measuring the growth, support, and employment in the sector. Although the economic and infrastructure components are inseparable from the various stages of the cultural cycle in practice, they can be used to present, arrange, and collect pertinent data all in one place.

5) The Digitalization of Culture

This component provides an analytical outlook of the digitalization of culture in each cultural subsector. Digitalization will often overlap in various dimensions and takes place on more than one level. The report's methodology identifies four general aspects of digitalization: (1) culture in virtual space, (2) digital consumption of cultural products, (3) the virtual cultural experience, and (4) digitalization as a means of preserving cultural heritage. In contrast to other

components, this component moves beyond description and draws initial conclusions based on available data from focus groups and statistics.

6) Organizational Developments

This component is used to exhibit direct information about any appointments, regulations, or decisions in the sector. It focuses on the programs and strategies of the sector's organizing commission that are not discussed within the chapter. The component's salience consists in its documentation of the most significant organizational developments in the sector throughout the year.

7) Sustainable Heritage Management

This component appears in some of the chapters specifically concerned with the preservation and documentation of heritage (e.g., the Cultural Heritage, Natural Heritage, and, in part, Fashion and Culinary Arts chapters) and their inventories of heritage elements and policies for preservation and documentation.



II. Chapter Components: Uniformity and Particularities in the Sectors.

Based on these seven aspects, each chapter typically consists of the following components:



Although every chapter attempts to follow the same template to ensure consistency and unity in methodological principles, most chapters had to be modified. Because of differences in the nature of sectors and data availability, some organizational patterns had to be modified. This is most apparent in chapters discussing facility or institution-dependent sectors, such as the Museums and Libraries chapters. The same can be said of sectors concerned with preserving heritage, such as cultural heritage and natural heritage; their creative, productive, and distributive functions notably differ from sectors such as film.

The Literature chapter does not contain a section on infrastructure and the creative economy since the market is primarily driven by book sales, which is covered in the Publishing and Translation chapter. The Museums, Libraries, and Fashion chapters do not provide cultural participation statistics on the number of visits or event attendance because of the circumstances of the pandemic and the organizational transformation currently underway. Lastly, the Heritage and Publishing and Translation chapters have been prepared in a combined form. In the Heritage chapter, each component was divided into two sub-components, one for tangible cultural

heritage and the other for intangible cultural heritage. The same is true for the Publishing and Translation chapter.

Chapter Scope Adjustments

The 2020 report includes amendments and adjustments to the names and scope of chapters compared to the 2019 report. The Books & Publishing chapter has been changed to Publishing and Translation, thus treating two subjects in one chapter. As such, the report treats the reality of translation in a single chapter instead of distributing its discussion throughout the Language and Publishing chapters. The Theater chapter, as it was called in 2019, has been changed to Theater and Performing Arts to expand the scope of the chapter to include popular song artists that were previously discussed as part of the Music chapter. The 2019 report's chapter Films and Visuals has been shortened to Films for the 2020 report.

Element/Component	Chapter
Traditional wear	Fashion
Manuscripts	Libraries
Popular traditional food	Culinary Arts
Traditional folk performing arts	Theater and Performing Arts
Traditional handicrafts (except clothing)	Heritage
Urban heritage	Heritage
Graphic design	Architecture and Design

III. Data Sources

To catalog the reality of the cultural sectors and the state of digital transformation therein, the report relies on preliminary quantitative data and qualitative data drawn from focus group discussions. The data is complemented by available information issued from media centers associated with their respective authorities and other reliable media outlets. In doing so, a more comprehensive survey of the development across the sectors is ascertained and is broadened beyond the enterprises of a specific institution.

1) Preliminary Data

The data used in the report is collected from forty-nine entities, including eleven cultural bodies, the King Abdullah International Center for Arabic Language, university departments and centers, libraries such as the King Fahd National Library and the King Fahad Public Library in Jeddah, the King Abdulaziz Public Library, the King Abdulaziz Complex for Endowment Libraries in Madinah, and private and government entities.



Data Source: Government Entities
Ministry of Culture
General Authority for Statistics
Ministry of Finance
Ministry of Education
General Entertainment Authority
Ministry of Human Resources and Social Development
Ministry of Communications and Information Technology
Saudi Council of Engineers
Ministry of Commerce
Royal Commission for Riyadh
General Sports Authority
Ministry of Media
Diriyah Gate Development Authority
Technical and Vocational Training Corporation
General Commission for Audiovisual Media
Al Madinah Region Development Authority
General Presidency for the Affairs of the Grand Mosque and the Prophet's Mosque
Ministry of Islamic Affairs, Dawah, and Guidance
Ministry of Environment, Water, and Agriculture
Ministry of Tourism
Royal Commission for Al-Ula
King Abdulaziz City for Science and Technology

Data Source: Private Institutions
King Abdulaziz Center for World Culture (Ithra)
Al-Madinah Al Munawwarah Research and Studies Center
Saudi Heritage Preservation Society
Saudi Arabian Society for Culture and Arts (SASCA)
MiSK Institute

Before being utilized, the data was checked and verified for accuracy and inconsistencies with other sources and indicators by soliciting requests and meetings from representatives of cultural bodies. A limited number of statistics were combined and incorporated into the report. Though the numbers may not constitute a comprehensive inventory, they offer the best gauge available, as is indicated throughout the report.

2) Focus Groups

Quantitative indicators alone are not sufficient to provide accurate coverage of the state of culture. Generally speaking, the report employs quantitative data to understand and analyze the state of culture and its changing trends. Doing so opens up a window to the lived reality in cultural fields through the cultural actors' experiences and perspectives. Although the first edition of the report utilized interviews, the 2020 report draws on focus groups because they foster a wider range of shared encounters, experiences, and viewpoints. The primary purpose of the focus groups was to address two main topics:

- The impact of the pandemic on the cultural sectors and their various processes.
- The reality of digitalization, its limitations, and the various trends around it.

The focus groups were held in November and December 2020 and included a total of eighteen discussion sessions—namely, one session for each sector except the heritage sector, which had two sessions, and one for translation and another for design arts besides architecture. The discussion sessions comprised three groups of cultural stakeholders in each sector: experts, practitioners, and officials in cultural institutions. A total of 138 participants attended the sessions.

3) 2020 Cultural Participation Survey, Second Wave

The first wave of the Cultural Participation Survey ran in 2019. The second wave in 2020 aimed to provide accurate and comparable data on the cultural participation of Saudi citizens and residents in the Kingdom in different cultural fields by measuring two dimensions: **consumption and practice**. The survey’s standards are adopted and adapted from the European Community Participation Framework (which is compatible with the UNESCO framework) to ensure a comparable standard of measurement. Modifications were made as appropriate for each chapter and its local context.

The survey questionnaire comprises thirty-three questions (variables), seventeen of which are related to the first wave of the survey, but with a modification of the wording to suit the circumstances, specifically the question about virtual and in-person activities. Sixteen new variables were added covering topics related to the consumption of digital culture or as necessitated by the

initial outlines of the chapters, all in addition to seven demographic variables.

Most of the questions included a specific time frame of the past twelve months. This conforms to similar surveys that measure levels of participation (For more on the framework, see “Measuring Cultural Participation,” 2009, UNESCO).

Region	Frequency	Percentage
Riyadh	710	22.8
Makkah	689	22.1
Madinah	210	6.7
Al-Qassim	154	4.9
Eastern	479	15.4
Asir	267	8.6
Tabuk	110	3.5
Hail	82	2.6
Northern Borders	44	1.4
Jazan	184	5.9
Najran	67	2.1
Al-Bahah	58	1.9
Al-Jawf	58	1.9
Total	3,112	100.0



Data Collection, Second Cycle

Data were collected in two phases, the first from October 14–15 (pilot survey) and the second from November 4–14, 2020, with the assistance of the Saudi Center for Public Opinion Polling. The survey was conducted using phone interviews with a random sample chosen by the simple random sampling technique and chosen by a number generator. The sample size is 3,112 individuals, with a margin of error of 1.79%.

Survey Population and Sample Characteristics

The survey population consists of all Saudi individuals and Arabic-speaking residents of both genders, aged fifteen or older and residing in the thirteen provinces of the Kingdom, regardless of citizenship. The sample comprises 71.8% Saudi individuals and 28.2% non-Saudi, Arabic-speaking residents. The following table presents the number of participants and their distribution across the provinces. Weights are applied to address the different rates of non-response (missing responses) among males and females.

Non-response was treated by deleting missing values, assuming that the distribution of such values is similar to the distribution of the observed data. All ratios presented in the chapter on statistics or the appendices include only valid values. All differences reported based on gender, income, regions, and education level are statistically significant ($p \leq .05$).

4) Survey of Private Museums

To learn about the impact of Covid-19 on private museums within the sector, a survey of a sample of private museums was carried out. These museums are owned by individuals who obtained licenses from the (former) Saudi Commission for Tourism and Natural Heritage. Conducted from December 26–30, 2020, fifty-two museum owners were surveyed by phone; in three other cases, the museum's director was surveyed. The sample was randomly selected from a comprehensive list of all 218 small private museums in the Kingdom. In other words, approximately 24% of all private museums are represented in the sample. The survey questionnaire comprises nine questions adapted from the International Council of Museums (ICOM)⁽¹⁾ on three topics: the impact of the pandemic, the level of digitization of holdings, and the digital activity of the museum during the Covid-19 pandemic.

5) Partial Survey of Art Galleries

Given that comprehensive lists of active galleries or their records are not available, the 2020 report builds upon the 2019 report insofar as it counts the largest possible number of active galleries in various regions of the Kingdom, all to estimate the level of exhibition activity in the visual arts



sector. The list was compiled from available data about galleries in documentary books, media sources, and the internet. Subsequently, the initial list of galleries was expanded to include associated galleries.

The partial survey of art galleries is conducted from January 6 to February 3, 2021, by phone and is documented via email. Forty galleries are part of the survey, with nineteen responses, thirteen non-responses, and eight responses indicating that exhibition activities have ceased or are no longer scheduled. The survey questionnaire includes a list of virtual or in-person exhibitions held, canceled exhibitions because of the pandemic, and partnerships and collaborative activities with other galleries.

6) Published Reports

The report draws from the published data of ministries, government agencies, and international organizations. It includes data from annual reports and special reports, statistical publications, and event publications of the organizing entity.

7) Media and Social Media Sources

In addition to data directly provided by entities, the report uses the abundance of news and statements of official media outlets such as the Saudi Press Agency, and media centers of official entities, including their official online pages or verified social media accounts.

Since many of the cultural activities took place on social media this year, the report documents the activities by citing links from social media platforms as a primary source. Founded on the belief that cultural activities include practices outside of the purview of official entities or institutions, the report documents and registers any spontaneous cultural activities undertaken that are not officially organized or documented by reports or associated with commercial activity.

IV. Cultural Indicators

Reviewing several frameworks and relevant reports, this year's framework of cultural indicators presents an improved version that builds on last year's framework. Prominent of the reports used in improving the framework:

- Culture/2030 Indicators, UNESCO, 2019
- 2009 UNESCO Framework for Cultural Statistics, UNESCO, 2009
- World Cities Culture Report, World Cities Culture Forum, 2018
- The Cultural and Creative Cities Monitor, European Commission, 2019
- Culture for Development Indicators: Methodology Manuel, UNESCO, 2014
- ESSnet-Culture: European Statistical System Network on Culture, 2012

The framework is primarily guided by the 2030 cultural indicators developed by UNESCO, with several modifications, the most significant of which are the exclusion of the cultural

production dimension and most of the (non-statistical) checklists. The framework establishes the statistical measurement of the state of culture through five dimensions (and intersects with UNESCO's objective indicators according to the list below). Still, the chapter on cultural indicators in the 2020 report does not cover the entire list because of the organizational and structural changes the cultural sectors are undergoing in the Kingdom and the circumstances of the pandemic, which prevented the completion of data in some fields.

1. **Cultural Infrastructure.** This offers several indicators that give the overall availability and distribution of cultural facilities and the availability and capacity of public cultural spaces (intersecting with the environment and resistance to climate change).
2. **Creative Economy.** This measures the economic dimension of culture (coinciding nearly with sustenance and livelihood).
3. **Education and Training.** The indicators of this dimension detail the overall presence of culture in public education and higher education outlets in the disciplines related to culture and creativity (coinciding with the subject of training and knowledge).
4. **Cultural Participation.** These indicators assess the extent of participation of community members in cultural activities in terms of consumption and practice (intersecting with participation and engagement).
5. **Cultural Production.** This offers a statistical overview of the quantitative levels of cultural production in several cultural subsectors.



V. Limitation of Data

1) Education Data

Given the circumstances of 2020, public education data is not available (Academic Year 1440/1441 AH), and thus the chapters do not include:

- The numbers or structure of educational program developments in cultural sectors.
- Growth trends in the number of graduates from these programs.

Thus, some chapters emphasized:

- Updates on the cultural scholarship program.
- Availability of data gained from open sources on the development of new educational programs.

2) Labor Data

Most cultural sectors are undergoing drastic structural changes. Previously, some sectors did not have a path toward professionalization, and thus the small number of registered workers in the sector does not reflect reality.

Procedure Followed:

- When the numbers are fewer than five persons in each profession, they are excluded from the chapters. In such case, it is sufficient to note the cultural professions added to the new Saudi Standard of Classification of Occupations (e.g., the registered number of workers under the title of Museum Director does not exceed five across the museums in the Kingdom).
- The numbers in some of the chapters are retained with those of previous years since there is a probability that growth reflects organizational developments more so than growth in the number of employees.

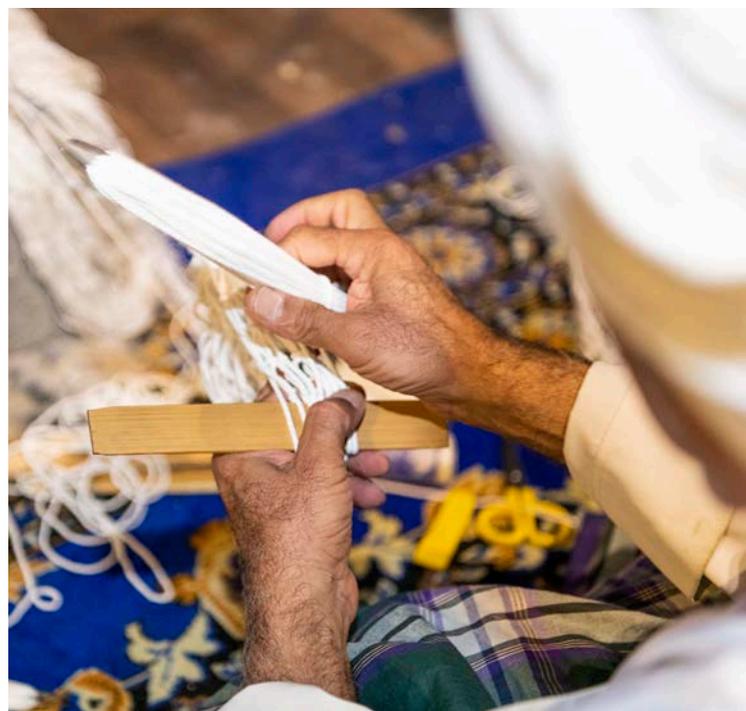
3) Creative Economy Data

Sales Figures

No official estimates of the volume of revenues are available in the cultural sectors, and the availability of figures is limited to international marketing companies or press rereleases from officials. Only in exceptional cases does the report draw upon revenue data from these sources, and then only when the primary source is from outside of the Kingdom (e.g., the earning revenues for operating a cinema or revenues from streaming services).

4. Structural Changes to Chapters Based on the Availability of Data and Other Observations

Fashion. The participation component is not given because of insufficient data on attendance levels at events. The Cultural Participation Survey does not include any questions about fashion because of the limited benefit of data from questions on the 2019 report about attendance to events in the sector.



Museums. The sector is undergoing structural transformations that mean data is unavailable, such as the number of private museums or museum visits. As a result, the chapter took a quite different shape than other chapters.

Libraries. Data is not available from enough libraries to be representative of the sector, and as a result, the chapter relies on detailed information on library activities. The data included may not be representative of all libraries but serves as a general pattern in the field. The number of visits is not available from enough libraries, and thus the participation component is excluded.

Publishing and Translation. The chapter uses official legal deposit statistics as an indicator of the levels of publishing in the Kingdom. Because more than half of the books registered in 2020 are yet to be deposited, using the number of deposits for 2020 may not reflect an actual decrease in the number of titles published, but rather delayed titles that are registered but not yet deposited. On the contrary, using registration numbers may account for titles registered that will not be published. Therefore, the chapter provided registration numbers for 2020 alongside deposit numbers for previous years, with an explanation of the difference between the two numbers.

References

- (1) International Council of Museums, Museums, museum professionals and COVID-19, May 2020.



Appendix (2): 2020 Cultural Participation Survey

Have you attended any poetry evening or literary event in the past 12 months?

	Percentage
Yes, I attended virtual events (online)	0.8
Yes, I attended events in person	2.0
Yes, I attended both in-person and virtual events	0.7
I didn't attend any	96.4
Total	100.0

Have you visited any archaeological sites near you in the past 12 months?

	Percentage
Yes, 1-3	18.3
Yes, 4-7	3.7
Yes, 8-12	1.0
More than 12	1.2
I didn't visit any due to the Covid-19 pandemic	39.2
I didn't visit any, for other reasons	34.5
There are no archaeological sites near me (not read aloud)	2.1
Total	100.0

Have you visited any of the archaeological sites in another region of the Kingdom in the past 12 months?

	Percentage
Yes, 1-3	12.6
Yes, 4-7	1.9
Yes, 8-12	0.4
More than 12	0.4
I didn't visit any due to the Covid-19 pandemic	42.8
I didn't visit any, for other reasons	41.8
Total	100.0

What is your favorite way to watch movies?

	Percentage
Cinemas	15.1
Online platforms (Netflix, Shahid)	34.0
DVD or VHS	0.6
Television	23.1
I don't watch movies	27.2
Total	100.0

How many times have you visited nature reserves or parks in the Kingdom in the past 12 months?

	Percentage
1-3 times	17.5
4-7 times	4.5
8-12 times	1.9
More than 12 times	2.8
I didn't visit any due to the Covid-19 pandemic	33.8
I didn't visit any, for other reasons	39.5
Total	100.0

Have you attended any art exhibitions in the past 12 months?

	Percentage
Yes, I attended a virtual art exhibition (online)	1.0
Yes, I attended an art exhibition in person	6.3
Yes, I attended both virtual and in-person exhibitions	1.5
I didn't attend any art exhibitions	91.2
Total	100.0

Have you attended any theater performances in the past 12 months?

	Percentage
Yes, I attended a virtual theater performance (online)	2.1
Yes, I attended a theater performance in person	4.2
Yes, I attended both virtual and in-person theater performances	0.8
I didn't attend any theater performances	92.8
Total	100.0

Have you attended any concerts or musical events in the past 12 months?

	Percentage
Yes, I attended a virtual concert or musical event (online)	2.5
Yes, I attended a concert or musical event in-person	10.0
Yes, I attended both virtual and in-person concerts or musical events	2.7
I didn't attend any concerts or musical events	84.8
Total	100.0

Did you buy an e-book from an online store in the past 12 months?

	Percentage
Yes	13.6
No	86.4
Total	100.0

Have you read an e-book in the past 12 months?

	Percentage
Yes	27.6
No	72.4
Total	100.0

How many books have you read in the past 12 months not for school or work?

	Percentage
1-3 books	35.6
4-7 books	9.8
8-12 books	2.1
More than 12 books	2.2
I haven't read any books in the last 12 months	37.0
I don't read books (not read aloud)	13.2
Total	100.0

What type of books do you prefer to read most often?

	Percentage
Novels	21.9
History / Politics	10.9
Literature and poetry	11.2
Religion	17.9
Specialized academic books	5.6
Science and technology	4.7
Autobiographies	3.2
Other	11.2
I don't read books (not read aloud)	13.3
Total	100.0

Do you listen to audiobooks?

	Percentage
Yes	19.4
No	44.7
I haven't heard of audiobooks before	35.9
Total	100.0

Do you own original artwork by an artist?

	Percentage
Yes	3.6
No, but I intend to do so	21.7
No, I am not interested in owning artwork	74.6
Total	100.0

Do you have a musical instrument at home?

	Percentage
Yes	12.8
No	87.2
Total	100.0

What kind of music do you prefer?

	Percentage
Arabic songs	47.0
Foreign songs	5.7
Western classical music (instrumental)	4.7
Traditional music	11.5
Arab classical music (instrumental)	10.4
I don't listen to music (not read aloud)	18.9
Other	1.9
Total	100.0

Are you proficient or interested in cooking?

	Percentage
Yes, mostly Saudi or local dishes	27.7
Yes, mostly foreign or international dishes	2.8
Same interest across categories	29.0
I'm not interested in cooking	23.7
Yes, mostly Arab or Gulf dishes	16.9
Total	100.0

Where do you normally find recipes for the Saudi dishes that you cook?

	Percentage
From family, relatives or friends	53.5
Television or radio	1.6
From websites	37.4
From cookbooks	3.3
I already know them (not read aloud)	4.0
Other (not read aloud)	0.0
Total	100.0

Have you attended a heritage event or festival in the past 12 months?

	Percentage
Yes, 1-3	13.8
Yes, 4-7	1.4
Yes, 8-12	0.2
Yes, more than 12	0.3
I didn't attended any event due to Covid-19	42.5
I didn't attend any event, for other reasons	41.8
Total	100.0

How many times have you been to cinemas in the Kingdom in the past 12 months?

	Percentage
1-3 times	14.1
4-7 times	5.6
8-12 times	2.0
More than 12 times	1.5
I didn't go to the cinema due to the Covid-19 pandemic	27.5
I didn't go to the cinema, for other reasons	45.6
There are no cinemas near me (not read aloud)	3.7
Total	100.0

Can you speak a language other than Arabic?

	Percentage
No	60.3
Yes (note which)	1.5
Yes, English (not read aloud)	34.1
I am fluent in more than one language other than Arabic (do not read aloud)	4.2
Total	100.0

What language do you prefer to use in social settings (including social media)?

	Percentage
Only Arabic	34.7
Only English	0.4
Mostly Arabic	33.0
Mostly English	1.5
Both Arabic and English equally	30.0
Some other language (not read aloud)	0.3
Total	100.0

What language do you prefer to use in educational and / or professional settings?

	Percentage
Only Arabic	20.5
Only English	8.1
Mostly Arabic	15.0
Mostly English	12.6
Both Arabic and English equally	43.6
Some other language (not read aloud)	0.1
Total	100.0

Have you attended any virtual cultural events in the past 12 months?

	Percentage
Yes, 1-3 events	7.7
Yes, 4-7 events	1.4
Yes, 8-12 events	0.2
Yes, more than 12 events	0.9
I didn't attend any virtual cultural events	89.8
Total	100.0

How much do you agree with the following statement: Virtual cultural events should continue even after the pandemic is over and there is no social distancing required?

	Percentage
Strongly agree	17.7
Agree	52.8
Disagree	23.0
Strongly disagree	6.4
Total	100.0

Do you have an internet connection at home or through your phone?

	Percentage
Yes	93.7
No	6.3
Total	100.0

Have you watched any Saudi films in the last 12 months?

	Percentage
Yes, in the cinema	2.5
Yes, on television	11.2
Yes, online	10.3
Yes, on more than one platform	3.2
No, I haven't watched any Saudi films	34.8
No, I am not interested in Saudi films	14.6
I don't watch films (not read aloud)	23.4
Total	100.0



Appendix (3): Glossary

1. Theme

The recurring idea in a work or text, or the main purpose around which the work and ideas are framed to create a coherent structure.

Source: Said Yaktine, *Reading and Experience* (Casablanca: Dar Al-Thaqafa, 1985).

2. Creative Economy

Economic activity "based on creative assets potentially generating economic growth and development."

Source: *The First Report of the United Nations Conference on Trade and Development* (UNCTAD), 2008, https://unctad.org/system/files/official-document/ditc20082cer_en.pdf.

3. UNESCO

UNESCO is The United Nations Educational, Scientific and Cultural Organization whose mission is to promote world peace through international cooperation in the fields of education, science, and culture. UNESCO's programs contribute to fulfilling the sustainable development goals laid out in the 2030 Agenda for Sustainable Development adopted by the United Nations General Assembly in 2015.

Source: UNESCO (online) <https://sdgs.un.org/goals>.

4. Artificial Intelligence

The science that creates and uses algorithms to simulate the capabilities of the human brain. It uses algorithms to develop artificial consciousness, trigger appropriate responses to stimuli, learn, plan, find solutions to new problems, communicate language, and manage cognitive development (these are often referred to as "higher cognitive faculties"). Excluded from this definition are known issues that have strict mathematical definitions and mathematically proven solutions.

Source: Al-Mu'tazz Billah Al-Saeed, *Arabic and Artificial Intelligence* (Riyadh: King Abdullah bin Abdulaziz International Center for the Arabic Language, 2019), 29.

5. Natural Language Processing

A cognitive field that uses machine learning to understand, process, and analyze natural language data to enable communication between humans and machines.

Source: Al-Mu'tazz Billah Al-Saeed, *Arabic and Artificial Intelligence* (Riyadh: King Abdullah bin Abdulaziz International Center for the Arabic Language, 2019), 14.

6. Knowledge Societies

"The capabilities to identify, produce, process, transform, disseminate and use information to build and apply knowledge for human development."

Source: The United Nations Educational, Scientific and Cultural Organization (UNESCO), "From the information society to knowledge societies," in *Towards Knowledge Societies* (France: UNESCO Publishing), 27.

7. Digital Literature

Text that employs digital technology in poetic and narrative works.

Source: Phillippe Bootz, "What is Digital Literature?" *Alamat*, no. 35, translated by Muhammad Aslim (Morocco, 2011).

8. Building Code

The group of terms and requirements specified in laws, regulations and annexes related to building and construction to ensure safety and public health.

Source: Saudi Building Code National Committee (online), <https://www.sbc.gov.sa/en/BuildingCode/Pages/Definition.aspx>.

9. Safeguarding Heritage

“‘Safeguarding’ means measures aimed at ensuring the viability of the intangible cultural heritage, including the identification, documentation, research, preservation, protection, promotion, enhancement, transmission, particularly through formal and non-formal education, as well as the revitalization of the various aspects of such heritage.”

Source: The United Nations Educational, Scientific and Cultural Organization (UNESCO), “Text of the Convention for the Safeguarding of the Intangible Cultural Heritage,” <https://ich.unesco.org/en/convention>.

10. Natural Heritage

“Natural features consisting of physical and biological formations or groups of such formations, which are of outstanding universal value from the aesthetic or scientific point of view.”

Source: The United Nations Educational, Scientific and Cultural Organization (UNESCO), “Convention Concerning the Protection of the World Cultural and Natural Heritage (1972),” <https://whc.unesco.org/en/conventiontext/>.

11. Intangible Cultural Heritage

“The ‘intangible cultural heritage’ means the practices, representations, expressions, knowledge, skills—as well as the instruments, objects, artefacts and cultural spaces associated therewith—that communities, groups and, in some cases, individuals recognize as part of their cultural heritage.”

Source: The United Nations Educational, Scientific and Cultural Organization (UNESCO), “Text of the Convention for the Safeguarding of the Intangible Cultural Heritage,” <https://ich.unesco.org/en/convention>.

12. Virtual Theatre

Theatrical performances that rely primarily on digital technologies in the production process.

Source: Theatre and Performing Arts Chapter

13. Year of Arabic Calligraphy 2020

Launched by the Ministry of Culture on December 8, 2019, the initiative showcases the art of Arabic calligraphy, promotes its practice, and supports professionals and amateurs by launching, adopting, and supporting various related projects.

Source: Visual Arts Chapter

14. Hybrid Events

Events that blend and maintain the benefits of in-person and virtual activity.

Source: Cultural Festivals and Events Chapter

15. Cloud Restaurants

Delivery-only restaurants with designated food preparation spaces and without any dine-in options.

Source: Culinary Arts Chapter

16. General Museums

Museums holding various collections from more than one field and subject at the national, regional, and local levels and may offer a special collection in additional spaces.

Source: Museum: Cultural Institution,” Britannica, <https://www.britannica.com/topic/museum-cultural-institution>.

17. Specialized Museums

Museums dedicated to displaying collections in a specific field or subject, such as science, music, and military, among others.

Source: Museum: Cultural Institution,” Britannica, <https://www.britannica.com/topic/museum-cultural-institution>.

18. Subtitles

The translation of dialogue displayed as running text below a visual presentation.

Source: Publishing and Translation Chapter





ثقافتنا هويتنا
Our culture, our identity