

**Quicktake**

 FTIDELTA™



# Building a World-class Performing Arts Institution

**Market overview and opportunities  
in the Middle East**

# Investing in cultural and creative industries offers significant social and economic benefits

## CULTURAL AND CREATIVE INDUSTRIES BENEFITS



### Social benefits



Better quality of life and living standards



Creation of distinct cultural identity



Increase in “soft power” and reputation



Development of attractive real estate destinations



### Economic benefits



Provision of employment opportunities



More direct foreign investment



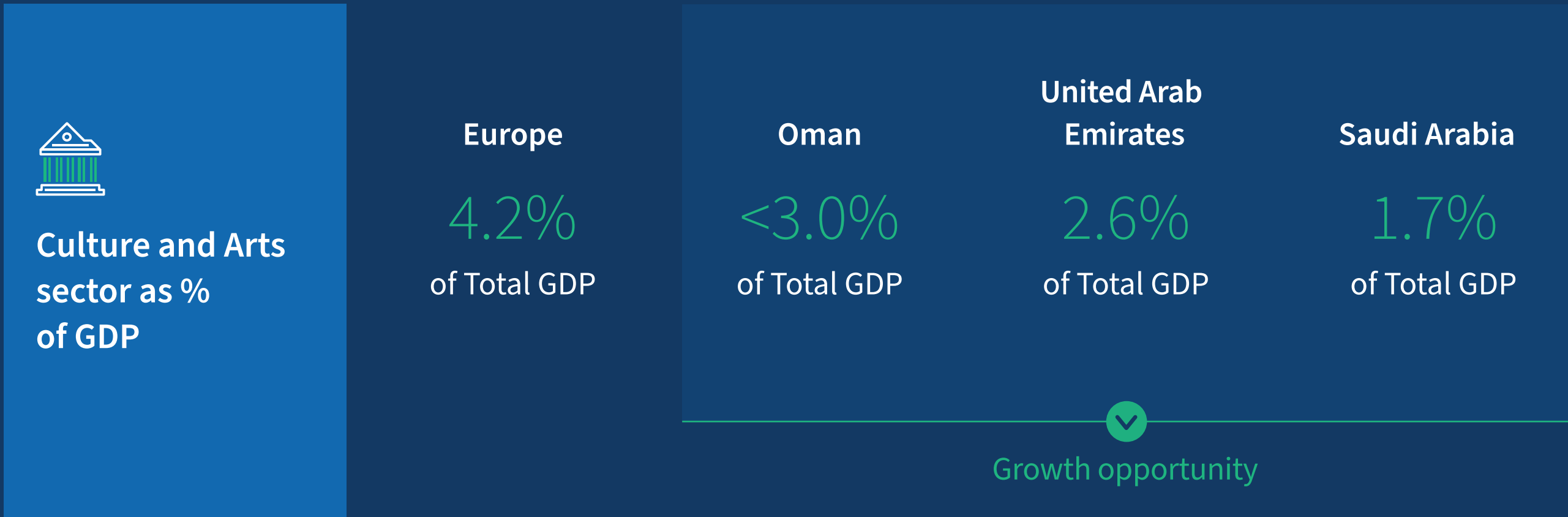
Creation of an ecosystem around cultural attractions



Build-up of ancillary and supporting industries

GCC states have recognized these benefits and have undertaken activities and investments to align more closely with leading markets

CULTURAL AND CREATIVE INDUSTRIES CONTRIBUTION



Region	Recent initiatives and investments in GCC
Oman	<p>Announced Oman Cultural Complex, seeking to promote cultural, literary, theatrical and research activities with a \$385 million investment</p> <p>Announced “Film City” with a projected investment of \$31.2 million</p>
United Arab Emirates	<p>Abu Dhabi to invest AED 6 billion by 2026 for CCI</p> <p>With an ambition to reach 140k jobs by 2026, Dubai’s strategy attracted FDI of AED 11.8 billion in 2023</p>
Saudi Arabia	<p>Investing in projects to increase CCI’s1 revenue generation to USD20 billion by 2030</p> <p>Allocated SAR 879 million for the movie sector</p>

Notes: 1) Cultural and creative industries.  
Sources: FTI Delta analysis, news clippings

# Recently, there has been a surge of interest in the performing arts scene within the region

## PERFORMING ARTS – AN AREA OF FOCUS IN THE GCC



### Recent activities to foster performing arts

#### Oman

Oman Culture Complex to include a National Theater with a 1,000-seat capacity auditorium

Hosts international theater festivals, e.g., in the Al Din Theater with over 20 participating countries

#### United Arab Emirates

Announced construction of two new theaters

Establishment of Sharjah Performing Arts Academy  
Launched “Create Theater” initiative, with financial grant programs

#### Saudi Arabia

Announced construction of eight new theaters

Launched Saudi Theater Festival

Hosted first grand opera, “Zarqa Al Yamama”, in the King Fahad cultural center



### Desired impact



#### Revitalization of communities

Can serve as centerpiece for development and cultural renewal due to its roots in the community



#### Creation of vibrant public spaces

Integrates into the urban setting, improving the quality of life for residents



#### Significant source of employment

E.g., 24% of all cultural jobs within the EU can be allocated to performing arts (or related) activities

Notes: 1) Definition for U.S. “Arts, Design, Entertainment, Sports & Media, definition for Europe and UK “Creative, Arts and Entertainment”

Sources: FTI Delta analysis, news clippings, Eurostat, Data USA

# However, the level of maturity and sophistication in the performing arts scene varies significantly between countries

## Kuwait

Maturity: High ↗  
Current Effort: Mid →

*Historically a performing arts powerhouse with plenty of talent*

## Bahrain

Maturity: Low ↘  
Current Effort: Low ↘

*Performing arts mainly imported for an expat audience*

## Egypt

Maturity: High ↗  
Current Effort: Mid →

*Important producing position within the Arabic-speaking world*

## UAE

Maturity: Mid →  
Current Effort: High ↗

*Possesses landmark buildings and has an activated “grassroots” scene of former artists*

## KSA

Maturity: Low ↘  
Current Effort: High ↗

*Nascent market that is gaining momentum with its Vision 2030*

## Qatar

Maturity: Low ↘  
Current Effort: Mid ↗

*Limited support to the performing arts ecosystem*

## Oman

Maturity: High ↗  
Current Effort: Mid →

*Pursued a strategy to become internationally recognized for elite performing arts*

# To advance the performing arts scene, overcoming challenges is essential, with the establishment of institutions being a key priority

## PERFORMING ARTS AS LANDSCAPE CHALLENGES



# Establishing these institutions requires a thorough, strategic approach addressing key questions

## KEY QUESTIONS FOR INSTITUTIONS STRATEGY

WHY	WHAT	HOW Producing and commissioning model	HOW Operating model
<ul style="list-style-type: none"> <li>Artistic value</li> <li>Socio-economic impact</li> <li>Reputation / Soft power</li> <li>Sector development</li> <li>Commercial focus</li> </ul>	<ul style="list-style-type: none"> <li>Target audience</li> <li>Genre focus</li> <li>Philosophy</li> <li>Application of R&amp;D</li> <li>Programme and use of spaces</li> </ul>	<ul style="list-style-type: none"> <li>Leadership</li> <li>Content model</li> <li>Talent development</li> <li>Community engagement</li> </ul>	<ul style="list-style-type: none"> <li>Main revenue source</li> <li>Facilities model</li> <li>Distribution channels</li> <li>Operational model</li> </ul>
 <p><b>Defines the purpose of the institution</b></p>	 <p><b>Defines the programming of the institution</b></p>	 <p><b>Defines producing and commissioning model of the institution</b></p>	 <p><b>Defines the modus operandi of the institution</b></p>



# How can FTI Delta support an institution's strategy definition and execution?



## Frame the opportunity

Understand market insights and trends

Assess peer institutions

Understand target audiences

Identify gaps and opportunities



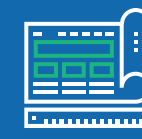
## Defining the strategy

Create strategic positioning options of institution(s)

Identify unique programming focus areas and define relevant formats

Develop target audiences' activation approach

Build business case



## Creating an activation plan

Define operating model

Develop incubation approaches

Create short-term action plan to get going right away

Draft implementation road map including key actions and milestones

# To learn more, connect with our key leaders in the Sports, Media, and Entertainment practice across EMEA



## FTI DELTA SPORTS, MEDIA AND ENTERTAINMENT KEY CONTACTS IN EMEA

### Josep Que

Senior Managing Director  
[josep.que@ftidelta.com](mailto:josep.que@ftidelta.com)

### Anthony Dornan

Senior Managing Director  
[anthony.dornan@ftidelta.com](mailto:anthony.dornan@ftidelta.com)

### Victor Font

Senior Managing Director  
[victor.font@ftidelta.com](mailto:victor.font@ftidelta.com)

### Javier Muñoz

Senior Managing Director  
[javier.munoa@ftidelta.com](mailto:javier.munoa@ftidelta.com)

### Carlos Vidal

Managing Director  
[carlos.vidal@ftidelta.com](mailto:carlos.vidal@ftidelta.com)

### Garazi Goia

Senior Managing Director  
[garazi.goia@ftidelta.com](mailto:garazi.goia@ftidelta.com)



The following marketing boilerplate should be added to the final slide: “FTI Consulting is an independent global business advisory firm dedicated to helping organizations manage change, mitigate risk and resolve disputes: financial, legal, operational, political & regulatory, reputational and transactional. FTI Consulting professionals, located in all major business centres throughout the world, work closely with clients to anticipate, illuminate and overcome complex business challenges and opportunities. For more information, visit [www.fticonsulting.com](http://www.fticonsulting.com) and connect with us on Twitter (@FTIConsulting), Facebook and LinkedIn