

Volume 3: MP Perspectives

THE CREATIVE IMPERATIVE

Redefining Growth and Influence in
the Post-Oil Arab World

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Abstract

This thought leadership document examines the pivotal role of Creative and Cultural Industries (CCIs) in driving economic diversification, soft power, and societal transformation across the Arab world, with a focus on the GCC, Jordan, and Iraq. Drawing on expert insights from Hysham Abdelnour, Senior Principal at Management Partners, the document explores how CCIs are emerging as strategic assets beyond traditional resource-based economies—contributing to GDP growth, employment, urban regeneration, and global cultural influence. It analyzes structural challenges in building integrated value chains, the necessity of robust education-to-industry linkages, and the importance of tailored governance and intellectual property frameworks. The document further highlights the soft power dimension of CCIs, illustrating how culture shapes national narratives and fosters cross-cultural dialogue in a complex geopolitical landscape. Finally, it presents actionable policy and investment recommendations aimed at accelerating CCI development, including strategic prioritization of high-impact sectors, inclusive governance models, talent development programs, and measurable success metrics. This comprehensive exploration offers a forward-looking roadmap for Arab countries to harness creativity as a foundation for sustainable growth, cultural diplomacy, and global competitiveness.

About MP Perspectives

The MP Perspective Series curates insights from conversations with leading thinkers across Management Partners and MP-Connect's expert network. Rooted in real-world experience and strategic dialogue, the series explores the most pressing themes in economic development, corporate and public strategy, and business and technology transformation. From reimagining institutional roles in rapidly shifting economies to unlocking value through digital innovation and AI, each edition connects the dots between macro trends and actionable insights. Designed for decision-makers and forward-thinkers, the MP Perspective Series provokes new ideas, challenge assumptions, and illuminate pathways toward more resilient and future ready organizations.

About the Expert



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Hysham's expertise covers multiple industries including the Public Sector, CCI (Cultural & Creative Industries, Infrastructure & Real Estate, Free Zones & Economic cities and has led projects in the Kingdom of Saudi Arabia, the United Arab Emirates, Jordan, Lebanon, Iraq and others.

He has advised governments across the region on Creative & Cultural sectors strategies, policy design, and institutional development to support CCI growth. Before joining Management Partners, Hysham held senior roles at Kearney and McKinsey & Company, where he supported high-impact government and private sector projects. He holds an MBA from the Darden School of Business at the University of Virginia and an Architectural Engineering degree from Jordan. Hysham is natively fluent in English and Arabic.

Executive Summary

The Gulf region—and the broader Arab World—are at pivotal crossroads. Having laid the foundations of economic diversification through real estate, tourism, and infrastructure, these economies now face a pressing imperative: **to redefine growth by placing creativity and culture at the heart of their future.** The transition from oil-based wealth to knowledge and innovation-driven prosperity demands more than traditional investments; it requires a bold embrace of Creative and Cultural Industries (CCIs) as strategic drivers that unlock new economic, social, and geopolitical opportunities.

Creative and Cultural Industries (CCIs) are far from peripheral—they are significant economic engines. They contribute over 3.1% of global GDP, account for 6.2% of total employment, and generate annual revenues exceeding US \$2.3 trillion, supporting nearly 30 million jobs worldwide. More importantly, they act as catalysts for **urban regeneration, talent attraction, and quality of life improvements**, making cities vibrant, inclusive, and globally competitive. This transformation resonates beyond numbers: **CCIs** shape how nations express their identities, **project influence**, and **engage with the world.**

Global experience offers compelling proof: the worldwide creative economy produces a remarkable **multiplier effect—where every dollar spent creates \$2.5 of wealth in indirect economic activity.** The Arab region stands to capture this promise by adapting these lessons to local realities, and effectively leveraging its rich cultural heritage and youthful demographics.

Yet, unlocking the full potential of CCIs requires more than aspiration. It demands building **robust value chains**—from nurturing talent and education to developing tailored governance frameworks, protecting intellectual

property, and establishing vibrant ecosystems. Current gaps—such as the reliance on imported inputs and fragmented support structures—must be addressed through coordinated, sector-specific interventions that recognize the diverse complexity of the creative sub-sectors.

Talent development is foundational. Creative industries are fundamentally **people-intensive, thriving on a continuous influx of skilled, inspired individuals.** This calls for educational reform that fosters creativity from early stages, strong linkages between academia and industry, and programs to attract and retain both local and international talent. Likewise, governance must evolve to establish **inclusive councils and regulatory frameworks** that reflect the unique needs of sectors ranging from fashion to digital art, ensuring stability, clarity, and growth.

In a region often characterized by competition, there is a growing recognition that **regional collaboration in infrastructure, innovation, and policy harmonization** can accelerate progress and scale. Shared ecosystems, interoperable regulations, and joint R&D efforts can turn competition into complementary strengths, positioning cities and clusters as **regional creative capitals** through leadership focus, investment, and broad stakeholder engagement.

CCIs also serve as powerful tools of **soft power and cultural diplomacy**, helping countries craft compelling narratives that numb and transcend geopolitical challenges. By exporting music, fashion, food, film, and digital creativity, nations project positive images that attract global admiration and foster cross-cultural understanding. This is particularly vital in reshaping existing perceptions and building bridges of empathy and cooperation in an interconnected world.

The potential for **creative exports remains vast yet underutilized**, with sub-sectors like culinary arts, digital content, NFTs, and fashion poised for growth but constrained by strategic, operational, financial, and ecosystem barriers. Balancing authenticity and innovation is essential—there is no fixed formula, but a commitment to experimentation, expert collaboration, and adaptation will pave the way to developing distinctive cultural identities that resonate globally.

Realizing this vision requires **strategic, integrated policy action**. Fragmented efforts must give way to coherent national strategies that synchronize governance, financing, talent development, infrastructure, and market stimulation. Governments must measure success with meaningful KPIs such as GDP contribution, job creation, income growth, and economic multipliers, ensuring accountability and continuous refinement.

To accelerate Creative and Cultural Industry (CCI) development in the Arab world, three practical and catalytic priorities stand out—**especially for countries in the early stages of their journey**. These actionable entry points, rooted in global experience, can build early momentum, foster credibility, and lay the groundwork for systemic growth:

- **Curate flagship cultural programs**—such as design hackathons, national awards, or creative showcases—that offer visibility, spark public engagement, and signal national commitment to the global creative community. These initiatives should be thoughtfully executed, with rigorous curation, meaningful rewards, and alignment with long-term ecosystem goals.
- **Create inclusive governance councils** that bring together voices from government, private sector, academia, creative practitioners, and youth. These

bodies can serve as strategic anchors—guiding national vision, vetting funding priorities, and fostering trust across diverse stakeholders.

- **Strengthen education-to-industry pathways** through targeted programs like design degrees, vocational bootcamps, and creative residencies. When paired with government support and global partnerships, these efforts can rapidly build skills, stimulate collaboration, and embed creativity within national development agendas.

The creative century is already here, and it is shaping the future of the Arab world. For governments, businesses, and entrepreneurs, embracing the full potential of Creative and Cultural Industries (CCIs) is not just about diversifying economies, it's about taking charge of cultural narratives, improving quality of life, and positioning the region as a global leader. Realizing this vision requires joint action across key stakeholders:

- **Governments** must lead with strong policies, funding, and infrastructure to embed CCIs in national development.
- **Education institutions** should equip talent through creative curricula, industry linkages, and global exposure.
- **Private sector and enterprises** need to invest in, scale, and commercialize creative output across sectors.
- **Cultural platforms and intermediaries** play a key role in public engagement and showcasing creative work.
- **Development actors** can accelerate impact through funding, expertise, and global partnerships.

By fostering coordinated action across public, private, and creative spheres, the region can decisively steer and grow its long-term cultural and economic legacy.

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Chapter 1: Rethinking Growth – The Creative Turn

1.1 From Oil to Ideas: A Necessary Shift

The Gulf region's transformation over the past two decades has been fuelled by a bold diversification agenda, shifting from an oil-dependent economy to one driven by emerging sectors. Initially focused on real estate, retail, tourism, and infrastructure, this first wave of investment laid the foundation for modern economies by catalyzing urban growth and creating new consumer landscapes. However, the potential of these sectors is reaching its limits, prompting a new phase of evolution, one where the focus is on intangible assets like creativity, culture and innovation. A new chapter in the region's growth story is unfolding where economic transformation is rooted not tangible resources but in intangible capital: creativity, culture, and innovation, as outlined in Exhibit 1.

Creative and Cultural Industries (CCIs) offer an avenue for meaningful diversification—one that aligns with the aspirations of dynamic, youthful societies, and leverages the rich cultural heritage and modern ambitions of Arab nations.



As countries in the Gulf Cooperation Council (GCC), as well as Iraq and Jordan, pursue post-oil strategies, CCIs are emerging as a central pillar of the next economic transformation.

"Today... the region is really progressing towards this next phase of transformation... focusing on CCIs among others. This will support the next wave of such an economic transformation at a country level."

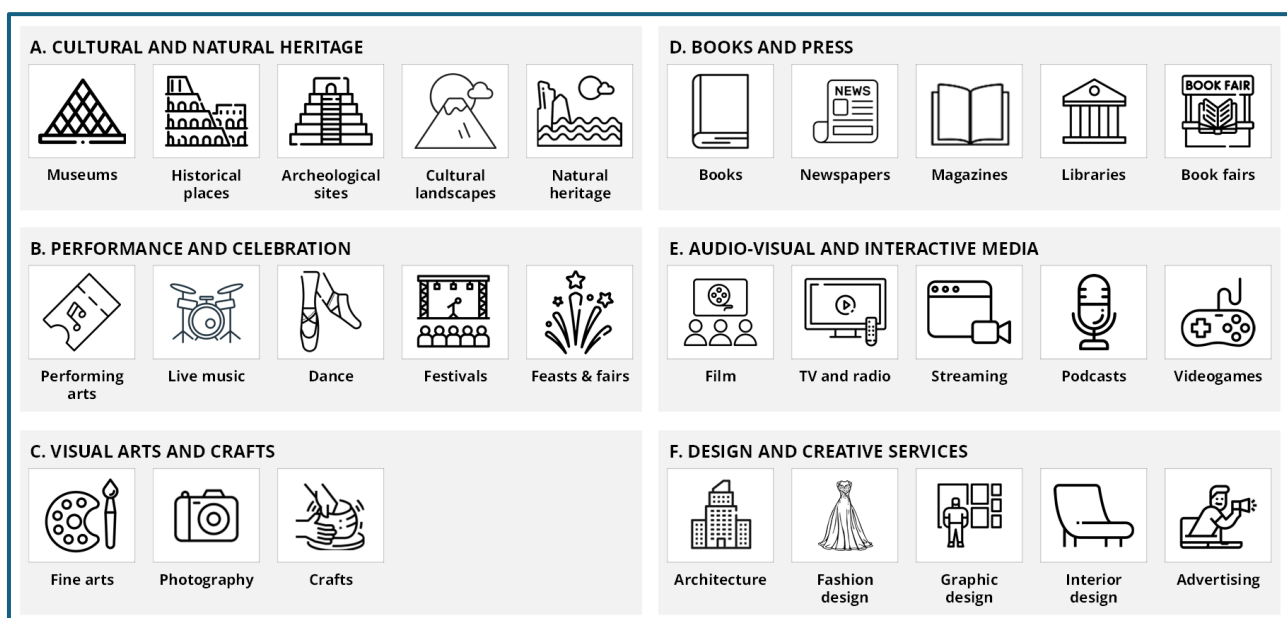


Exhibit 1. CCI classification- sub-sectors¹

This shift is not merely sectoral—it represents a deeper rethinking of growth itself. Unlike traditional sectors that rely on physical infrastructure and natural resources, CCIs thrive on human creativity, cultural expression, and digital technologies. They represent a form of capital that is regenerative, inclusive, and future-oriented—an engine not just for economic returns, but for identity, influence, and innovation.

1.2 Creative Economies as Strategic Assets

The value of CCIs is multidimensional. At the core, they provide direct economic benefits—contributing to GDP, creating jobs, and enabling the formation of vibrant small and medium enterprises (SMEs). But the real power of CCIs lies in their spillover effects. They regenerate urban districts, stimulate tourism, enhance quality of life, and attract global talent. In short, they make cities—and countries—liveable, desirable, and competitive.

“This new direction aims to position the GCC as a hub for creative industries... spurring job creation, SME formation, urban regeneration and a richer quality of life.”

The cultural and creative industries are among the fastest growing sectors in the world today. As per UNESCO 2023 report⁸, CCIs contribute

over 3.1% of global GDP, account for 6.2% of total employment, and generate annual revenues exceeding US \$2.3 trillion, supporting nearly 30 million jobs worldwide; employing more people aged 15 to 29 than any other sector.

The transformation of economies through CCIs has already begun. Saudi Arabia, for example, has committed to growing its creative economy as part of Vision 2030, with projections indicating that the sector will contribute 3% to GDP, generate \$20 billion in revenue, and create over 100,000 jobs by 2030. UAE aims for 5% GDP contribution & doubling its creative workforce by 2031, while Qatar is leveraging major cultural institutions to foster global engagement.

More broadly, the very nature of CCIs aligns with the economic challenges and aspirations of the region. These industries are high in impact but low in carbon, leveraging the digital and cultural assets of a nation rather than depleting natural ones. They are particularly effective in empowering women and youth—two demographic groups central to national transformation plans. And they position countries to export not only goods but also narratives, aesthetics, and values.

“By cultivating such creative industries, the new CCIs are laying the foundation for sustainable long-term growth that resonates beyond traditional economic measures.”














Country	Year	CCI Contribution to GDP (USD)	CCI Contribution to GDP (%)
 China	2024	\$1,970 billion	4.5%
 United States	2023	\$1,200 billion	4.2%
 United Kingdom	2022	\$169 billion	5.8%
 Italy	2022	\$108 billion	6.0%
 South Korea	2021	\$101 billion	3.5%
 Japan	2019	\$97 billion	1.9%
 Australia	2022	\$63.7 billion	2.5%
 Philippines	2024	\$34.8 billion	7.3%
 UAE	2022	\$13.7 billion	2.7%
 South Africa	2020	\$9.0 billion	3.0%
 Nigeria	2022	\$ 5.6 billion	1.2%
 Qatar	2021	\$5.5 billion	3.0%
 Saudi Arabia	2024	\$4.3 billion	0.6%

Exhibit 2. Comparative overview of the CCI market size and GDP contributions across selected countries ²

As per IFC⁹, Creative Industries contribute up to 2–7% of GDP in advanced economies and are among the fastest-growing sectors globally. They are projected to account for up to 10% of global GDP by 2030, underscoring their rising strategic and economic significance. Exhibit 2 highlights the gap: while mature markets like the US, UK, and China see creative industries contributing 4–6% of GDP, GCC countries remain well below that mark. This contrast signals a clear opportunity—CCIs can be a powerful lever for economic diversification and global competitiveness across the region.

1.3 Key Success Factors and Lessons from Global Leaders

The shift towards Creative and Cultural Industries (CCIs) is not merely aspirational; it is supported by strong empirical evidence. Across the globe, countries that have invested consistently in creative economies have reaped impressive results. These industries outperform many traditional sectors and are becoming central to national economic strategies.

“The sector has an important economic multiplier effect, for every dollar spent, there is an estimated wealth creation of \$2.5”

For example, the UK’s creative sector has emerged as a major economic driver, according to CEBR Analysis, the sector indirectly supports an additional £2.11 in GVA for every £1 of direct creative activity, and when including induced effects, the total multiplier rises to approximately £2.50. These numbers matter. They show that CCIs are not only vibrant cultural engines but also powerful economic drivers. They justify public investment, demand policy attention, and signal to the private sector that this is a space worth entering. Another example is Peru, as illustrated in Exhibit 3, which shows Peru’s focus on developing regional creative sectors like crafts, gastronomy, and community

Peru: Creative Industries Program



Overview: Peru implemented programs to develop creative industries in regions like Cusco, focusing on crafts, gastronomy, and community tourism

Key initiatives:

- **Community Engagement:** Involving local communities in developing and promoting their cultural products.
- **Capacity Building:** Providing training and resources to artisans and entrepreneurs.
- **Market Access:** Facilitating access to broader markets for local creative products.

Exhibit 3. Peru - Lessons from global leaders³

tourism through community engagement, capacity building, and market access.

Consistent government investment and support are crucial for the sustained growth of CCIs. Key elements and initiatives include developing infrastructure and educational programs aimed at cultivating and retaining creative talent. Collaborative efforts between public and private sectors amplify the impact of cultural initiatives, while tailored support and resources nurture local and grassroots creative enterprises. Empowering local communities plays a vital role in ensuring the sustainable development of CCIs, enabling these sectors to thrive organically from the ground up.

Such efforts result in improved recognition of national culture, elevated country branding, and enhanced global influence.

Arab countries can draw on these global lessons—adapting successful strategies to local contexts, forging new pathways tailored to the region’s unique heritage, and leapfrogging development stages through digital technologies and regional cooperation.

1.4 Cultural Mindset Shifts: Seeing Creativity as Infrastructure

Despite the growing momentum, perhaps the most significant barrier to CCI development is not infrastructure, policy, or even funding—it is mindset. In many countries, creative work is still viewed as supplementary or leisure-oriented. Shifting this perception is critical. Creativity must be seen not as a luxury but as a foundational component of national resilience and global competitiveness.

“The work of CCI practitioners should no longer be considered as ‘nice to have’... but as key drivers of economic and social development.”

This cultural shift must occur across all levels of society—from policy circles to school curriculums, from investor pitch decks to public media. Governments must recognize CCI practitioners as economic actors. Education systems must treat creative skills with the same seriousness as STEM. Citizens must embrace culture as a living asset that defines identity, fosters pride, and creates opportunity.

Realizing the full potential of CCIs will require a reconfiguration of value systems—where creative labor is dignified, cultural institutions are prioritized, and innovation is understood to emerge not just from labs and factories, but from studios, stages, and screens.

Chapter 2: Building the Value Chains – Constructing the Infrastructure Behind Sustainable Creative Economies

2.1 What Are CCIs and How Are They Segmented?

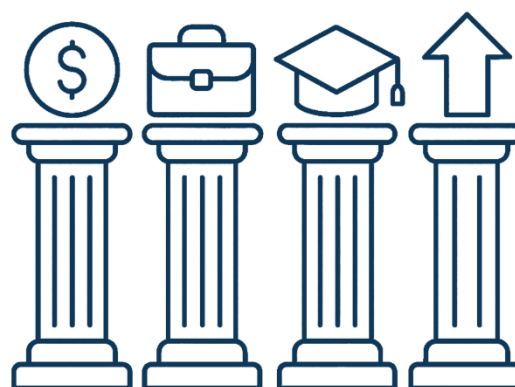
Understanding the structure of Creative and Cultural Industries (CCIs) is foundational to building sustainable value chains because these industries are highly heterogeneous, with each sub-sector (whether film, fashion, design, or crafts), requiring distinct support mechanisms across production, distribution, and monetization. Without a clear segmentation and understanding of how these sectors function, policies risk being too generic to be effective. A granular understanding enables tailored interventions, strategic prioritization, and ecosystem development that aligns with each sector's specific value logic and growth barriers.

UNESCO classifies the cultural & creative industries into six main domains and related sub-sectors are designated according to the terminology and classification within UNESCO's Framework for Cultural Statistics (2009).

- Cultural & Natural Heritage
- Performance & Celebration
- Visual Arts & Crafts
- Books & Press
- Audiovisual & Interactive Media
- Design & Creative Services

The various subsectors within CCIs face unique challenges and opportunities across their value chains.

"The CCI sector encompasses a diverse range of disciplines... which are very different in nature & require bespoke interventions to address each sector's particular environment."



2.2 Identifying Structural Gaps

Despite vibrant creative scenes in parts of the Arab world, such as the fashion studios of Beirut, the independent film and media hubs emerging in Amman, and Dubai's thriving design festivals and art fairs, the value chains that underpin these sectors remain fragmented and fragile. A critical bottleneck lies in the reliance on imported inputs and the absence of robust upstream industries. For instance, a flourishing fashion design industry may face supply chain vulnerabilities because essential raw materials like fabrics, zippers, and accessories are sourced internationally rather than locally produced.

This fragmentation constrains the sustainability of CCIs and limits their ability to scale and compete globally. Without well-developed, standalone sub-industries feeding into the broader creative ecosystem, local value creation remains capped. Additionally, the lack of distribution platforms, weak institutional support, and underdeveloped financial mechanisms exacerbate these gaps.

"To have successful and sustainable value chains... this typically will include well-developed standalone sub-industries that fully integrate with other activities within the value chain."

Bridging these gaps demands a holistic approach, recognizing the heterogeneity within CCIs and crafting segment-specific interventions that strengthen each link of the value chain from production through to market reach or access & monetization.

2.3 Framework for CCI Sector Growth & Sustainability

Building strong Creative and Cultural Industries (CCIs) requires more than isolated talent or flagship events. It demands a systems-level approach—one that supports creative talent through a coherent architecture of regulation, financing, business services, education, and market demand.

This thinking is encapsulated in a strategic framework used by the Dubai Culture and Arts Authority to design its Design Sector Strategy. Often visualized as a “pillar house,” the framework articulates the foundational elements necessary to build a robust creative economy. These are not abstract ideas—they are tangible levers that policymakers can act upon.

As illustrated in Exhibit 4: Strategic Pillar Framework for CCI Development, the pillars are:

- **Regulation & Governance:** Effective legal and institutional structures ensure clarity of roles, streamline coordination, and establish accountability across the creative ecosystem.
- **Financial Support:** Access to funding—through grants, subsidies, or private capital—enables creatives to take risks, scale ideas, and build sustainable ventures.
- **Business Support:** Incubators, advisory services, and go-to-market platforms are critical for helping creative talent commercialize their output and navigate entrepreneurship.
- **Education & Talent:** Talent pipelines must be nurtured from early education to advanced training, with international exposure and clear bridges to industry.
- **Demand Stimulation:** Consumption of Cultural and Creative products must be actively encouraged through public campaigns, public procurement, events, and policies that incentivize engagement with local creative outputs.

Beyond the five foundational pillars, sustainable creative growth hinges on broader systemic enablers that connect, elevate, and accelerate creative activity. These enablers operate across the entire value chain and act as glue between policy, practice, and innovation. Listed below are the critical enablers:

- **Physical Infrastructure** provides foundational spaces and facilities for creative production and consumption.
- **Legal Infrastructure** ensures IP protection and eases cross-border operations.
- **Ecosystem Networks** foster collaboration across creative hubs.
- **Public Engagement** builds cultural relevance and demand.
- **Digital Tools** expand access to markets and audiences.
- **Innovation & R&D** drive new formats and creative breakthroughs.
- **Value Chain Integration** localizes production and boosts economic retention.

Next, it is important to deep dive into each of these pillars individually as well as the broader ecosystem enablers that are essential for long-term CCI development in the GCC.

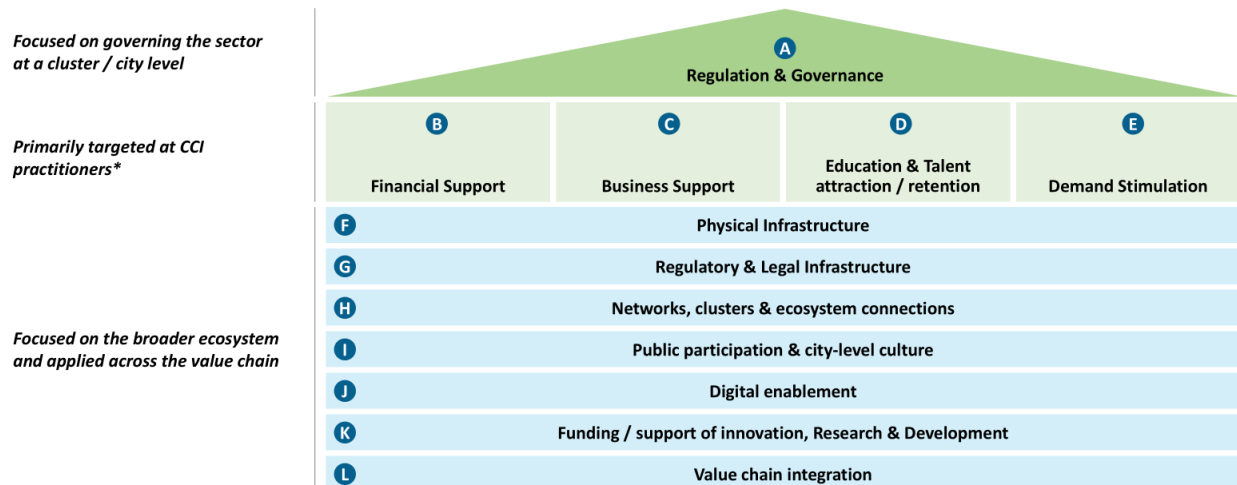


Exhibit 4. Developing the Cultural and Creative Industries sector in the GCC needs to follow a strategic framework for growth, focusing on a well-structured set of initiatives integrated with various elements.⁴

2.4 Regulation & Governance: The Institutional Bedrock

In many parts of the Arab world, the **creative sector is fragmented across ministries and regulatory bodies**, making cohesive planning difficult. A well-governed creative economy starts with clear mandates—who owns what, who funds what, and who drives what.

Effective regulation sets standards, protects intellectual property, and enables cross-sectoral alignment. Crucially, it also legitimizes creativity as a pillar of national development. Models such as France’s fashion federation demonstrate the power of dedicated, well-resourced councils that can steer entire subsectors through strategy, coordination, and promotion.

Establishing these institutions within the GCC—whether at the city, cluster, or national level—will be key to moving from intent to execution.

“At the core you need a robust regulatory framework... Effective governance establishes clear guidelines and encourages the growth of creative clusters.”

“Robust IP protection needs to be tailored for the various subsectors involved... NFTs are very different from culinary arts or fashion design.”

The complexity and diversity of creative subsectors **require IP regimes finely attuned to their specific needs**. For example, fashion design entails different protection mechanisms compared to emerging digital art forms like NFTs or culinary arts.

Drawing inspiration from global exemplars, such as France’s Fédération de la Haute Couture et de la Mode, provides valuable lessons on how governance bodies can elevate a sector to international prominence.

2.5 Financial Support: Closing the Capital Gap

Creative ideas often falter **not for lack of merit, but because they cannot secure capital**. This is particularly true in the Arab region, where financing for creative entrepreneurs remains inconsistent, fragmented, or inaccessible.

To overcome this, countries must develop purpose-built financial instruments tailored to the unique nature of creative work—where assets are intangible, returns nonlinear, and risk appetites unique.

This could include:

- Creative-sector focused funds or accelerators
- Tax incentives for investors in cultural enterprises
- Direct public grants tied to local content creation
- Export development subsidies for internationally viable projects

For example, in Dubai, over half of surveyed creatives identified grant access as a critical enabler. Yet the opportunity extends far beyond subsidies. Financial systems must evolve to treat cultural production as a strategic investment, not a cost centre.

2.6 Business Support: Turning Creativity into Commerce

Creative talent needs more than capital—they **need tools to run sustainable businesses**. From early-stage designers to mid-career filmmakers, many struggle with legal setups, pricing strategies, marketing, and international growth and expansion.

This is where business support infrastructure plays a pivotal role. The region must invest in sector-specific incubators, mentoring programs, and shared services that help creatives navigate the complexities of commercialization. Digital platforms can further enhance reach, offering e-commerce and portfolio tools that connect local talent with global markets.

For example, Dubai's proposed "design portal" is a case in point—a centralized ecosystem hub linking creatives, mentors, producers, and buyers in one digital space. The overall ambition should be to make creativity not just viable—but profitable.

2.7 Education & Talent: The Engine of the Creative Economy

Creative industries are fundamentally human-centric. Unlike capital-intensive sectors, CCIs thrive on a continuous influx of fresh talent, new ideas, and evolving cultural narratives.

Therefore, education and talent development form the backbone of any successful CCI ecosystem. Developing educational curricula that foster creativity from a young age is imperative. But this alone is insufficient. Bridging the gap between education and industry is equally critical. Structured internships, joint academic-industry projects, scholarships, and cultural exchange programs are vital mechanisms to nurture and retain creative talent locally, while attracting international practitioners.

"Cultural and creative industries thrive on a continuous influx of talent... Developing the right educational programs that foster creative skills from a young age is imperative."

Efforts to institutionalize such pipelines will ensure the region remains competitive on the global creative stage, encouraging innovation while preserving cultural authenticity.

2.8 Demand Stimulation: Creating Markets for Creativity

Even the best creative products need markets to thrive. In many parts of the GCC, the challenge is not the supply of talent—but insufficient local demand and market awareness.

Governments can play a core catalytic role in stimulating demand. New public procurement policies that prioritize local creative content—whether in architecture, fashion, or public art—send powerful market signals. National events like design weeks, film festivals, or awards can drive visibility and build industry credibility.

Demand generation also depends on shaping public taste—through media, education, and civic engagement. Ultimately, demand stimulation isn't just an economic tool; it's a cultural investment.

2.9 Ecosystem Enablers: Scaling Creativity Across the Value Chain

Creative industries thrive when supported by a strong ecosystem that connects regulation, infrastructure, talent, and innovation. Clear legal frameworks—covering IP, licensing, and mobility—enable smoother operations and attract investment. Regional clusters and cross-border networks foster collaboration and knowledge exchange, while public participation—through events and cultural engagement—grounds creativity in everyday life.

Digital platforms are essential for distribution and visibility, especially in a region aiming for global creative relevance. Equally, investment in innovation and R&D—from immersive media labs to experimentation grants—helps creatives stay ahead of global trends.

Physical infrastructure must not be overlooked. Access to affordable studios, exhibition venues, and retail spaces provides the foundational environment where creativity is produced, shared, and consumed. When combined, these enablers ensure CCIs are not just culturally vibrant but economically sustainable and scalable.

2.10 From Regional Competition to Collaboration & Developing Creative Capitals

As the region invests in Creative and Cultural Industries, a shift from national competition to

regional collaboration is vital. Fragmented markets and duplicated efforts limit scale, while creative production—especially in film, fashion, or gaming—often demands high fixed costs and broad distribution. Collaborative platforms such as shared IP registries, regional film commissions, or interoperable funding schemes can lower barriers, attract international investment, and position the GCC or the Arab World as a unified creative bloc.

"It really takes a decision and focus from the leadership to define and implement a multi-pronged strategy... Governance, education, investments, public participation – all need to align."

At the same time, cities across the region must focus on becoming creative capitals—not by chance, but through strategy. While many have the ingredients—heritage, infrastructure & talent—they often lack alignment. Becoming a true creative capital requires leadership and an integrated approach: regulation, education, funding, creative and cultural production as well as public participation working in unison.

These elements must be synchronized, ensuring that all stakeholders from government to private sector, from academia to entrepreneurship to community, move collectively towards a shared vision.

Developing such creative capitals is not only an economic imperative but a cultural one, creating hubs that attract talent, foster innovation, and elevate national and regional identity on the global stage.

"Today, we see more competition between countries versus collaboration. However, that should not be the end game... Shared infrastructure, joint innovation, and ecosystem connections are all feasible."

Chapter 3: Culture as Power – The Soft Power Dimension

3.1 How Does Influence Work?

In today's interconnected global landscape, a nation's ability to exert influence increasingly depends on soft power, shaping how others think and feel through culture, values, and ideas, rather than through force or economic pressure. Creative and Cultural Industries (CCIs) play a central role in this dynamic. They allow countries to tell powerful stories, express their identity, and build meaningful international relationships by fostering cultural connection, admiration, and understanding.

The region's leading countries have recognized that cultural exports are not only commercial commodities but also powerful tools for shaping global perceptions and enhancing national identity. By projecting a vibrant, creative image, these countries can counterbalance geopolitical complexities and position themselves as open, innovative, and culturally rich societies.

"Many countries around the world have recognized the power of culture as a soft power tool – where it can complement political, economic & military strength... K-pop from Korea... Manga and Anime from Japan... In our region, media, design and fashion are key. Saudi Arabia, UAE, Qatar have all given priority to CCIs under national strategies."

This paradigm shift expands the scope of international relations and culture becomes a bridge rather than a barrier, facilitating cross-border dialogue and collaboration that enrich global understanding.

Exhibit 5, 6, 7 respectively illustrate how South Korea's "Hallyu" wave and Japan's "Cool Japan" initiative and UK leverages creative industries to enhance global relations and tourism.



South Korea

Overview: Harnessing the Korean Wave (Hallyu)



Examples:

- Food: Kimchi, Korean BBQ (Samgyeopsal)
- TV shows: Squid Game, Culinary Class Wars
- Comics: Manhwa

Soft Power Impact & Key Benefits:

- Global Cultural Influence: The Korean Wave, encompassing K-pop, K-dramas, and films, has significantly elevated South Korea's cultural presence worldwide.
- Enhanced National Image: South Korea is now perceived as a modern, dynamic and culturally rich country enhancing its global influence.
- Economic Contribution: BTS (a K-pop group) alone contributes ~\$4.65 billion annually to the economy, accounting for ~0.3% of GDP.
- Increased Exports: The popularity of Korean culture has led to a surge in exports of Korean products, including cosmetics, fashion & technology among others.
- Tourism Boost: BTS's popularity has attracted ~800,000 foreign tourists to S. Korea annually.

Exhibit 5. South Korea - Lessons on soft power⁵

3.2 CCIs as Instruments of Influence

Countries in the Gulf region have embraced CCIs as cornerstones of their soft power strategies. Saudi Arabia's Vision 2030 includes ambitious investment in arts, culture, entertainment, and heritage, projecting the cultural sector to contribute over \$20 billion to GDP and generate more than 100,000 jobs by 2030.

Similarly, the United Arab Emirates has positioned its cultural and creative industries at the forefront of national development. Dubai aims to double the sector's GDP contribution and expand its creative workforce from 70,000 to 140,000 by 2025. Qatar leverages the Qatar Museums Authority and world-class cultural and sporting events as catalysts for creative growth and global engagement.

By championing these industries, these countries are not only building domestic economies but also exporting values, aesthetics, and narratives that enhance their global standing.

"Saudi Arabia, the UAE, and Qatar to name a few have given priority to CCIs under national strategies...."

These efforts illustrate how CCIs function as instruments of influence—showcasing modernity while honoring tradition, attracting international audiences, and establishing cultural footprints that endure.

3.3 Unlocking Creative Export Potential

While significant strides have been made, the region's creative export potential remains vastly underexploited. Sub-sectors such as culinary arts, digital art, fashion design, and emerging domains like NFTs (Non-Fungible Tokens) hold

Japan



Overview: "Cool Japan" Initiative

Examples:

- Anime: Studio Ghibli, Toei Animation
- Gaming: Nintendo, Mario, Zelda
- Fashion: Uniqlo, Issey Miyake
- Food: Sake, Sushi, Ramen, Wagyu Beef

Soft Power Impact & Key Benefits:

- Global Influence: Japan's cultural products have fostered a positive international image, aiding in diplomatic and economic endeavors
- Cultural Branding: The "Cool Japan" strategy promotes Japanese pop culture, including anime, manga, and fashion, enhancing Japan's global cultural appeal.
- Economic Revitalization: By capitalizing on cultural exports such as anime, gaming, fashion, and food, Japan has revitalized certain sectors of its economy.
- Economic Contribution: Japan's content industry was valued at over \$150B in 2022
- Tourism Growth: Cool Japan contributed to a significant increase in tourism, with visitors drawn to Japan's unique cultural offerings.

Exhibit 6. Japan - Lessons on soft power ⁶

enormous promise but face barriers that hinder their international reach. NFTs, often misunderstood as a fleeting trend, represent a revolutionary digital asset class that allows creators to tokenize their work and retain ownership, offering new opportunities for artists and innovators. However, many still view NFTs as a bubble that has burst, which can limit investment and broader acceptance.

Challenges span strategic, operational, financial, human capital, and ecosystem dimensions. Lack of comprehensive strategies, fragmented governance, funding gaps, limited infrastructure, and insufficient skill development restrict the scalability and export readiness of many creative industries.

"The culinary arts scene has a huge growth potential... Similar opportunities are in fashion design and emerging sectors like digital art and NFTs... Barriers include: strategic, human, operational, financial, and ecosystem-related issues."

Overcoming these barriers requires a coordinated effort, including aligning national and regional strategies to support creative industries. Boosting funding through public-private partnerships will address financial gaps, while improving education and skill development will nurture talent. Additionally, developing export platforms like digital marketplaces and international collaborations will help local creatives gain global visibility and access new market.

3.4 Balancing Heritage with Innovation

One of the critical challenges in leveraging CCIs for soft power is striking a balance between authenticity and innovation. Cultural expressions must honour heritage and traditional values while simultaneously embracing innovation and contemporary relevance.

There is no one-size-fits-all formula. The process is often iterative, involving trial and error. Importantly, early involvement of domain experts and international best practices can accelerate learning and reduce costly missteps.

"There's no strict rule... it's a process of trial and error. But getting the right experts involved early can save a lot of wasted time, money and effort."

Arab nations have the opportunity to leapfrog traditional development pathways by adapting global lessons to their local contexts, ensuring that their cultural narratives are both rooted and dynamic, authentic yet forward-looking.

United Kingdom



Overview: Creative Industries as Soft Power Assets

Examples:

- Film & Animation: James Bond, Go Jetters
- Fashion: Burberry, Paul Smith
- Food: Full English Breakfast, Cheddar Cheese

Soft Power Impact & Key Benefits:

- International Relations: Cultural diplomacy has strengthened the UK's global partnerships and influence.
- Global Rankings: The UK consistently ranks among the top 3 nations in global soft power indices, attributed to its creative sectors.
- Cultural Exports: British music, film, and literature have a substantial global footprint, influencing cultures worldwide.
- Economic Contribution: UK creative industries added 5.7% of UK GVA in 2022, growing 6.8% from 2021, with £46 billion in exports annually.
- Tourism: Cultural attractions drove 38M inbound visits in 2023, with £31.1B in visitor spending.

Exhibit 7. United Kingdom - Lessons on soft power ⁷

3.5 Building Cross-Cultural Bridges

Creative outputs serve as potent vehicles for cross-cultural exchange, dialogue, and diplomacy. Whether through food, dance, music, film, theater, folklore, or digital art, CCIs humanize narratives and foster empathy across diverse audiences.

"CCIs allow countries to demonstrate a softer counter image... and act as vehicles for cross-cultural exchanges — through food, dance, digital art, and more."

This soft power dynamic enables countries to actively reshape postcolonial perceptions that have historically framed the Arab world through orientalist or extractive lenses.

By exporting contemporary cultural narratives be it through film, design, music, and digital content, nations can counter reductive stereotypes, assert cultural agency, and project pluralistic, future-facing identities. In doing so, CCIs become tools not only for global engagement, but for reclaiming narrative

sovereignty and fostering mutual understanding in a complex geopolitical landscape.

Countries that embrace openness to cultural exchange ultimately reap multifaceted benefits: immediate economic growth, job creation, enhanced diplomatic relations, and a more positive global image.

Chapter 4: From Strategy to Action – Policy, Investment, and Acceleration

4.1 The Policy Imperative: From Aspirations to Architecture

Across the Arab region, the momentum around Creative and Cultural Industries (CCIs) is palpable. National visions reference them, investments are increasing, and public interest is rising. But enthusiasm alone will not catalyze transformation. What's needed now is policy architecture—integrated, long-term, and aligned across ministries, sectors, and institutions.

So far, regional governments have launched promising initiatives—cultural festivals, design competitions, museum expansions, and national strategies. But these efforts often remain fragmented, led by siloed institutions, and disconnected from broader industrial policy. A holistic national framework is urgently needed.

“It really requires a holistic mindset... Governance, financial and business support, talent development, and demand stimulation — all must be integrated into a national strategy.”

That means defining clear mandates for ministries of culture, commerce, education, and foreign affairs; allocating budgets aligned to measurable outcomes; and developing dedicated public-private governance structures for CCIs. It also means embedding creative economy objectives into national development plans and digital transformation strategies—not treating them as cultural side projects, but as central economic pillars.

Effective policy must also be granular. It must distinguish between sectors (e.g., film vs. fashion vs. gaming), formats (e.g., digital vs. analog), and



business models (e.g., IP-based vs. service-based). Each of these requires tailored legal, financial, and institutional solutions. Without such precision, generic policy tools risk misalignment or irrelevance.

4.2 Prioritizing High-Return Sectors: The Strategic Bet

Every country must make strategic bets. While all CCIs offer cultural value, not all offer the same return on investment or scalability. Governments need to identify sub-sectors where they possess a comparative advantage—be it talent, heritage, geography, or digital infrastructure—and double down.

Currently, digital content and tech-enabled creative sectors are showing the greatest promise across the region. Gaming, AI-generated art, animation, e-learning platforms, and NFTs are not only growing rapidly but align closely with the digital aspirations of Gulf economies. They are exportable, high-margin, and culturally resonant with a young, tech-savvy population.

"We're seeing a lot of recent activity around digital... digital content, AI-driven innovation, gaming, NFTs, and other emerging art forms."

Prioritization also means aligning investment incentives, incubation infrastructure, and talent development to these high-impact areas. If fashion is prioritized, then textile parks, prototyping labs, and global retail linkages are needed. If gaming is the focus, then coding schools, gaming engines, and international publishers become central.

Importantly, strategic focus does not imply exclusion. Countries must still support smaller or traditional sectors for their cultural significance. But clarity on where economic scale lies will help attract private capital, accelerate exports, and build globally competitive clusters.

4.3 Defining Success: Metrics that Matter

What does success in the creative economy look like? For far too long, culture has been measured through attendance numbers and exhibition counts. But CCIs are not only about engagement—they are also about economic contribution, job creation, and global influence.

"Typical KPIs revolve around GDP contribution, job creation, income levels..."

This multiplier effect must be documented and tracked. Ministries and national statistics offices need to establish dedicated data systems for CCIs—including satellite accounts, sectoral breakdowns, and impact dashboards. These metrics should include:

- **Direct and indirect GDP contribution** from creative sectors.
- **Employment levels** and the formalization of creative labor.

- **Export volumes** of cultural goods and services.
- **Investment flows**, both public and private.
- **Audience reach**, digital penetration, and global media coverage.
- **Cultural participation** and public perception shifts.

Having this data not only informs better policymaking but also gives investors confidence, supports international partnerships, and justifies budget allocations. In short, if you can't measure it, you can't scale it.

4.4 Three Actionable Levers: What to Do Now

For countries early in their CCI journey, three actionable starting points at the subsector level are proposed below. These are not silver bullets, but achievable and catalytic first steps drawn from global experience to help build early momentum.

1. Launch Flagship Competitions and Awards

Well-designed cultural competitions, design hackathons, and awards can jumpstart ecosystems. They provide visibility, attract practitioners, engage the public, and signal national intent to the global market.

"Competitions and awards – to attract attention and stimulate practitioner interest."

But execution matters. These should be curated with rigor, include international juries, offer meaningful rewards, and be embedded in long-term ecosystem-building efforts—not one-off PR exercises.

2. Establish Inclusive Governance Councils

Governance structures must go beyond government. They should bring together public institutions, private companies, academic leaders, artists, and youth voices. These councils can steer national strategy, vet funding decisions, and build trust across stakeholders.

“Governance structures such as committees or councils should include representatives of the public sector, private sector, practitioners, educational institutions... even members of the public.”

International models like France’s FHCM show how such councils can elevate a sector globally.

3. Build Education-Industry Linkages

Creative talent cannot thrive in a vacuum. Educational programs must be aligned with market needs—from fashion design degrees to animation bootcamps to culinary residencies. Government grants, industry mentorships, and international faculty partnerships can rapidly close the skills gap.

“Develop educational programs and design residency initiatives to attract international talent.”

Additionally, short-term residencies that bring global creatives into local ecosystems can act as powerful accelerators—cross-pollinating skills, creating media buzz, and igniting collaboration.

Creative and Cultural Industries are no longer optional—they are fundamental. They influence how countries grow, how societies connect, and how identities are shaped. As the Arab world steps into a post-oil future, embedding creativity into national development is no longer a luxury—it is a necessity.

“Culture is no longer a soft issue. It is soft power — and it’s powerful.”

The path forward is clear: from vision to policy, from fragmented projects to cohesive strategies, from soft influence to hard economic value. Those who act now—who institutionalize creativity, empower their talent, and invest with intention—will not just participate in the creative century. They will lead it.

Conclusion and Recommendations: Why CCIs Are Not Just a Sector—but a strategic imperative

Recommendations

The transformative potential of Creative and Cultural Industries (CCIs) for the Arab world is undeniable. As traditional economic drivers mature and global competition intensifies, the region's future prosperity hinges on its ability to integrate creativity and culture as core components of sustainable growth. This is not merely an economic choice but a strategic imperative—one that reshapes how societies define success, express identity, and engage internationally.

Outlined below are the key stakeholder groups whose collective actions will shape the future of Creative and Cultural Industries. Each holds a unique yet interconnected role in building resilient, impact-driven ecosystems that are fit for the next generation of creative growth and expression.

1. Government Leaders and Policymakers: Architects of National Ecosystems

Governments, including ministries of culture, economy, education, and urban development, are the primary stewards of national creative transformation. Their objective is to build enabling ecosystems that nurture talent, unlock investment, and elevate CCIs to a national priority. They must act as integrators—aligning regulation, funding, infrastructure, and education under one shared strategic vision.

Key Actions:

- Institutionalize CCIs through dedicated governance structures (e.g., national councils or agencies) with authority and budget.

- Embed creativity in national economic development plans, positioning it as a cross-sectoral lever—not a standalone niche.
- Enact robust IP and digital content protection frameworks adapted to emerging formats like NFTs, immersive tech, and AI-generated work.
- Develop fiscal and legal incentives for creative enterprises, such as tax rebates, grants, and simplified licensing.
- Coordinate regional collaboration mechanisms (e.g., joint funds, export platforms, shared R&D initiatives) to unlock scale and reduce duplication

2. Education Institutions and Talent Development Platforms: Builders of the Creative Workforce

Academic institutions, vocational schools, and talent accelerators play a central role in shaping the next generation of creative professionals. Their aim is to build inclusive, future-ready curricula and enable seamless transitions from learning to practice. These institutions must act as bridges between culture and industry—infusing creative thinking into all stages of education.

Key Actions:

- Integrate creative skill development—design, storytelling, innovation—into general education from primary school onwards.
- Establish or expand specialized degrees, certifications, and continuing education programs in digital arts, cultural management, fashion design, and more.
- Foster strong linkages between students and creative industries through

residencies, internships, mentorships, and joint research.

- Create international partnerships for talent exchange, allowing students and professionals to access global standards and networks.
- Recognize alternative talent pipelines (e.g., self-taught creators, digital communities) and formalize pathways for upskilling.

3. Private Sector and Creative Enterprises: Engines of Innovation and Commercialization

Private companies—ranging from SMEs and startups to major media, tech, fashion, and entertainment firms—are the lifeblood of the creative economy. Their role is to invest, scale, and commercialize creative output while driving job creation and market expansion. These businesses must act as innovation hubs, forging new business models and partnerships.

Key Actions:

- Invest in product development, digital content, and creative formats that amplify regional identity for global audiences.
- Establish in-house programs or partnerships with accelerators to support emerging creators and creative entrepreneurs.
- Engage in public-private collaborations to co-develop infrastructure, events, and export platforms.
- Leverage digital tools (e.g., AI, AR/VR, Web3) to build scalable creative experiences and intellectual property assets.
- Contribute to ecosystem development by participating in policy consultations, educational initiatives, and industry-wide collaborations.

4. Cultural Institutions, Platforms, and Intermediaries: Connectors and Curators of Public Life

Museums, galleries, design weeks, festivals, creative hubs, and digital platforms are central to shaping public engagement with creativity. These intermediaries must curate inclusive experiences, elevate local voices, and act as conduits between creators, consumers, and institutions. Their mission is to make creativity accessible and visible across society.

Key Actions:

- Program events and exhibitions that reflect local culture, amplify emerging talent, and promote experimentation.
- Develop platforms—physical and digital—for showcasing and distributing creative work at scale.
- Support demand stimulation by integrating creative experiences into tourism, city branding, and public space design.
- Advocate for cultural equity by decentralizing access and involving underrepresented communities in creative discourse.
- Establish archives, data repositories, and economic research on CCIs to inform policy and track progress.

5. Regional and International Development **Actors:** Partners in Capacity Building and Global Integration

Development agencies, multilaterals, cultural attachés, and international NGOs are critical allies in supporting CCIs through technical expertise, funding, and cross-border collaboration. Their purpose is to catalyze ecosystem capacity, integrate regional efforts into global markets, and facilitate South-South and North-South knowledge transfer.

Key Actions:

- Fund capacity-building programs focused on governance, creative entrepreneurship, and sustainable infrastructure.
- Support data generation, benchmarking, and evaluation frameworks for creative sector development.
- Facilitate regional exchange programs, creative fellowships, and joint productions across borders.
- Promote Arab creative work through global cultural diplomacy channels, expos, and partnerships with international festivals or institutions.
- Co-create frameworks for ethical, inclusive, and future-fit development of the cultural economy.

Conclusion: The Time to Act Is Now

Creative and Cultural Industries (CCIs) are no longer optional—they are essential. They offer nations a dynamic toolset to reshape economic models, elevate global positioning, and deepen social cohesion. For the Arab world, the creative economy represents both a strategic opportunity and an urgent imperative: a means to diversify beyond oil, connect with global audiences, and build future-facing, resilient societies.

This transformation, however, will not be delivered by a single actor or institution. It requires a shared commitment across the ecosystem. Outlined in the sections above are the primary stakeholder groups whose coordinated actions will determine the pace and scale of change. Each plays a distinct but interdependent role—governments as enablers of vision and policy, educators as builders of talent, businesses as engines of innovation, cultural institutions as public connectors, and international partners as accelerators of capacity and global reach.

Together, they must move beyond fragmented efforts and embrace long-term collaboration, backed by policy, investment, and measurable outcomes. The foundation has been laid. The ambition is clear. What remains is the collective will to turn aspiration into momentum—and momentum into legacy.

This is not just about building a creative sector. It is about designing a new chapter for the region—one where culture and creativity are not peripheral, but central to how nations grow, engage, and lead.

About Management Partners

Management Partners is a leading consultancy firm specializing in driving strategic transformation across diverse sectors in the Middle East and beyond. With deep expertise in economic diversification, innovation strategies, and industry transformation, the firm helps governments and private sector enterprises navigate disruption, optimize performance, and achieve sustainable growth.

Success in today's rapidly evolving landscape demands more than just understanding market trends—it requires an integrated approach that aligns people, processes, and technology. Management Partners brings extensive experience in assisting both the public and private enterprises to unlock new opportunities, refine business models, and build lasting competitive advantages.

While the firm's work spans a broad range of industries, a particular focus lies in Creative and Cultural Industries (CCIs). In this area, Management Partners specializes in enabling integrated value chains, strengthening education-to-industry linkages, and designing tailored governance and intellectual property frameworks. These services support the full potential of CCIs, contributing to GDP growth, job creation, urban regeneration, and global competitiveness.

By collaborating with governments, business enterprises, and creative leaders, Management Partners designs actionable strategies that position creativity as a powerful driver of economic diversification, business growth, and cultural diplomacy. Whether the focus is on nation branding, economic development, or talent nurturing, the firm remains committed to empowering clients to lead in an increasingly complex global landscape.

For those interested in exploring how Creative and Cultural Industries can shape their country's or organization's future, the team is available for consultation. Contact cci@m-partners.biz or call +971 4 3589 920 to connect with one of the firm's experts.



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UAE | KSA | IRAQ | BAHRAIN

Endnotes

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