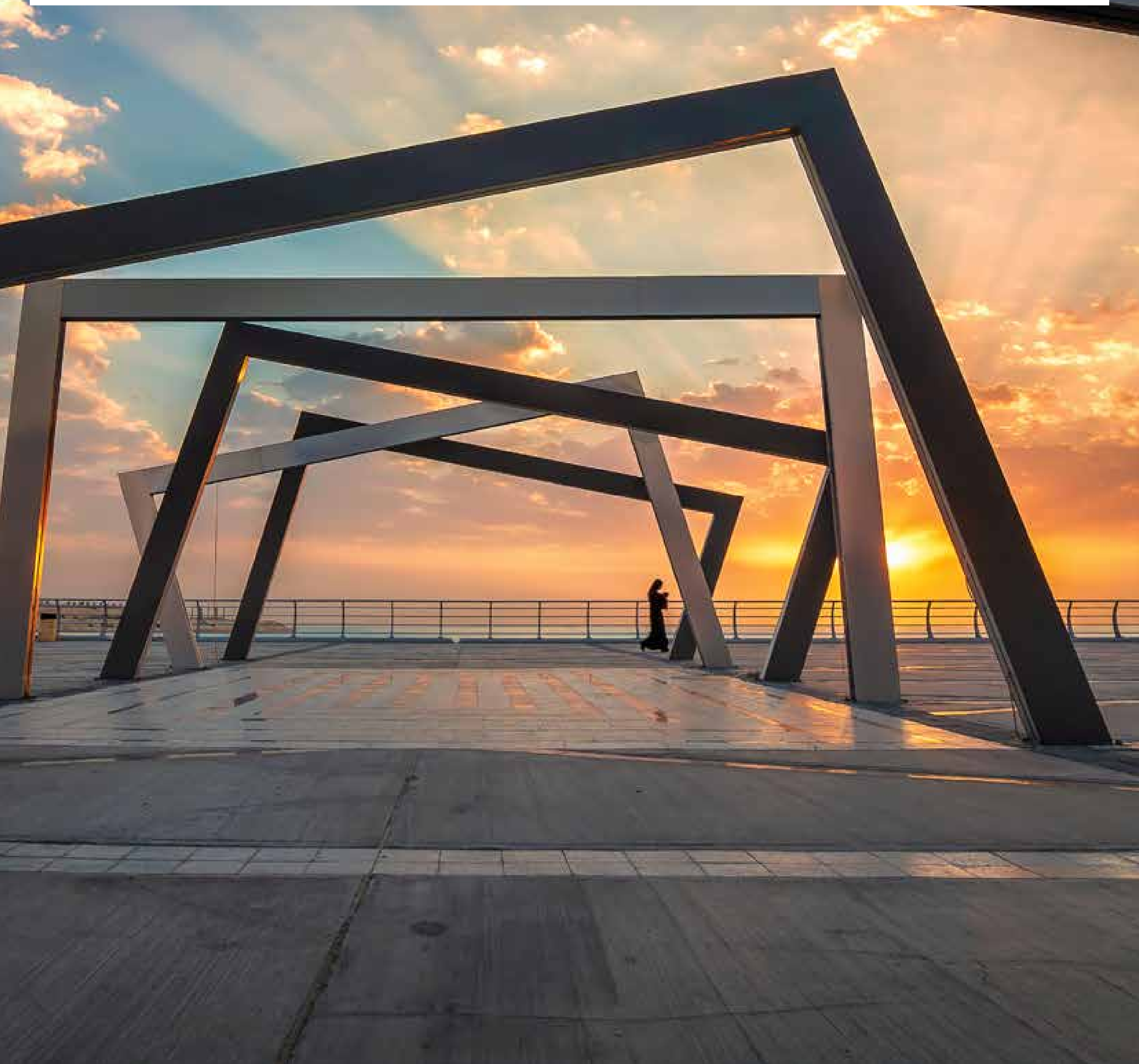
BRITISH COUNCIL

CULTURE IS GREAT
BRITAIN & NORTHERN IRELAND

# SAUDI FILM SKILLS

REPORT
Nordicity | March 2020



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## ACKNOWLEDGEMENTS

We would like to express our sincere gratitude to all of the project partners, filmmakers and sector stakeholders who contributed to this report and without whom we could not have undertaken this study. In particular, we would like to thank Rehana Mughal, Susan Hay and Vanessa Gabriel-Robinson from the British Council for their leadership in this project. We are eternally grateful for the strategic support provided by the project partners at the Saudi Arabian Ministry of Culture (MoC), led by Faisal Baltyuor, Fahad Alsuwayan and Hajar Alnaim. We extend our thanks to the many filmmakers, production companies, educational institutions and students who instilled their insight and expertise into this research, ranging from individual filmmakers to organisations such as Telfaz11, Eqew, 32 Action Films, 8ies, Holam Productions, and Namaa Studio to Dar Al Hekmah University and Effat University.

The report was written by Stephen Hignell and Sophie Hollows of Nordicity.

# EXECUTIVE SUMMARY

## BACKGROUND

This research was commissioned by British Council in the wake of Vision 2030 and the initial steps that were taken by the Saudi Arabian government to work towards the goals set forth in that document, including the re-opening of cinemas throughout the country. The British Council is the UK's international organisation for cultural relations and educational opportunities and works to develop trust and friendship between the people of the UK and citizens of other countries. It does this primarily by working through the arts, education, and English language teaching and learning.

This research is intended to provide evidence-based recommendations for the British Council's Culture and Sport programme in the Gulf which is focusing on developing long term, collaborative relationships between organisations in the UK and in the Gulf through support to cultural institutions, festivals and public events. In particular, the programme aims to share UK expertise in the creative industries with young people in the Arab world through capacity building programmes.

This work focused on the film and cinema sector in Saudi Arabia, and attempts to understand the current profile of the industry, how the industry will develop in the future and how the UK sector can contribute to this. It considers what specific opportunities exist for the sector, and particularly focuses on skills and training needs and how best to fulfill these.

## METHODOLOGY

The methodological approach for this work drew on four distinct phases: a desk research phase, a qualitative data collection phase, a quantitative data collection phase and an analysis phase.

### Desk Research

During the initial desk research phase, the consultants engaged with a broad range of literature to gain an understanding of the size of the sector currently, and to be able to situate the current and potential size of the Saudi cinema sector in relation to other countries in the Gulf. Reviewing the literature also allowed the researchers to identify educational institutions already engaging with cinema and film and international actors active in the sector.

### Qualitative Data Collection

In February 2019, the Nordicity research team travelled to Saudi Arabia for the qualitative data collection phase. During this phase, the team met with several stakeholders in film production and in education and conducted in-depth interviews with them.

### Quantitative Data Collection

Following this field work, an online survey was designed and was made available in both English and Arabic. This was circulated by the Ministry of Culture and the British Council.

### Analysis and Recommendations

Finally, the qualitative and quantitative data was triangulated, and the analysis was written up into a cohesive report. Following this, a series of recommendations for British Council and the Ministry of Culture were generated.

## FINDINGS

The qualitative and quantitative data collected as part of this work largely support each other and allow clear findings to be drawn from the work. These largely relate to the profile of the current workforce and the need for further training and skill development programmes. In addition, there are some clear areas of consensus related to a strategy for the sector moving forward.

### Profile of the Current Workforce

The current workforce overwhelmingly appears to be concentrated in above-the-line roles, though the largest single number of respondents stated they worked in 'Camera and Lighting'. Most individuals in the sector work as freelancers, or supplement their income with other work, and most individuals who work in the sector have been involved in film for four years or less.
Overall, the sector is already quite internationally engaged. Most individuals who work in the sector speak English as well as Arabic. Furthermore, the sector appears to employ many individuals who are not originally from Saudi Arabia, mainly in below the line roles which are not considered as prestigious, but also as teachers and trainers in the few film education programmes that exist in the country.

### Skill Development, Training and Educational Needs

There is a lack of training and educational opportunities for individuals who would like to work in film in Saudi Arabia. The two University programmes that do exist are both based at women's universities. Nevertheless, a degree in film is considered to be important by employers in the sector. This expectation leads many students to pursue qualifications or training overseas, though this is also not without controversy.
Priority areas for future training include scriptwriting and acting, and there is also a need for practical technical training.

### Strategy Development

There is some disagreement over the priorities for the sector, however it appears to be agreed that the government has a crucial role to play in supporting the growth of the sector, both by investing in films and training, and by ensuring a wider ecosystem is developed for the sector.

# INTRODUCTION

Saudi Filmmakers in a workshop in Ministry of Culture Filmmaking workshop in France : Image © Ministry of Culture

The United Kingdom and Saudi Arabia share a long history of collaboration and support. As global demographics change, with populations of young people increasing alongside new geopolitical dynamics, emerging economies, rapid technological innovations, and new social trends and ways of living and working, it is a relationship that cannot be taken for granted and a legacy that can be built on to the benefit of both countries.

70% of Saudi Arabia's population is under the age of 30 and finding opportunities for employment and cultural expression have become important pillars for the country's policy and features in the country's ambitious Saudi Vision 2030. Despite this, and the historical links between Saudi Arabia and the UK, the country's younger generations have limited exposure to the UK and to Britain's cultural output.

Saudi Arabians are amongst the largest consumers of YouTube and social media in the world and are renowned for their computer sciences and technical competencies. Now, for the first time in 35 years, cinemas have been allowed to operate in the country starting 2018. Through the Saudi Vision 2030 initiative, Saudi Arabia has plans of generating economic growth and satisfying Saudi's consumer demand by opening over 45 cinemas in 15 cities by 2020[1].

Meanwhile, a highly talented pool of Saudi filmmakers exist both in KSA and abroad. Many foreign educated Saudis studied film and media production at world class institutions overseas, and while some returned home to work in broadcast television, content creation or advertising, others continue to work in film outside their home country. Through the world of 'webisodes' and social media, entire sub-sectors have emerged with numerous companies and countless workers operating on online platforms like YouTube and Instagram.

It is likely, however, that there will be some key challenges for creatives and operators as a new Saudi film industry develops. There was initially some confusion over whether the new cinemas would be gender segregated – until further liberalisations in December 2019, women and men were separated in most public spaces. It has since been announced that they will not be, however the position of women in Saudi Arabia remains controversial. As women were allowed to start driving in 2018 and have been able to run for office since 2015, much of the progress around women's rights is new. Related to this, there have historically been questions around censorship – in the past, women's faces have been known to be pixelated in some advertisements in Saudi Arabia and images of alcohol and other content deemed inappropriate may also be censored from films. More recently, females have been seen on screen without pixellation, typically with some editing of scenes to keep with cultural customs.

Saudi Arabia has a long tradition of storytelling, which is core to its cultural heritage. And there is a unique opportunity to leverage these traditions for the social and economic development of the country in the form of film. And whilst the cultural policy priorities in Saudi Arabia appear focused on heritage and traditional arts, film is increasingly seen as a new and complementary opportunity. Meanwhile, there is a significant opportunity to partner with the UK's world-class film sector in a mutually-beneficial approach to film sector development.

## SAUDI VISION 2030

A plan for major economic and social reforms were introduced by Crown Prince Mohammad bin Salman in 2016. Saudi Vision 2030 set a national plan for diversifying Saudi Arabia's economy and investing in non-oil sectors while improving the quality of life of

As Saudi Arabia introduces more international events, it also opens its doors to more cultural activities, such as art exhibitions with Saudi artists. Image © Ministry of Culture

1 Quality of Life Program 2020

its residents. One of the goals of Vision 2030 was to 'attract local investors and create partnerships with international entertainment corporations', and to 'increase household spending on entertainment' and 'develop a market in recreational services'.

Saudi Vision 2030 has the potential to drastically shift the relationship between the state and citizens in the Kingdom of Saudi Arabia. It has an overall goal of diversifying KSA's economy and ensuring that the country is less dependent on oil revenue; as such, it addresses numerous policy areas, including the entertainment industry. The General Entertainment Authority was established in May 2016, and the first public music concert was held a year later. Early in 2017, the government announced a large sport, culture and entertainment centre to open in Riyadh in 2022. As a result of the reforms and resulting support that is being provided to the burgeoning culture and leisure sector, the government expects that Saudi families will double the amount that they spend on entertainment and recreation in coming years. Recently, for example large scale events and festivals, such as Saudi Seasons, has focused on bringing world entertainment to Saudi Arabia.

## THE ECONOMIC AND SOCIAL POTENTIAL OF FILM

The revival and reintroduction of cinema are seen as supportive of the goals of Vision 2030. The sector is regulated by the General Commission for Audiovisual Media (GCAM), which expect more than 350 cinemas (with approximately 2,500 screens) to be open by 2030, generating roughly 1 billion USD per year in ticket sales. Films are already hugely popular in the country. A 2014 survey concluded that approximately two thirds of Saudis with internet access watch at least on film online per week. Film festivals with pop up screens have also been on the rise. Some Saudi films have even been made, including Wadjda and Barakah meets Barakah. Effat University recently renamed its 'Visual and Digital Production' course to 'Cinematic Arts' and has held a partnership with New York University's Tisch School of Arts since 2016, while Dar Al-Hekma University offers a Visual Communications programme and a partnership with the New York Film Academy. These are particularly significant moves – both Effat University and Dar Al-Hekma University cater


A still from a video created for the Creative Futures Forum in Riyadh, February 2019, where children from ages seven to twelve were asked about their future jobs. This young girl answers, after meeting with an artist and creating an artwork together, what she would like to do. She answers "Artist". Image © British Council



exclusively to women. The Ministry of Culture and previously, the Saudi Film Council, have also offered courses in animation and other aspects of film making. These includes several summer courses that will be hosted overseas – one in France with Les Gobelins, one at the Studio School in Los Angeles, and two in the United Kingdom.

Cinemas are also very popular and financially successful in other countries in the gulf region, suggesting that the Saudi market may offer similar opportunities. Indeed, there has already been significant interest from international operators keen to open cinemas in KSA. British company Vue International have announced a plan to build up to 30 multiplexes in Saudi Arabia in collaboration with a Saudi real estate group. American-owned AMC Entertainment Holdings, the world's largest film exhibitor, has signed a deal to open up to 40 cinemas in 15 cities, with several more in the works.[2] The Marvel superhero film Black Panther played for five days in April 2018 in an AMC-owned cinema in Riyadh – the first film to show in the country for over 35 years. IMAX and VOX Cinemas have also announced an agreement, as have companies from Kuwait, UAE and India.

UK stakeholders may have some advantage when seeking to operate in Saudi Arabia. Positive historic relationships between the two countries mean that UK firms will likely be well received, and the UK is currently KSA's second largest cumulative investor with 200 joint ventures worth over £11 billion. The UK exported £7.34 billion[3] goods and services to Saudi Arabia in 2015, with over 6,000 UK firms engaged in the Saudi market. The UK is also well regarded as a destination for further study – the education and training system is considered to be of a high quality. Saudi Arabia sends the most students to the UK of any middle eastern country. In 2013/14, this amounted to 9,060 students.

Saudi Arabia is a priority country for both Her Majesty's government and The British Council. With over 50 years of working with Saudi Arabia on supporting skills and English language, this film skills project is a new foray of working in culture for the British Council in Saudi Arabia.

## THE BRITISH COUNCIL'S ROLE

British Council works across the arts, education and society, and English and exams to encourage trust and friendship between people and organisations in the UK and in other countries around the world. British Council does this by creating opportunities and building connections. In the arts, this can happen through programmes that focus on improving social outcomes, opportunities for cultural professionals and artists to develop their skills and networks, events and programmes that showcase the artistic output of the UK and other countries, projects that focus on investment and collaboration, and experiences that leverage art and culture as soft power tools. The arts provide an approachable and familiar way to engage with audiences overseas through sectors in which the UK is a world leader. For any film skills initiative in Saudi Arabia, it will also be important to consider the British Council's experience and portfolio in education – education providers may provide crucial structures and programmes through which to address skill gaps across the culture sector.

In the Gulf, the Culture and Sport programme is working in part to develop long term relationships between organisations in the UK and in the Gulf. This is based on the rapid development of cultural institutions, festivals and public events in the region, and builds on the programme's goal to position the UK as a global leader in the cultural industries and creative economies. The programme also engages with the sector in the UK to develop an awareness about opportunities to collaborate with individuals and organisations in the Gulf. In particular, it does this through capacity building programmes in the cultural sector. British Council's work with young people in the Gulf and across the Arab world is a priority for the organisation, adding further importance to this project.

Young people are one of the British Council's target audience groups around the world. Young people in Saudi Arabia play a crucial role in Crown Prince

2 https://www.bloomberg.com/news/articles/2018-04-04/amc-cinemas-wins-first-license-for-theaters-in-saudi-arabia

3 http://www.sbjbc.org/membership/saudi-uk-trade-relations/

Mohammed bin Salman's Saudi Vision 2030 – research has been commissioned throughout the world to help the Kingdom of Saudi Arabia to understand how young people elsewhere in the world are engaging with their societies and communities in the twenty first century. Young people are actively engaged with film and cinema – video platforms like YouTube are exceedingly popular and, as a key part of Saudi Vision 2030, cinemas were recently reopened after a 35-year ban. However, despite the interest in the film sector, there exist significant skill gaps. Given the objectives of the British Council's Gulf's Culture and Sport Programme, opportunities are growing for increased impact and partnerships.

## APPROACH AND METHODOLOGY

Nordicity was commissioned by the British Council, in partnership with the Ministry of Culture, to undertake the first-ever strategic review of skills in Saudi Arabia's film sector.

A combination of primary and secondary research was used, led by extensive fieldwork in Saudi Arabia, focus groups and a series of one-on-one interviews, combining desk research and a literature review. Nordicity conducted an extensive survey of Saudi film sector stakeholders, which was promoted widely by British Council, the Ministry of Culture and other strategic partners. The survey achieved a notable 422 responses from filmmakers and film companies, cast and crew, students, training and education providers and other key stakeholders, the high response rate as a testament to the strong promotion and engagement by the British Council and its project partners.

In February 2019, Nordicity undertook a ten-day period of field work in Riyadh and Jeddah engaging with government, filmmakers, educational institutions, students and other stakeholders from across Saudi Arabia and indeed the Gulf. Nordicity contributed to the two-day Creative Futures Forum in Riyadh, presenting interim findings and consulting with delegates, and participated in the sixth edition of Saudi Art Council's, 21,39 consulting with the wider cultural sector.


Attendees of the first ever screening and opening of a cinema in 35-years, taking a selfie. The first cinema opened in April 2018.
Image © REUTERS/Faisal Al Nasser

# CURRENT STATE OF THE SAUDI ARABIAN FILM SECTOR

Directors workshop with Director Jonas Grimas in Riyadh in September 2018 : Image © Ministry of Culture

As part of this study, Nordicity conducted over 13 days of fieldwork in Saudi Arabia consulting with sector stakeholders from across the country. Concurrently, Nordicity conducted a survey of the Saudi film sector ecosystem to obtain a comprehensive profile of the sector, its challenges and opportunities. The survey was distributed far and wide to as many filmmakers, students, film crew, film production companies, screen and voiceover actors and film training providers across the country as possible. The survey also extended to students not studying film courses, as well as film professionals and students residing outside of Saudi Arabia.

The Saudi film sector is emerging as an experienced start-up after a 35 year ban. Aware of the social and economic opportunities ahead, the Saudi film sector has been working to understand its existing strengths and challenges through sector mapping and planning its next steps.

The sector is driven at the grassroots, led by over over 30 independent film companies largely concentrated in the three metropolitan centres of Riyadh, Jeddah/Makkah and Dammam, alongside a number of other film companies located throughout the country.

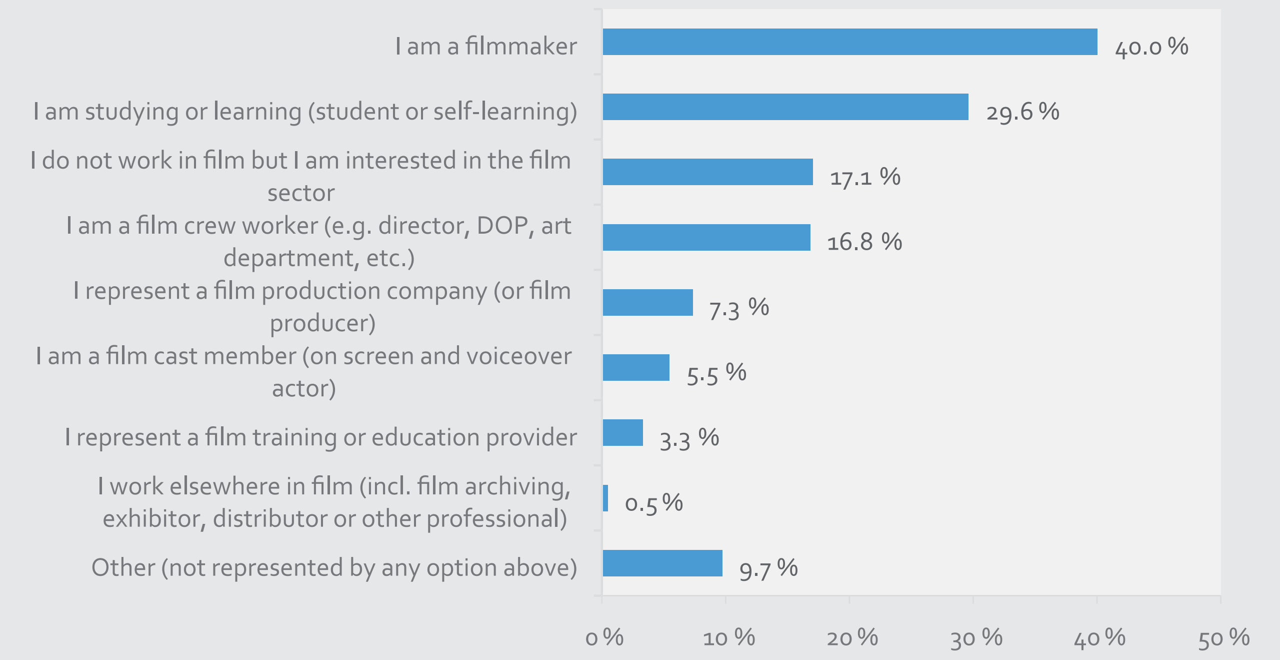
The sector is supported by key private and public sector players including the King Abdulaziz Center for World Culture (Ithra) and the Saudi Film Festival, Saudi Arabian Society for Culture & Arts, Saudi Broadcasting Authority, MBC Group and Misk Art Institute. Other supporters include the British Council and its inaugural Creative Futures Forum, the Arab British Centre, Art Jameels Hayy Creative Hub and the London-based Shubbak Festival of contemporary Arab culture.

The talent pipeline is supported by local and international film education and training providers, including the only two universities providing film education in Saudi Arabia at the time, Effat University and Dar Al Hekma University – both women's universities. In addition, the Ministry of Culture and Imam University both provide tailored training workshops throughout the year, while the New York Film Academy has been active in training Saudi filmmakers in KSA and the US alike.


Saudi Film Director Haifa Almansour during promotion of her film 'Wadjda' ;
Image © Inga Kjer/picture-alliance/dpa/AP Images



**Figure 1: Types of stakeholders who responded to the survey (multiple responses allowed)**




n = 422
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

In this context, there is a vibrant albeit underrepresented talent pool of filmmakers in the country. As a nascent sector, the skills base has been developed professionally abroad and self-taught at home within the country for years. And for Saudi filmmakers there has been little opportunity to further develop these skills and take them to the next level in KSA, until now. The work experience obtained abroad has been tremendously valuable for creatives in KSA, including film and other sectors from, work placements and internships, and through this consultation it has become clear the lack of a coherent skills strategy in Saudi Arabia is a barrier to its growth potential. As one stakeholder interviewed during Nordicity's fieldwork put it, education encourages investment, and the lack of investment in the film sector in Saudi Arabia currently means that the industry is not reliable.

Though there are differing perspectives about the route that the industry should take to ensure it can develop in a sustainable way, it is also characterised by a significant amount of optimism. Stakeholders suggest that film in Saudi Arabia will follow a similar growth pattern the country experienced in graphic design over the past two decades. Mirroring the success of Saudi Arabia's graphic design, they believe the film sector could take hold as an area of study and work by developing an initial workforce, enabling graphic designers locally to integrate a unique Saudi aesthetic that speaks to its citizens and local consumers.

## FILM SECTOR PROFILE

**The Nordicity survey of 422 Saudi film sector stakeholders provides the first-ever baseline for the film industry in Saudi Arabia.** A total of 169 filmmakers accounted for 40% of respondents, followed by 125 students (30%), 72 crew (17%), 71 people interested in the film sector (17%), 31 from production companies (7%), 23 cast (6%), 14 from training or education providers (3%), and 43 from other sector stakeholder positions (10%).

Saudi Arabia has the potential to have more films made by Saudis, in Saudi Arabia, about Saudi culture. It has the opportunity to retain skills, creativity and money within the country.

**The Saudi Film Sector is concentrated in the three major urban centres.** Over one-third (35%) of the respondents resided in the capital city of Riyadh, while 29% resided in the western cities of Jeddah/Makkah, and 11% resided in the eastern city of Dammam. A small percentage (2%) lived outside of Saudi Arabia, with almost half of those respondents indicating that they have never lived in Saudi Arabia, but they work in film or have an interest in the sector.

**Saudi Arabia's film sector is characterised by a workforce of young people under 30, reflecting the national population.** The average age of all respondents was 26, with almost three-quarters (72%) of respondents being younger than 30 years. As previously mentioned, this aligns closely with the target audience for British Council and with a key group for Vision 2030.

**There is an opportunity to increase female participation in the Saudi film sector workforce.** The sector stakeholders are predominantly male, with just over one-third (34%) of the respondents as female. The gender gap is notable given that the two universities with film programmes are both women's institutions. During Nordicity's in-country interviews, it was commented that women who do work in film often work specifically on animation or graphics, as these are roles that can be completed remotely, often from home, and can therefore be seen to be more culturally appropriate.

**The Saudi film sector surveyed is highly proficient in English.** Boding well for collaborations with UK and US film partners, a large majority (64%) of the respondents indicated that they are fluent in both Arabic and English. Nearly a third of respondents were fluent in Arabic only (29%). This also provides an opportunity for training and education programmes – there is less likely to be a need for content and resources to be translated. However, it is worth noting that stakeholders in Saudi Arabia who spoke to Nordicity noted that the British accent was harder to understand than the standard American accent.

## FILM WORKFORCE PROFILE

**This section provides a profile of the 213 individuals working in film responding to the Nordicity survey.** The Saudi film workforce is comprised largely of employees of small companies, micro-enterprises and freelancers. However, it is important to note that several of the companies Nordicity visited in Saudi Arabia are currently seeking financing in order to be able to employ staff on a more regular basis. Freelancing is also, according to stakeholders interviewed, looked down on.

**The sector is comprised predominantly of people with under four years of experience in film.** On average, respondents working in film have worked in the industry for five years. The years of experience vary slightly by gender, with the average for female respondents being four years. This reflects the recent growth and interest in the sector, as well as the pattern for Saudi Arabians who study film to work outside of the country.

**The sector self-identifies largely as mid-level seniority in their film career**. Almost half (45%) of film industry stakeholders indicated being in intermediate positions. Broken down by gender, a larger percentage of female film industry stakeholders were in entry-level positions (11%) than male stakeholders (4%).

**The Saudi film workforce is highly flexible, comprising a majority of casual and part-time workers.** More than one-third of film industry stakeholders work in film on a casual basis, whereas less than a quarter (22%) work in the industry full time. A higher percentage (56%) of female stakeholders worked on a casual basis in the industry than male stakeholders (33%).

> "I want to develop my skills in writing the script, the output and imaging. Note that I am interested in film industry mimic community issues and not commercial."
>
> - Survey respondent interested in film sector



### Key Saudi Decision makers

- Vision 2030
- Ministry of Culture
- General Commission for Audiovisual Media (GCAM)
- Ministry of Education

### Saudi Film Sector

West (including Jeddah)
- Uturn
- Namaa Productions
- Millimeter Productions
- Speedtrack
- Namaa Studios
- Ritix Productions
- Telfaz 11 & C3

Central (Riyadh)
- Aflam
- 123 Action
- Holam
- Nebras Films
- Telfaz 11 & C3 Films
- 8ies
- Eqew
- Myrkott
- Rotana
- Almountage
- Harakat

East
- Manga Productions
- Habar
- Jather Productions
- Scene
- Backlight

Other
- All Over Group
- Egg Dancer Films
- RGB
- Aura
- Flying Honey
- Black Bee
- Flaying Camel

### Key Film Players & Activities

- British Council
- Creative Futures Forum
- Ithra
- Saudi Film Festival
- MBC Group
- Misk Art Institute
- Saudi Arabian Society for Culture & Arts
- Red Sea International Film Festival
- Arab British Centre
- Shubbak Festival London
- Art Jameel Hayy Creative Hubb
- Saudi Broadcasting Authority

### Relevant UK Film Sector

- British Film Institute (BFI)
- BBC
- British Film Commission
- Creative England
- Creative Scotland
- Ffilm Cymru Wales
- National School of Film & Television
- London Film School
- Pinewood Studios
- Warner Bros. Studios
- ScreenSkills
- Production Guild of GB
- National Film Youth Academy
- Northern Ireland Screen
- Wales Screen

### Potential Activities

UK-KSA Film Training KSA
UK-KSA Film Training UK
Showreel
Industry Director
Certification
Arabic Library
Innovation Centre
Interships & work Placement
Masterclasses
Consultations
Sector network/ film cluster

### Film Education & Training

Effat University
Dar Al-Hekma University (DAH)
New York Film Academy
MoC Workshops
Imam University
US schools
Online

### Skills

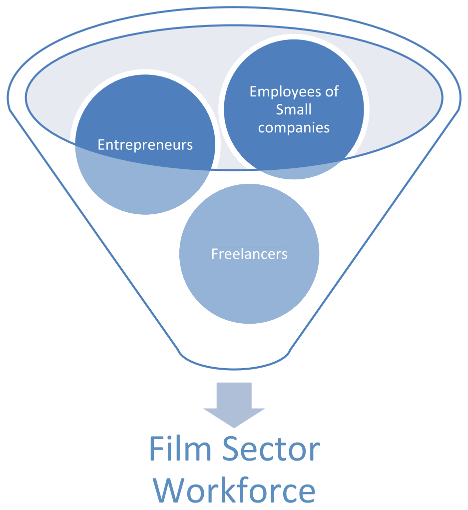
Scriptwriting skills
Acting skills
Producing skills
Soft skills
Creative skills
Technical skills
Strategic planning
Marketing

### Opportunity

Economic Growth & Diversification
Jobs/ Employment
Domestic & Int'l Market
Audience Development
Opening of Cinemas
Screen Tourism
Cultural Relations
Creativity & Artistic Development
Digital Platforms
Film premieres

**The vast majority of Saudi's film workforce supplement their film sector income from other sources.** Income from film reflects the modes of employment shown above, with more than one-third of stakeholders indicating that they earn no income from film. Only 3% indicated that they earn all their income from work in the industry. This finding is particularly pronounced for female stakeholders, with almost half (48%) indicating that they earn none of their income from film. This reflects wider sector challenges with regards to funding and employment. Similar dynamics were raised in several of the interviews conducted by Nordicity in Saudi Arabia: many filmmakers are required to self-finance, and can therefore afford to produce short films but not feature length films.

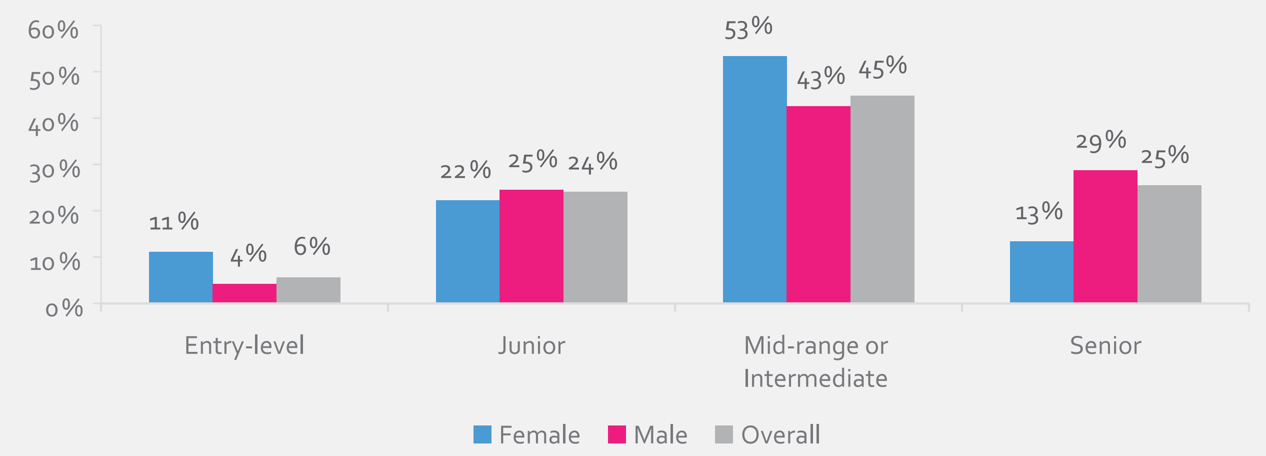
**Nearly half of the workforce survey respondents worked in above-the-line roles**. Almost a quarter (25%) of the stakeholders reported having camera and lighting job roles in the industry. The most common role for female stakeholders was Producer, while for male stakeholders, it was camera and lighting. The low number of below-the-line workers suggests a priority for more provision of technical training.




**Similarly, stakeholders identified above-the-line roles as the most important for developing the future of the sector in Saudi Arabia.** The most important roles identified by stakeholders were above-the-line positions such as Screenwriter (77%), Producer (63%) and Cast (33%). This reflects a finding from Nordicity's interviews in Saudi Arabia, where acting and scriptwriting were highlighted as key areas where training was required. According to these interviews, actors in Saudi Arabia often start their careers as social media influencers and do not have any formal training, though their potential was deemed significant.

Attendees of key note speech on the "Art of Filmmaking" in September 2018. Image © Ministry of Culture

**Figure 2: Breakdown of film industry stakeholders by seniority and gender**




n = 212
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**The motivations for a majority of Saudi film stakeholders to work in the sector were altruistic and creative rather than financial or nepotism.** The desire to tell stories and make films was the most common reason, indicated by 45% of respondents. This was also reflected in Nordicity's fieldwork and meetings with Stakeholders. Ahmad Alerwi of Telfaz11 noted that "an experience with and understanding of storytelling is important for all employees regardless of their role in film". The second most common reason was the love of visual storytelling and film (23%) followed by the desire to work in a creative environment (21%). Meanwhile, only 8% were motivated by the pay, unsurprising given the large number of respondents who supplement their income elsewhere. Only 3% of respondents indicated the sector was incidental and no respondents indicated their main motivation as due to family or personal relationships in the sector.

**The motivations for women working in the sector varied from their male peers.** A higher percentage of women (51%) work in film because of their love of visual storytelling compared to the percentage of men (36%). The largest variation perhaps is the financial opportunity they see in the sector, with only 2% of female stakeholders indicating finance as the leading motivator.

**The majority of Saudi's film workforce had studied or worked in film prior to their current role in film.** Stakeholders entered the film industry through a variety of paths, with the common being from prior casual work in the industry. Over a fifth of survey respondents had casual work in film prior to their current role (22%), followed by workers coming directly from film-related education, along with those volunteering in film (17% each), while 15% had previous internships in film. Meanwhile, 29% of the workforce came from non-film backgrounds, including 12% directly from non-film education, 12% from a job not related to film, and 5% from unemployment.

**There is a preference for the workforce to have been trained in film within Saudi Arabia.** The main priority for experience needed for working in the industry was workers having trained in film in Saudi Arabia (28% of respondents). The second priority for experience was workers having obtained film training outside of Saudi Arabia (22%), followed by internships in film (22%). Meanwhile, previous film work within Saudi Arabia was a priority for 7% of respondents, followed by workers with personal connections in the sector (6%) and previous television or advertising work (5%). Only 4% deemed previous film work experience outside of Saudi Arabia was the most important, and only 3% felt that online training was.

## FILM COMPANIES AND PRODUCERS PROFILE

**This section provides a profile of the 47 film producers and companies responding to the Nordicity survey.**
**The Saudi film sector is comprised of predominantly new producers and companies.** On average, Saudi film producers and companies have been in operation for six years.

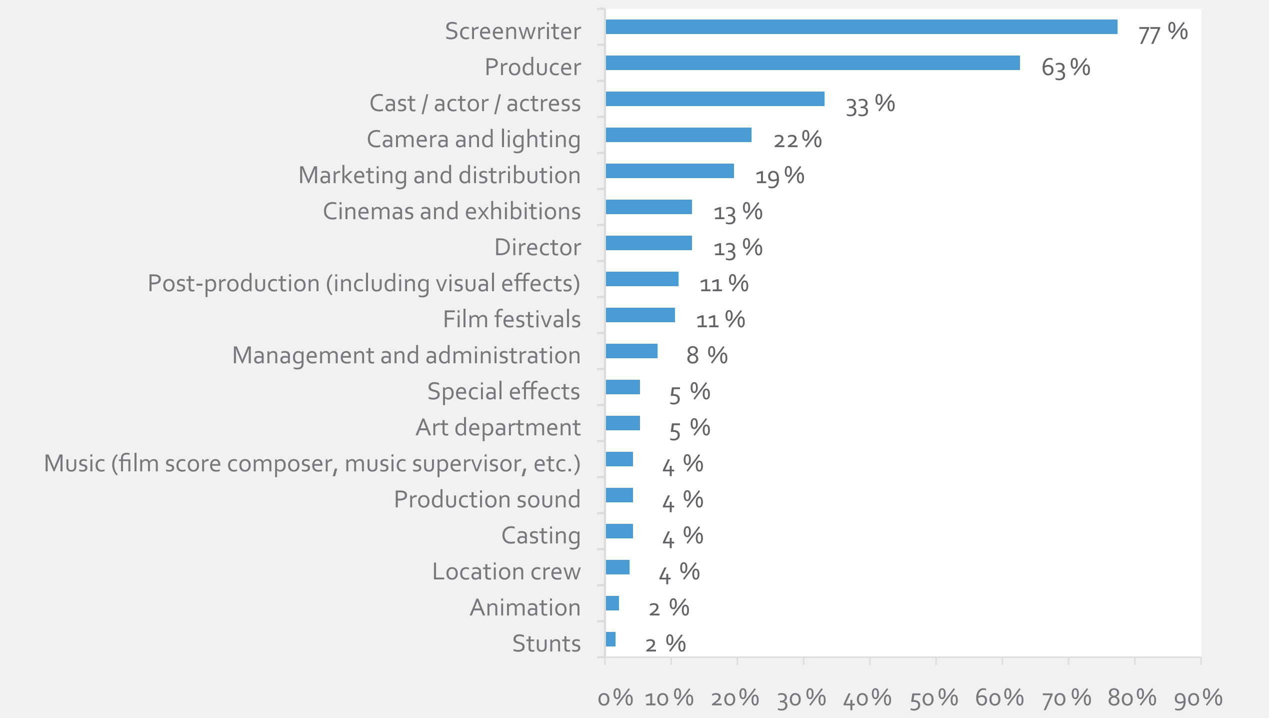
**The sector is comprised primarily of micro-enterprises.** The majority of the producers and companies are single-employee enterprises (61%). A quarter of film companies employ 2-4 people, while just under one-fifth employ over 5 employees. Many of these companies additionally employ casual staff and freelance workers.

**The typical Saudi film producer or company has produced 12 productions since inception, and the vast majority of these were short productions.** Short films accounted for over half of all productions (54%), followed by web productions (30%), and only 4% were feature films. Meanwhile, there is a significant pipeline of production with 12% in development.

**Online streaming is the most prominent form of Saudi film distribution.** A number of distribution methods are employed by companies to distribute film in the industry. The most common form of distribution was via YouTube and Vimeo, where 77% of responding producers and companies have done so. Indeed, several of the producers and companies visited by Nordicity in Saudi Arabia focused their content on online platforms. The second most common form of film distribution was through film festivals (46% of producers and companies), followed by private viewings/screenings (25%), and broadcast television (14%). Meanwhile, 11% of film producers and companies had their films distributed via peer-to-peer file sharing, 7% had screened in cinemas, 4% had distribution via in-flight entertainment and only 2% had distributed via DVDs and other online streaming platforms each.

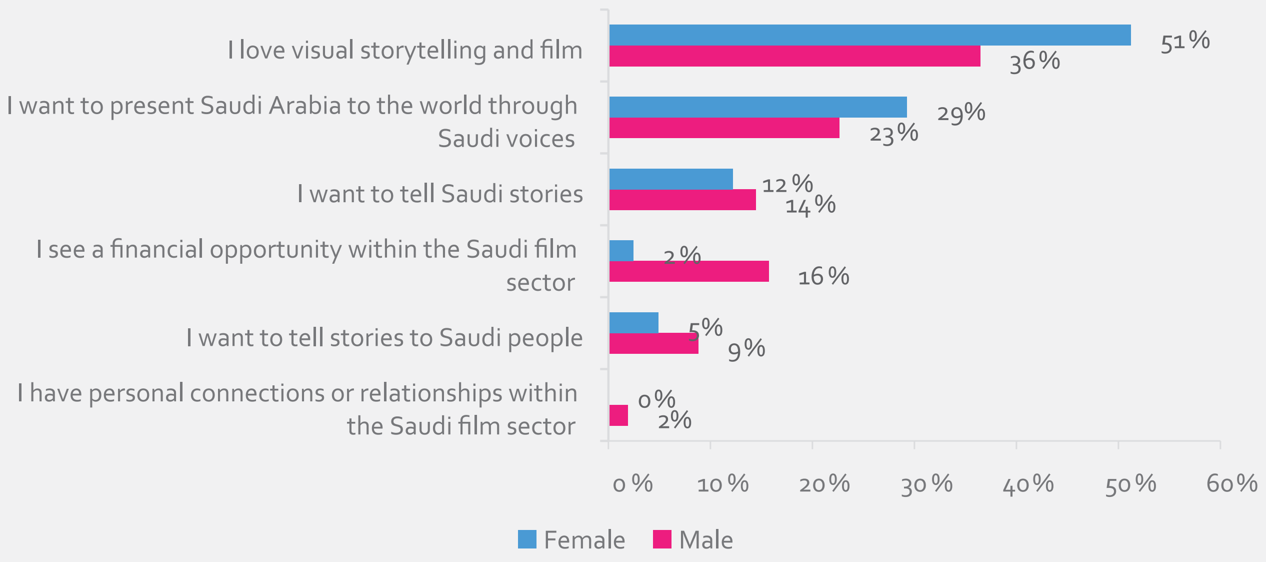
**Almost all companies reported producing or shooting films locally within Saudi Arabia**

**Figure 3: Most important roles in film as identified by film industry stakeholders (multiple responses possible)**




n = 194
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 4: Film industry stakeholders' reasons for working in film, by gender**




n = 192
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**(93%).** Neighbouring Middle East and North Africa was a distant second location used by only 13% of companies, followed by the US and the Americas (10%), Asia (6%) and Europe and UK (4% each). There was virtually no activity in Australia and New Zealand and Sub-Saharan Africa. Overall, however, the United States, Egypt and United Kingdom were the film industries respondents were most familiar with. In interviews Nordicity conducted in Saudi Arabia, stakeholders reported that many Egyptian films were in fact financed by Saudis.

**There is a considerable interest in working with the UK film sector.** Nearly a third of film producers and companies indicated an interest in working with the UK. When asked where they would like to work, a large majority of companies (71%) indicated their desire to work in, partner with or co-produce films in the Middle East and North Africa. Key locations for foreign production mirrored current activities. This again may reflect existing links between Egypt and Saudi Arabia.

**Access to finance was considered the greatest barrier to growth for Saudi film producers and companies.** Nearly half of the survey respondents identified financing as the greatest barrier (43%) over the next five years, followed distantly by access to skilled cast (13%) and access to film training and education (11%). This largely reflects the qualitative data collected by Nordicity in Saudi Arabia, though in those conversations training needs were arguably more prominent.

**Recruitment of crew is a significant issue for Saudi film companies.** Over half of surveyed companies found recruitment difficult, of 22% found it very difficult and 31% found it somewhat difficult to recruit the right crew at the right time.

**The biggest issue in recruitment was skills shortages.** Saudi film companies cited a lack of job specific skills, education or experience as the biggest challenge in recruiting (41%). This was followed closely by the cost of labour (38%). A shortage of applicants was the third challenge (13%), while competition from other employers and lack of soft skills were relatively insignificant (4% each).

This was also reflected in the interviews conducted by Nordicity in Saudi Arabia. At Eqew, it was highlighted that the main reason why it was difficult to recruit crew members was that the potential applicants in Saudi Arabia were not qualified. Indeed, a majority of Eqew's staff were from other countries – most notably Yemen and Egypt. This also reflects the interests of the survey respondent stakeholders, who mainly worked in and were interested in above-the-line roles.

In addition, another interviewee during the fieldwork noted that most below the line roles were filled by non -Saudis. This stakeholder estimated it was as many as 75-80%. A third interviewee also noted the difficulty in recruiting for below-the-line positions. The Eqew team highlighted their particular difficulty in recruiting lighting technicians and grips and stressed that they only felt confident working with freelancers who had experience working with equipment, in part due to how expensive the equipment is and in part because of safety considerations.

**Current recruitment practices of Saudi film companies are overwhelmingly informal.** Companies tend to rely on their personal networks to recruit crews, as illustrated in the figure below.

## FILM TRAINING AND EDUCATION

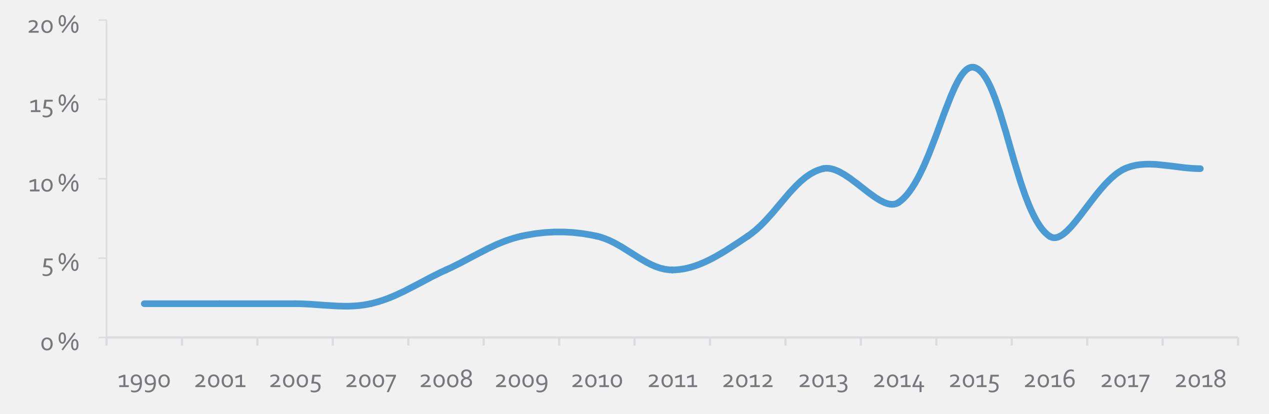
**The current provision of film training and education in Saudi Arabia is limited, and many of the sector skills are obtained through training and work experience in other countries including the US and UK.** There are currently two universities providing film education in Saudi Arabia –Effat University and Dar El Hekma University, both of which are women's universities.

And whilst there is talk of interest from other universities in providing film education, no formal plans have been publicised. Some film training delivered in Saudi Arabia comes from providers outside the country, most notably the New York Film Academy, which has delivered intermittent courses and training workshops locally and providing some opportunities for Saudis to learn in the US. However, the consultations with the sector revealed a major shortage in film training and education in Saudi Arabia, particularly in terms of addressing the needs of local employers.

Sector stakeholders also expressed a desire for a very high caliber of professional training provision, citing current provision as being focused on entry- and mid-level careers, and thus insufficient for experienced film professionals.
Consultations revealed that a significant amount of training is done informally through peer networks and on-the-job working, whereas many skills have been self-taught. Eqew Productions, for example, hired many recent graduates and those without prior experience to train them for the roles on the job. Another stakeholder emphasised the need for short courses in collaboration with universities that people who already work in the sector could take part in.

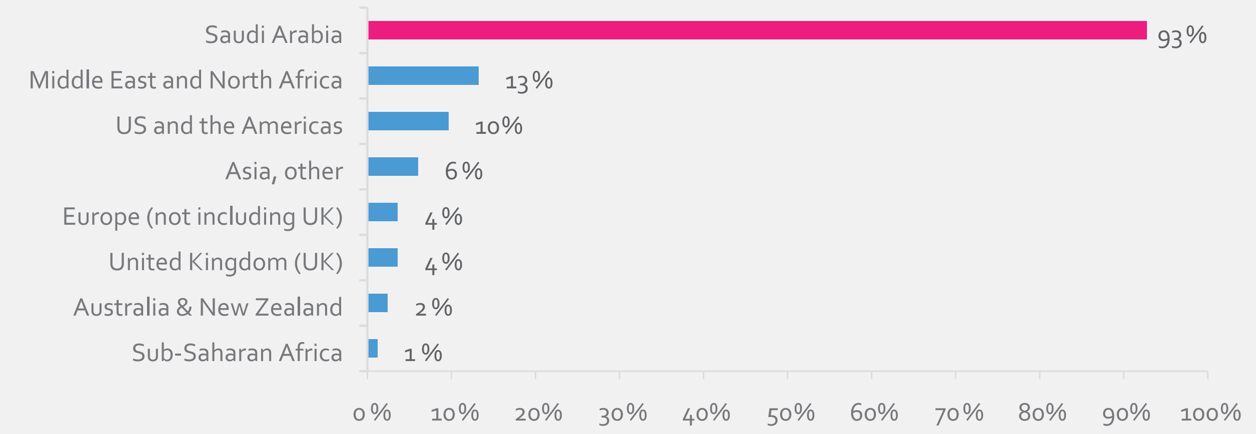
The internet has been a valuable source of training for some filmmakers, who even cite YouTube channels such as Business Noura or their contemporary filmmaker's channels as valuable sources for upskilling. Meanwhile, many of the informal courses available were taught by Saudi

**Figure 5: Companies established each year since 1990 (% of companies)**



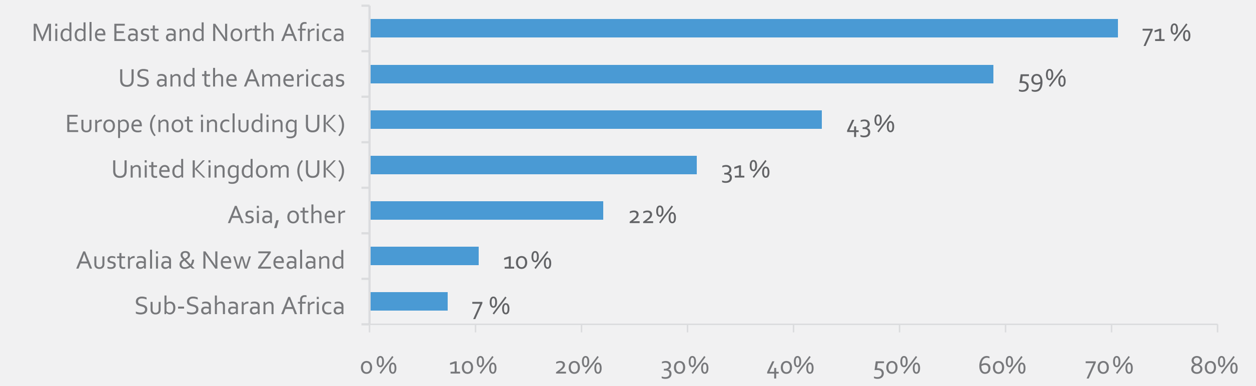

n = 47
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 6: Locations where films have been produced or shot (multiple responses possible)**



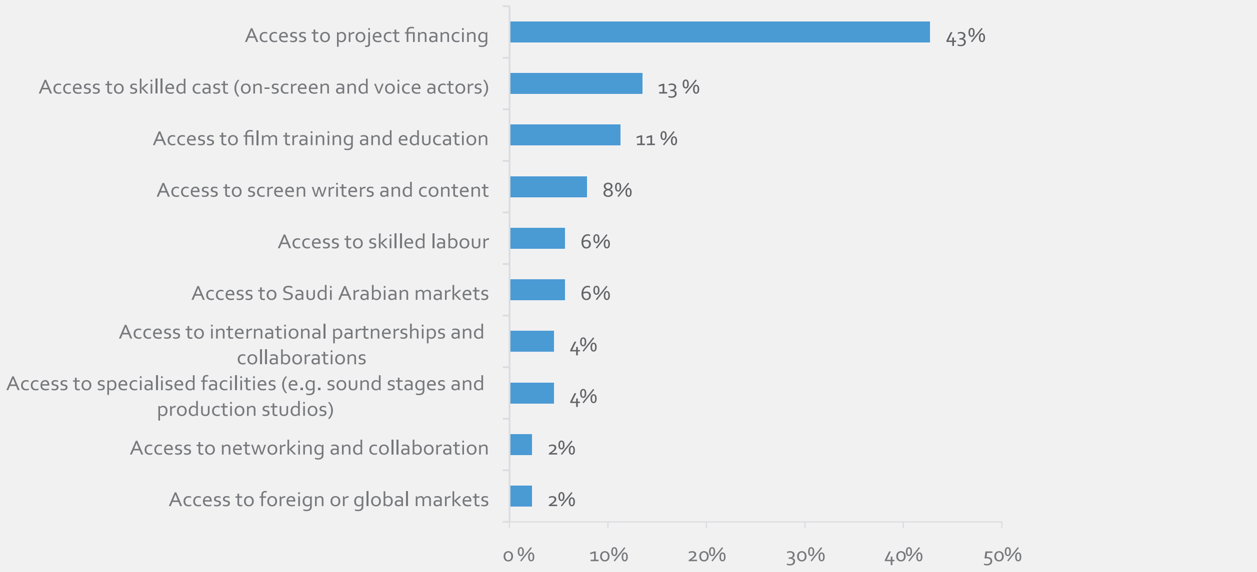

n = 83
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 7: Regions where companies would like to work, partner or co-produce**




n = 68
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 8: Barriers to growth identified by companies**




n = 89
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

filmmakers who have previously studied film abroad, and may not have had ample industry experience prior. During Nordicity's fieldwork in Saudi Arabia, some interviewees noted that they were completely self-taught, with no technical experience.

Many young people also appear to participate in training programmes overseas, either on degree length courses or, more often, on short courses. Whilst this provides them with a strong background to work in the sector, it also creates a problem in the sector when students return from overseas and offer 'masterclasses' despite having limited industry or teaching experience. Recent alumni have reportedly offered training sessions at high prices with some participants questioning the value. Furthermore, one of the stakeholders who was interviewed by Nordicity in Saudi Arabia expressed concern that people who study overseas are then less able to create relevant content for Saudi audiences.

**The provision of training in Saudi Arabia is widely focused on film theory and film production largely through the two women's universities and the New York Film Academy.**

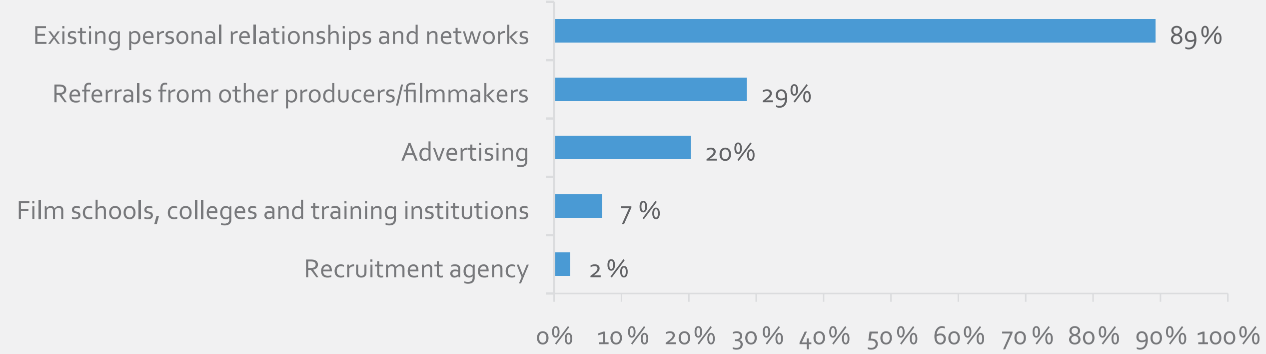
However, it is not clear what the demand is for formal training at universities. One university did a trial summer course in collaboration with NYFA, as a prelude to introducing a degree, and had very low enrollment. They recognised, however, that this may have been due to the prohibitive costs associated with the course, for which expensive equipment had to be shipped over from America on a temporary basis and subsequently returned.

Saudi Arabia's practical film training opportunities also exist in the form of work placements and internships, often coordinated through the universities. Amongst the training provided, animation featured as the most prominent among training providers responding to the survey. It can be challenging, according to stakeholders, to find appropriate internships to fulfill university requirements.

One challenge facing training in the sector is the government Ministry prerequisites for university-level instructors is a Master's degree. This has been cited as a barrier for recruitment by educational institutions and has meant that educational institutions often

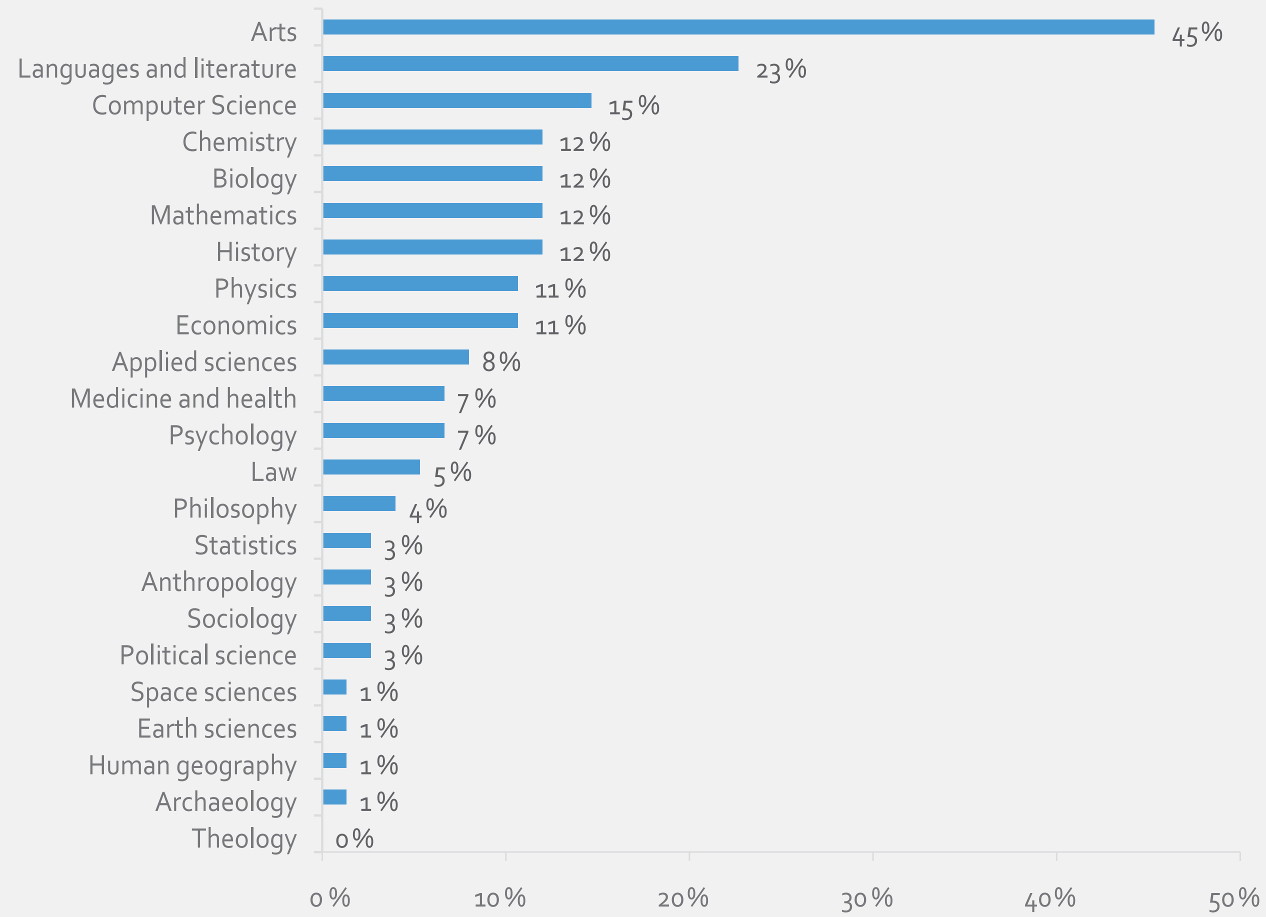
Cinemagoers at the opening of the second commercial cinema in Saudi, Vox cinemas. Cinema audiences continue to be high and cinemas have played host to Saudi movies; Image © REUTERS/Faisal Al Nasser

**Figure 9: Methods used by companies to source crews (multiple responses possible)**



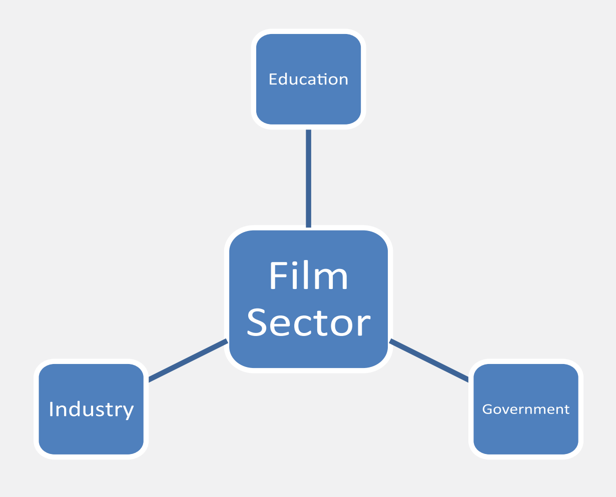

n = 84
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 10: Subjects studied by student respondents (multiple responses possible)**




n = 75
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 11: Triple-helix of education for sustained job creation**




have to recruit instructors from abroad. Furthermore, it is important to be able to recruit both male and female instructors because of the gender segregation in most higher education institutions.

**Increasing opportunities for on-the-job training was recommended as the most essential action for helping students progress from their studies into a successful career in film by training providers.** Other priorities included the introduction of a film training accreditation scheme, as well as inviting more international guest trainers, teachers and speakers.

## STUDENTS AND THE TALENT PIPELINE

The Nordicity Survey consulted with 92 students from across Saudi Arabia. Almost a third of students were studying film at the time of the survey (31%), while 10% had previously studied film. A majority were not studying film at all (59%). When Nordicity spoke to sector stakeholders in Saudi Arabia, representatives from companies such as Namaa Productions and Telfaz11 noted that they looked for university degrees in film when recruiting new members of their team.

Nearly half of the survey respondents indicated their studies were in the field of arts (45%), followed by nearly a quarter studying languages and literature (23%).

The surveyed students expected to graduate over the next three years. More than 50% of respondents were due to graduate in 2020. This reflects the qualitative data collected by Nordicity in country – stakeholders noted the lack of training for the sector available in Saudi Arabia. What media training there is appears to be largely geared towards television and online content rather than film.

Saudi filmmakers on set; Image © Ministry of Culture



A strong film sector requires a holistic approach to skills development – one which educates, trains and prepares prospective workers for the demands of employers today and the jobs of the future. In addressing these issues, a 'triple helix' of education approach applying cohesive links between Higher Education, Industry and Government helps to create jobs whilst facilitating the dissemination of ideas, commercialisation, and consultancy.

## VIEWS FROM OUTSIDE THE FILM SECTOR

Individuals from outside the film sector, including students, were also surveyed for their views.

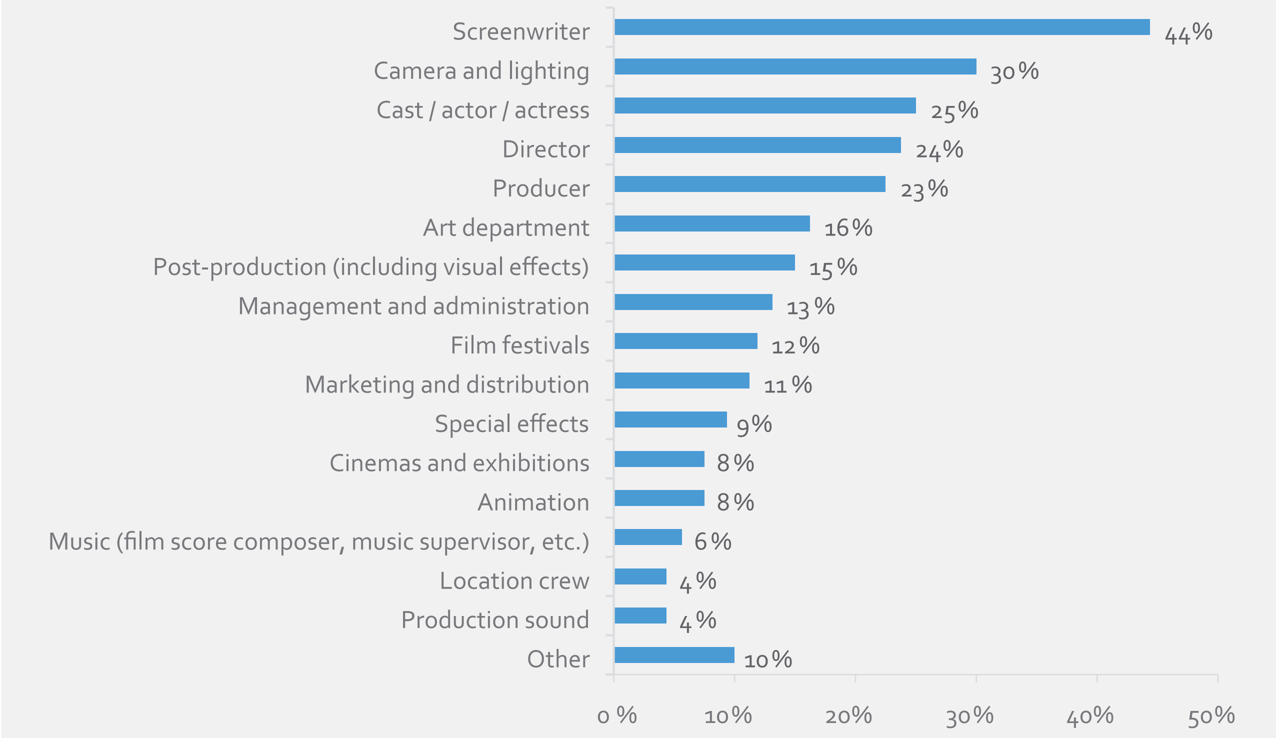
Overall, most individuals from outside the film sector were somewhat to very decided in their future career or education plans. Only 5% were undecided in their future career plans. Exposing prospective and future students to the opportunities in the film sector could help young people with their future career plans.

**There is a growing pipeline of talent needing jobs in Saudi's film sector.** The vast majority of survey respondents indicated they were likely to consider a career in film. Over half of respondents were extremely likely to pursue a career in film, totaling 85 individuals (53%), while 39% indicated they were somewhat likely, totaling 62 individuals.

**The current talent pipeline is focused on above-the-line roles.** Of those who indicated that they are likely[4] to consider a film career, almost half (45%) indicated that they were very decided on their future career plans. More respondents were intrigued by screenwriter and camera and lighting opportunities compared to special effects or animation. This links back to the challenges highlighted by several film producers and companies during Nordicity's time in Saudi Arabia, including Holam Films, 32Action Films, 8ies and Eqew.

4 Respondents indicating Likely or Extremely likely to consider a career in film.

**Figure 12: Career opportunities in the film industry by which respondents are most intrigued (multiple responses allowed)**




n = 160
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

# OPPORTUNITIES FOR SAUDI ARABIA'S FILM SECTOR

**There is a tremendous economic potential for film in Saudi Arabia**. Saudi Arabia has the highest GDP of the MENA countries (USD $782 billion in 2018) and an expected annual growth rate of 2.2%.[5] With a population of 33.7m and 6m foreign nationals employed in the Kingdom, the country has a significant consumer market and film audience potential.

**There is considerable demand for a Saudi film sector.** 67% of Saudi consumers preferred to watch films depicting their own culture[6], yet Saudis watched far fewer films from their own country than the rest of the surrounding region[7]. 44% of Saudi consumers saw American films as harmful for morality, which was the highest in the region, while only 7% considered films from the Arab World to be harmful, which was the lowest in the region.[8] Only 35% of Saudi consumers watched films in English, which was amongst the lowest in the region[9], while 88% watch films from the Arab world, which was much higher than the rest of the region.[10] Saudi consumers watch a moderate amount of films from the US as compared to other countries in the region[11], though during Nordicity's qualitative fieldwork it was noted that American films were shown more often than British films. Nordicity's survey found that a majority of respondents were not satisfied with the availability of quality Arabic films.

**In terms of genre, the Action/Adventure genre was by far the most preferred film genre in the Middle East and North Africa region, at 35%.** This was followed distantly by comedy (16%), Arab Classic (12%), Drama (11%), Romance (8%), Horror/Thriller (4%) and Children/Family (4%).[12] Meanwhile in Saudi Arabia specifically, Nordicity's survey found that the drama genre had the greatest opportunity for the country's film sector (33% of respondents), followed by action/adventure (27%) and comedy (25%). The Arab Classic genre was identified as a priority for only 6% of respondents, followed by horror/thriller (5%) and children/family (3%). In addition, several key stakeholders noted a high potential for the documentary and animation genres for Saudi Arabia, as well as VFX given the country's strengths in technology and the indoor studio-based nature of the work in the Gulf climate. During interviews in Saudi Arabia, stakeholders noted that they had already worked on comedies, with the budgets being a bigger obstacle for action or fantasy films.

Nordicity's survey found that online streaming and over-the-top services were the viewing platforms with the greatest opportunity for Saudi film. A quarter of survey respondents also found that films made for cinemas were an opportunity, coinciding with the recent opening of Saudi Arabia's cinema market.

Saudi Arabia's internet users were amongst the most prolific consumers of online video content in the world, where 64% of consumers surveyed by Google indicate they watch online video content every day.[13] Approximately half of all Saudis watch films online (49%), which was only surpassed by the UAE in the region, and significantly higher than Qatar, Lebanon, Tunisia and Egypt.[14] At the beginning of 2016, Saudi Arabia had amongst the least amount of content available on Netflix in the world.[15] Meanwhile,

5 https://data.worldbank.org/country/saudi-arabia

6 **Note:** Africa; MENA; 2016; 18 years and older; 4,529 Respondents; in the past six months. **Source**: Northwestern University in Qatar. Harris Poll: Pan Arab Research Centre, Doha Film Institute. ID 689194

7 **Note:** Africa; MENA; 2016; 18 years and older; 4,529 Respondents; in the past six months. **Source:** Northwestern University in Qatar; Harris Poll; Pan Arab Research Center; Doha Film Institute ID 689158

8 **Note:** Africa; MENA; 2016; 18 years and older; 4,529 Respondents; in the past six months. **Source:** Northwestern University in Qatar; Harris Poll; Pan Arab Research Center; Doha Film Institute ID 689218

9 **Note:** Africa; MENA; 2016; 18 years and older; 4,529 Respondents; in the past six months. **Source:** Northwestern University in Qatar; Harris Poll; Pan Arab Research Center; Doha Film Institute ID 689148

10 **Note:** Africa; MENA; 2016; 18 years and older; 4,529 Respondents; in the past six months. **Source:** Northwestern University in Qatar; Harris Poll; Pan Arab Research Center; Doha Film Institute ID 689174

11 **Note:** Worldwide; as of January 24, 2016. **Source:** The Verge ID 429253

12 **Note:** Africa, MENA; 18 ;2016 years and older; 4,212 Respondents; in the past six months. **Source(s):** Northwestern University in Qatar; Harris Poll; Pan Arab Research Center; Doha Film Institute; ID 689250.

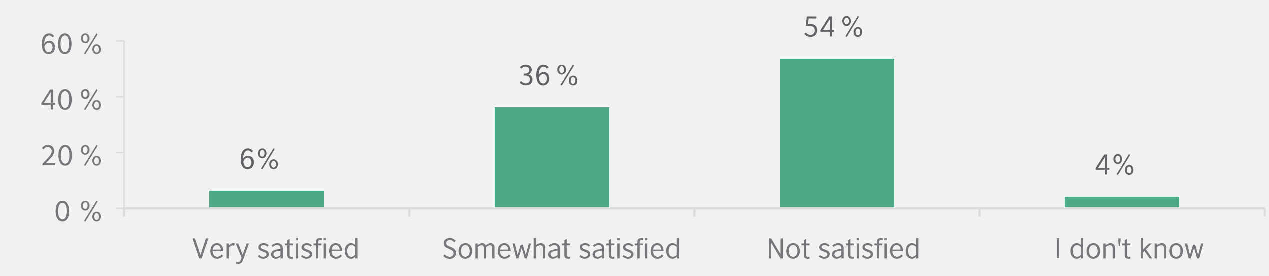
13 We Are Social; Google Consumer Survey. ID 319688

14 Northwestern University in Qatar. Harris Poll: Pan Arab Research Centre, Doha Film Institute. ID 689039

15 **Note:** Worldwide; as of January 24, 2016. **Source:** The Verge ID 429253

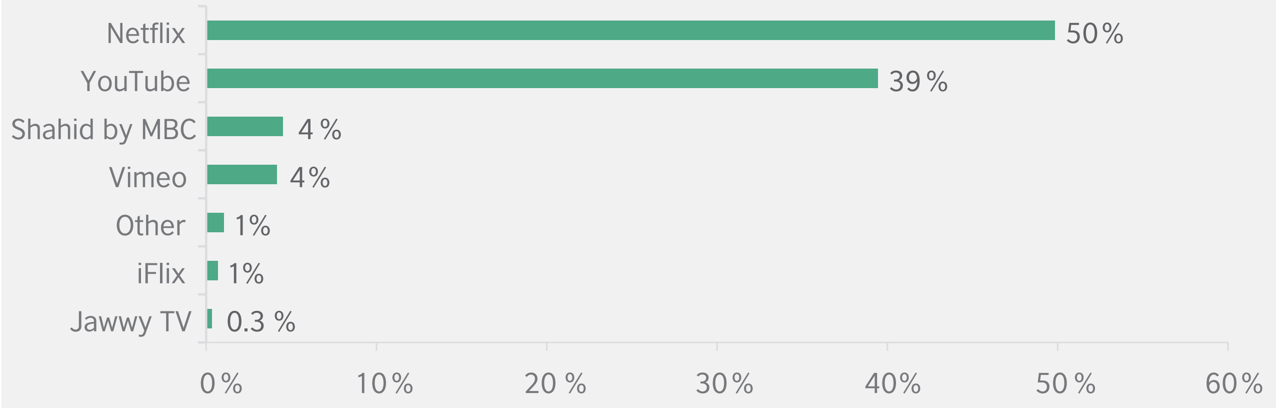


**Figure 13: Satisfaction with the availability of quality Arabic films**




n = 293
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

**Figure 14: OTT platforms that present the greatest opportunity for Saudi film**




n = 289

Nordicity's more recent survey found that of Over-the-Top (OTT) platforms, Netflix had the greatest potential for Saudi Arabia's film sector, followed by YouTube (39%).

**Meanwhile the demand in Saudi Arabia for cinema is expected to grow, recouping film audience expenditures leaking to its neighbours.** Dodona Research anticipated a shift in cinema investment from the UAE towards the Saudi Arabian market given the market liberalisation, and the expectation of an inward shift towards Saudi domestic film tourism given the emergence of cinema in their own country.[16] Indeed, a majority of respondents to the Nordicity survey believed Saudi Arabia had the potential to develop a thriving film industry, as illustrated in the figure below.

**Cast and on-screen talent were seen as the biggest advantages of the Saudi film sector, according to 35% of respondents of the Nordicity survey.** The availability of film locations was seen as the second biggest advantage by survey respondents (19%), followed by the market potential and audience demand (17%). Saudi Arabia's existing strength in producing online video content was seen as the biggest advantage by 12% of respondents, followed by its opportunities in sponsorship (11%). Meanwhile, its workforce was seen as the biggest advantage by only 6% of respondents, and its former status as a tax-free economy was seen as the biggest advantage by only 2%.

16 Dodona Research. Cinema Industry Research: United Arab Emirates. September 2018.

An acting workshop in Riyadh in December 2019 : Image © Ministry of Culture

**Film has the potential to address some of Saudi Arabia's employment pressures.** There is a significant workforce potential to supply a growing film sector in Saudi Arabia. The country has high levels of unemployment, at 12.5%, and very young population whereby 70% are under the age of 30.[17]

**Some promising developments are already underway.** The Saudi Government through the Ministry of Culture has identified the Cultural strands, of which Film and content is one, and have been working with the British Council to identify new areas of development together. The King Abdulaziz Center for World Culture (Ithra) was developed to become a national production hub for Saudi Culture, based in the eastern city of Dhahran near Dammam, while Dubai-based MBC Group and the Riyadh-based MiSK Art Institute have been providing funding and training support. Two women's universities in Jeddah have begun offering film courses, at Effat University and Dar El Hekma University.

17 General Authority for Statistics (GaStat)

## OPPORTUNITIES FOR SECTOR GROWTH

**Production was the area seen as the greatest opportunity for Saudi Arabia's film sector.** Two thirds of Nordicity survey respondents identified production (66%) as the sub-sector with the greatest opportunity. The second and third areas were film distribution (13%) and post-production (12%), followed by exhibition (7%) and film archiving and screen heritage (1%). During Nordicity's time in Saudi Arabia, several of the companies consulted noted their intention to establish themselves more formally as production houses for feature films. One of the stakeholders identified a mismatch between the current cinemas – which are high-end establishments – and the types of films that the domestic industry was likely to produce initially. This meant, according to this interviewee, that distribution opportunities were limited. In light of this mismatch, one stakeholder urged for so-called 'garage cinemas' to be allowed.

Similarly, research by the Saudi Arabia Ministry of Culture (MOC) had previously identified early signs of strength in film production alongside pre-production and distribution, while it has noted that there was virtually no activity in development and post-production.[18]

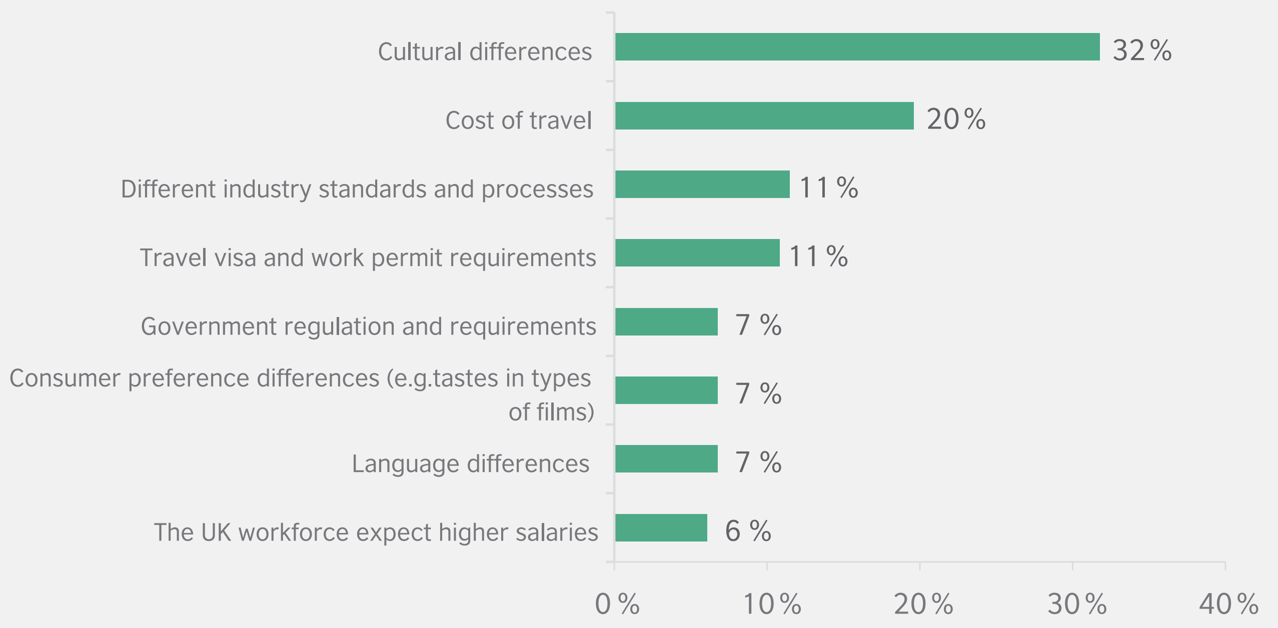
18 Port Partners Analysis with Ministry of Culture.

**The provision of traditional film education offered in Saudi Arabia was a priority for the sector.** The establishment of film schools in Saudi Arabia was identified as the top activity that would help the Saudi film industry (65%), followed distantly by establishing apprenticeships, internships and on-the-job training. The provision of Arabic script writing courses was the third most important area, mirroring the views of industry members interviewed and reflecting the consumer research in the demand for quality Arabic productions.

Other areas of prominence included the provision of film training qualifications (22%), training workshops

> "While the 1970s were the golden age of cinema, we're now in the golden age of social media".
>
> Talal Ayeel, 32 Action Films

**Figure 15: Challenges in partnering with the British film industry according to respondents**




n = 148
Source: 2019 Survey of the Saudi Film Industry conducted by Nordicity

and masterclasses (21%), and inviting international film industry professionals to Saudi Arabia (20%) alongside the availability of quality film critique (20%).

Activities of lower priority included sending Saudi Arabian film industry professionals to international markets (16%), the role of film schools in other countries (15%), pitching opportunities and matchmaking and relationship brokering (13%). Amongst the least important areas were conferences and awards shows (11%), industry meetings and panel discussions (9%), film education at schools and film clubs (8%), and online showcasing and directories (3%).

## OPPORTUNITIES FOR UK AND SAUDI ARABIAN COLLABORATION

**The Saudi Arabian film sector has a significant interest in collaborating with the British film industry.** The vast majority of survey respondents were very interested in partnering with the UK (72%), while just over a fifth were somewhat interested (22%). Meanwhile, only 1% were not interested at all. During Nordicity's fieldwork and consultations in Saudi Arabia, film producers and companies highlighted the professionalism of the UK sector, and their strengths in pre-production. These strengths were seen to be distinct from other international film sectors – for instance, the Germans were seen to have particular strengths on the equipment and technical side.

Of those who expressed interest in collaborating with the UK, almost half (47%) perceived the biggest benefit of collaborating to be that the UK film industry has leading film industry experience. The second biggest benefit was identified as the UK's international standards of working (21%). The use of new filmmaking techniques not known in Saudi Arabia was identified as a top benefit by 10% of respondents, followed by the UK's opportunities for international distribution (9%), the UK's technically trained film workforce (7%), and the UK's insight into international markets (5%). Meanwhile only 1% identified the UK's use of the English language on-the-job as a benefit.

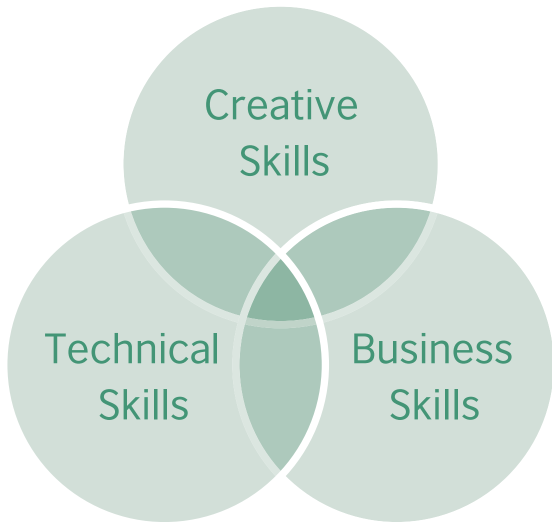
Cultural differences were deemed the biggest challenge in UK and Saudi partnering, identified by a third of survey respondents. The cost of travel was the next biggest challenge identified by a fifth of respondents, while the difference in industry standards and travel visas were both identified as the next biggest challenges by 11% of respondents each. This was also raised by interviewees in Saudi Arabia consulted by Nordicity, though it is important to note that several of these individuals were foreign nationals working in Saudi Arabia. Other challenges identified included differences in government regulation, consumer preferences and language (7% each), while only 6% identified the salary differences as a challenge.

Survey respondents were mixed in their views for the form of collaboration with the UK. Just under a third of respondents saw the opportunity to bring UK expertise to Saudi Arabia as the optimal form of collaboration (32%), mirrored by those who saw the opportunity to send Saudi film stakeholders to the UK. 38% did not indicate a preferred model for collaboration.

## OPTIONS FOR SECTOR GROWTH

This report proposes a series of evidence-based options for sector growth. These options range in complexity and impact from short-term to long-term, and address a range of areas of work, from policy and institutional changes to grassroots-level interventions.

It should be noted that many of these issues are faced in other country's film sectors, and the approaches to each are often unique and highly localised. There is a pressing need for a film sector strategy for Saudi Arabia, and the window of opportunity is present.




Considering the shortages indicated by employer demand alongside the survey's skills assessment of availability, provision of training for technical skills alongside creative skills, and business skills would help the sector adapt to change and enhance its resilience.

### Short term options

In the short-term, a number of options can be taken as priorities to bolster the Saudi Film Sector, including facilitating the deeper organisation and coordination of the sector, the provision of film training and education both in Saudi Arabia and the UK, enhanced marketing and promotion of the sector domestically and internationally, and increasing international relationships with key markets in the US, UK and MENA region. In essence, these steps would allow the industry to take the first step towards becoming a cohesive film sector, rather than a sector shaped by content creation.

- **Organising the sector:** intiatives to support the development of a cohesive and consistent sector, with a strong pipeline of opportunities
  - Develop a film sector trade body or industry association (Jeddah Workshop suggested a 'chamber'). Telfaz11 highlighted the opportunities they saw in a production guide which could also provide training, but highlighted it would need to be government facilitated.
  - Sign-posting. Jeddah Workshop suggested an 'online platform for actors, castings and performance test ads to advertise their works'. A database (Riyadh Workshop) could be made accessible to students or other young people.
  - Creating a film sector network to link industry members for more peer-to-peer learning, knowledge transfer and freelance engagement and employment/recruitment opportunities. Networking events ensure that stakeholders and aspiring stakeholders are aware of each other and of the existing Saudi talent they can draw on.
  - Creating or supporting efforts to systematize

recruitment and crewing activities. This could also involve outreach to students and universities for recruitment, raising awareness of the film sector as a career opportunity. Moreover, it could focus on introducing them to below-the-line roles as most of the talent pipeline are interested in above-the-line roles.

- **Skills, talent and training:** providing training will be an important way to both upskill existing stakeholders and raise awareness of opportunities above and below the line. This would include skill sharing, knowledge transfer and peer-to-peer training, and could be facilitated through government structures but owned by the sector.
  - **Screenwriting Skills**
    - A priority for much of the Saudi film sector, production companies are keen for all of their workforce to engage with screenwriting and storytelling as a benefit to their companies (not just those who do the screenwriting). There was a specific demand for Arabic script writing, localised to Saudi Arabian context. This could be developed in partnership with a Saudi expert to localise it. An alternative could be partnering with a Saudi literary or storytelling expert, given the country's strong tradition in storytelling.
    - Deliver short-term workshops in Saudi. Delivered by international experts from the UK and US.
    - Include a preparatory phase prior to the workshop and the opportunity for follow-up after the workshop.
  - **Producing and Management Skills**
    - Deliver a 'film production and film management skills' workshop including training on international film financing, production management, distribution, access to markets, access to festivals, how to pitch, business culture (punctuality, planning, international approaches to working, professionalism).
    - Access to finance was considered the greatest barrier to growth for Saudi film producers and companies.
    - Incorporate casting element to the producing workshops, to address the producers note that access to skilled cast was the second biggest barrier to growth.
    - Training on HR should be delivered, as recruitment of crew was identified as a significant issue for producers and companies.

> "My ambition is to be a pioneer in animation in Saudi Arabia."
>
> Abrar Qari, Namaa Productions and graduate of Effatt University


More Film Festivals bring forth more opportunities to showcase skills and fund them, such as Red Sea International Film Festival which debuts in March 2020 in Jeddah : Image © Red Sea International Film Festival

  - **Acting and casting skills**
    - Upskilling/sideskilling actors for film roles, which are different from stage, social media and advertising skills
  - **Below-the-line crew skills**
    - This would help address the views of film stakeholders that KSA's workforce was not considered at all uncompetitive. This would also help counter the current talent pipeline surveyed being focused on above-the-line roles.
    - Training for lighting technicians and grips were identified as priorities for below-the-line crews.
  - **General introductory courses on 'Set Etiquette'**
    - These were sought out by production companies to help to raise the standard of crew in KSA.
    - This could also help to mitigate the challenge of 'cultural differences', which was seen to be the greatest challenge that Saudi

filmmakers would have in partnering with the British sector, and would likely also be a challenge with others.

It is important to note that international collaboration on these training efforts would be possible: Eqew suggested they would be open to co-delivering training with UK experts, and Telfaz11 noted that they were willing to pay for continuous professional development programmes for their staff. An effort could also be made to develop and enhance international relationships with training institutions, universities and production studios in KSA and around the world.

### Medium term options

In the medium-term, a number of options can be taken as priorities to bolster the Saudi Film Sector, including market and audience development, international training and exchange with key markets including the UK, US and MENA region, advancing public policy in the interest of film business in Saudi Arabia, enhancing the film education offering domestically, and promoting increased film production overall.

- **Audience and Market Development**
  - E.g. pop-up screenings and outdoor cinemas- this might allow wider audiences to attend screenings and could develop a wider culture of going to the cinema.
  - Events and festivals, including those in collaboration with international actors and stakeholders could be another way to develop an audience
  - Film events in schools would be another way to do this that would explicitly reach out to young people. This could also be tied to skill development initiatives or linked to recruitment initiatives.
  - Film heritage and archiving – creating a sense that film in Saudi is building on a heritage will help to propel the sector and to foment demand for Saudi stories presented through film, and will link the sector to Saudi Arabia's tradition of storytelling.
- **Independent local cinema or film screening and festivals skills.**
  - Given that major international cinema operators are rolling out in KSA, they will be investing in and delivering their own commercial training and capacity building. In this way, the traditional cinemas and exhibitions sub-sector is not deemed a priority, and instead the focus should be on grassroots cinema exhibition. These same cinemas are likely to screen international content, and so in order to provide Saudi filmmakers with access to audiences, the sector would benefit from a local grassroots cinema and festival market.
  - This training would likely be non-traditional in form, delivered through collaborations, partnerships and mentorships with UK-based independent cinemas, film groups and film events and festival organisers. This would allow small, independent operators to learn entrepreneurial, curatorial, audience development and operations skills.
- **International training and exchange**
  - This would involve sending Saudi students to UK to learn from experts. An exchange programme – where institutional collaboration would not be initially feasible, it may be worthwhile to promote existing opportunities to students.
- **Attract foreign production**
  - This would involve undertaking a branding and marketing exercise to position KSA as a film location market for UK films – materials already exist for this. Visits could be organized in order to give UK stakeholders a first-hand experience of the country.
- **Facilitate local production**
  - This could involve developing a film fund to finance local productions and should also likely involve a professional development fund.
- **Develop a film sector network/hub**
  - Empower existing networking activity to reach out to smaller centres to ensure the whole country, not just big cities, are enfranchised in the industry.
- **Marketing and promotion**
  - Market access should be improved to facilitate international sales and exports.

> "We'd like all of our crew to take a scriptwriting course. To localise the content you need local people who understand storytelling in film."
>
> Fayaz Melibari and Omar Zahrani, Holam Films

  - A Festivals strategy, both in-bound and out-bound could also be developed.
  - Celebrate and showcase Saudi films. The Jeddah Workshop suggested a showroom. Awards could be another opportunity to draw attention to the sector.
- **Policy Changes**
  - Demonstrate that the government place value in the sector
  - Improve data collection through monitoring and reporting
  - Regular Workforce Survey and Employer Survey
  - Skills Network (or board) to continuously assess the needs of the sector
  - Administrative: facilitate visas and permits.
- **Outreach to cinema audiences for recruitment**
  - Marketing and promotion to Saudi cinema filmgoers on the opportunities for working in film should be continuous until the sector is fully autonomous.

### Longer-term considerations

In the long-term, a number of considerations can be taken to bolster the Saudi Film Sector supporting Vision 2030, including the development of a national screen institute, establishing film tourism in the country, integrating film as within the country's heritage, and advancing the public policy and administrative landscape for film in the country.

- Establish a film school in Saudi (UK partner)
- Foster a business culture upholding punctuality, planning and professionalism
- Develop a market of film tourism
- Expand educational opportunities (and engagement)

### UK partnerships

- **Networks, Peer-to-peer learning & Mentorship** – Remote mentorship with UK experts, film sector network, internship scheme
- There is a desire to **partner with and learn from the UK film sector** and their professionalism due to their international prestige and quality filmmaking. The biggest benefit to collaborating with the UK was seen as benefiting from their industry experience.
  - Training should be delivered for **both feature-length film and web productions**. The sector has an existing growth trajectory in web productions that it can leverage, and the sector stakeholders have demonstrated an interest in developing its capacity and prowess feature-length film.
  - The level of training should be **concentrated at the intermediate- and senior-levels of experience**. This would reflect the sector demand, which seeks to upskill their existing strong talent base from one of service, social media and advertising production towards one of international feature film and cinematic production. Stakeholders noted that the current provision of training is tailored to new entrants and intermediate-level film workers, and more advanced training is required.
  - Given economies of scale, the more advanced training may be more cost effective to deliver outside of KSA, by bringing individuals to the UK. E.g. Collaboration with UK training institutions, sponsored by MoC.
  - Where possible, training and programmes should be done in **collaboration with MoC or other local partners** to ensure it is sufficiently localised for the Saudi context. This would also help with further capacity building and would help address the challenge of cultural differences between KSA and the UK as noted by industry stakeholders.

- Promotion of the training provision across the country, including the smaller centres to converge on the three major cities.
- Industry stakeholders were equally open to bringing UK experts to KSA for training as they were with sending Saudis to the UK.
  a. **In the short term**, it would be advisable to bring UK experts to Saudi Arabia to deliver short-term training and workshops.
  b. **In the medium-term**, it would be advisable to establish programmes that bring Saudi filmmakers to the UK for capacity development with UK partners in-country.
  c. **In the long-term**, it would be advisable for UK experts to help stablish formalised training programmes and institutions in KSA with local Saudi partners.

## SHORT TERM RECOMMENDATIONS

Based on the data collected during this process and summarised in this report, a series of recommendations have been developed for British Council and the MoC to take forward. These predominantly focus on areas of training and skill development that are relevant as well as methods for delivery. These recommendations would be designed to be rolled out in the short term, to allow for further opportunities to develop as the wider MOC strategy to support the sector becomes clearer.

### Accredited Workshops or Training Programmes

The UK's drama schools are world renowned. Whilst it may not be feasible to introduce a degree level course or to, initially, bring students from Saudi Arabia to the UK to study a possible solution might be to train educators to deliver accredited programmes that are more flexible, and that would subsequently only require an examiner to travel to Saudi Arabia once or twice a year. A possible example of these would be the Trinity Guildhall Speech and Drama Exams. Indeed, if training educators was not possible, course could be delivered at British Council teaching centers. This might provide a way for British Council to engage with the film and cinema sector in a way that is aligned with the organisations existing work in the country, can be rolled out rapidly and which responds to a need in the country.

If this proves successful, the teaching center's might also consider other courses specifically tailored to the film industry, such as scriptwriting.

### Screening Opportunities

Another way in which British Council could trial engagement with the Saudi Arabia film and cinema sector would be by providing screening opportunities, or hosting film festivals, with the express aim of providing a showcasing opportunity for local creators working in English. Particularly if this is combined with an incentive of a further training opportunity or prize money, this could encourage creators to start to consider feature length films and would provide an opportunity for these to be screened outside of the main, high end cinemas.

### Remote Mentorship

Another way in which the British Council might be able to provide support and encouragement to young Saudi filmmakers would be by providing opportunities for remote mentorship. Arguably, one challenge facing the sector, is a lack of established career paths or awareness, particularly of rolls in the industry that are less high profile. By providing opportunities for remote mentorship, the British Council might raise the profiles of these positions and increase the skills and professionalism in the sector.

**Nordicity**

Nordicity is an international consultancy providing research and evaluation, strategy, policy and economic analysis for the arts, cultural and creative industries.

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