

UAE's Cultural and Creative Industries Pulse Check:

تقرير رصد نبض الصناعات الثقافية والإبداعية:

Resilience & Recovery during
the pandemic

المرونة والتعافي خلال
الجائحة

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01

Foreword

This report tracks the transition from lockdown to recovery as the Cultural and Creative Industries (CCI) emerge from the COVID-19 crisis, examining where we are now as an industry and how the next six months might look.

In 2020, businesses and freelancers across the CCI experienced radical disruption and change as a consequence of lockdowns and social distancing measures. On average, companies in the CCI of the UAE lost 41% of their revenue in 2020, while freelancers lost 52%—and one in five freelancers lost their income entirely. For those hardest hit by the pandemic, like venues and freelancers, the future still looks uncertain and funding remains a critical challenge in 2021.

Yet this report shows that the recovery phase has begun in the UAE, albeit at different speeds across the six sectors of the CCI. We heard from companies in Cultural and Natural Heritage who expect to bounce back almost entirely in 2021, while in the Performing Arts and Celebration sector, companies and freelancers alike expect things to get a little worse before they get better. We were all in the same storm, but not all on the same boat, and the Ministry acknowledges that different sectors within the CCI will need different types of support. The Ministry will work with cultural authorities and community-based organizations across the UAE to shape recovery strategies and direct investments that will bring back jobs and create new opportunities.

Despite the serious impact of the crisis, the CCI in the UAE have demonstrated the capacity to reimagine their future and the report tracks the most significant adaptation strategies developed by companies and freelancers during 2020. When the first effects of the pandemic took hold, we saw immediate steps to cope with the sudden halt of business as usual, including downsizing, reducing salaries and seeking relief funding. As closures and cancellations persisted, companies and freelancers explored new ways to generate revenue and find audiences, often turning to digital technology and new business offerings. Eventually, a set of structural changes emerged—shifts to business strategy and organization that show enduring potential and that will continue to shape the CCI's future.

Looking forward, the recommendations from this report will inform the 10-year national strategy for the CCI that the Ministry is finalizing. As we lay the foundations for the future of the industry, the feedback from businesses and freelancers encourages us to find new ideas to reduce barriers to entry, to center the needs of SMEs and independent creatives, to invest in skills to monetize digital cultural content and to simplify procurement procedures—all of which will contribute to a more supportive and enabling environment for creative talent in the UAE.

On a personal note, I want to acknowledge the resilience, solidarity and ingenuity of our sector. The generosity that the people of the cultural and creative industries have shown each other has been inspiring and made it easier to navigate the very difficult environment we all lived through in 2020.

Through the pandemic, we have realized that as human beings we especially value the connection with others. While digital technology has revealed new ways to consume culture online, in-person interactions with culture that engage our senses directly will remain vital to the concept of culture. They connect us and they trigger our emotions and our imagination; they help us communicate and they make more resilient as a human community.

One thing is certain: the CCI in the UAE have been forced to change. As we refocus, reconfigure and repurpose our industry for the new dynamics of the next normal, let us choose to fix the vulnerabilities within the CCI and change for the better.

Noura Al Kaabi
Minister of Culture and Youth

02

Executive Summary

COVID-19 fundamentally disrupted the Cultural and Creative Industries (CCI) in the UAE. From venue closures to cancelled events and projects delayed indefinitely, the pandemic sent shockwaves across the six sectors that make up the CCI.

This report, entitled UAE's Cultural and Creative Industries: Resilience and Recovery seeks to:

- 01** Assess the impact of the pandemic on the UAE's CCI
- 02** Elucidate the adaptation strategies of freelancers and companies, highlighting significant shifts in the industry
- 03** Address the perspectives of the creative community on support measures taken to date
- 04** Define priorities and future outlooks for the next six months and long-term

The report's quantitative findings arise from a survey of 618 respondents from all six sectors of the UAE's CCI, conducted in January 2021. Interviews with 17 leading figures in the sector provide perspective on COVID-19's impact on government authorities, cultural organizations, SMEs and creative talents. It reflects the views of the respondents at the time of the survey, in January of 2021. Those views may have evolved since, as a consequence of the gradual reopening of cultural activities.

The report's key findings include:

- **More than 75% of all companies and freelancers report having suffered a loss of revenue compared to 2019.** On average, companies lost 41% of their revenue in 2020, while freelancers lost 52%—and one in five freelancers lost their income entirely. The size of this revenue loss varied, but the large majority of companies and freelancers lost 40% or more of their revenue in 2020.
- **The cancellation of cultural events was the leading cause of lost revenue, and had a profound effect across all sectors of the CCI.** While the industry has reorganized around virtual events, survey respondents believe traditional events are critical to their financial recovery.
- **The industry as a whole took immediate steps to reduce costs and find new work.** Companies most frequently reduced salaries and downsized, with almost half reporting layoffs, half reducing salaries, and one in four asking employees to take unpaid leave. Two thirds of freelancers tried to find new clients or jobs within the CCI, although close to half looked for a job outside the CCI.
- **The Performing Arts & Celebration sector struggled more than any other.** Companies and freelancers in this sector lost more than 70 percent of their revenue. The sector was the least likely to increase revenues in 2020, and is the only sector projecting a further downturn in 2021. Its companies were the most likely to reduce salaries and conduct layoffs; its freelancers were the most likely to look for jobs outside the CCI and cancel contracts with other workers.
- **Only 13 percent of companies and 9 percent of freelancers reported having gained revenue in 2020.** This small group indicates that leveraging digital technology to reach new clients and audiences is a winning strategy. Respondents in Cultural & Natural Heritage and Audiovisual & Interactive Media were most likely to increase their revenues, usually through a smoother transition to remote work, digital content and online sales. Companies in Cultural & Natural Heritage predict a near-complete recovery in 2021; led by digital success in art galleries and cultural education, this recovery projection signals a new normal.
- **Digital strategies were critical to generating new revenue, and are here to stay.** Nearly half of all respondents created new digital initiatives in 2020, like paid online events. Three quarters of all survey respondents used digital means to distribute content, products or services in 2020. While the digital shift was first and foremost a survival attempt, the movement toward online creative and cultural consumption has shaped expectations for the future of cultural consumption patterns.
- **Early and decisive government intervention was essential to maintain the social and skills fabric of the CCI.** The first relief funding programs in the UAE were launched in April 2020, and 23% of companies and 30% of freelancers reported applying to one or more of these programs. Government interventions are particularly crucial for freelancers and small companies who in general do not qualify for traditional assistance from banks and need targeted relief.
- **The financial and staff challenges of SMEs illuminate areas where government intervention could be especially effective.** Survey respondents with medium to large annual revenues more frequently reported taking business-sustaining measures like reducing fixed costs, offering discounts, and launching new initiatives, whereas small companies and freelancers took these steps markedly less often. SMEs and freelancers need policies that take their financial and staff constraints into account as the industry recovers: license and visa fee reductions, simplified processes, and upskilling opportunities to seize the opportunities of an increasingly digital CCI.
- **COVID-19 has left many companies and freelancers feeling uncertain about the future.** When asked to estimate how their income would change in the first half of 2021 compared to 2020, companies on average projected a modest recovery of only 5%, while freelancers expect only a 1% improvement. Nearly half of respondents say securing funding to cover salaries and rent is their primary concern for the next six months.
- **To sustain the growth of its unique cultural economy in a post-COVID context, the UAE will need collaborative strategies between cultural authorities.** By first engaging with the CCI to understand its biggest threats, the Ministry in collaboration with cultural authorities in the UAE can be better prepared to focus resources where they will be more impactful. Government should focus on a mix of urgent measures and long-term plans to provide sustained financial assistance, develop forward-thinking policies, and launch innovation focused initiatives that will support the CCI's resilience and recovery.

03

Introduction

COVID-19 fundamentally disrupted the Cultural and Creative Industries (CCI) in the UAE. From venue closures to cancelled events and projects delayed indefinitely, the pandemic sent shockwaves across a sector that is, by its very nature, highly connected and interdependent. Gradually, disruption evolved into resilience, adaptation and renewal. As consumers looked for culture and creativity online, companies, institutions and freelancers found ways of engaging digitally with audiences, forging new connections and unleashing new formats for producing and consuming culture and creativity that are likely to shape the future of the creative economy in the UAE.

Early in 2020, the UAE government put in place a suite of emergency actions to mitigate the impact of the crisis. An initial survey of the CCI conducted by the Ministry of Culture and Youth in April 2020 gathered data essential to guide an urgent response. The National Creative Relief Program was launched in May 2020 to sustain cultural production in the UAE and mitigate the economic impact of COVID-19. The UAE was the first country in the region to launch a stimulus program to support creatives, and the fund distributed grants among 140 freelancers and companies.

In January of 2021, the Ministry of Culture and Youth launched this study to take the pulse of the UAE's CCI. Its findings will inform the next set of actions and policies required to address the vulnerabilities that remain in the sector.

This report seeks to

01



Assess the impact of the pandemic on the CCI, with representation from all sectors

02



Elucidate how freelancers and companies adapted their strategies and highlight significant shifts in the industry

03



Address the perspectives of the creative community on support measures

04



Define priorities and future outlooks for the next six months and long-term

As the CCI continue to adapt to a new normal, the Ministry of Culture and Youth wishes to reinforce its commitment to the cultural and creative community by listening first. To sustain the unique cultural economy of the UAE in a post-COVID world, a collaborative strategy is required. The insights this study has revealed will guide practical measures to improve the recovery of the CCI in the UAE and help amplify solutions developed by the community to enhance its long-term resilience.

04

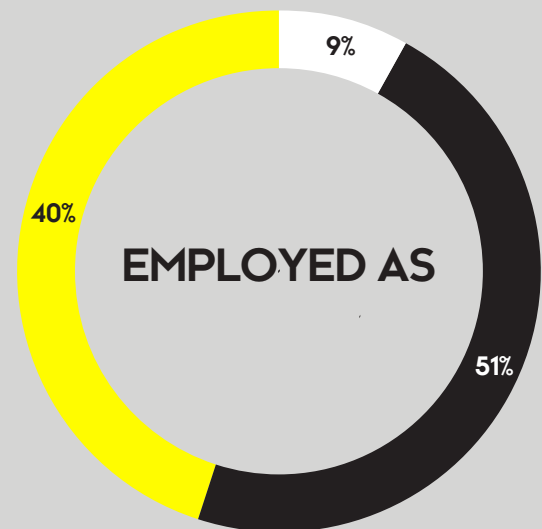
Methodology

As defined by the Ministry of Culture and Youth, the Cultural and Creative Industries (CCI) consist of the ideation, creation, production, distribution and dissemination of goods and services of creative expression and cultural preservation that generate and sustain socio-economic impact.

The findings presented in this report arise from two sources: a survey of 618 respondents from the Cultural and Creative Industries of the UAE and interviews with 17 leading figures in the sector, representing government, cultural organizations, SMEs, and creative talents.

The survey was conducted in English and Arabic in January 2021. Survey respondents were a random sample of individuals working in the CCI in the UAE. The quantity of respondents makes the survey statistically representative of the CCI sector. To ensure adequate representation of industries within the sector, a number of partners across the UAE assisted with survey distribution; these organizations are listed at the end of this report, with the Ministry's gratitude.

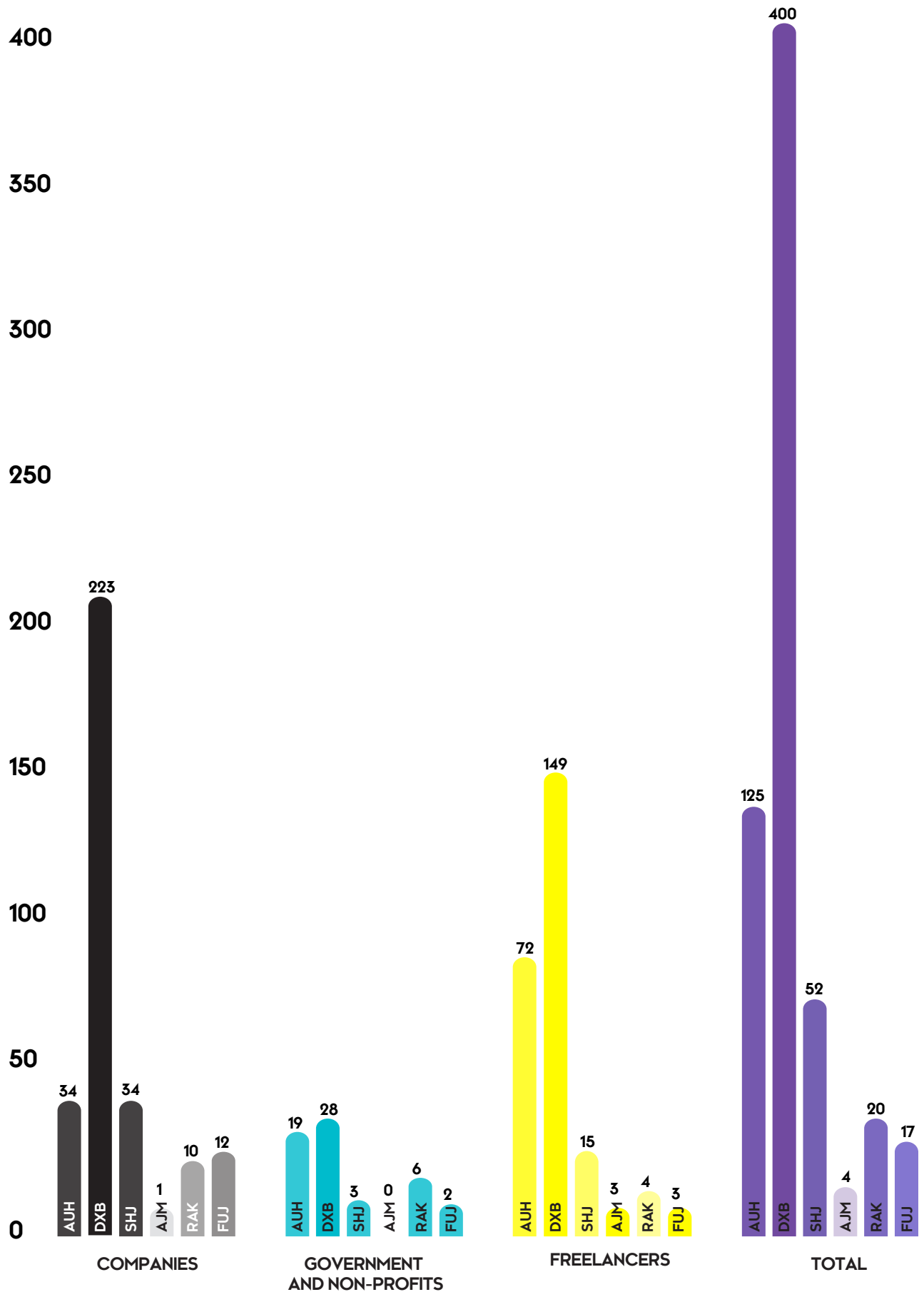
Over half of respondents reported their employer type as a commercial business, SME or Free Trade Zone company, while 40% are categorized as a freelancer or independent professional, including artists, musicians, and performers. In the discussion of the survey results, these two categories are referred to as Companies and



Freelancers. Respondents from government, non-profit, NGO, charity or foundation organizations are considered separately.

Throughout the analysis, multiple choice responses are reported as the percentage of respondents that chose a particular answer. Questions allowing multiple selections are reported the same way; consequently, some questions will sum to greater than 100%. Responses to open-ended questions have been manually coded by theme. Quantitative analyses of revenue and income change describe the average response across each given category of respondents.

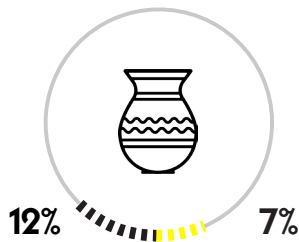
The 618 survey respondents hailed from six of the UAE's seven emirates



Respondents represented all six CCI sectors defined by the Ministry of Culture and Youth

■ COMPANIES ■ FREELANCERS

Cultural & Natural Heritage



Museums

Natural History Museums
Galleries
Science & Technology Museums
Other Museums

Natural Heritage

National Parks
Aquaria
Zoos & Reserves

Cultural Education

Music Schools
Visual Art Academies
Performing Arts Schools
Architecture & Design Schools
Film & Media Academies

Archaeological & Historic Places

Historic Sites & Buildings
Cultural Landscapes

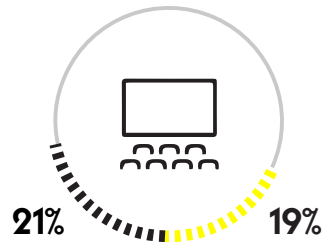
Culinary Arts

Culinary Traditions
Culinary Education
Culinary Performances
Specialty Foods
Eating Establishments & Catering

Intangible Cultural Heritage

Oral Tradition
Rituals
Social Practices
Expressions & Languages
Translation & Interpretation
Islamic Heritage

Performing Arts & Celebration



Performing Arts

Theater
Dance & Ballet
Musicals
Opera
Live Performances

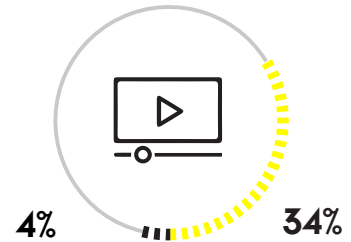
Music

Composition
Production & Recording
Distribution
Concerts & Tours

Festivals & Fairs

Festivals
Community Fairs

Visual Arts & Crafts



Fine Arts

Painting
Sculpture
Digital Art
Engraving
Calligraphy

Photography

Commercial Photography
Artistic Photography
Photojournalism

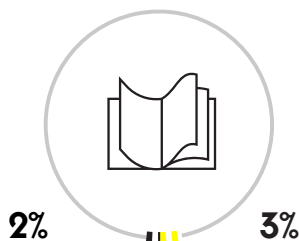
Crafts

Glass
Paper Craft
Weaving
Handicrafts

Art Reproductions

Statuettes
Printing
Ornaments

Books & Press



Books

Books
Audio & E-Books
Publishing
Book Fairs
Specialized & Thematic Stores

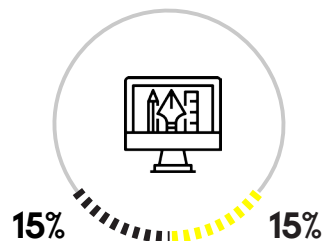
Newspaper & Magazine

Newspapers
Magazines
Journals & Periodicals
Printing
Digital Publishing

Library & Archives

Library Management
Archives Storage & Distribution

Audiovisual & Interactive Media



Film & Video

Pre-Production
Production
Post-Production
Distribution
Animation
Exhibition
Other Specialized Services

TV & Radio

Production
Broadcasting
Over-the-Top Media

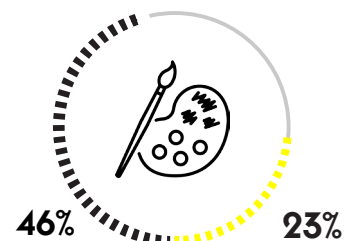
Interactive Media

Podcasting
Content Creation
Distribution

Video Games

Online Games
Console Games
Mobile Games

Design & Creative Services



Fashion

Fashion & Jewelry Design
Production & Distribution

Graphic Design

Graphic Design
Production & Distribution

Product Design

Industrial Design Services

IT & Software

Programming
Software Publishing
Emerging Tech

Interior & Landscape Design

Interior Design
Landscape Planning

Architectural Services

Architectural Consulting
Urban Planning
Other Architecture

Advertising Services

Advertising
Marketing Campaigns
PR & Communications
Media Representation

Freelancers were concentrated in Visual Arts and Crafts, at 34% of respondents, and 23% in Design and Creative Services. Companies were overwhelmingly concentrated in Design and Creative Services, at 46% of respondents. In both groups, there are more respondents in the top two sectors than in the bottom four combined. Due to the low number of respondents in the Books and Press sector, the results reported for this sector have a larger margin of error and should be interpreted with caution.

As a baseline statistic, all survey respondents are categorized as small, medium or large according to their estimated annual revenue (for companies) or annual income (for freelancers) in 2019.

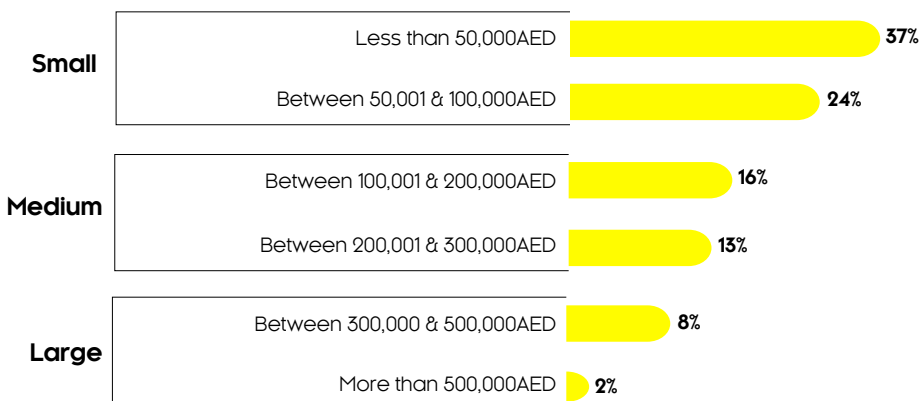
While companies are evenly distributed by size, freelancers tend to fall in the small category: more than 60% of freelancers earn less than AED 8,500 per month, and only 10% of freelancer respondents are classed as large.

Revenue category of survey respondents

COMPANIES



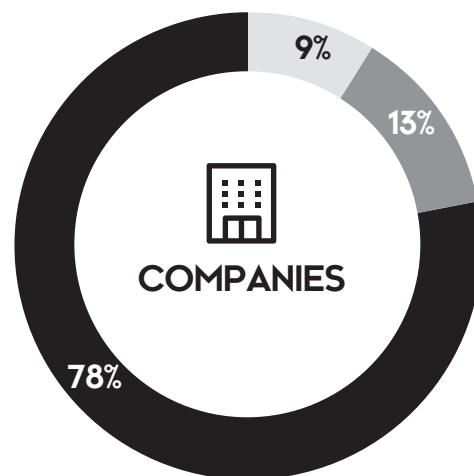
FREELANCERS



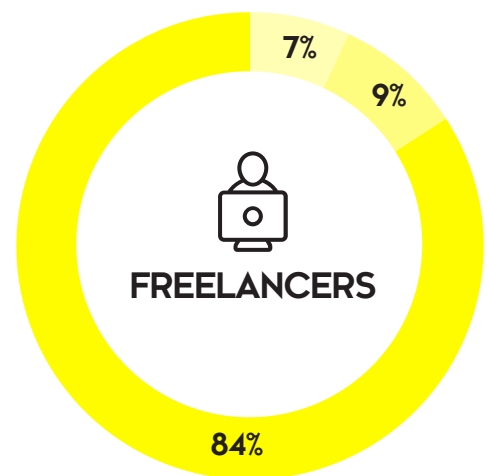
05 Analysis

5.1 How did COVID-19 Impact the Cultural and Creative Industries in the UAE?

■ LOST REVENUE
 ■ GAINED REVENUE
 ■ NO CHANGE

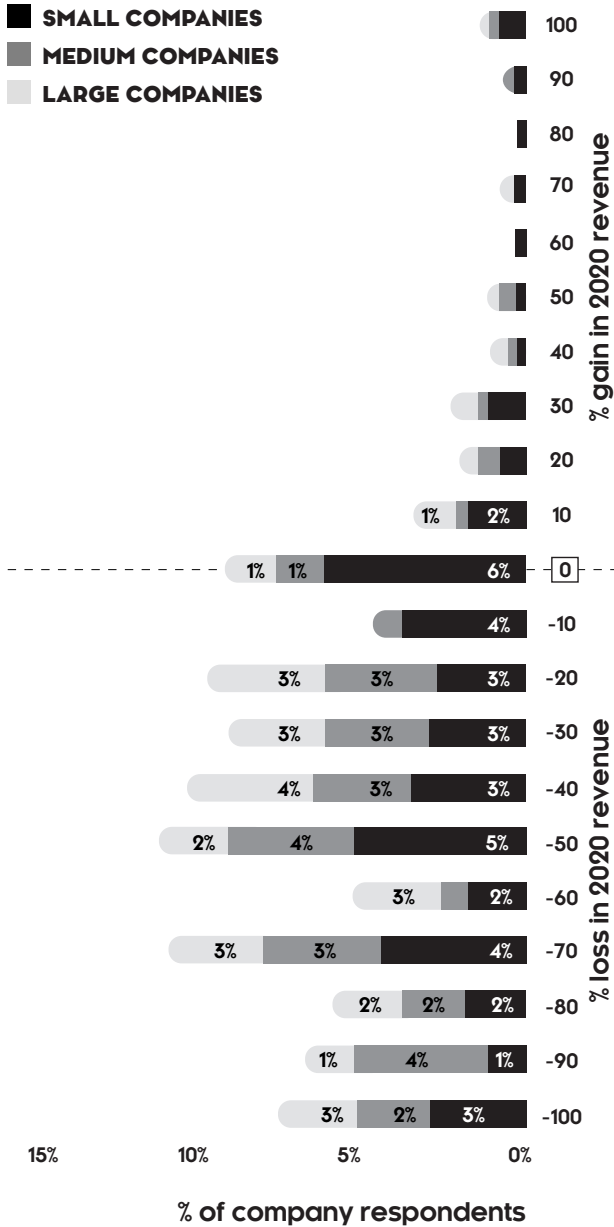


■ LOST REVENUE
 ■ GAINED REVENUE
 ■ NO CHANGE

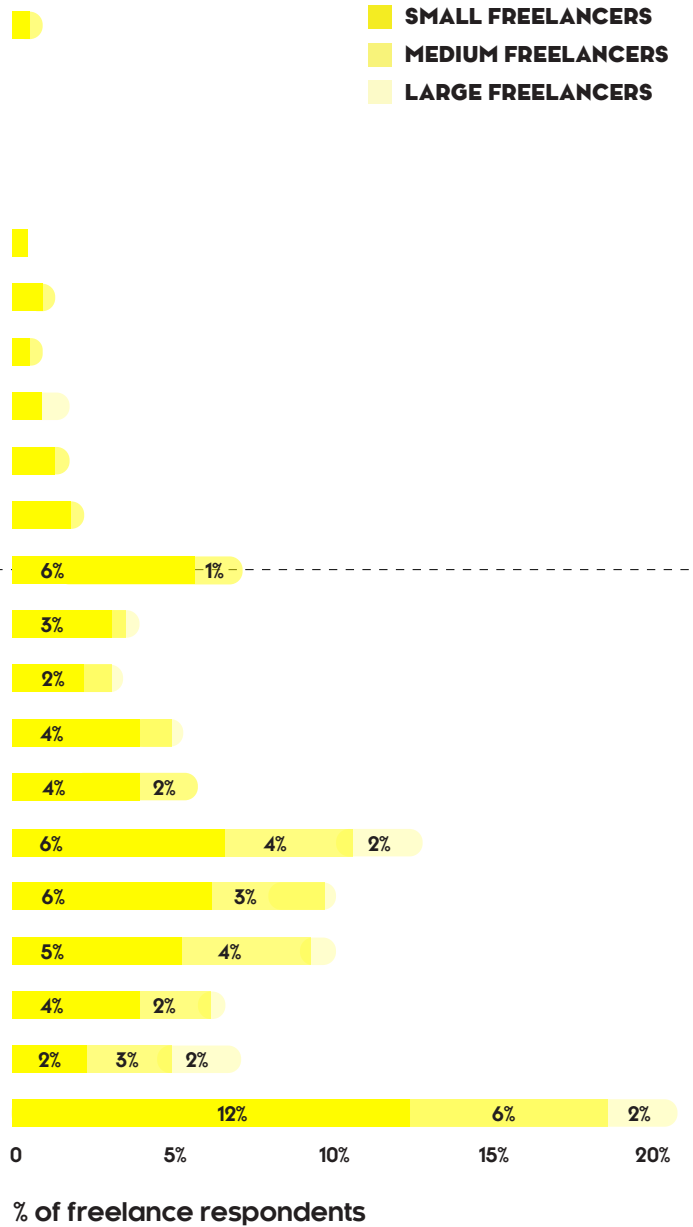


The impact of COVID-19 on CCI in 2020 is clear: more than three quarters of all companies and freelancers report having suffered a loss of revenue compared to 2019. Only 13 percent of companies and 9 percent of freelancers reported having gained revenue in 2020.

2020 revenue change by company size



2020 revenue change by freelancer size



56%
COMPANIES

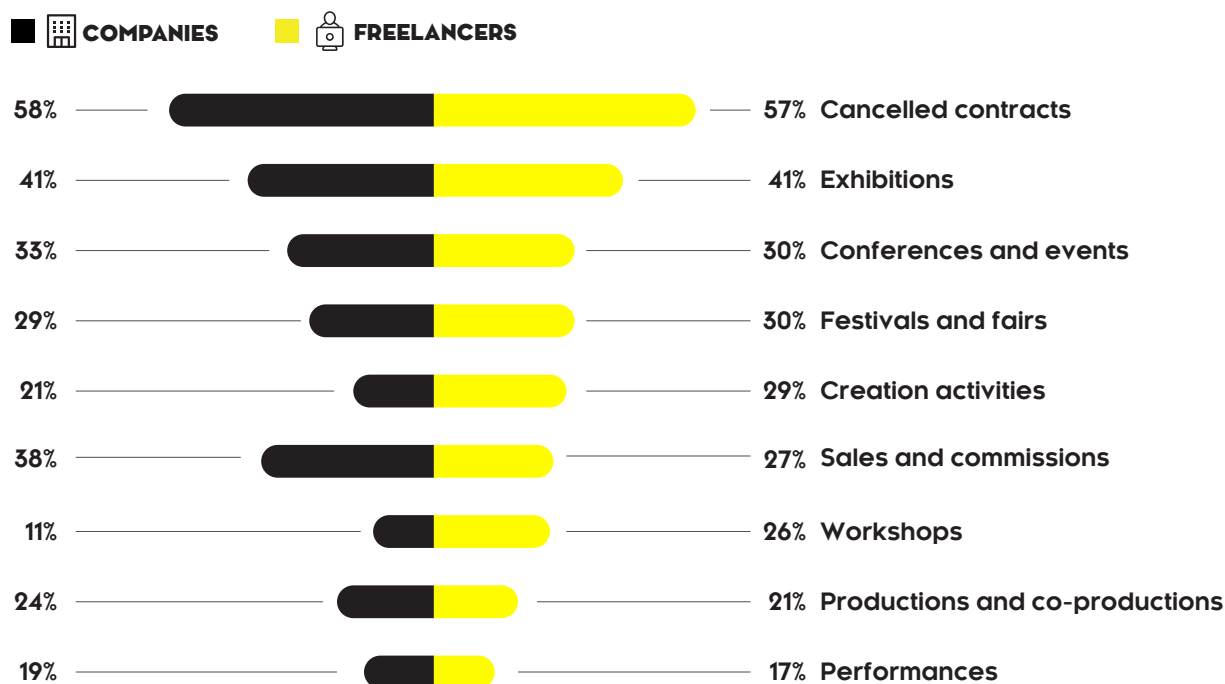
LOST 40% OR MORE OF THEIR
REVENUE IN 2020.

72%
FREELANCERS

1/5
FREELANCERS

ONE IN FIVE FREELANCERS REPORTED A
TOTAL LOSS (100% OF REVENUE) IN 2020.

Causes of revenue loss for companies and freelancers



The survey reveals that the cancellation of exhibitions, conferences and events, and festivals and fairs had a profound effect across all sectors of the CCI. They appear among the top five causes for loss of revenue for companies and in the top four causes for loss of income for freelancers.

While the industry has reorganized around virtual events, Zoom meetings and online sales, survey respondents seem eager to see the return of traditional events. Not only are these events important sources of jobs, business opportunities and networking, they often act as guiding structures for their sectors, shaping the work calendar for companies and freelancers. In this context, it is significant that when asked about the biggest perceived threats for the next six months (page 40), respondents cited the risk of another lockdown and the cancellation of events as their two main concerns.

Other than the cancellation of exhibitions, conferences and events, and festivals and fairs, the main cause for loss of revenue in 2020 was the cancellation of contracts or retainers. Over 57% of companies and freelancers selected the cancellation of contracts or retainers as a cause of loss of revenue in 2020. In the specific case of freelancers or gig workers, they often work

on a contract basis and for multiple clients. The survey reveals that 35% of freelancers cascaded the cancellation down to other freelancers. Most freelancers are vulnerable to prolonged loss of business and do not qualify for traditional financial assistance from commercial banks. Breaking the domino effect of cancellations in the gig economy is one of the strongest arguments in favor of early and decisive government intervention.

Gig workers in the UAE (as in other countries) tend to be closely connected and networked, making contagion of lack of confidence and evasion measures more likely than among companies. If one part of the gig economy suffers, the whole ecosystem feels the impact. The larger and more connected the network is, the more likely it is that freelancers have heard bad news and in turn, lose confidence. Thirteen percent of freelancers who answered the survey are contemplating leaving the UAE; if one in ten gig workers were to leave the CCI, it would represent a substantial loss of talent and expertise, as well as reduced intersectoral connectivity. All of these factors increase the vulnerability of the gig economy and can potentially delay or halt its development in the UAE.

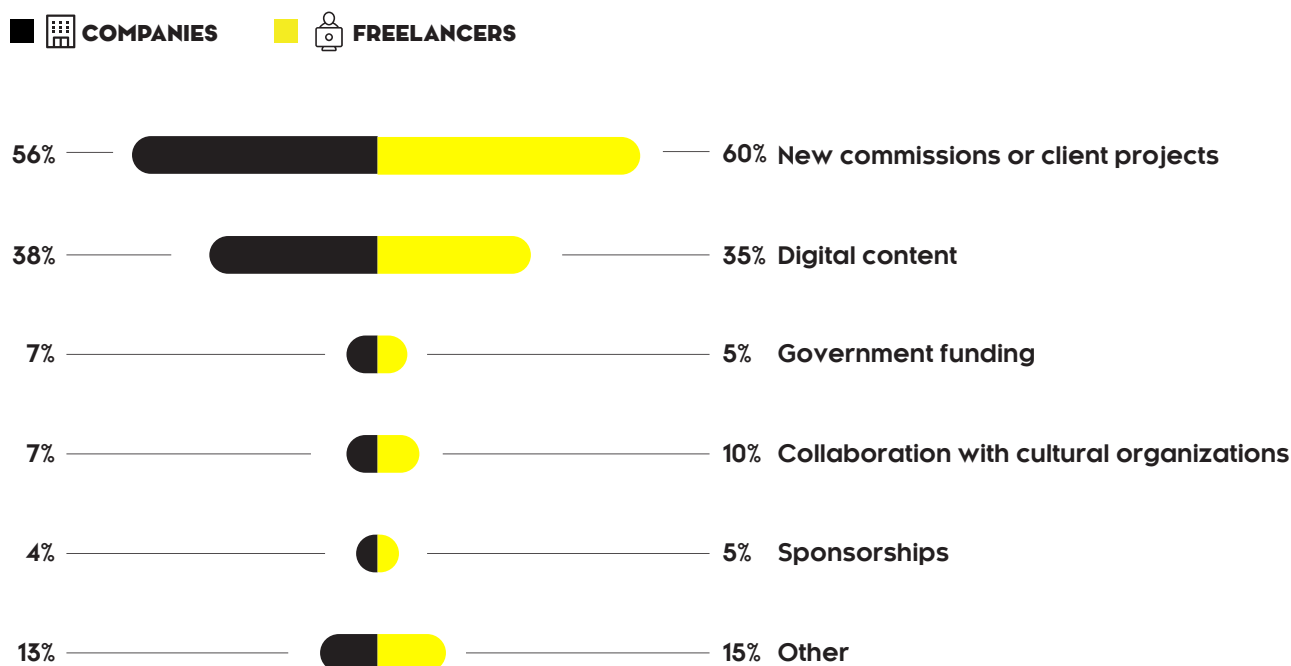
Photo courtesy of Ola Allouz for the National Geographic  @olaaaly



5.2 Who had a good 2020?

While the CCI struggled in 2020, the survey also reveals that a small group of companies (13%) and freelancers (9%) managed to increase their revenues during the crisis. Although the information provided by this small group of respondents is not representative of the sector, it gives an indication that new clients and digital technology are the two most important causes for larger revenues in 2020.

Causes of revenue gain in 2020



Large and medium companies had success with new commissions or client projects, with 67% and 75% respectively reporting earnings from that source. Small and medium freelancers that grew also attributed those earnings to new commissions or client projects first and digital efforts second. Although large freelancers are a small sample, the respondents in that category who earned more in 2020 did so digitally. Even as the pandemic wanes, digital is here to stay. To improve resilience, the CCI should investigate this approach to maintaining and growing their client base—their digital audience—in the worst of times.

Contradictorily, the lockdown opened up parts of the CCI. One third of companies and 35% of freelancers placed their content or services online, firstly to survive and later to tap into entirely new audiences, even beyond the UAE. For consumers, 2020 has been an explosion of new content and services, from online classes to museum events, from concerts to conferences. As H.E. Noura Al Kaabi mentioned in her interview, cultural offerings in the future may simultaneously cater to live and digital audiences: *“We will continue to consume culture differently, yet virtual will complement the in-person. If we want to transcend borders, this is an opportunity”*—one that bodes well for the accessibility and the ecological footprint of cultural events.

CASE STUDY

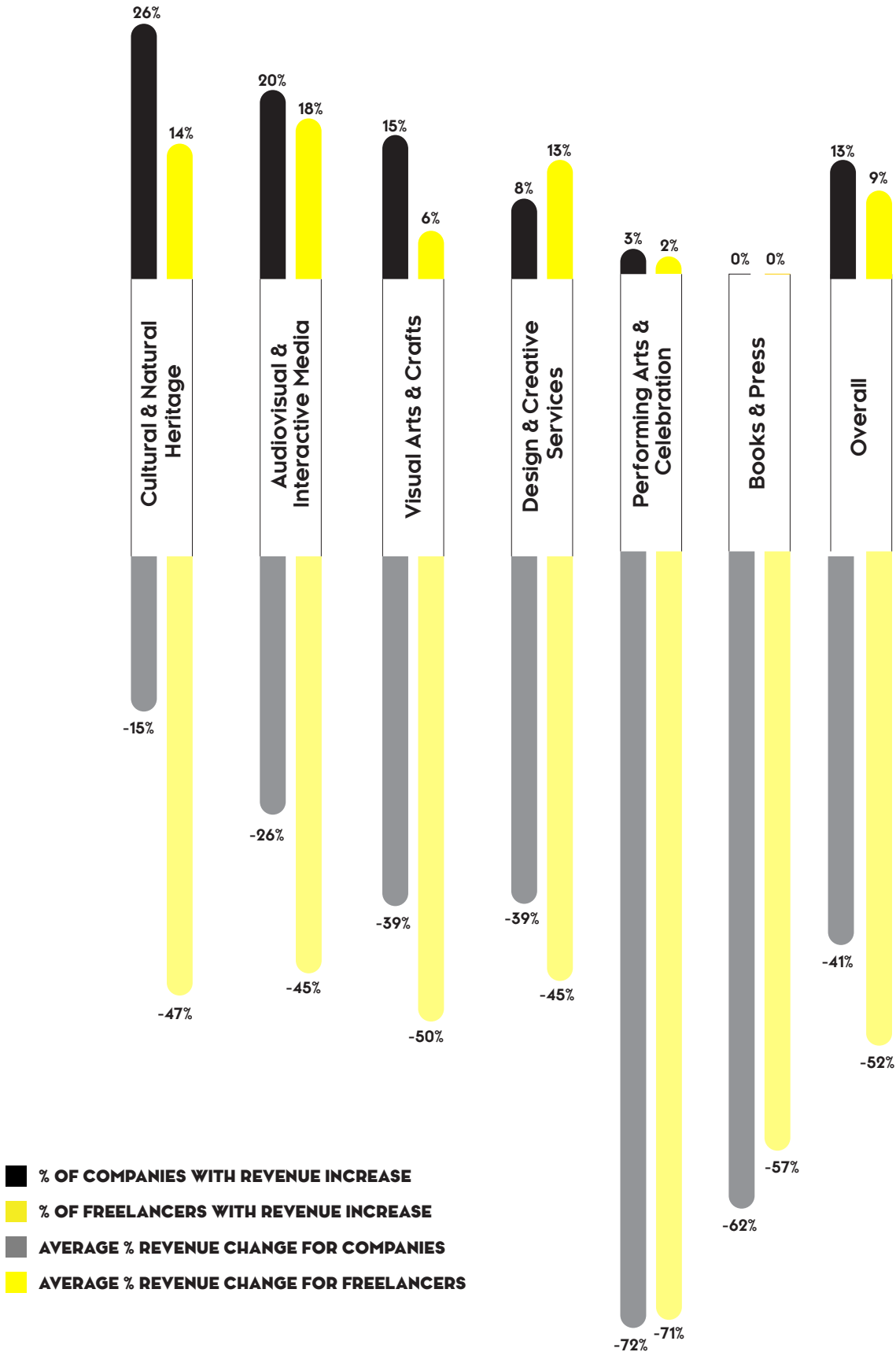
Salama Khalfan Jewellery, Dubai

 @salamakhalfanjewellery

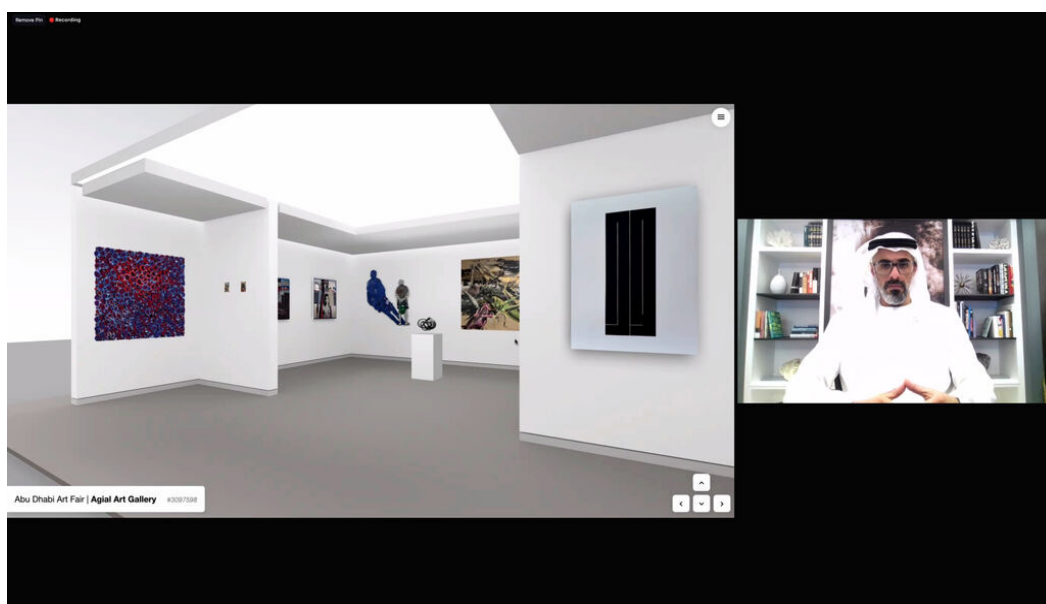
Salama Khalfan Jewellery was not entirely unprepared for the shift to online shopping caused by the pandemic. Founder and CEO Salama Khalfan's team had recently updated their e-commerce site in January 2020, making it easy for clients to purchase online during lockdown. However, now-cancelled trade shows had previously generated 40% of her business's annual sales, while the typically steady demand for special occasion, high-end and custom pieces lagged. She and her team relied on social media to engage with new and existing clients, and partnered with international designers to reach clients in new markets. These strategies proved successful as her revenues increased in 2020, which she credits to hard work and creativity.



Distribution of companies and freelancers reporting gains in 2020 revenue by sector



Respondents in the Cultural and Natural Heritage sector and in the Audiovisual and Interactive Media sector were the most likely to increase annual revenues in 2020. Some of these positive outcomes arose through a smoother transition to remote work: galleries could sell online; craft workshops went virtual; much design and marketing work involves portable skills and is easily done remotely when there is demand. That said, even in the two best-performing sectors, only one in four and one in five companies reported an increase in annual revenues when compared to 2019.



H.H. Sheikh Khaled bin Mohamed bin Zayed attends virtual tour of Abu Dhabi Art 2020. Image courtesy of Abu Dhabi Government Media Office.

The Performing Arts and Celebrations sector clearly struggled more than any other sector. With restrictions on entertainment still in force, performers and event workers are struggling to cover basic living expenses, as well as visas, licenses, and other business fees. One survey respondent highlighted the risk of permanent damage: *"If events and venues continue to be closed, the expats who do these jobs will leave and they won't come back."*

Freelancers in the Audiovisual and Interactive Media sector and in the Cultural and Natural Heritage sector were the most likely to experience higher annual revenues in 2020. The rise of digital seems to have been beneficial to freelancers in sectors where online sales and online content were most important. Unsurprisingly, freelancers in the Performing Arts and Celebration sector struggled the most, reporting almost identical percentages to companies.

5.3 Resilience from Adaptability

The CCI in the UAE have demonstrated the capacity to endure and the ability to reimagine the future. The examples of creative resilience during the lockdown and the rise of new digital experiences created by companies and freelancers in the CCI are proof that the sector not only survived, but that it is ready to help the rest of the country think about how to thrive in the new normal.

In many ways, the companies, innovators and entrepreneurs of the CCI are already shaping the global adaptation to the new normal. From streaming services to social media, from the rise of audio to the new role of the mobile phone camera for content creation, from Amazon to Zoom—the A to Z of the global knowledge economy is digital and driven by the creative minds in the CCI.

To measure adaptation to the pandemic, the survey considers three stages:

- **Stage 1: Coping measures**

To cope with the initial impact of the crisis, companies and freelancers in the CCI took a variety of immediate steps, from downsizing to negotiating unpaid leaves.

- **Stage 2: New strategies to generate revenue**

Confronted by the prolonged contraction of their traditional audiences and sources of business, the sector explored new approaches to find audiences online and generate revenue.

- **Stage 3: Structural shifts in the industry**

Once the impact of the crisis sank in, the sector implemented significant shifts in business strategy and organization that are likely to shape the future of the CCI.



“We’ve learned that survival is for those having flexibility and adaptability.”

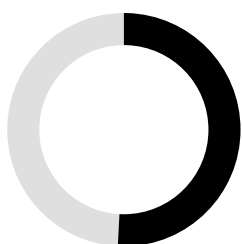
Sheikh Abdulaziz bin Humaid Al Nuaimi, Chairman, Ajman Tourism Development Department

 @ajman.tourism

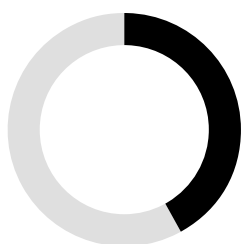
Stage 1: Coping measures

Immediate first steps & in-built resilience

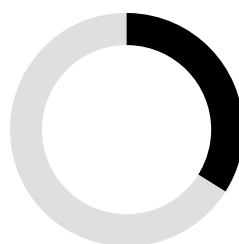
Coping measures taken by companies



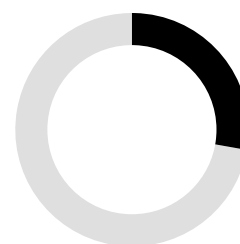
Reduced salaries
51%



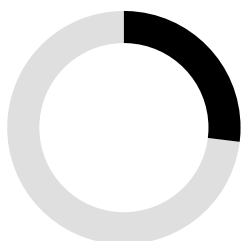
Laid off staff
42%



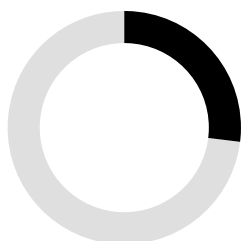
Renegotiated
rent terms
34%



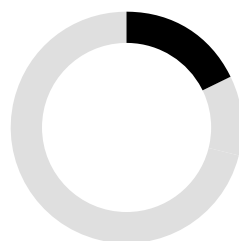
Asked employees to
take unpaid leave
28%



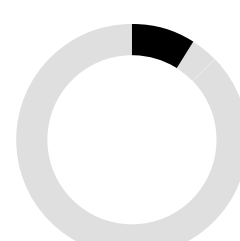
Laid off
freelancers
27%



Downsized office space
or ended lease
27%



None
18%



Other
9%

Salary reductions and layoffs were the measures most frequently mentioned by companies trying to cope with the impact of the crisis.



42%
LAID OFF
STAFF



27%
LAID OFF
FREELANCERS



1/2
COMPANIES

REDUCED THE SALARIES OF
EMPLOYEES



1/3
COMPANIES

RENEGOTIATED THEIR
RENT TO REDUCE FIXED
OPERATING COSTS



1/4
COMPANIES

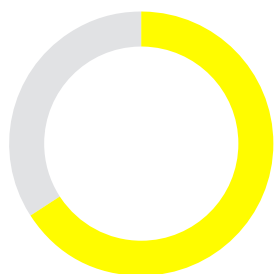
ASKED EMPLOYEES TO TAKE
UNPAID LEAVE



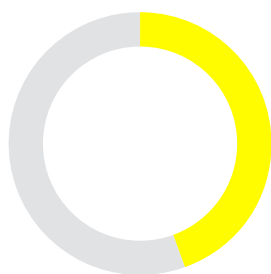
1/4
COMPANIES

DOWNSIZED THEIR OFFICE
SPACE OR ENDED THEIR LEASE

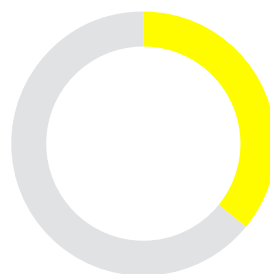
Coping measures taken by freelancers



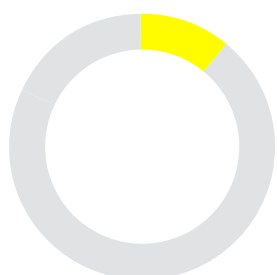
Tried to find
new clients or
jobs in the CCI
66%



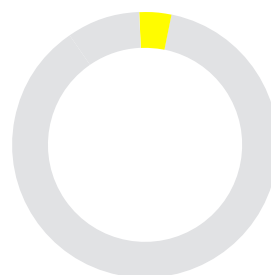
Tried to find
another job
outside the CCI
44%



Cancelled or
postponed
external contracts
36%



None
11%



Other
4%



66%

FREELANCERS

TRIED TO FIND NEW CLIENTS OR JOBS WITHIN
THE **CULTURAL AND CREATIVE SECTOR**—THE
SECTOR THAT THEY KNOW BEST AND WHERE
THEY HAVE THE STRONGEST NETWORKS



44%

FREELANCERS

LOOKED FOR **A JOB OUTSIDE THE CCI**—
A TESTIMONY TO THE INDUSTRY-WIDE
IMPACT OF THE PANDEMIC

The first relief funding programs in the UAE were launched in April 2020, and 23% of companies and 30% of freelancers reported applying to one or more of these programs. However, the non-standard forms of employment commonly found in creative industries are harder to assess for income or business support measures. In a time of crisis, freelancers first look for jobs within their sector; then, if they are gravely concerned about the future predictability of their income, they may widen their search to beyond the CCI. This is why early and decisive government intervention in the gig economy can help avoid a chain reaction, nudging freelancers to remain in the industry.

Speedy and sizeable interventions translate to a sense of trust in the quality of the industry's recovery and can have a significant impact on the decisions made by gig workers within CCI. Looking internationally, we see an example of this in the substantial CCI relief packages announced by Germany and the UK. To creatives in those countries, the measures were a signal to not lose hope, to remain in their cities (not canceling their leases) and fundamentally, to maintain the social and skills fabric of the sector.

H.E. Manal Ataya, Director-General of the Sharjah Museums Authority, suggested that future creative relief measures would benefit from a speedier rollout and simplified application processes. To keep small businesses and individuals afloat, funding for the CCI in general

should be consistently available, and the Ministry should consider implementing an annual grant-giving program as well as contingency funding for a crisis. *"An art relief fund would be integral to the sustainability of the sector in the future."*

The creative sector is by its very nature more networked than the rest. It naturally sectors around cultural infrastructure and investments, geographically and socially, creating a collaborative ecosystem that supports new ventures and established businesses alike. This interdependence leaves it uniquely vulnerable: when a business in such a sector fails in times of crisis, it can weaken the ecosystem—but when a business survives, the ecosystem's roots grow stronger.

During the pandemic, this clustering manifested as collaborative support of local creatives. Gulf Photos Plus sold limited edition prints from local freelance photographers, at reduced profit, while Sotheby's hosted a *"This Too Shall Pass"* collaborative auction, featuring local galleries and artists. In May 2020, Fikra Design Studio offered free design services to healthcare providers and charities working on COVID-19 relief, as well as reduced fees on design and branding work for SMEs. This solidarity, ingenuity, adaptability and resilience are core strengths of the CCI, and can lead the sector back to economic success and social prosperity.

RELIEF FUNDS

National Creative Relief Program Ministry of Culture and Youth

The two-phase National Creative Relief Program awarded grants totaling **Dh4.6 million** to SMEs and freelancers in the UAE's cultural and creative industries. The first program of its kind in the region, it was open to citizens and residents alike.

Research and Practice Platform Dubai Culture and Art Jameel

The Research and Practice Platform offered micro-grants based on urgent need and creative merit. Over three cycles, it awarded 47 grants of **AED 3,500-7,000** to independent artists, writers and small enterprises within the UAE.

Project Revival Fund Warehouse 421

Open to creatives across the MENASA region, the Project Revival Fund awarded grants of **AED 7,300** to 30 artists to finish projects in-progress while isolating at home during the pandemic. Once completed, selected projects will be exhibited publicly at Warehouse 421.



"The spirit of the National Creative Relief Program was one of joining forces to help the sector survive. We are looking at culture and creativity from a new perspective, and readjusting our priorities to ensure integrated, holistic and results-oriented interventions."

H.E. Noura Al Kaabi, Minister of Culture and Youth

 @uaemcy



"At the beginning of COVID, we had to close the space for at least two months. We then applied to the Ministry of Culture for aid and, because of their help, were able to sustain and continue to work."

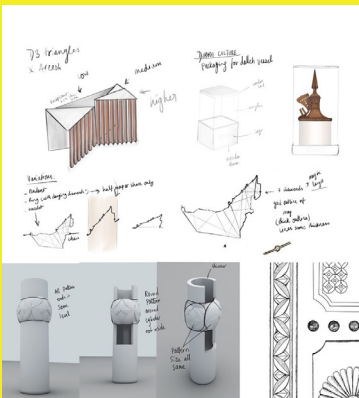
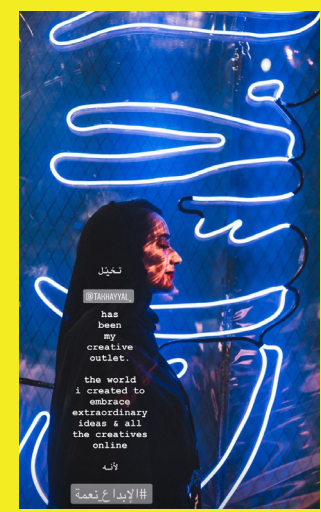
Sheikh Salem Al-Qassimi, Founder and Principal Designer, Fikra Design Studio

 @fikradesigns

CASE STUDY

National Creative Relief Program

In January 2021, the Ministry of Culture and Youth surveyed 83 recipients of grants from the National Creative Relief Program. The grants were a lifeline for respondents, with 60% describing the funds received as very helpful or instrumental in saving their creative enterprise.

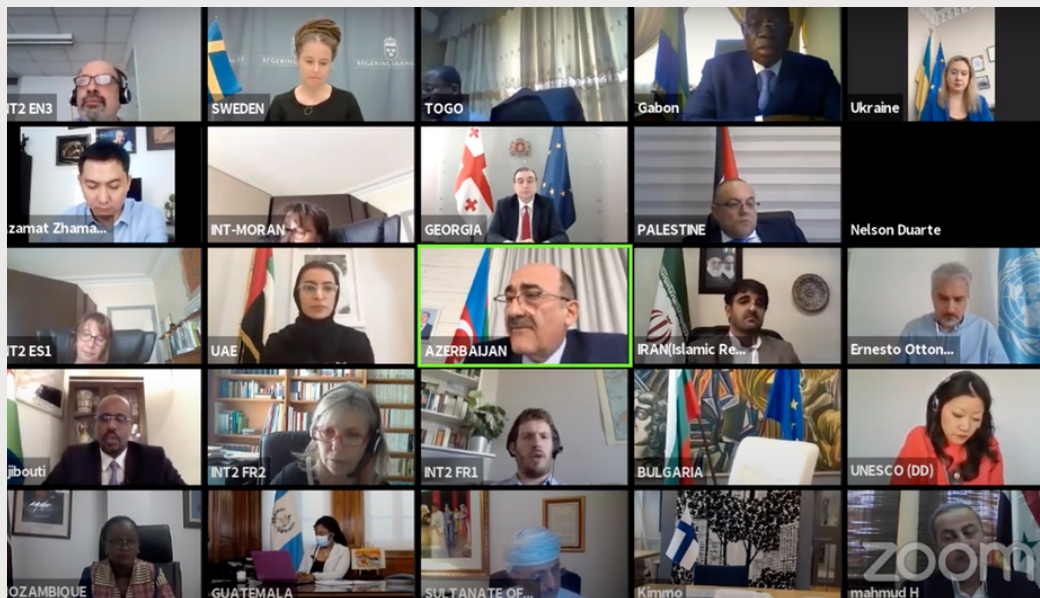
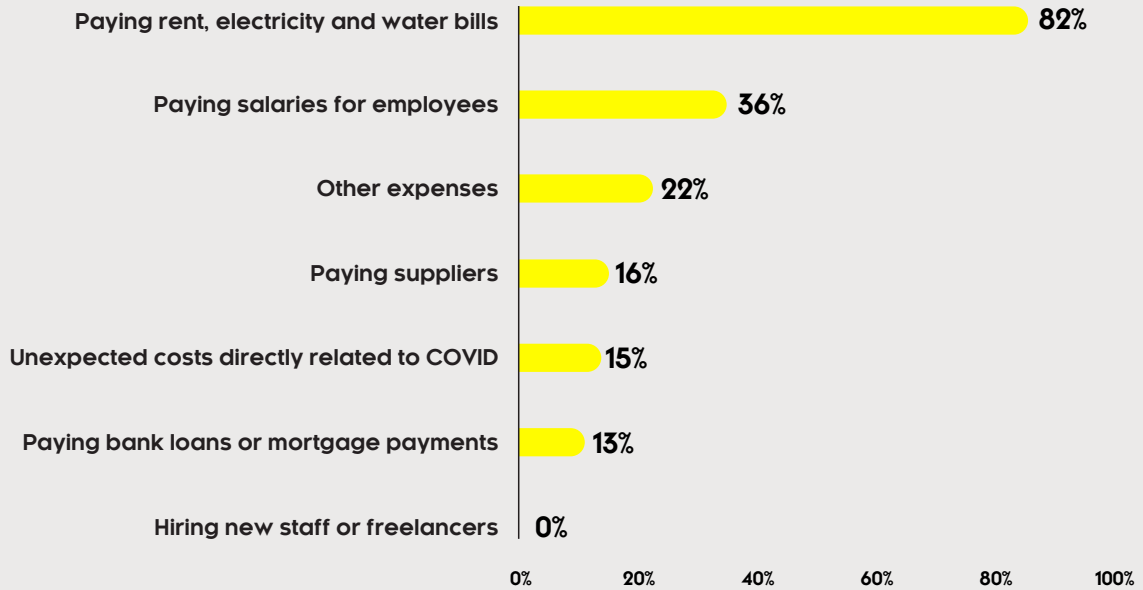


Four out of five grant recipients reported using the funds received to cover fixed costs at a time when business was slow or nonexistent, while a third were able to continue paying salaries with their relief funds. More than a fifth of respondents used the funds for other expenses, most frequently citing recurring costs like business licenses, health insurance, or even living expenses. None of the recipients surveyed reported hiring new talent with their grant funds, indicating a critical need for further funding to increase job opportunities in the CCI. Nevertheless, the majority of recipients are cautiously optimistic about a recovery in 2021; 82% see positive market trends that point to a better year ahead.



NCRP grant spending

% OF NCRP RECIPIENTS

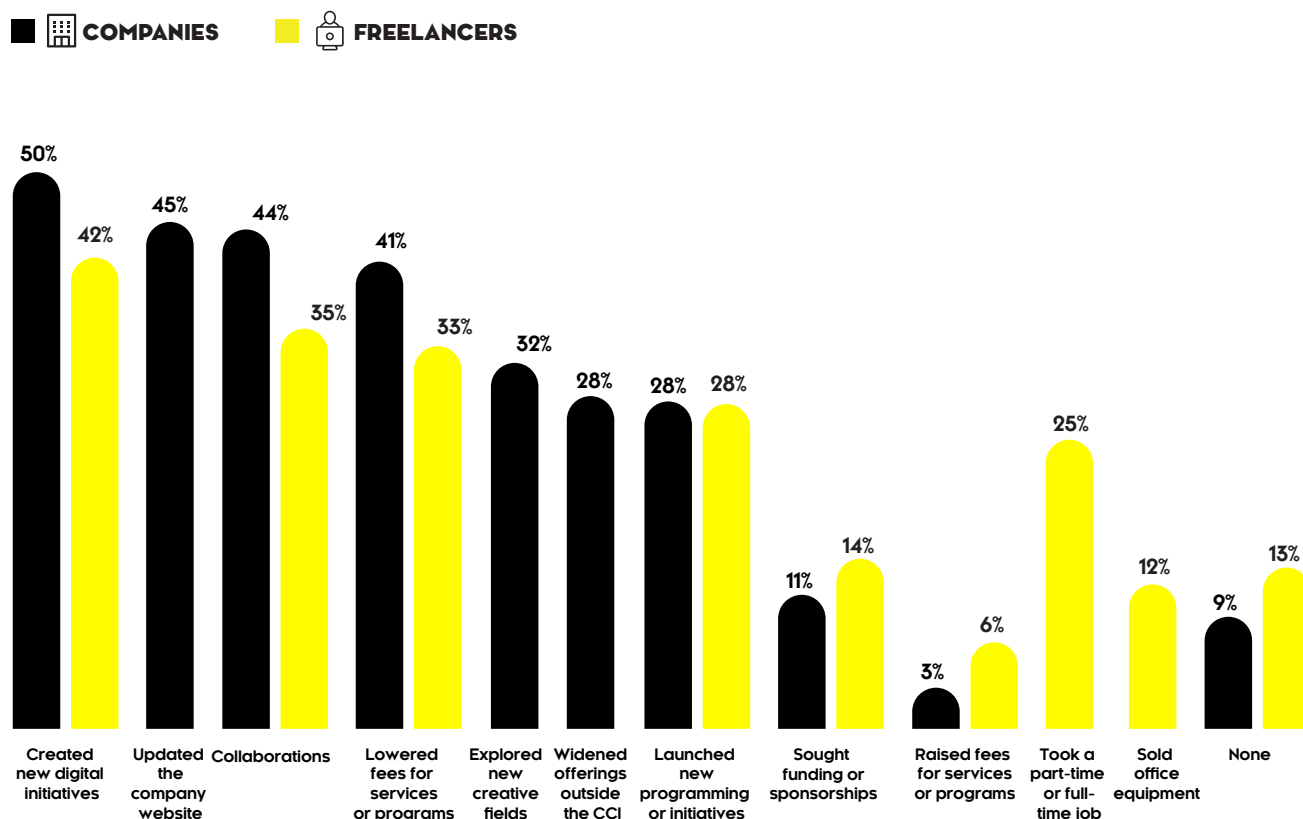


World leaders gathered to discuss the cultural crisis on the UNESCO website

Stage 2: New strategies to generate revenue

Second set of measures & ingenuity

Revenue strategies in 2020



The rise of digital as a strategy to reach new audiences and generate revenue emerges as the most significant story in this report. Digital strategies were by far the most popular approaches to generating new revenue for companies during the crisis.



50%

COMPANIES

CREATED NEW DIGITAL INITIATIVES
(such as livestreaming or paid online events)



45%

COMPANIES

UPDATED THEIR WEBSITE
DURING 2020



42%

FREELANCERS

TRIED PAID ONLINE EVENTS DURING 2020
(Web-based content, livestreaming or other digital initiatives)

Significantly, 36% of companies and 33% of freelancers invested in their digital presence. Whether in livestreaming, social media, website upgrades or marketing, the movement toward online creative and cultural consumption was clear. Once the companies and freelancers of the CCI followed their audiences online, they designed new products, offered new services, and found new audiences in the process.

More freelancers reported expenditures on training and reskilling compared to companies, especially small freelancers—and some of this training seized on the growing digital shift. To keep pace with this trend, Waleed Al Shehhi, Filmmaker at VillaCinema Art Productions, believes sector-specific training will be critical: *“Digital technology is key to the future of film production in the UAE. We need support with online workshops, trainings and networking among creatives in the film sector.”*

As mentioned previously, the CCI sector tends to sector with more intensity than other industries, which explains why new collaborations were the second most important strategy to generate revenue for the respondents. Almost half of companies (44%) and one third of freelancers (35%) collaborated with others to generate new income—see some notable examples on the next page.

However, making ends meet sometimes required stronger steps: a third of freelancers lowered their fees in hopes of enticing budget-conscious clients to spend, while a quarter took full-time or part-time jobs. One in four freelancers renegotiated their rent, but small freelancers took fewer steps to lower their fixed costs—perhaps due to a lack of leverage, or mixed living/working space.

More than a third of companies also lowered their fees or offered discounts, though small companies took this step less frequently. Companies with less staff seem able to do less, launching fewer new initiatives than medium and large companies. Small companies also applied for relief funding notably less than all other categories, with interviewees reporting that the complex, time-consuming applications were beyond the capacity of small teams struggling to stay afloat. This highlights a possible need for specialized funding support.

These are areas where government intervention to support small businesses could be especially effective. The financial and personnel challenges of SMEs in the UAE were thrown into relief by the pandemic, and deserve special attention from the government. Butheina Kazim, founder and managing director of Cinema Akil, suggests policies that take the financial constraints of small organizations into account, perhaps by offering fee reductions for creative business licenses and visas. *“The UAE’s cultural landscape needs systemic interventions not only to sustain those who are taking the risk of setting up independent organizations, but to encourage those who want to set them up.”* Similarly, Salama Khalfan’s jewelry business survived the pandemic but faces other obstacles to growth and sustainability, especially the high costs of investing in and retaining talent. *“Talent is scarce, and there is no protection mechanism to help SMEs retain talent that is recruited away by larger businesses and institutions.”*



Sheikha Latifa bint Mohammed bin Rashid Al Maktoum, Chairperson of Dubai Culture and Arts Authority, in the 14th edition of Art Dubai 2021.

Collaboration is key



**H.H. Sheikha Latifa
bint Mohammed
bin Rashid
Al Maktoum**

**Chairperson, Dubai Culture and
Arts Authority**

 @dubaiculture

When lockdown brought a sudden halt to Dubai Culture's projects and initiatives, H.H. Sheikha Latifa felt the loss of the human dimension acutely. One of the first ways her organization sought to address this lack was the Dubai Ideathon, in collaboration with Art Dubai. *"The Dubai Ideathon helped us put a finger on the pulse of the sector and understand what creatives actually needed. We can sit and strategize internally and come up with hundreds of initiatives to roll out, but the only way to create the right strategies and launch meaningful projects that will address existing challenges within the sector and truly support our creatives is to have an open channel of communication with them—to listen to what they need and respond through action."*



H.E. Noura Al Kaabi

Minister of Culture and Youth

"The pandemic highlighted the solidarity among communities within the creative industries—sharing work, supporting each other and working together. Institution-led initiatives to offer relief and share ideas worked in tandem with many examples of collaboration among artists and creative entrepreneurs." This image reflects the Ministry's vision of supporting the UAE's unique cultural landscape while maintaining the human dimension.

 @uaemcy



Abdelmonem Bin Eisa Alserkal

Founder, Alserkal, Alserkal Avenue and Alserkal Arts Foundation

"More than 50 Alserkal Avenue organizations joined forces through the 'Alserkal Pay It Forward Program' to support each other (and the wider Dubai community) in the face of the unprecedented challenges posed by the COVID-19 pandemic. This powerful community collaboration saw the Avenue businesses generate a barter economy to the value of more than AED 2 million in just two months through the exchange of goods, services, and expertise."

 @alserkalavenue

SPOTLIGHT ON STRATEGY

To stay afloat during lockdown, the Middle East Architecture Network (MEAN) shifted focus entirely to online training and education through their "Live Academy". The platform was a success, attracting learners from around the world and contributing to MEAN's internal repository of research. While highly effective in the early months of the pandemic, the long-term viability of online training for MEAN is in question due to an increasingly crowded market. Working at the nexus of design and technology, MEAN has since collaborated remotely with a furniture manufacturer in Spain to launch a 3D-printed armchair, which H.E. Noura Al Kaabi has acquired for her collection.



Riyad Joucka
Lead Architect and Founder,
Middle East Architecture Network
 @mean.design

Digital initiatives in the UAE

Cultural institutions and government entities were among the most notable movers in bringing culture directly to UAE residents during a year of uncertainty. Not only did the shift to digital content make culture more accessible, it opened doors to personalization and interaction, breathing new life into what a cultural experience can be. Interviewees believe online offerings will remain an essential component of cultural institutions through 2021 and beyond.

01

CulturAll

Department of Culture and Tourism Abu Dhabi

- Brought Abu Dhabi's cultural landmarks online through virtual experiences, conversations and archives
- Distributed content by social media under three themes: #CulturAllExplore, #CulturAllMeet, and #CulturAllCreate
- Partnered with institutions across the emirate, including Louvre Abu Dhabi, Cultural Foundation, Manarat al Saadiyat, Qasr Al Hosn, Berklee Abu Dhabi, Abu Dhabi Art



"The launch of our CulturAll platform has seen dynamic content from the emirate's major cultural venues and programs specially adapted for audiences online. In adapting much of the content of our initiatives to virtual platforms, we provided the public with open access to our creative programs and fostered a much-needed sense of community and belonging in a time of physical separation."

H.E. Mohamed Al Mubarak
Chairman, Department of Culture
and Tourism Abu Dhabi

 @dctabudhabi

02

TRACE Series

NYU Abu Dhabi Art Gallery

- Created digital archives of six years of exhibitions, each launched with a virtual reunion of artists, curators, and collaborators
- Seized opportunity to reconnect with their audience and add an extra dimension to the online cultural experience

03

Remote Cultural Experiences

Alserkal Avenue, Dubai

- "Alserkal Online" virtual experience invited art enthusiasts around the world to tour art galleries online
- Gallery show openings at Alserkal Lates hosted exhibiting artists via Zoom, allowing live conversations with visitors

04

Virtual Museum Tours

Dubai Culture and Arts Authority

- 298 live, virtual tours guided Dubai students through the offerings of six museums: Etihad Museum, Al Shindagha Museum, Coins Museum, Dubai Museum, Poet Al Oqaili Museum, and Naif Museum
- Collaborative effort with the Ministry of Education and Dubai Knowledge and Human Development Authority



When cultural spaces closed their doors, Dubai Culture prioritized online access to cultural assets, and developed popular virtual tours of their museums. Opening the door to new audiences is a step away from the status quo of cultural institutions who prize exclusivity of their exhibits, but it represents the way forward. “I believe that to thrive in the future, institutions need to be flexible, and they need to be adaptive.”

H.H. Sheikha Latifa bint Mohammed bin Rashid Al Maktoum
Chairman, Dubai Culture and Arts Authority

 @dubaiculture

05

Online Workshops,

Lectures and Tours

Sharjah Museums Authority

- Sharjah Art Museum and Sharjah Museum of Islamic Civilization launched virtual tours of several key exhibits, in partnership with Barjeel Art Foundation and Museums With No Frontiers
- Online workshop and lecture attendance more than doubled compared to previous in-person events, due to the ease of online visits from other emirates



The transition to online programming during the Sharjah Museums’ closures has been “a gift”, drawing new audiences and maximizing their limited resources. She plans to maintain the museums’ increased digital presence while ensuring that online content adds something substantive to the visitor experience. “If technology allows you to see an object in a different way—for example, a marble urn from the inside, or a 3D rendering magnifying an object’s detail—that’s where it can do something really great.”

H.E. Manal Ataya
Director-General, Sharjah Museums Authority

 @sharjahmuseums

06

Digital Arts Initiatives

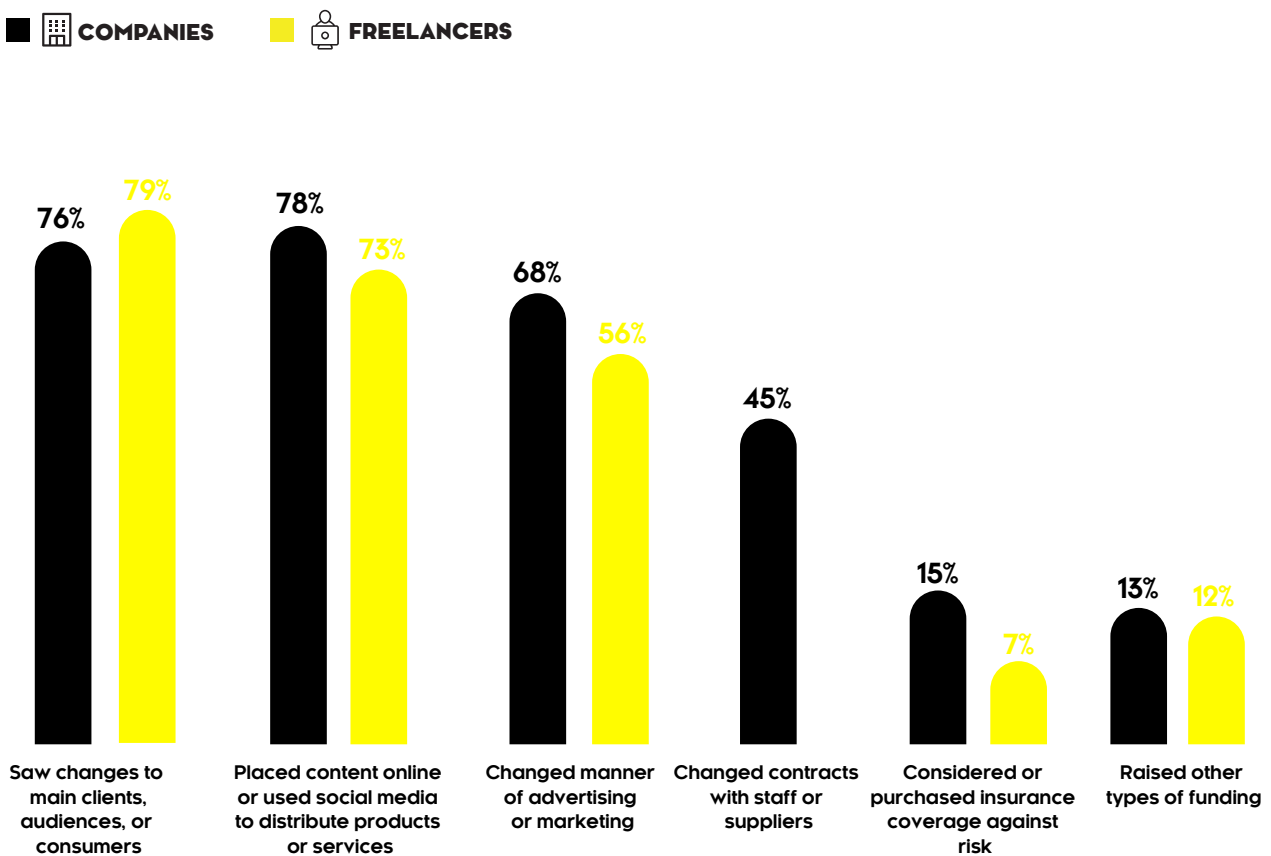
Al Qasimi Foundation, Ras Al Khaimah

- Hosted Creative Dialogues, a series of virtual conversations with creative leaders in the UAE, artists and entrepreneurs
- YouTube channel offers a virtual tour of the Ras Al Khaimah Fine Arts Festival, as well as creative workshops

Stage 3: Structural shifts

More profound changes & more likely to shape the sector

Structural shifts in 2020



In addition to immediate coping measures and to testing new strategies to generate revenue, survey respondents also implemented some significant shifts to their business strategy. This third layer of adaptation, structural change, is slower to take shape across entire sectors but, once adopted, is more likely to persist and define the future.

As a result of the pandemic, over three quarters of companies and freelancers have seen changes to their main audience, whether clients or consumers. To maintain and grow these audiences in the future, CCI will need to rely on digital means—the pursuit of audiences online through social media or other virtual content.

This new context has pushed more than 50% of all respondents to change their marketing and advertising strategies. These shifts toward new forms of outreach and communication strategy, as well as their consequences in terms of costs, duration and sector adaptability, will have deeply transformative impact in the CCI. For instance, a similar majority of respondents have placed content online or used social media during the pandemic to distribute their products or services. Having found new audiences online, a reversal is unlikely. Digital is here to stay and will continue to transform how this industry produces content and communicates with new and more diverse audiences.

Three-quarters of freelancers have reorganized their working environment during the pandemic. The loss of creative public spaces exacerbated initial quality of life and productivity issues for freelancers as early as the spring of 2020. Since then, workspaces, institutions and informal gathering spots for like-minded creatives have largely remained inaccessible due to the lockdown, eventually pushing informal, serendipitous gatherings common to the creative community to move online and to be scheduled.

SPOTLIGHT ON BOOKS & PRESS

“Markets where publishers have adapted to the dynamics of digital content publishing and distribution have fared much better than those who rely solely on physical setups.”

While print has seen resurgent demand in recent years, Sheikha Bodour is excited about pairing established business models with innovative platforms, like hybrid online book fairs, as the sector evolves. *“I expect new trends in reader behavior to emerge as new digital content platforms come into existence almost every year, which will undoubtedly impact the way new generations engage with the written word.”*



Sheikha Bodour bint Sultan bin Muhammad Al Qasimi

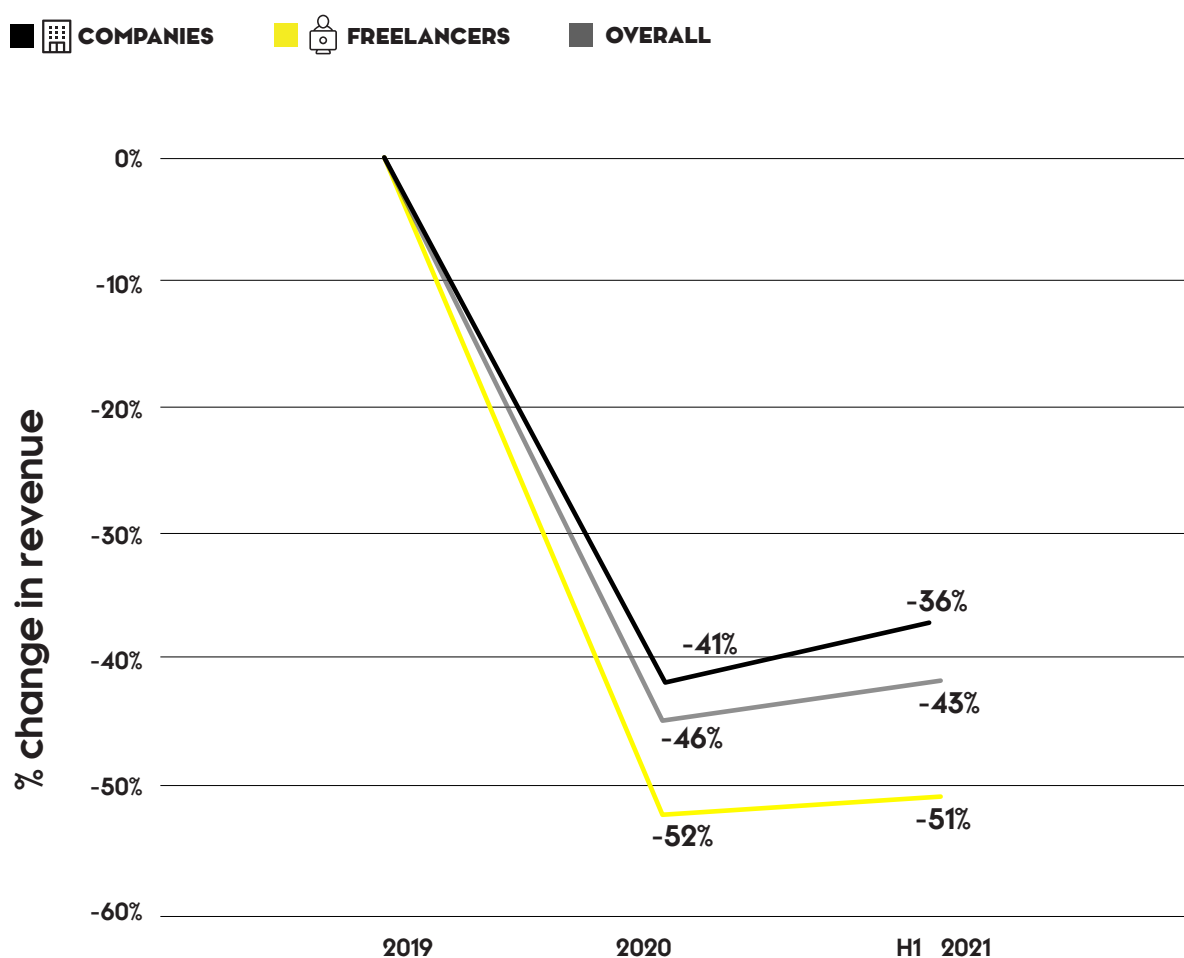
Founder and CEO, Kalimat Group
President, International Publishers Association

 @bodouralqasimi

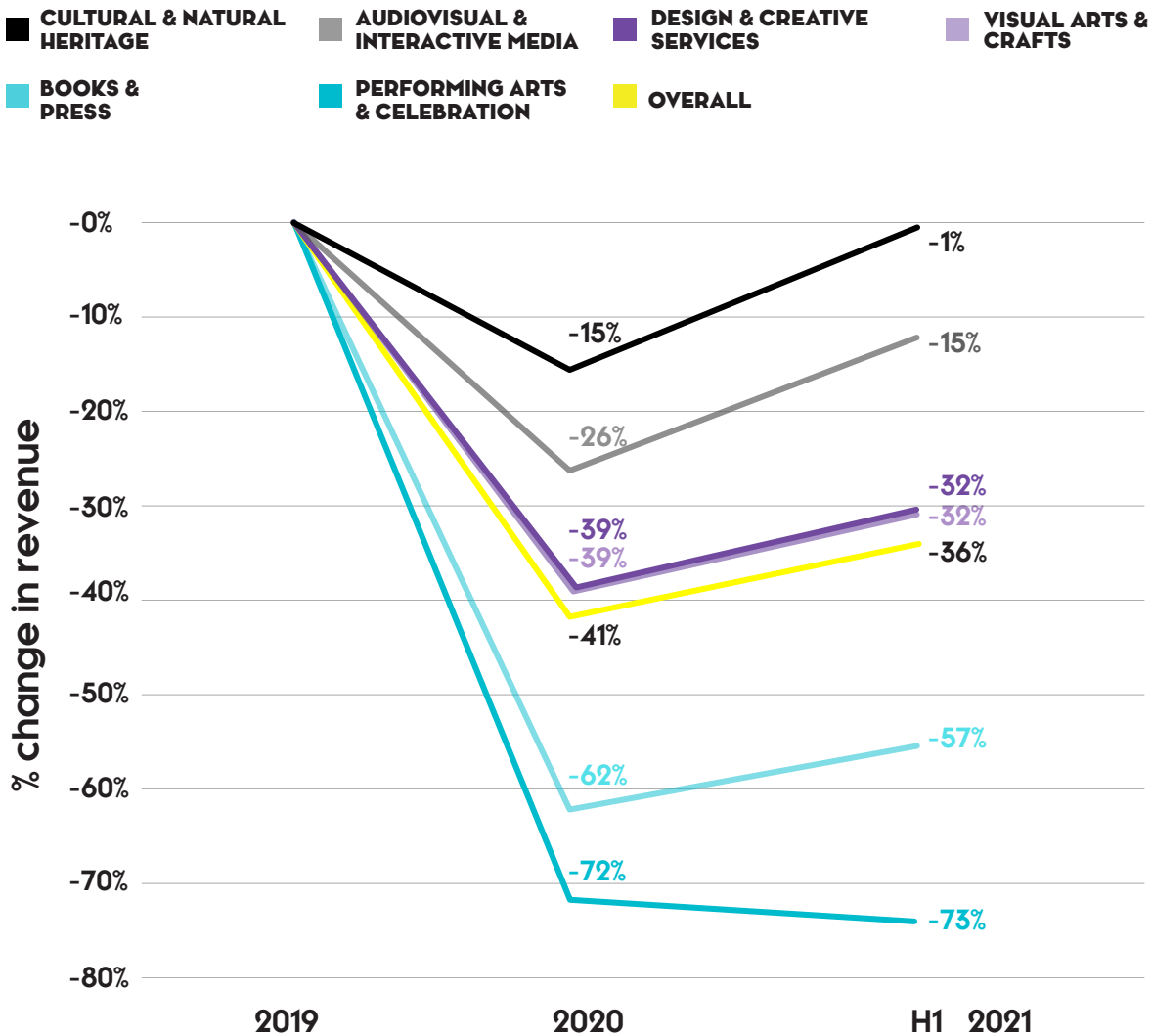
5.4 Looking Ahead: The Next Six Months

The impact of COVID-19 has left many freelancers and companies feeling uncertain about the future. When asked to estimate how their income would change in the first six months of 2021 compared to 2020, companies on average projected a modest recovery of only 5%, while freelancers suggested only a 1% improvement. Delving into these projections by sector provides a clearer picture of struggles and promise within the CCI.

Impact and projected recovery



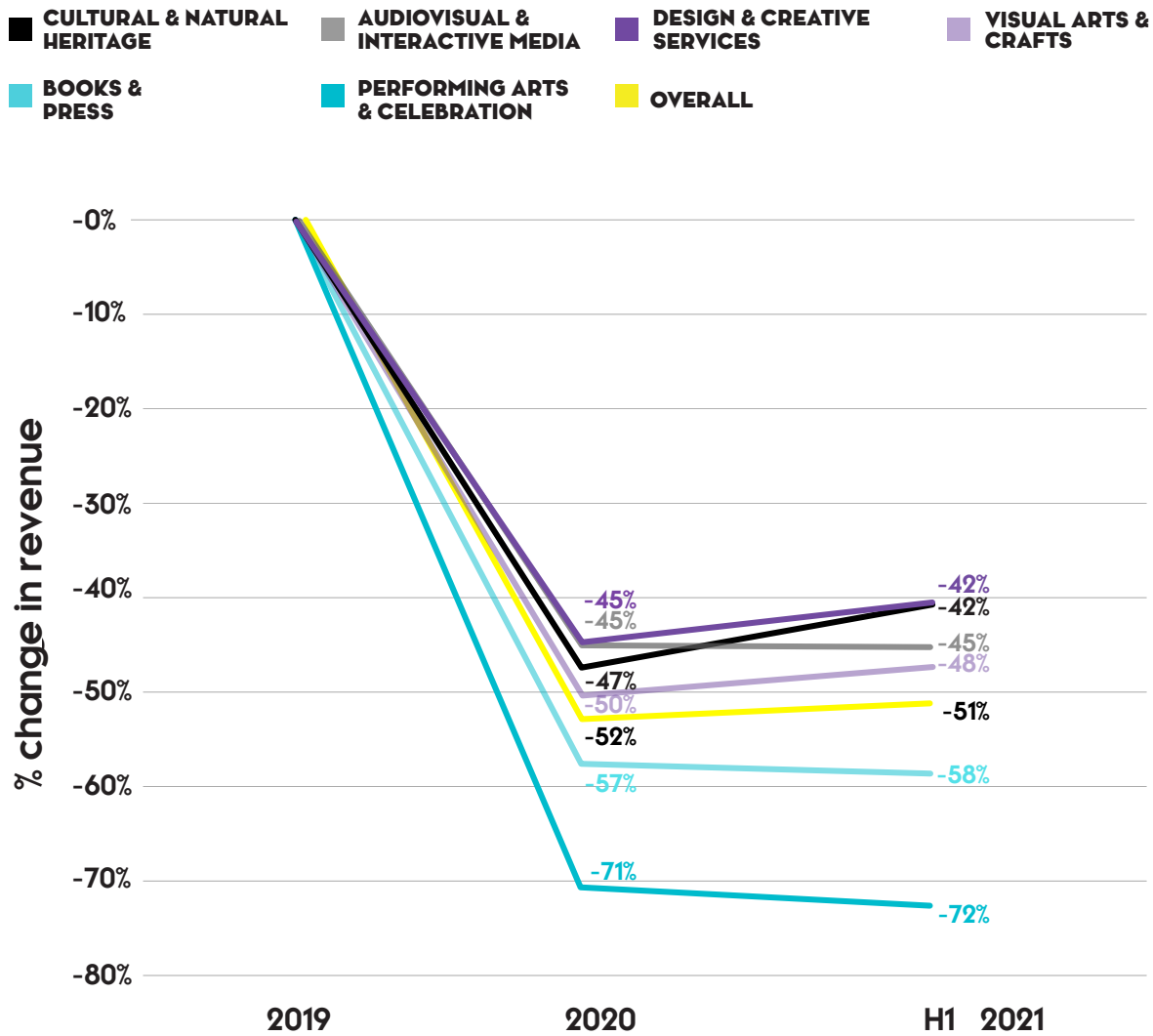
Projected recovery - companies



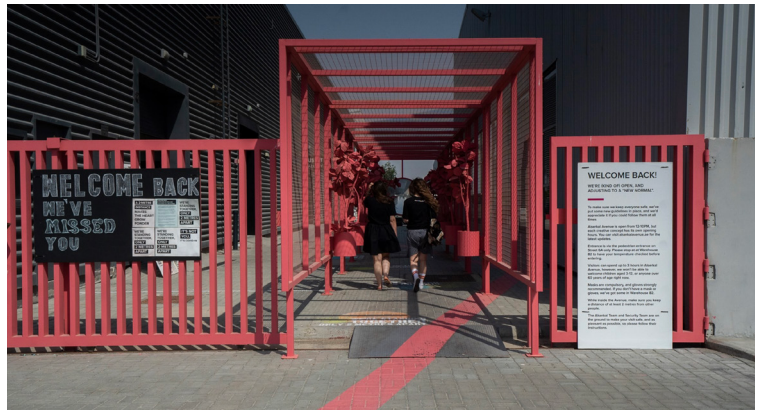
Among companies, respondents in the Cultural and Natural Heritage sector predict a near-complete recovery in 2021. Led by digital success in art galleries and cultural education, this recovery projection signals a new normal for companies in the sector. In March 2021, industry-critical event Art Dubai held a smaller, hybrid art fair that included virtual events alongside in-person art viewings—an example of adaptation as well as hopes for renewal post-vaccine.

However, the Performing Arts and Celebration sector paints a very different picture as the only set of companies predicting a further decline through June 2021. Many forms of entertainment remain restricted by the government's pandemic guidelines, while live performances and festivals are ill suited to capacity limits and physical distancing. In open-ended responses, respondents from that sector felt the least supported by relief measures and requested funding above all else.

Projected recovery - freelancers



For freelancers, the outlook holds less promise, though the story is similar. Freelancers in Cultural and Natural Heritage hope for a modest 5% recovery, the largest reported, while those in Performing Arts and Celebration share the same outlook as their company peers. Government support will be essential to retain freelance workers in the CCI—find an analysis of the areas where they expect government assistance on page 42.



Alserkal Avenue held its first art event, titles Alserkal Lates, since the Covid-19 lockdown in September 2020.

SPOTLIGHT ON FUNDING

The pandemic has highlighted the precarious nature of financial support for the arts. **Dr. Natasha Ridge**, Executive Director at the Sheikh Saud bin Saqr Al Qasimi Foundation for Policy Research, says, *“The arts sector was the first to shut down and the last to start up again. Arts are seen as superfluous, or as a sideline to life, but a lot of people work in and inspire the creative sectors, and it impacts individuals and communities when you shut them down.”* Arts and culture are essential to our well-being, and Dr. Ridge believes future cultural policy should be a collaborative effort between ministries that ensures a fixed budget: *“It is important to have a sustainable approach to arts and culture, developing talent and providing funding that is not contingent upon economic ups and downs.”*



Dr. Natasha Ridge

Executive Director, Sheikh Saud bin Saqr Al Qasimi Foundation for Policy Research

 @alqasimifoundation



Ras Al-Khaimah Fine Arts Festival's eighth edition in the Al-Jazirah Al-Hamra Heritage Village a recently restored pearling village dating back to the 17th century. Image courtesy of RAKFAF instagram.

Priorities the for next six months

PRIORITY RANK



 COMPANIES

 FREELANCERS

Securing funding



New audiences



Digital services



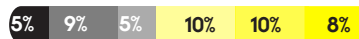
Restoring clients



Hiring/training



Paying off loans



% of respondents

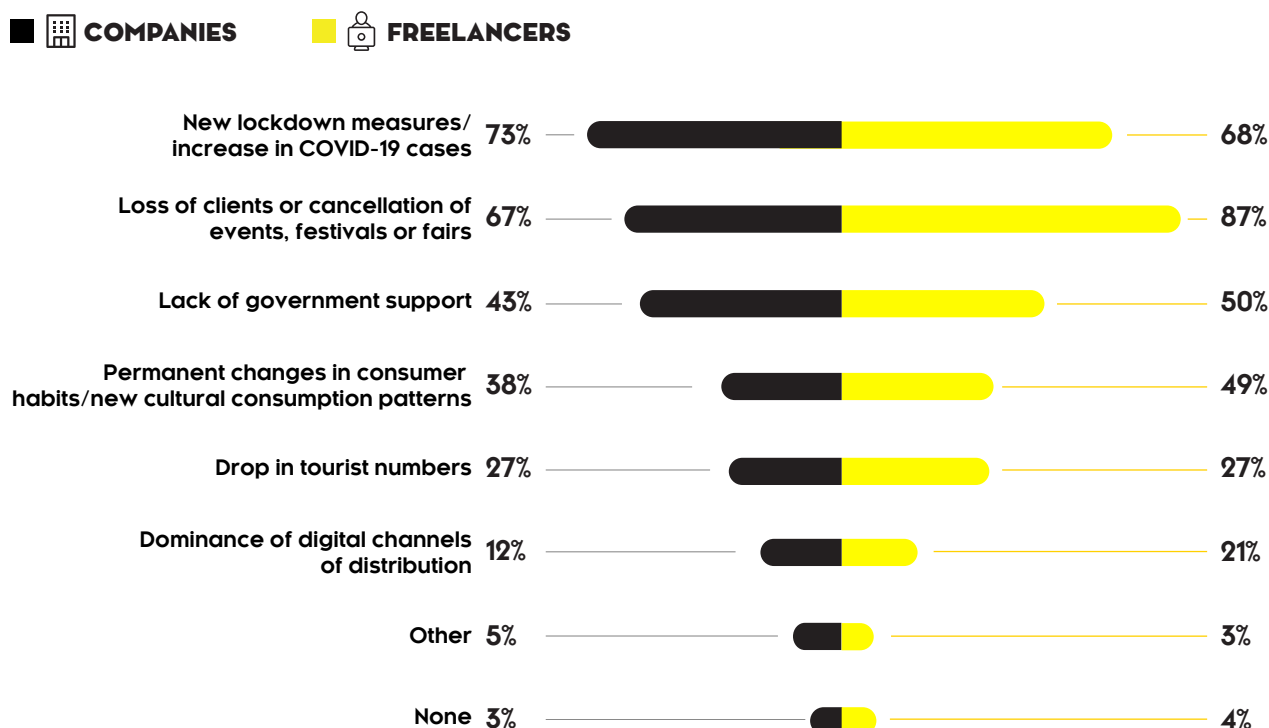
When asked to rank a set of six priorities, the average ranking order was consistent across all respondents. On average, companies ranked funding as priority 2.5 out of 6, while freelancers ranked it 2.3. 43% of companies and 44% of freelancers say securing funding to cover salaries and rent is their primary concern for the next six months.

Increasing online presence or making more services available digitally is the top priority for 20% of companies.

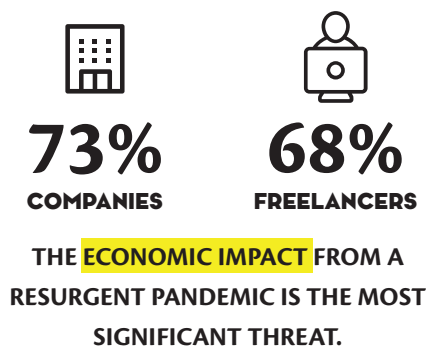
Across all company respondents, expanding to new audiences or customers (27%) and restoring relationships with clients (26%) rank most often second and third.

Among freelancers, 38% ranked expanding to new audiences or customers either first or second, whereas 34% ranked restoring relationships with clients either second or third. Increasing online presence or making more services available digitally ranks second or third for 43% of freelancers.

Perceived threats over the next six months



Respondents also perceive a number of significant threats to the continuity of their activities. The most significant by far is the concern over another mandatory lockdown in the next six months.



This concern is reflected in ongoing fears of event cancellations and loss of projects or clients, reduced tourism, and permanent changes in consumption habits. Event cancellations are a bigger concern for large and medium companies than small, and a much bigger concern for freelancers. One in five freelancers also worry that digital distribution of creative content will reduce demand for their services.

Notably, half of freelancers and 43% of companies are concerned about the lack of adequate government support in coming months. By examining where the CCI perceive the biggest threats, the government can be prepared to offer meaningful assistance going forward. The more the government can do to identify concerns and implement interventions, the more it will reduce uncertainty and accelerate the industry's recovery as a whole.

In line with measures to reduce uncertainty, another theme common among survey respondents and interviewees was the need for effective, centralized communication about regulations, job opportunities, events and other happenings—both between government and the industry, and within the industry. A central portal for the CCI would enable the government to:

- **Synchronize efforts and spread best practices**

H.E. Manal Ataya shared that local museum professionals formed a virtual group during the pandemic—an example of practical information sharing and community networking that should be a model for the larger CCI community. *“Every single cultural organization in the UAE was going through the same thing, putting together reopening protocol in English and Arabic.”* With the Ministry’s support, a central repository for information useful to the CCI would help synchronize efforts within and across sectors.

- **Simplify and stimulate hiring within local CCI**

H.E. Maryam Eid AlMheiri, Director General of Abu Dhabi Government Media Office, notes that as media jobs shift to remote working, finding talented creators has proved tricky. Al Mheiri envisions a national database of creatives and their portfolios, particularly one accessible to government entities. She also suggests policies focused on nurturing these talents and strengthening the UAE’s gig economy.

- **Gather and share real-time information**

H.H. Sheikha Latifa bint Mohammed bin Rashid Al Maktoum encourages communication and collaboration as key to supporting the industry’s future and informing policy. *“I believe that governments should take a comprehensive and adaptive approach to supporting the cultural industry and creative economy. We need to be very creative about solutions and understand that the future of the industry might require a completely different approach than we are used to, with strategies that may differ across countries and regions. We need to be the connectors, supporters and facilitators for the industry—to study the industry closely and objectively, understand the gaps within it and plan lasting solutions that will benefit everyone working in the CCI.”*

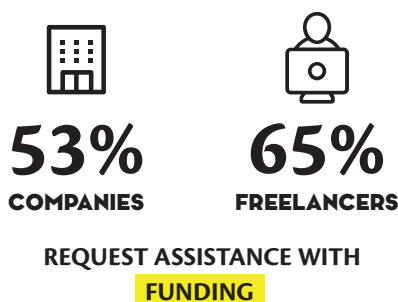
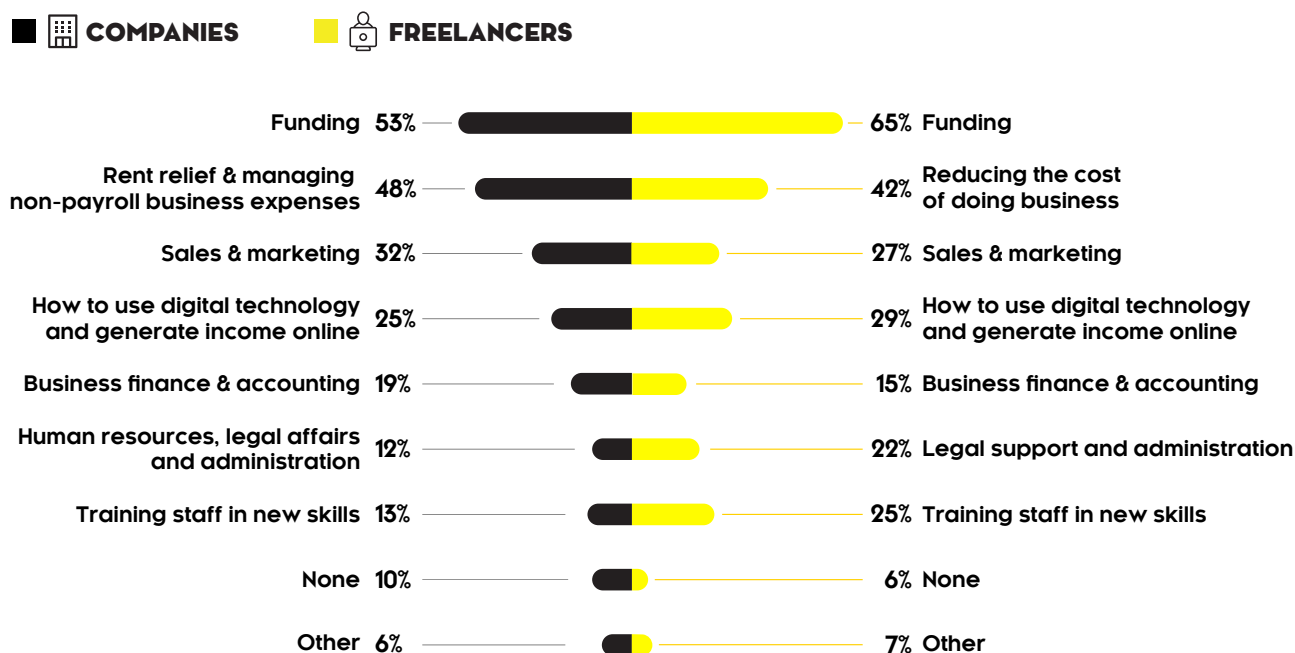


“Supporting creatives not only enables them to thrive, it helps us tell our stories better. The more we champion creativity, the stronger our ecosystem becomes and the greater the impact it has economically, socially and culturally.”

H.E. Maryam Eid AlMheiri,
Director General, Abu Dhabi
Government Media Office

 @admediaoffice

Areas of required assistance



Both groups perceive the risk as financial and most also request assistance managing fixed costs, such as rent and other non-payroll expenses.

Butheina Kazim, founder and managing director of Cinema Akil, said the pandemic exacerbated existing financial challenges to Cinema Akil's operations; for instance, the cinema still had to pay censorship and license fees in full although they were closed or at limited capacity for most of the year.

Freelancers reiterated this priority in answers to an open-ended question about their expectations of government assistance. Alongside calls for funding, 34% of freelancers mentioned the high cost of doing business in the UAE as a particular challenge, highlighting

freelance licenses and visas (at 22%) as expensive and difficult to obtain. Waleed Al Shehhi, film director at VillaCinema Art Production, notes that filmmaking in the UAE is heavily reliant on freelancers and small companies. He believes more affordable licensing is essential to sustain the local film industry: "I cannot apply for a full production license to produce 1 or 2 films per year. The cost of licenses should be lower, especially for Emirati filmmakers as we are very limited in number." As the industry recovers, respondents requested a temporary

Opportunities for government assistance

FREELANCERS



reduction in these fees, as well as a simplified process to encourage more freelancers to work from the UAE.

Beyond business expenses, many freelancers expressed worries about getting new work; 33% mentioned adjusting or upgrading government procurement protocols to give more work to local creatives and/or lower the barriers to entry. Sheikh Sultan Sooud Al Qassemi, writer and founder of Barjeel Art Foundation, believes regulatory bodies need clear guidelines to cut the red tape and pave the way for a truly international cultural and creative industry: “We need to rethink how to market the UAE to the world community.”



***“We will continue to feel the real impacts of the pandemic and the economic strain that businesses have had to absorb over the coming year, and the priority should be to remain vigilant to the plight of cultural entrepreneurs. It is essential that the government revisit legislation to support SMEs in order to strengthen the ecosystem and encourage sustainability.*”**

As we look to the future, our focus will be on auditing our sustainability efforts, examining the civic role of cultural communities, and finding new ways to harness the digital tools that have become so important to connecting with audiences, remapping our global community, and the digital commons.”

Abdelmonem Bin Eisa Alserkal,
Founder, Alserkal, Alserkal Avenue and Alserkal Arts Foundation

 @alserkalavenue

06

Focus Areas

The UAE will need new collaborative strategies to sustain the growth of its unique cultural economy in a post-COVID context. The respondents to the CCI survey request a mix of urgent measures and long-term and sustained plans led by the Ministry of Culture and Youth in collaboration with the UAE government and cultural authorities and organizations across the country



Engaging

As the CCI emerge from the pandemic, the Ministry, in collaboration with cultural authorities, can champion the needs of the sector by sustaining the human dimension of responses.

- **Engaging with industry voices** to direct the recovery measures and assess their impact
- Creating a **central portal for effective communication** between all stakeholders that will synchronize efforts, improve networking and spread best practices
- Gathering and sharing **real-time data** on the industry's pulse and evaluating policy effectiveness



Funding

The CCI—especially SMEs and freelancers—need sustained **financial assistance**. The Ministry of Culture and Youth and other cultural authorities must play a leading role in incentivizing and mobilizing philanthropic capital and greater support from banks, Third Sector organizations and non-traditional funders.

- Creating new funds to **support direct giving** to cultural non-profits and regular grant opportunities for others in the CCI
- Exploring **community action, micro-loans and crowdfunding** as models for funding creative and cultural initiatives, especially in the smaller emirates
- Investing in **affordable upskilling programs** for more resilient creative careers



“To cultivate a healthy creative ecosystem, it is crucial for regulations to be favorable to all aspects of the cultural and creative industries—funding, investment, partnerships, education, legal protections, information sharing, and more. Government has the power to change society; institutions and non-profits have the power to influence society.”

H.E. Huda I. Alkhamis-Kanoo
Founder, Abu Dhabi Music & Arts Foundation

@admafsocial



“We need more grassroots initiatives—to do something positive as a community to promote culture.”

Sheikh Sultan Sooud Al Qassemi
Writer And Founder,
Barajeel Foundation

@barjeelart



Enabling

The UAE needs to create **an environment that encourages anyone with a creative idea to join the CCI**, and enables the sector's workers and companies to thrive.

- **Reinventing government procurement protocols** to match the capacity of local creative providers, especially freelancers
- Developing **forward-thinking policies that actively support freelancers and SMEs**, beginning with a reduction of barriers to entry around visas and work permits
- **Distributing cultural investment across all seven emirates** to increase attractiveness as a hub for CCI, diversify cultural offerings, and improve sustainability
- Launching **incubator programs** directed at creative and cultural startups and entrepreneurs



“What kind of alternatives can we develop to allow people to think creatively? If you think of the city as your canvas, culture can become part and parcel of it, rather than just a destination.”

Butheina Kazim
Co-Founder, Cinema Akil

@cinemaakil



Innovating

The UAE needs to invest in the capacity of the CCI to adapt to shifting trends, **generate innovative ideas**, and make the most of new opportunities.

- Expanding **access to digital technologies** and diffusing them across the CCI to ensure recovery and competitiveness
- Improving the **research and training capacity** in the CCI in UAE universities



“In the UAE, we have two distinct advantages when we look at our creative potential. One is the diversity of expressions in our land in terms of cultures, nationalities, faiths and ethnicities. This diversity also includes various modes of creative expression. The second advantage is our mastery of and constructive approach to technology in general and digital technology in particular. The Ministry of Culture is now fully engaged in turning these advantages into concrete accomplishments.”

H.E. Noura Al Kaabi
Minister of Culture and Youth

@uaemcy

Partners

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Creative Lab, twofour54

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Warehouse421

DUBAI

Alserkal Avenue

British Council

Canadian Consulate

Dubai Design District

Dubai Development Authority

Dubai Internet City

Dubai Media Incorporated

Dubai Production City

Dubai SME

Dubai Studio City

Dubai Textile City

French Consulate

In5

International Live Events Association (ILEA)

Launch DXB

Sekka Magazine

Tashkeel

SHARJAH

Sharjah Media City (Shams)

Sharjah Publishing City

Sheraa

AJMAN

Ajman Media City

Ras Al Khaimah

Ras Al Khaimah Economic Zone (RAKEZ)

Sheikh Saud bin Saqr Al Qasimi

Foundation for Policy Research

FUJAIRAH

Creative City Fujairah

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The Ministry of Culture and Youth is grateful to the below interviewees for their time and insights in contributing to this report.

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