

Status Report

# Architecture and Design Sector

2021 - 2022



هيئة فنون العمارة والتصميم  
Architecture and Design Commission



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Commission . Architecture and Design  
Architecture and Design Sector Status Report 2021- 2022.  
/ Commission . Architecture and Design .- Riyadh , 2023  
175p ; 29.7x21cm

L.D. no. 1445/ 17212

ISBN: 978- 603 - 91754 - 3 -8



هيئة فنون العمارة والتصميم  
Architecture and Design Commission



The Kingdom is experiencing rapid growth and a cultural renaissance of the Architecture and Design fields, fueled by investment in ambitious and visionary infrastructure and development projects. From architecture and urban design to landscape architecture, interior design, industrial design, and graphic design, our remit covers a range of subsectors that play a vital role in shaping the visual identity; of our cities and country.

It is our goal to create a harmonious environment that brings together all the creative sectors to realize the Ministry of Culture's vision. We want to do more than just create a visual identity, we want to build and structure our cities in a way that enhances the lives of all citizens, while addressing the environmental issues that are often exacerbated by urban expansion, population growth, climate change, and topography.

Our 2023 A&D Sector Report looks to analyse the end-to-end Architecture and Design ecosystem by investigating the sector outlook potential and its impact across businesses, practitioners, education, research and community engagements at the national and international stages.

On behalf of ADC, we hope you find this report insightful, and we look forward to developing future iterations.

**Dr. Sumayah Solaiman Al-Solaiman**  
CEO, Architecture and Design Commission

# Table of Contents

<b>1</b>	<b>Executive Summary</b>	<b>06</b>
<b>2</b>	<b>Introduction</b>	<b>12</b>
<b>3</b>	<b>A&amp;D Sector Outlook</b>	<b>18</b>
<b>4</b>	<b>Business</b>	<b>40</b>
	4.1 A&D Business Survey	50
<b>5</b>	<b>Practitioners</b>	<b>64</b>
	5.1 A&D Practitioners Survey	73
<b>6</b>	<b>Education</b>	<b>80</b>
	6.1 A&D Education Survey	94
<b>7</b>	<b>Research</b>	<b>102</b>
<b>8</b>	<b>Community Engagement</b>	<b>116</b>
<b>9</b>	<b>ADC Strategy</b>	<b>140</b>
<b>10</b>	<b>Appendices</b>	<b>144</b>
	10.1 A&D Education Appendix	145
	10.2 A&D Community Engagement Appendix	150
<b>11</b>	<b>Methodology, Terminology, and Sources</b>	<b>152</b>

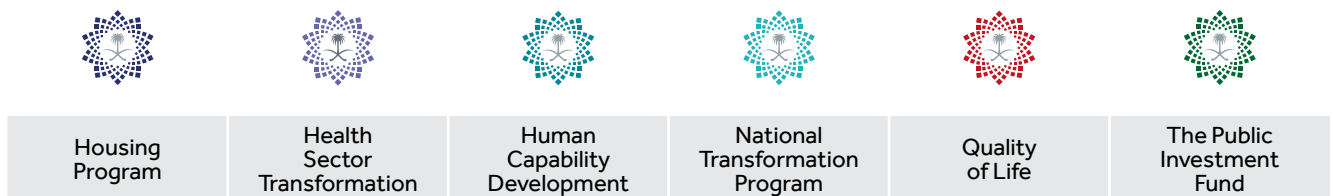
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**Executive  
Summary**

# Today, the Kingdom of Saudi Arabia Is Undergoing a Unique Transformative Journey that Will Benefit the End-to-End A&D Sector for Years to Come



- Saudi Arabia is poised to become the world's fastest-growing economy in 2022, boosted by massive investments to achieve its 2030 vision goals and other regulatory reforms, which are improving the business environment and attracting foreign investments to the country.
- This large-scale economic overhaul aims to shift the country's historic reliance on oil & gas revenues and diversify its giant economy, which includes a portfolio of vast Giga projects such as Neom, Qiddiya, and the Red Sea project, among other infrastructure-related projects.
- The Kingdom introduced 11 realization programs, six of these programs are projected to cost \$3tn by 2030 to continue driving the Kingdom's A&D sector and demand for construction through investments across both the residential and non-residential sectors, with a +77.5% increase in construction project contracts awarded since the COVID-19 pandemic:



- The Architecture and Design Commission's strategic objectives, in line with Vision 2030, will also play a pivotal role in supporting this journey and benefiting the whole A&D ecosystem in the process:

■ ADC's Strategic Objectives:



Note(s): (A) Indirect Impact  
Source(s): Mentioned in detailed sections

## The State of the A&D Sector across the Kingdom Varies in Maturity across the A&D Ecosystem



### Business

- Currently, firms must undergo multiple complex phases across many entities to be able to practice in the sector.
- Structural regulatory gaps and complex licensing systems are hindering the A&D sector's development.
- The sector's contribution to economy is currently limited due to the low maturity of local firms in comparison to their global counterparts.
- KSA is still a developing economy and therefore drives more demand. This leads to an increase in the newly registered A&D firms.



### Practitioners

- The sector's current registration processes and the regulatory environment have led to lack of inclusion in registration, especially for practitioners in government entities.
- The lack of titles protecting law and practicing requirements resulted in many non-specialized people claiming these titles such as "Architect" or "Interior Designer".
- The limited contribution of national companies in meeting local demand affected the quality of experiences and expertise of practitioners in various services.

## A Collective Effort to Continue Developing the Environment is Evident

- ✓ In 2022, the Ministry of Commerce (MC) issued the "New Companies Law," which will support investment in businesses by easing procedures & regulatory requirements and increase diversity in the market by encouraging the set up of new companies.
- ✓ Due to the numerous construction projects planned and underway, there is a growing demand for Built Environment services such as Architecture and Interior Design.
- ✓ The introduction of the six realization programs to stimulate large-scale construction and infrastructure projects across KSA, is expected to play a major role in helping the Kingdom attract \$100bn of foreign direct investment per year by 2030, thus leading to a flow of foreign A&D firms enriching the sector and promoting knowledge exchange.

- ✓ In 2019, the Kingdom's local content agenda was set to stimulate the development of the national economy across all sectors.
- ✓ The Kingdom's investments in the realization programs are expected to boost the demand for construction projects, and thus, the need for A&D professionals across all sub-sectors.
- ✓ The government has been active in introducing initiatives to empower women and increase their contribution to the sector.
- ✓ SCE only registers built environment practitioners (Architecture, interior architecture, urban design, and planning and landscape architecture), making it more challenging to capture the total number of A&D practitioners (including graphic and industrial designers).
- ✓ Special projects will contribute to the development of their cadres in the Architecture and Design aspects.





## Education

- The Education governing entities have highlighted three main challenges in the sector: Minimal vocational training compared to leading countries, limited labour data, and low alignment between higher education curricula and market needs & trends.
- Riyadh & Makkah have the highest concentration of accredited A&D programs throughout the Kingdom and thus are key hubs for attracting academics, researchers, and A&D students.
- Generally, the Kingdom has a low number of accredited A&D universities and programs compared to global benchmarks.
- The Architecture and Design student population is largely dominated by Saudi male students with low representation from non-Saudi students due to linguistic and registration barriers.

- ✓ The MoE's Council of University Affairs published three key development decisions to enhance the number of student admissions, professional certifications offered, and performance measurement in the sector.
- ✓ As part of ADC's strategy to upskill the sector, a series of initiatives are planned across all educational levels by 2025, such as Educational Enrichment Programs, Internship Advisory Programs, etc.
- ✓ Vision 2030's Human Capability Development Program was introduced to improve the higher education's alignment with the demands and trends of the labor market.
- ✓ TVTC has also taken steps to broaden its offerings through its recent strategic partnership program.



## Research

- Historically, the Kingdom's investment in R&D has been minimal compared to other countries and has lacked a comprehensive research strategy for the sector.
- The research ecosystem is fragmented, with multiple entities involved, and overlapping mandates leading to scattered efforts in the research space. Therefore, Research Development and Innovation Authority has been established to enable and encourage the sector.
- A&D-specific research grants remain limited to date.
- Despite the Kingdom's efforts to support research, a centralized repository to collect, preserve & share knowledge is lacking.
- Whilst new emerging A&D technologies such as Artificial Intelligence and Machine Learning, are being utilized in some Giga projects e.g., NEOM, their adoption remains limited.

- ✓ The National Research Strategy was introduced by the government to address the research gaps in the sector.
- ✓ ADC has already been working to define its Research target aspirations and goals, in line with the national objectives.
- ✓ The Kingdom is making noticeable efforts to develop its intellectual property regulations, but limited awareness regarding IP protection within the A&D sector necessitates further educational efforts.
- ✓ Vision 2030's national human capability development strategy, aims to develop a solid educational base for all Saudis and instill values to compete globally. Though progressing, its implementation has not fully cascaded to the A&D sector as there are still a limited number of A&D programs offered at Master's and PhD's levels.



## Community Engagement

- To date, the Kingdom's A&D community has been active in organizing multiple events to enrich professionals, students, and academics, and connect communities.
  - ADC has been working on increasing the Kingdom's visibility on the international stage by participating in multiple global events, forging relationships with key stakeholders, and facilitating numerous national engagements to connect and recognize stakeholders across sub-sectors.
  - Across the A&D landscape there are certain areas where more efforts are required to support, upskill, and recognize all A&D communities.
- ✓ ADC's calendar of initiatives lined up for 2023 spans across the A&D landscape to offer opportunities for the local community and propel the sector forward.
  - ✓ ADC plans to continue attending or participating in global events e.g., Milan Triennale, to promote the Kingdom's A&D sector.



# ADC has been Pivotal in Guiding and Supporting the wider A&D Community by Impacting all Sub-Sectors in its Initiatives to Ultimately Strengthen and Propel the Sector



Through the introduction of its six ambitious strategic objectives...



Sector Development	GDP Contribution	Talent Enablement	Global Recognition	Sustainability	Community of Innovation
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To empower and grow all sub-sectors in the end-to-end A&D ecosystem...



Architecture	Landscape Architecture	Interior Design	Urban Design & Planning	Industrial Design	Graphic Design
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2

# Introduction

# Report Sections



## Introduction

Introduction to the report highlighting its objective along with the roles of the Ministry of Culture and the Architecture and Design Commission.



## A&D Sector Outlook

Overview of the Kingdom's A&D sector and its outlook driven by large-scale construction projects & government programs.



## Practitioners

Analysis of A&D professionals in the Kingdom across the different sub-sectors.



## Business

Characteristics and recent trends of firms in the A&D sector.



## Research

Overview of the A&D research landscape in Saudi Arabia.



## Education

Status of the A&D education in the Kingdom including students, graduates, academic programs and faculty.



## Community Engagement

Overview of key initiatives within A&D on both the national and international levels.

# Introduction to the Report

This is the first edition of the A&D Sector report, published by the Architecture and Design Commission. Its objective is to evaluate the current state of the Architecture and Design sector, based on facts and figures, highlighting calls for action where needed, and assessing the prospects of the sector.

## Sub-sectors' Scope



### Architecture

Architecture is both the creative process and the artful product of planning, designing, and constructing buildings and spaces, integrating culture, aesthetics, and beauty with science and technology to fulfill society's needs for places of exchange and interaction.



### Landscape Architecture

is the process of analyzing, designing, and managing natural and Built Environment at different scales, uniting science and design to enhance outdoor environments and promote people's well-being.



### Urban Design & Planning

is the process of designing resilient cities and parts of cities, integrating public and private interests, and bringing together environmental stewardship, social equity, and economic viability to enable human interactions and improve quality of life.



### Interior Design

is the process of designing and integrating functional and aesthetic aspects of interior spaces to enhance the physical environment and facilitate interactions between users and spaces.



### Industrial Design

is the creative process of designing manufactured products that are human-centric, functional, aesthetically pleasing, economical, and environmentally responsible. It plays an integral role in the product lifecycle to detail technical aspects of manufactured products with the purpose of improving users' lives.



### Graphic Design

is the practice of projecting messages and ideas with visual communication through image, typography, text, and color across different print and digital media to enhance visual interaction between people.



## وزارة الثقافة Ministry of Culture

The Ministry was established on 2 June 2018 by Royal Order A/217, under the leadership of His Highness Prince Bader bin Abdullah bin Farhan Al Saud, the Kingdom's first dedicated Minister of Culture, in an effort to support the country's shift away from an oil-focused economy and realize the untapped value of the Kingdom's rich culture and history.

The Ministry has a crucial role to play in delivering Saudi Arabia's ambitious transformation program, Vision 2030.

The Ministry defined its three main objectives as follows:

- Promote culture as a way of life.
- Enable culture to contribute to economic growth.
- Create opportunities for global cultural exchange.



### Vision

A flourishing of arts and culture across Saudi Arabia that enriches lives, celebrates national identity, and builds understanding between people.



### Mission

To support and enable a vibrant Saudi Arabian culture that is true to its past and looks to the future by cherishing heritage and unleashing new and inspiring forms of expression for all.

The Ministry seeks to realize the cultural sector's potential, bringing all aspects of the Kingdom's rich cultural heritage into the daily life of Saudis – it will enrich the lives of the people of Saudi Arabia.

Culture is a broad term, and the Ministry has identified 16 priority sub-sectors where it will focus its work. The intention of this is to create a Ministry which can effectively champion causes across the sector. The Ministry will also create 11 new bodies, reporting to the Ministry which will focus on these sectors.

The Architecture and Design Commission (ADC) was established under the umbrella of the Ministry of Culture to uncover the value and invigorate the Architecture and Design sector in the Kingdom of Saudi Arabia.



## هيئة فنون العمارة والتصميم Architecture and Design Commission

The Architecture and Design Commission was established in February 2020 as one of 11 commissions under the Ministry of Culture. One of the Commission's key objectives is to regulate the sector, including supporting and encouraging practitioners, organizing exhibitions and seminars, and stimulating creative thinking in the sector. The sub-sectors represented under the Commission include architecture, urban design and planning, and landscape architecture, as well as various design fields such as interior design,

graphic design, and industrial design. Our role at the Commission is to achieve the goals of the Ministry of Culture and Vision 2030 and contribute to the national economy, through creating programs and initiatives to support Saudi architects and designers and enrich our national identity. The Commission also seeks to establish national companies and encourage investment in the field. This will contribute to creating job opportunities for qualified Saudis and enhancing cooperation between the public and private sectors.



### ADC's North Star

The Architecture and Design Commission aims to regulate and enhance the Architecture and Design sector with the support of key stakeholders. It holds an independent supervisory role in this vital cultural sub-sector to ensure maximum efficiency in achieving the overarching missions incorporated in Saudi Vision 2030.

## ADC's Objectives



### Sector Development

Integrate and regulate the Architecture and Design ecosystem and facilitate collaboration across the A&D landscape.



### Global Recognition

Build a regional powerhouse, drawing international attention to the Saudi designers' achievements.



### GDP Contribution

Support the diversification of Saudi Arabia's economy by growing the creative industries.



### Sustainability

Position Saudi Arabia as the regional environmental sustainability leader.



### Talent Enablement

Educate future professionals to align talents with the evolving needs of the profession.



### Community of Innovation

Foster and promote innovation and research to shape the future of the sector.





Qasr Al-Hukm

3

**A&D Sector  
Outlook**

# A&D Outlook

The A&D outlook section aims to track and provide an overview of the latest A&D drivers and projects currently being undertaken in the Kingdom. Furthermore, the section assesses the projected implications for A&D stakeholders in the long-term, thus allowing for a better understanding of market dynamics (opportunities, demand, commitments, etc.), which are crucial for sound decision-making especially for planning and setting long-term objectives.



## Overall, the Architecture and Design Sector is Particularly Well Positioned to Benefit from the Growth Momentum Experienced in the Kingdom Driven by:

### 01

The demographic and economic growth, which will drive the demand for Architecture and Design services to accommodate the need for both affordable and high-end housing.

### 02

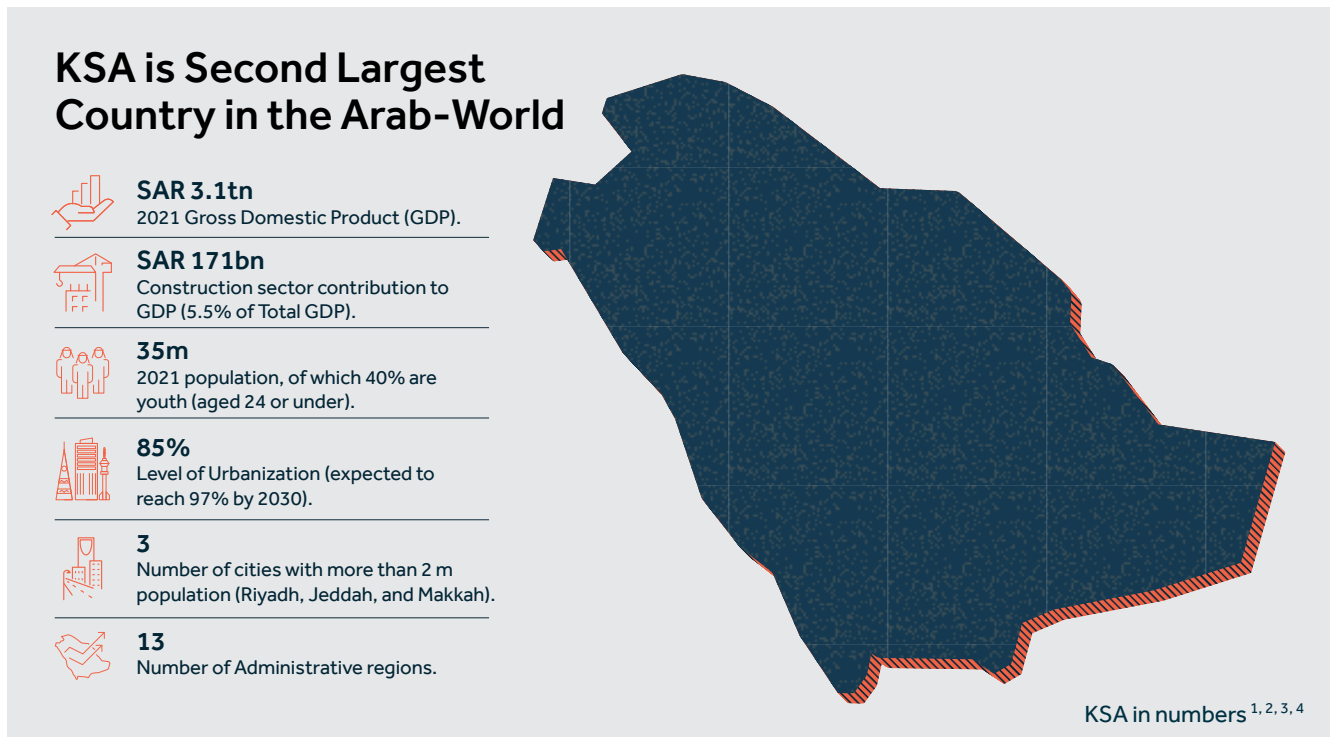
The Kingdom's large-scale national infrastructure program, including transportation, healthcare, and education, to improve its citizens' access to public services and quality of life.

### 03

Vision 2030 and its development projects, which aim to diversify the Kingdom's economy by focusing on the untapped value in the leisure, cultural, sport, and hospitality sectors.



# KSA in a Nutshell



## The Kingdom of Saudi Arabia is Currently Undergoing a Unique Transformative Economic and Social Reform Fueled by Vision 2030

- Saudi Arabia is poised to become the world’s fastest growing economy in 2022, boosted by massive investments to achieve its 2030 vision goals and other regulatory reforms, which are improving the business environment and attracting foreign investments to the country.
- These projects are projected to cost \$3tn by 2030 and are expected to significantly drive the country’s Architecture and Design sector, powered by the construction development projects planned.
- This large-scale economic overhaul aims to shift the country’s reliance on oil & gas revenues and diversify its giant economy, which includes a portfolio of vast giga projects such as Neom, Qiddiya, and the Red Sea project, among other infrastructure-related projects.

### KSA’s Architecture and Design key figures <sup>5,6,7,8</sup>.

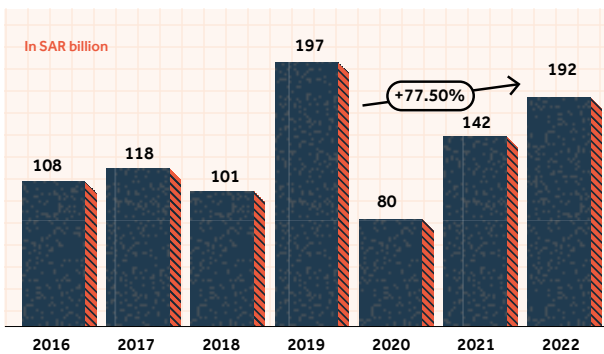
<b>24,646</b> Total A&D practitioners*	<b>1,626</b> Registered firms*	<b>34</b> Universities	<b>7,585</b> A&D students*	<b>87</b> A&D programs

Note(s): (A): Internal analysis is considered internal rework of provided data  
 \*Estimated numbers in 2021 (see relevant sections)  
 Source(s): (1) World Bank, (2) Arab News, (3) Statistic Times, (4) Saudi Embassy, (5) Ministry of Commerce, (6) MHRSD and SCE, (7) Internal AnalysisA, (8) University Forms

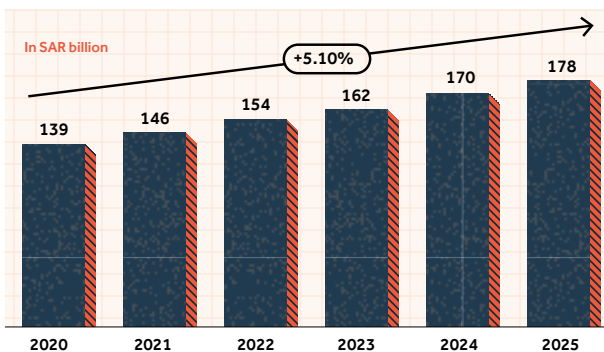
# This Vision will Bring Significant Investments and Growth to the country’s Architecture and Design Sector Powered by the Major Construction Projects Needed to Deliver the Desired Outcomes

Construction acts as the main driver behind the demand for Architecture and Design services. Hence, we expect a surge in the demand for A&D services in the Kingdom going forward, driven by the significant construction projects to be undertaken under Vision 2030. This will present the A&D sector with valuable growth opportunities to be realized across both the residential and non-residential projects.

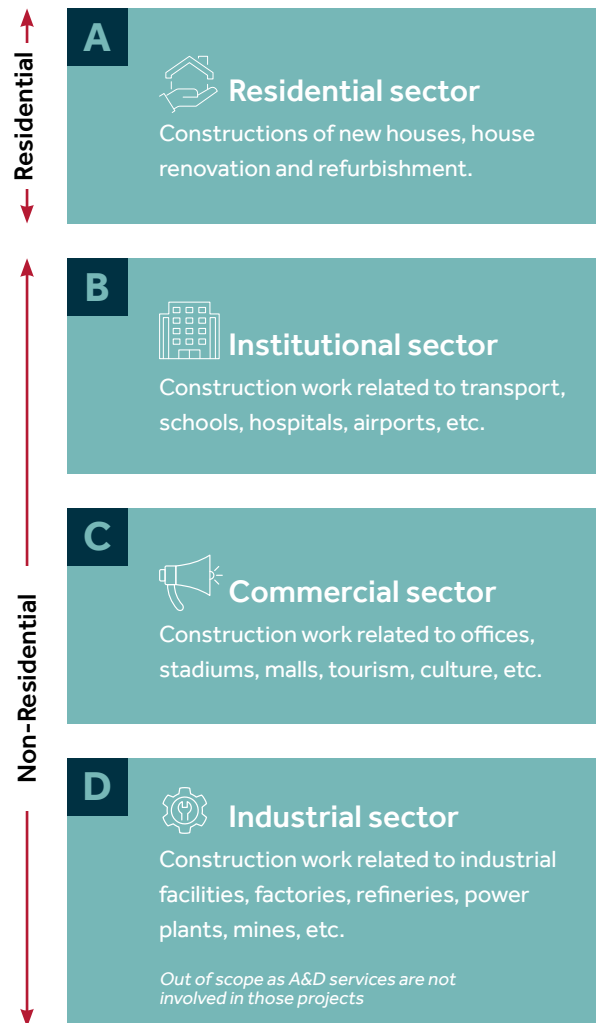
**1** The Construction market in KSA has been recovering after the COVID 19 pandemic, as evidenced by the value of contracts awarded<sup>9</sup>.



**2** It is poised to increase between 2021 and 2026 at a 5.2% CAGR to reach c SAR 178 bn in 2025<sup>10</sup>...



**3** ...driven by the Kingdom’s Vision Realization Programs related to V2030 across both the Residential and Non-Residential sectors.



# Demand for Construction and A&D Services will be Driven by the Investments for the Realization Programs, Notably the Six Highlighted Programs Below<sup>11</sup>



## Housing Program

Aims to provide housing solutions to house ownership among Saudis.

**A** This program will boost the construction demand in the residential sector.

## The Public Investment Fund

Aims to enhance the Kingdom's economic and investment health via launching local sectors, developing local real estate projects, and launching major projects.

## Quality of Life

Aims to improve citizen's quality of life by creating the necessary environment to support and encourage participation in cultural and heritage activities, entertainment, sports, tourism, and more.

**B** Those two programs will drive the demand for commercial construction projects.

## National Transformation Program

Aims to provide infrastructure for all sectors to achieve Vision 2030's first phase initiatives include enhancement of the urban landscape, desalination plants and network. The next phase will continue to develop the necessary infrastructure.

## Human Capability Development

Aims to prepare citizens for the job market and focuses on developing a solid educational base and infrastructure for all citizens.

## Health Sector Transformation

Aims to improve access to health services through optimal coverage, sufficient health facilities, improvement of hospitals and equitable geographical distribution, among others.

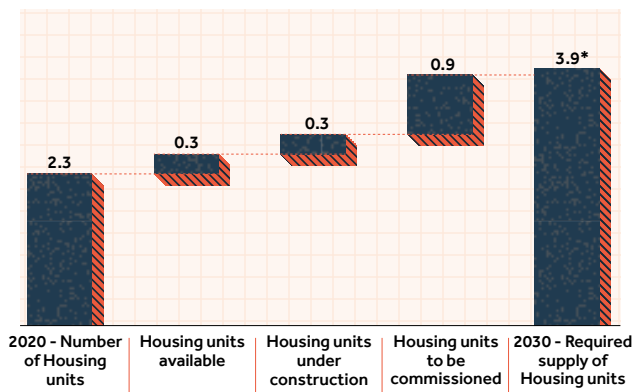
**C** Those three programs will drive the demand for institutional construction projects.

# The A&D Sector is Poised for Significant Growth Driven by the Housing Program’s Target of 70% Home Ownership for Saudis by 2030

Saudi Arabia’s Demographics & Housing Figures <sup>12, 13, 14, 15, 16</sup>.

Key Figures	2020	2030
Kingdom’s Population	35 million	c 40 million
Proportion of Saudis among the Population	64% (c 23m)	75% (c30m)
Housing Ownership Target	60% (achieved in 2019)	70%
Average Household Size	5.8 p	5.3 p

## One million homes needed in Saudi Arabia by 2030 <sup>17, 18, 19</sup>.



Avg HH<sup>(A)</sup> size: 5.8 → Avg. HH size: 5.3

\* (30 million x 70%): 5.3 = 3.9 million housing units. This number represents the total supply of housing units required by 2030 to meet the Housing Program’s target.

## Key Analysis

- The Kingdom’s population is projected to grow by 14% to reach 40 million by 2030 according to UNICEF’s 2019 report.
- This growth will boost the need for the government to increase the supply of appropriate housing units to accommodate the increasing demand.
- With the average household size expected to continue its decrease to reach 5.3 people in 2030 and the government’s target to achieve 70% home ownership among its projected 30 million Saudi population in 2030, Saudi Arabia

needs to deliver more than 1 million housing units. With only 300k<sup>20</sup> housing units currently available in KSA, and to cater for the increased demand, A&D firms and professionals will play a major role going forward, leading to substantial growth in the A&D Residential segment.

- Additionally, 20,000 residential units are expected to be renovated in Jeddah by 2027<sup>12</sup>.

## Key takeaways for the Kingdom’s A&D sector

- The Housing Program will ensure a significant amount of work for the Architecture and Design sector in the Kingdom through the construction and renovation of 1 million+ housing units.
- Additionally, the increased demand for high-end housing should further strengthen this demand to the benefit of architects and designers.
- A&D Sectors to benefit the most:

	Architecture		Industrial Design
	Interior Design		Landscape Arch
	Urban Planning		

Note(s): (A): Household Source(s): (12) Oxford Business, (13) Al Arabiya English, (14) Vision 2030, (15) Trade Arabia, (16) UN Habitat, (17) Construction Week, (18) (20) Mordor Intelligence, (19) International Finance, (21) Arab News



# The Kingdom's A&D Sector Growth will be Additionally Boosted by the Country's Aspirations to Become an International Tourism Destination by 2030

The Kingdom's Tourism sector is expected to grow in the coming years as per the Vision 2030 listed targets and objectives. To cater for this development, and the expected increase in touristic activities, new jobs will need to be created, boosting the overall tourism landscape and ecosystem.



## Actual 2022 Key Tourism Indicators<sup>22, 23, 24</sup>

**5.3%**

GDP Contribution

**836k**

New jobs created

**62m**

Total visitation

**32.5m**

Domestic visitation

**29.5m**

International visitation

## Projected 2030 Key Tourism Indicators<sup>22, 23, 24</sup>

**10%+**

GDP Contribution

**1m**

New jobs created

**100m**

Total visitation

**45m**

Domestic visitation

**55m**

International visitation

## The Museums Commission is Placing the Kingdom's History at the Forefront of Vision 2030 by Showcasing the Country's Rich Cultural Aspects via its Museums and Heritage Sites...



هيئة المتاحف  
Museums Commission

- The Commission is planning to open four new museums across four major sites in the Kingdom: Abha, Dammam, Hail and Al-Qassim<sup>25</sup>.
- Currently, the Museums Commission is also overseeing the construction of two museums in Riyadh<sup>26</sup>:
  - ✓ The Saudi Arabia Museum of Contemporary Art in Diriyah.
  - ✓ The Black Gold Museum in King Abdullah Petroleum Studies and Research Center in Riyadh, focusing on the artistic interpretation of the history of oil.



Museum of Contemporary Art



Black Gold Museum

## ... Along with the Heritage Commission, Which Has Been Helping Protect the Kingdom's Natural Heritage



هيئة التراث  
Heritage Commission

- The Kingdom of Saudi Arabia currently counts six UNESCO World Heritage sites<sup>27</sup> (some of the sites below).
- In 2021, the Commission created the National Antiquities Register to record, manage and preserve archaeological and historic sites. More than 8,000 locations have been registered so far<sup>28</sup>.
- Furthermore, the Commission is organizing several initiatives to promote the Kingdom's culture through 150 projects.



Al Turaif Site



Hail site








Hegra site



Jeddah's Al Balad site

# The Development of 12 Downtown Areas Across the Kingdom Led by the Saudi Downtown Company Will Create Multiple Opportunities for A&D

- HRH Crown Prince unveiled the plan for the establishment of the Saudi Downtown Company (SDC).
- This entity is charged with the development and construction of downtown areas and mixed-used destinations in 12 cities across the Kingdom.
- Overall, SDC will develop more than 10 million sqm of land within the Kingdom, leveraging cutting-edge technology while embracing the country's diverse culture and heritage. These projects are expected to generate a powerful social and economic impact and a legacy that will benefit generations to come.
- This large-scale project is guaranteed to create a significant demand for all A&D services.
- Through SDC, PIF will strengthen the ties between the public and private sector entities using strategic partnerships, creating new businesses, and investment opportunities.
- Overall, the mission of the Saudi Downtown Company is in line with Vision 2030, which is to enhance the attractiveness of the Kingdom and unlock promising sectors to help diversify the Kingdom's economy.
- Impacted sub-sectors:

	Architecture		Industrial Design
	Interior Design		Landscape Arch
	Urban Planning		

## Illustrative Location of the 12 Downtown Projects to be Built and Developed<sup>29</sup>

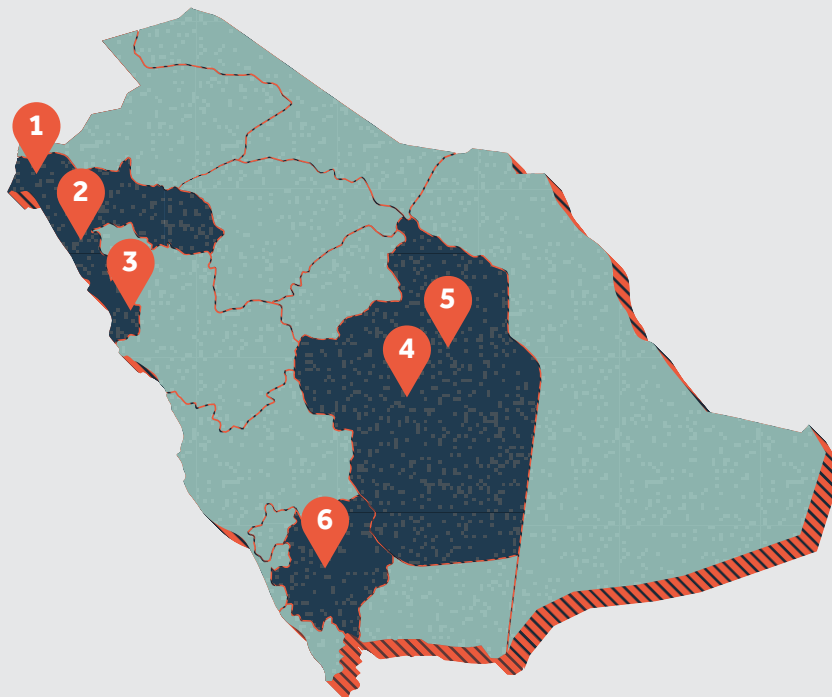


- |              |                    |
|--------------|--------------------|
| 1 Al Madinah | 7 Hail             |
| 2 Al Khobar  | 8 Al Baha          |
| 3 Al Ahsa    | 9 Arar             |
| 4 Buraidah   | 10 Taif            |
| 5 Najran     | 11 Dumat Al-Jandal |
| 6 Jizan      | 12 Tabuk           |

Source(s): (29) Gulf Business

## Additionally, Saudi Arabia is Heavily Investing in Leisure and Hospitality through its Impressive Giga-Projects<sup>30</sup>

- The upcoming six giga projects in the Kingdom are the symbol of the future of the country.
- Those projects are mainly located in three regions: Tabouk, Aseer, and Riyadh.
- The projects are in line with the Kingdom's vision to open up and diversify the economy by tapping into the huge potential of the tourism, hospitality, and entertainment markets.
- Those projects represent together more than USD 1 trillion in investments and are expected to drive the Architecture and Design markets upward through the construction of hotels, villas, sports compounds, offices, and several other attractions and entertainment centers.



### 1 **Neom: Vision 2030**

26,500 km<sup>2</sup>.  
 \$500bn Investments.  
 \$100bn GDP contribution by 2030.  
 380,000 jobs created by 2030.

### 2 **Amaala: Ultra-luxury**

4,155 km<sup>2</sup>.  
 \$c3bn GDP contribution upon completion.  
 50,000 jobs created by 2030.

### 3 **Red Sea Project**

28,000 km<sup>2</sup>.  
 \$5.9bn annual GDP contribution by 2030.  
 70,000 jobs created by 2030.

### 4 **Qiddiya**

367 km<sup>2</sup>.  
 \$8bn Investments.  
 \$4.5bn GDP contribution upon completion.  
 c57,000 jobs created.

### 5 **Diriyah Gate**

7 km<sup>2</sup>.  
 \$17bn Investments.  
 \$7.2bn GDP contribution upon completion.  
 55,000 jobs created by 2030.

### 6 **Aseer**

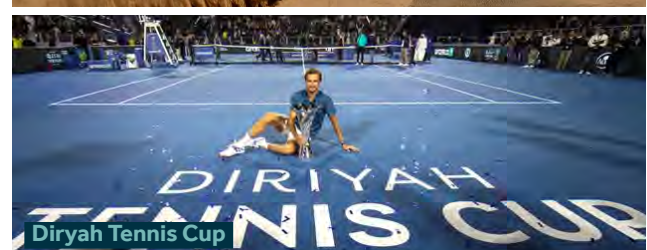
81,000 km<sup>2</sup>.  
 \$13bn Investments.  
 \$20bn GDP contribution by 2030.  
 130,000 jobs created by 2030.

## Saudi is also Investing in Sports to Establish Itself as a Regional Hub for World Class Professional Sporting Events, Which Will Create Ample Opportunities for the Design Sector

- The sports industry is recently being highlighted in the Kingdom. In just a few years, KSA has moved to the forefront, hosting some of the biggest sporting events in the world and providing an additional boost for employment for A&D firms and practitioners to back up its aspirations. The Kingdom's Public Investment Fund has announced in 2020 its commitment to invest \$ 2 billion in sports by 2024<sup>31</sup>.
- Recently, the Kingdom hosted major international sporting events in various sporting sectors, including Formula 1, Boxing, Tennis, etc. Additionally, Saudi Arabia is going to host both the 2027 Asia football Cup and the 2029 Asian Winter Games.

## Key Takeaways for the Kingdom's A&D Sector

- The sports sector is an important growth factor for A&D practitioners, creating multiple opportunities across all specialties:
  - ✓ Build and improve sports facilities and stadiums through planning, construction, and fit-in of venues.
  - ✓ Design through creative visual content production, event promotion, advertising, etc



### Snapshot of the Kingdom's Recent Major Sporting Events<sup>32</sup>

**Mar 2022**

Jeddah Grand Prix

**Feb 2020, 2021, 2022**

The Saudi Cup  
(the world's richest horse race)

**Jan 2022 and 2023**

Spanish Supercopa final in Jeddah

**Dec 2019**

World heavyweight boxing

Source(s): (31) Front Office Sports, (32) Arab News

# NEOM

## Vision 2030 Flagship Project



نيوم NEOM

### Project Overview<sup>33</sup>

- The NEOM giga-project project is a mega-city to be located in northwest Saudi Arabia, on the Red Sea coast. It aims to build an international hub for a wide range of sectors and services to be completed by 2030. NEOM's key projects are:
  - ✓ **THE LINE:** A revolutionary urban development.
  - ✓ **OXAGON:** A reimagined industrial city.
  - ✓ **TROJENA:** A mountain tourism destination.
  - ✓ **SINDALAH:** A luxury island destination in the Red Sea.

### Development Outline<sup>34</sup>

- The project plans to construct villages with labor communities of up to 30,000 workers, offices, warehouses, and construction service establishments.
- The goal is for all residents and industries in the project to be powered by 100% renewable energy through a multi-dimensional hydrogen ecosystem.

### Key Figures<sup>35</sup>

Non-exhaustive

**200,000+** Housing units

**c.80,000** Hotel rooms

**1-2m sqm** Retail space

**1-2 sqm** Offices pace

### A&D Firms Mandated

- (Master plans, design, infrastructure, etc.)  
Non-exhaustive



NEOM (Vision 2030 flagship project)

# AMAALA

## Ultra Luxury Tourism Project



AMAALA

### Project Overview<sup>36</sup>

- AMAALA is a giga-project focusing on wellness, healthy living, and meditation located within the Prince Mohammad bin Salman Natural Reserve on Saudi Arabia’s Red Sea coast.
- The project aims to offer luxury facilities and services in arts, culture, fashion, wellness, and sports services.

### Development Outline<sup>37</sup>

- The AMAALA project consists of three sub-projects:
  - ✓ The Coastal Development.
  - ✓ Triple Bay.
  - ✓ Amaala Island.

### Key Figures<sup>38</sup>

Non-exhaustive

**900+** Private residential villas

**25** Hotels

**c3,000** Hotel rooms

**200** High-end retail outlets

**500,000** Annual visitors

### A&D Firms Mandated

- (Master plans, design, infrastructure, etc.)  
Non-exhaustive

HKS



@egis

Foster + Partners



Amaala (Ultra luxury tourism project)

# The Red Sea Project

## Luxury Tourism Venture



### Project Overview<sup>39</sup>

- The Red Sea Project is a luxury sustainable tourism project located on the western coast of the Kingdom. It aims to become a world leader in regenerative tourism. It will emphasize environmental preservation and will only rely on renewable energy source(s) and ban single-use plastics. The Red Sea Project and the AMAALA projects merged into the Red Sea Group in 2022.

### Development Outline<sup>40</sup>

- The Red Sea Project will employ 35,000 people and will showcase the rich cultural heritage of the Red Sea Coast. The project aims to preserve the natural landscape of the coast, such as the archipelago of more than 90 islands, dormant volcanoes, deserts, and a wide variety of wildlife and mountains.

### Key Figures<sup>41</sup>

Non-exhaustive

**1,000+** Housing units

**50** Hotels and resorts

**8,000** Hotel rooms

**1** New international airport

**22** New islands to be developed

### A&D Firms Mandated

- (Master plans, design, infrastructure, etc.)  
Non-exhaustive

WATG

BURO HAPOLD

Contracting &  
Construction  
Enterprises

killia  
design

KENGO KUMA AND ASSOCIATES  
隈研吾建築都市設計事務所

OPPENHEIM  
ARCHITECTURE



The Red Sea project (Luxury tourism venture)



# Qiddiya Project

## City for Entertainment, Sports & Arts



### Project Overview<sup>42</sup>

- The Qiddiya giga-project aspires to become the entertainment, sports, and arts hub built near Riyadh. The project is built on five main pillars:
  - ✓ Sports and wellness.
  - ✓ Nature and environment.
  - ✓ Parks and attractions.
  - ✓ Motion and mobility.
  - ✓ Arts and culture.

### Development Outline<sup>43</sup>

- The Qiddiya project aims to have five key development nodes:
  - ✓ Resort Core, Qiddiya Village, Motion Zone, Eco Zone and Golf Community.
- A key attraction will be the Kingdom’s first water theme park, featuring 23 rides and attractions. Qiddiya will also feature luxury-tented retreats, animal encounters, and outdoor adventure, among other attractions.

### Key Figures<sup>44</sup>

Non-exhaustive

- 2** Golf courses to be built
- 1** FIA grade 1 racetrack
- 17m** Visitors expected annually
- 11,000** Housing units

### A&D Firms Mandated

- (Master plans, design, infrastructure, etc.) Non-exhaustive



Qiddiyah project (City for entertainment, sports & arts)



# Diriyah Gate

## Destination for History & Culture

### Project Overview<sup>45</sup>

- The Diriyah Gate giga-project aims to redevelop the “birthplace of the Kingdom” into a world-class destination. The Riyadh-based location will feature luxurious restaurants and hotels, with all structures built in the traditional Najdi architectural style. The first phase of the master plan has been awarded platinum-level LEED pre-certification accreditation by the United States Green Building Council (USGBC)<sup>45</sup>.

### Development Outline<sup>46</sup>

- Diriyah Gate is a mixed-use development featuring an array of world-class cultural, entertainment, retail, hospitality, educational, office, and residential areas, including hotels, museums and outdoor plazas.
- The first phase of the Diriyah Gate project will focus on a landscaped park, Wadi Hanifah, and Bujairi Terrace, featuring 18 new restaurants.

### Key Figures<sup>47,48</sup>

Non-exhaustive

**19+** Hotels and resorts

**3,000+** Hotel rooms

**5+** Museums

**27m** Visitors expected annually by 2030

### A&D Firms Mandated

- (Master plans, design, infrastructure, etc.)  
Non-exhaustive



Diriyah Gate (Destination for history & culture)

# Aseer Project

## The Arabian Highland



### Project Overview<sup>49</sup>

- The Aseer Development Project was launched as the strategy for the development of the Aseer Region under the theme of "The Arabian Highland." The project aims to turn the Aseer mountain region into an all-year-round world destination by developing tourism attractions. The strategy will also contribute to the social and economic prosperity of the region.

### Development Outline

- His Royal Highness Crown Prince Mohammed bin Salman bin Abdulaziz Al Saud asserted that the implementation of the strategy will contribute to Vision 2030 by providing new job opportunities in addition to raising the quality of life and improving the region's basic services and infrastructure, including communication, healthcare, transport, and other citizen-empowering services and facilities.

### Key Figures<sup>50</sup>

Non-exhaustive

**2,700** Hotel rooms

**1,300** Residential units

**30** Commercial and entertainment attractions

**10m** Visitors by 2030

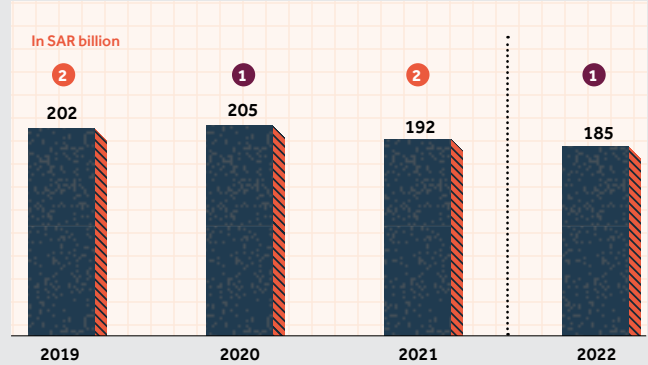


Aseer Project (The Arabian Highland)

# This Growth will be Further Boosted by the Kingdom’s Vision 2030 Efforts to Improve Access to Quality Education via the Construction of 120 New Schools

Education is the Kingdom’s highest priority, as evidenced by the government’s overall public spending in the sector<sup>51</sup>.

- 1 Highest government spending area
- 2 Second highest government spending area



And the recent Public Private Partnership contract, which the government has signed in (2020) to build 120 new schools<sup>52,53</sup>.

Key Figures	Wave 1		Wave 2
	Jeddah	Makkah	Madinah
Number of Schools	27	33	60
Capacity (in Number of students)	52,680		50,000
Delivery Date	2022	2023	2024
Capex	c SAR1.2tn		

A&D companies involved in the Public Private Partnership contract (non-exhaustive)



## Key Analysis

- The government has spent over SAR 500 billion on education for the past three years, which represents the biggest portion of government spending for the period, surpassing both healthcare and military spending.
- Additionally, the Kingdom is experiencing increased demand for education facilities, driven by increases in both population and urbanization.
- This surge in government spending on education infrastructure is expected to significantly stimulate demand for A&D services to meet the program’s targets.

## Key Takeaways for the Kingdom’s A&D Sector?

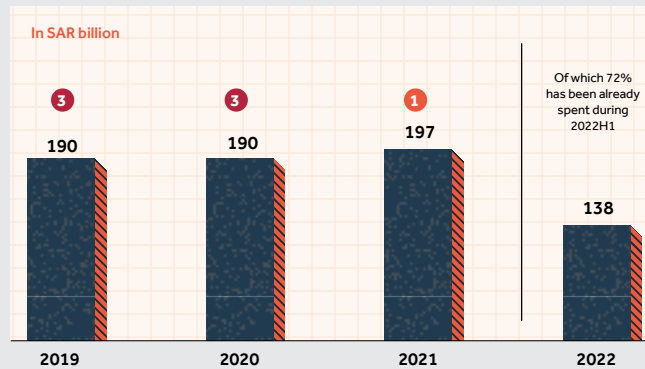
- The Education Program (Human Capability Development Program) will bring sizable investments and projects for the Architecture and Design sector in the Kingdom, which will positively impact its growth in the medium to long-term.
- A&D sectors to benefit the most:

	Architecture
	Interior Design
	Urban Design & Planning

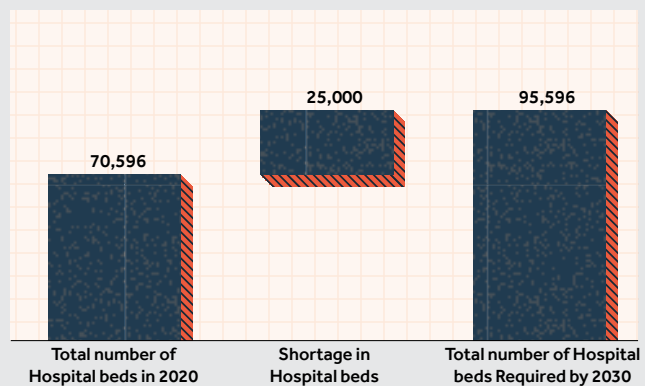
# There is a Need in the Healthcare Sector to Tackle the Shortages in the Number of Hospital Beds to Meet the Needs of the Growing Population

The Healthcare & Social Development sector has seen significant investments from the government<sup>54</sup>

- 1 Highest government spending area
- 3 Third highest government spending area



Which are expected to further grow, in order to tackle the shortage of hospital beds<sup>55</sup>



## Key Analysis

- The Vision 2030 goals and the growing population will require KSA to provide an additional 20,000 – 30,000 long-term care beds by 2030 (28%-42% increase).
- To this end, the government has already stated that it plans to invest SAR250bn (USD66bn) in Healthcare infrastructure, of which SAR 110 bn is dedicated to building hospitals.
- Those investments have already been initiated, and the Ministry of Health (MOH) is currently undertaking two medical city projects – the King Faisal Medical City in Abha in the Asir region and the Prince Mohammad bin Abdul Aziz Medical City in Al-Jouf, to serve the southern and northern regions. These two projects will add 1466 hospital beds, respectively.
- The government is also looking to boost the participation of the private sector to meet the expected targets.

## Key Takeaways for the Kingdom’s A&D Sector?

- With 50% of the government investment in healthcare likely to be focused on infrastructure until 2025.
- A&D Sectors to benefit the most.

	Architecture
	Interior Design
	Urban Design & Planning

# Other Sectors Contributing to the Growth in the Demand for A&D Services

1

## Mobility & Transportation Infrastructure

The Kingdom plans to invest more than **SAR500 bn** in transport and logistics over the next nine years.

- Two main initiatives are to be launched regarding mobility and infrastructure in the Kingdom:
  1. New international airline: Saudi Arabia plans to invest up to US\$30 bn in a second national airline as part of its ongoing attempt to diversify its economy.
  2. Expansion of airports: Saudi Arabia is undertaking a massive airport expansion and upgrade program to serve 330 million travelers by 2030 through \$147 bn in investments that will support \$82.3 bn of GDP by 2037<sup>56</sup>.
- Building the King Salman International Airport, which is expected to be one of the world's biggest airports with six parallel runways to serve 185 million passengers annually by 2050<sup>57</sup>.
- Building a broader train network: The Riyadh metro, for example, is one of the largest urban transport projects in the world, with six lines covering an area of 176km and 85 metro stations across the city<sup>58</sup>.
- Exploring new technologies, enlarging its railway network, increasing port capacity, expanding and investing in cutting-edge public transport technology, etc.



Riyadh metro by Zaha Hadid

2

## Gaming & E-sports

Saudi Arabia plans to invest more than **SAR142 bn** to turn the Kingdom into a hub for e-sports by 2030<sup>59</sup>.

- Around 86 initiatives touching on the whole A&D landscape will be generated and managed by more than 20 public and commercial organizations<sup>60</sup>.
- The activities range from setting up educational academies and creating innovative legislation to hosting major gaming and e-sports events and building business incubators.
- These projects will focus on eight main areas, including game development, e-sports, extra services, and other supporting factors like infrastructure, regulations, education, and talent acquisition, as well as funding and financial support.
- The Public Investment Fund (PIF), Saudi Arabia's sovereign wealth fund, acquired a 6.07% share in Nintendo, marking its third investment in Japanese video games. The PIF has also established the Savvy Gaming Group, creating an integrated network for the gaming industry.



Launch of the Savvy Gaming Group

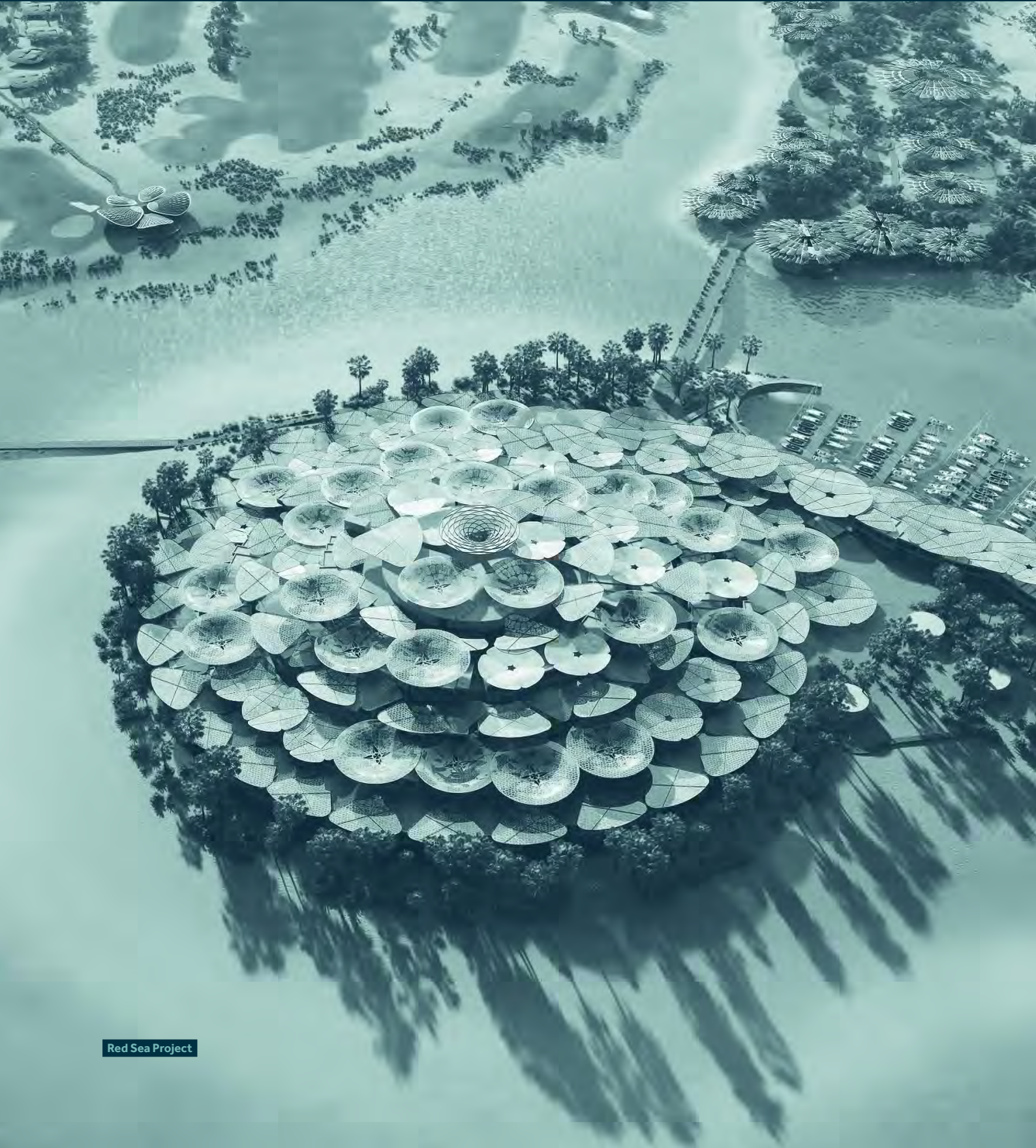
4

# A&D Business



# The A&D Business

This section looks at the current business regulatory entities, structure and identified gaps, then moves on to analyze the distribution of Built Environment A&D firms within the Kingdom. This section also identifies the shortcomings of the business landscape and highlights actions taken to address them in order to improve its maturity and output.



## The Current A&D Business Ecosystem is very Dense with Several Governmental Entities Involved<sup>1</sup>

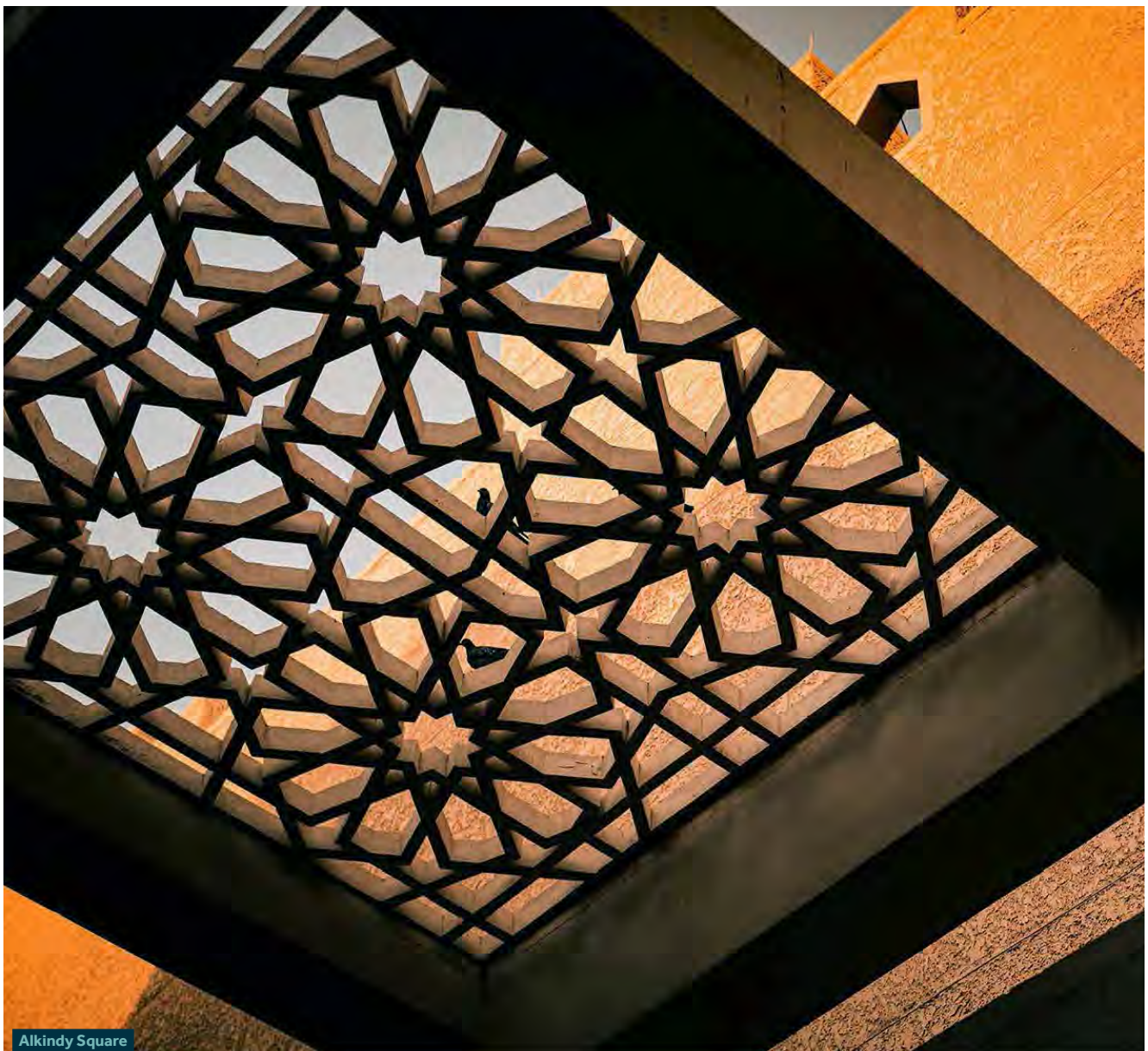
In order to practice in the Kingdom, A&D firms must go through multiple complex phases involving multiple governmental entities to become eligible.

First, firms need to be registered across two to three entities -depending on whether the firm is international or local- to obtain their commercial licenses and certificates. Following this, A&D firms must start their licensing process in line with the following entities depending on their services:

- The Saudi Council of Engineers for firms offering architecture, interior design, landscape architecture & urban planning & design services.





- The Ministry of Media for graphic design firms.
- The Ministry of Commerce for all six sub-sectors firms to obtain a commercial register.

Additionally, firms must also register with numerous other entities for administrative purposes, such as ZATCA and MoMRAH, therefore adding another layer of complexity from a regulatory perspective, all of which are being monitored (for compliance and conflict resolutions) under multiple entities.



1: Entities involved in these steps are also involved in the closing part

**Exhibit 1: Government entities involved in the A&D regulatory scene<sup>1</sup>.**

Business Setup							
 <b>هيئة تنمية البحث والتطوير والابتكار</b> Research Development and Innovation Authority	<b>Issuance of foreign investor license</b>	✓	✓	✓	✓	✓	✓
 <b>وزارة التجارة</b> Ministry of Investment	<b>Issuance of commercial register</b>	✓	✓	✓	✓	✓	✓
 <b>مجلس الغرف السعودية</b> Council of Saudi Chambers	<b>Issuance of certificate of enrollment</b>	✓	✓	✓	✓	✓	✓
Licensing							
 <b>SCES</b> الهيئة السعودية للمهندسين SAUDI COUNCIL OF ENGINEERS	<b>Issuance of engineering company/office license</b>	✓	✓		✓		✓
 <b>وزارة التجارة</b> Ministry of Investment	<b>Issuance of consulting license</b>			✓			
 <b>وزارة الإعلام</b> Ministry of Media	<b>Issuance of media license</b>					✓	
Administrative							
 <b>وزارة الشؤون البلدية والقروية</b> Ministry of Municipal & Rural Affairs	<b>Issuance of a commercial license</b>	✓	✓	✓	✓	✓	✓
 <b>المؤسسة العامة للتأمينات الاجتماعية</b> General Organization for Social Insurance	<b>Registration with GOSI</b>	✓	✓	✓	✓	✓	✓
 <b>هيئة الزكاة والضريبة والجمارك</b> Zakat, Tax and Customs Authority	<b>Registration with ZATCA</b>	✓	✓	✓	✓	✓	✓
 <b>الدفاع المدني السعودي</b> Saudi Civil Defense	<b>Issuance of a safety license</b>	✓	✓	✓	✓	✓	✓
 <b>الموارد البشرية والتنمية الاجتماعية</b>	<b>Issuance of a work permit</b>	✓	✓	✓	✓	✓	✓
Compliance							
 <b>البناء المستدام</b> Sustainable Building	<b>Checking permits to detect violations</b>	✓	✓	✓	✓	✓	✓
 <b>كود البناء السعودي</b> Saudi Building Code	<b>Reviewing any potential violations</b>	✓	✓	✓	✓	✓	✓
 <b>وزارة الشؤون البلدية والقروية</b> Ministry of Municipal & Rural Affairs	<b>Notifying authorities of penalties for violations</b>	✓	✓	✓	✓	✓	✓
 <b>المنطقة العامة للنيابة العامة</b> REGION OF SAUDI ARABIA PUBLIC PROSECUTION	<b>Implementing penalties</b>	✓	✓	✓	✓	✓	✓

**Subsector Legend**

					
Architecture	Interior Design	Industrial Design	Land Arch	Graph Design	Urban Plan

Source(s): (1) Internal Analysis

## ...Resulting in a Complex Licensing Process for Firms

- To be a licensed firm or office specialized in architecture, interior design, landscape architecture, or urban planning & design in Saudi Arabia, practice-owners must at least obtain an associate membership from SCE. This step is required before going into a seven-step process, starting with the Ministry of Commerce (MC) and Ministry of Investment (MISA) (for international firms) and ending with the SCE license.
- Although the Built Environment subsectors (Architecture, Interior Design, Landscape Architecture and Urban Planning & Design) under ADC's supervision, are not engineering firms, they must be fitted into one of the licenses types offered by SCE due to it being considered an engineering-oriented entity.
- Graphic and Industrial Design, however, are out of SCE's scope and are currently licensed by the Ministry of Media and the Ministry of Commerce, respectively.



### Survey Insight

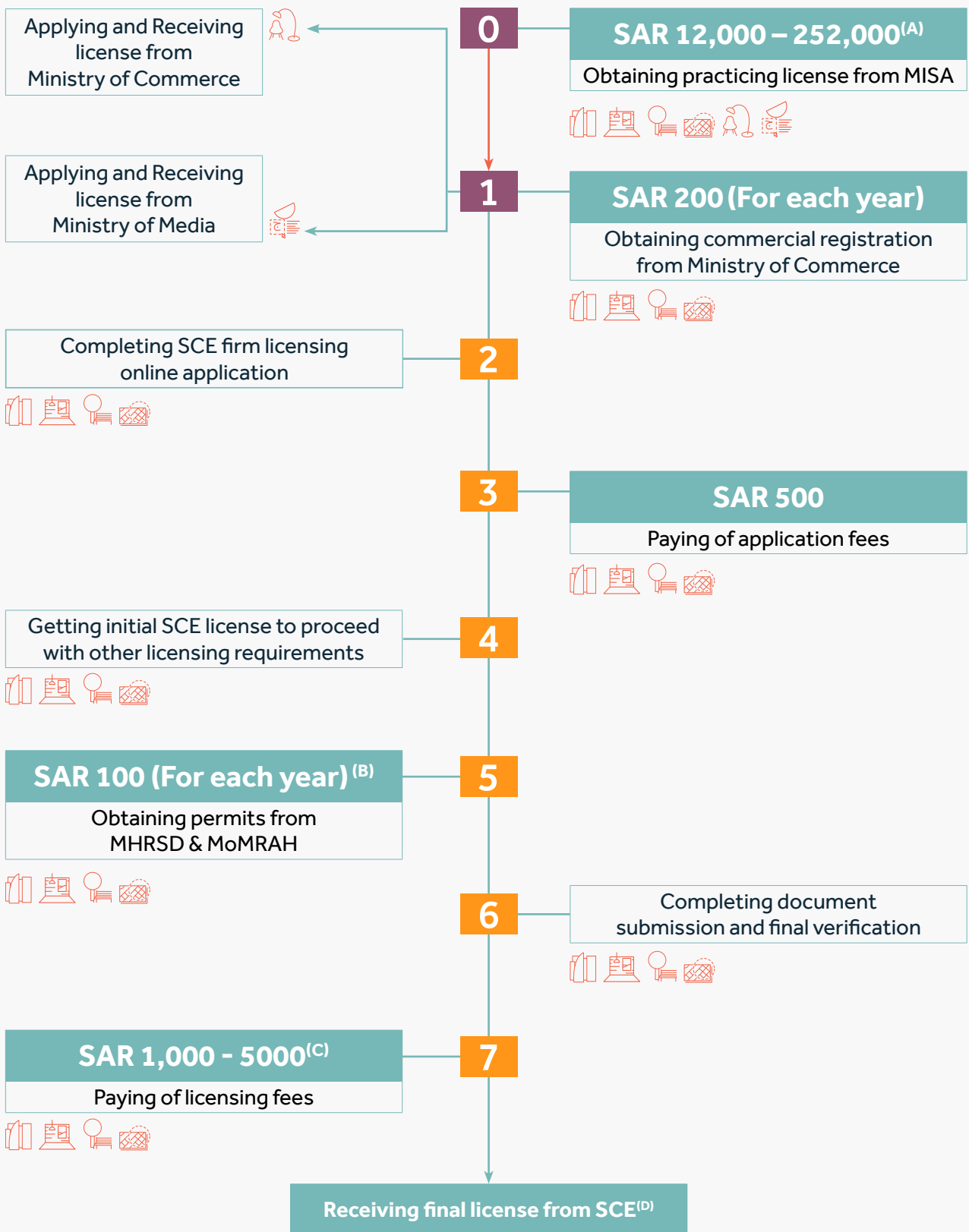
The conducted survey showed that:

1. More than 50% of the Built Environment firms are generally not satisfied with the current registration process and other internal procedures related to licensing.
2. 38% of the firms are dissatisfied with the available electronic services.
3. Around 46% of firms are dissatisfied with the ease of the registration process. Some of the reasons mentioned are the expensive licensing fees and the inaccurate classification.



King Fahad National Library

**Exhibit 2: Firms licensing process** <sup>2,3,4,5</sup>



**Subsector Legend**



Note(s): A: International firms pay a subscription fee of SAR12,000 in the first years and SAR60,000 in each of the following years, B: Fees for MHRSD only as MoMRAH's fees vary depending on multiple factors (eg, Location, space of office, etc), C: Range depends on the duration of license in years, D: Offices are required to obtain a commercial registration before obtaining the SCE license  
Sources: (2) MISA, (3) MC, (4) MoMRAH, (5) SCE

**Exhibit 3: Key Regulatory gaps in the business environment.**



**Lack of clear regulation  
of business environment**



**Lack of specific  
regulatory focus**



**Unrecognized A&D  
economic value**

## Still, Several Structural Regulatory Gaps Persist, which are Hindering the Sector's Development

Despite efforts to regulate and control the sector, several structural gaps remain, preventing the protection of the A&D professions and leading to its limited recognition:

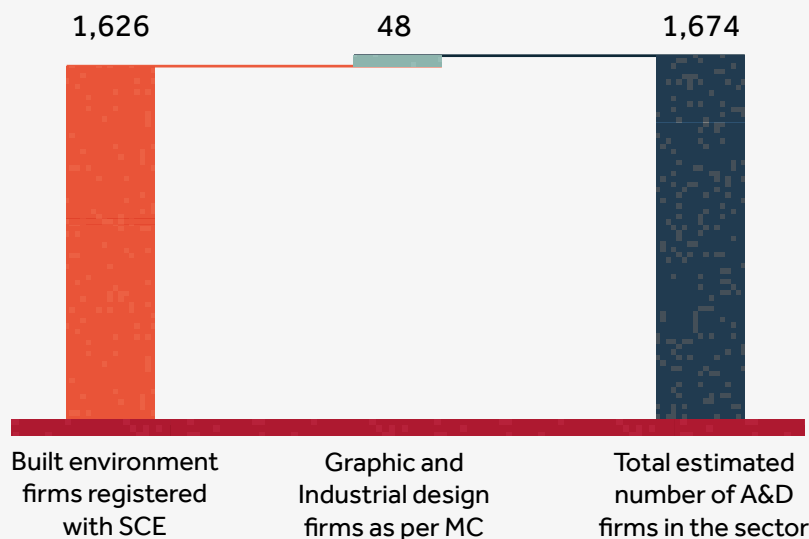
- The current regulatory environment in the sector is mostly generic and driven by regulations developed from an engineering perspective.
- There are no guiding templates for contractual agreements to support the sector's development.
- The local output and content from the sector are not up to global standards, relative to leading countries in the A&D sector.

As a result, at present, SCE's captured number of active A&D firms seems low and not reflective of the entire set of A&D business-related entities. This is primarily due to:

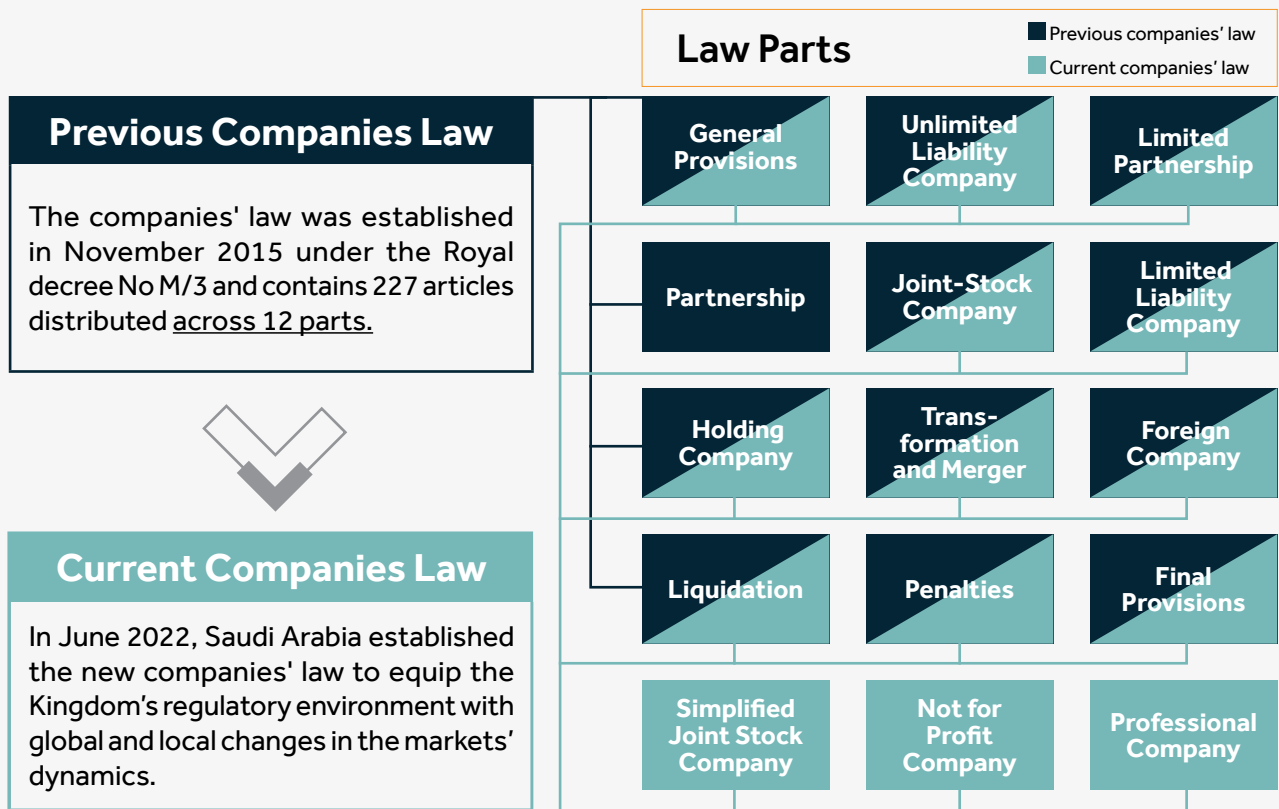
- Multiple construction and engineering companies offering a complete package of services to clients, including A&D services.
- For Graphic and Interior Design, many freelancers provide services on a small scale without the need for formal registration.

The estimated number of Graphic and Interior design firms is currently tracked by the Ministry of Commerce for firms registered under the ISIC code 741090.

**Exhibit 4: Current estimated number of registered A&D firms<sup>6</sup>.**



**Exhibit 5: New companies' laws in Saudi Arabia<sup>7</sup>.**



## Recent Efforts to Strengthen the Sector's Governance

Initially, the Kingdom of Saudi Arabia developed the companies' law to govern and regulate both local & international firms. This law represented a steppingstone for regulating firms in the Kingdom and was split into 12 parts, detailing the legal formation of companies, including the licensing and registration process from the Ministry of Commerce.

Following the recent efforts and to further cement the regulatory landscape in the Kingdom, in mid-2022, the Ministry of Commerce issued a new companies' law, building on the existing foundations, to regulate commercial companies, non-profit companies and

professional companies. The scope of the law was extended to include new types of companies such as a "Simplified Joint Stock Company", to accommodate the rising demand of entrepreneurship and venture capital, and expected to result in:

- Helping the growth of new A&D business, which is characterized largely by small firms.
- Boosting the confidence of international A&D firms as the law provides a better governance outlook.



Source(s): (7) Bureau of Experts

## The Number of A&D Firms in the Kingdom is Steadily Growing, however the Majority is Concentrated in Riyadh, Makkah, and the Eastern Region

- There are three main regions across the Kingdom where A&D firms are highly present: Riyadh (79%), Makkah (8%), and the Eastern Region (5%). Combined, those three regions accommodate approximately 90% of the 1,626 total number of firms.
- Riyadh concentrates today 79% of all A&D firms, the highest across the nation. This figure has been constantly growing over the years, indicating the region's attractiveness and growth potential as an emerging global business hub for businesses to set up shop.
- Makkah and the Eastern Region come second and third, respectively, due to their well-developed infrastructure and economic activities.
- Overall, the high concentration in the three regions above is in line with the economic weight and importance that those regions hold on several social and economical factors (education, unemployment, urbanization, etc).
- As for the remaining 10 provinces, we observe an uptake in popularity either due to region-specific reasons (e.g., tourism attraction) or for future aspirations (e.g., Giga projects like NEOM).

Exhibit 6: Heatmap of firms per province in 2021<sup>6</sup>.

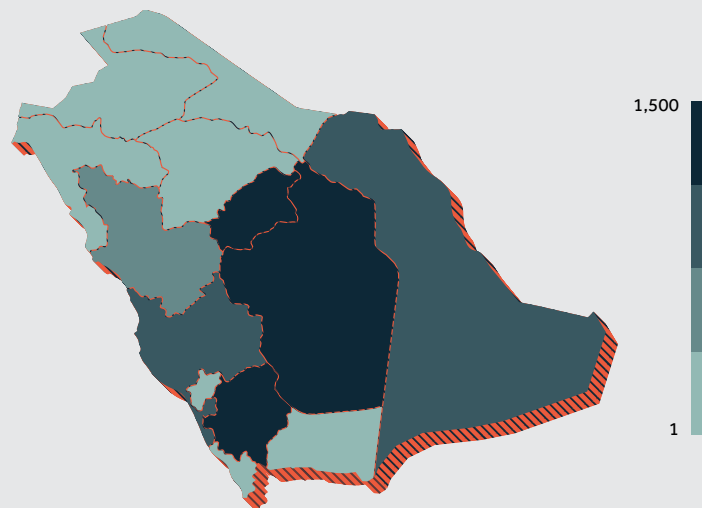
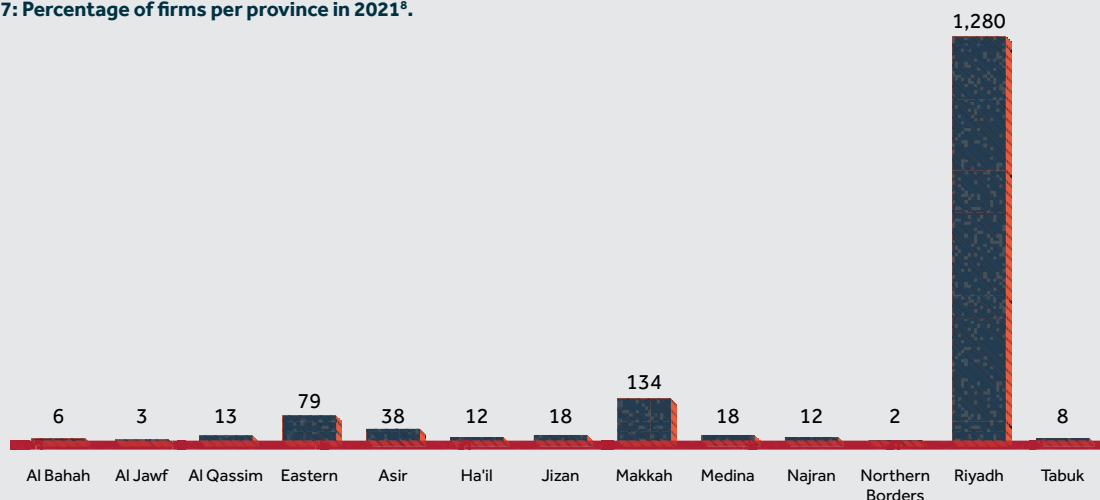


Exhibit 7: Percentage of firms per province in 2021<sup>6</sup>.







King Abdullah Financial District

# A&D Business Survey



Riyadh General Court

# A&D Firms on Labor Market Laws, Contracting, & Compensations

Firms have been impacted by laws and regulations from the labor market, such as the Saudization program and the expats tax, at different rates on several fronts:

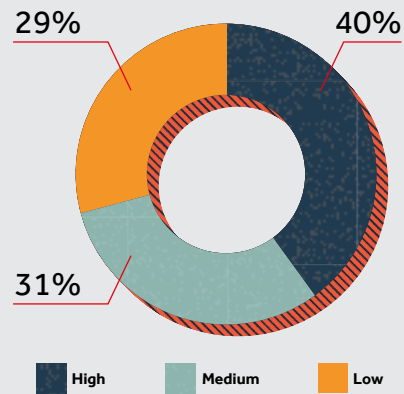
## Impact on Business Continuity and Number of Projects

The recently implemented laws and regulations have impacted the number of employees, which in turn has affected business continuity and the number of projects that firms can undertake. According to our survey, 40% of firms report a high impact on the aforementioned dimensions as a result of the new laws and regulations.

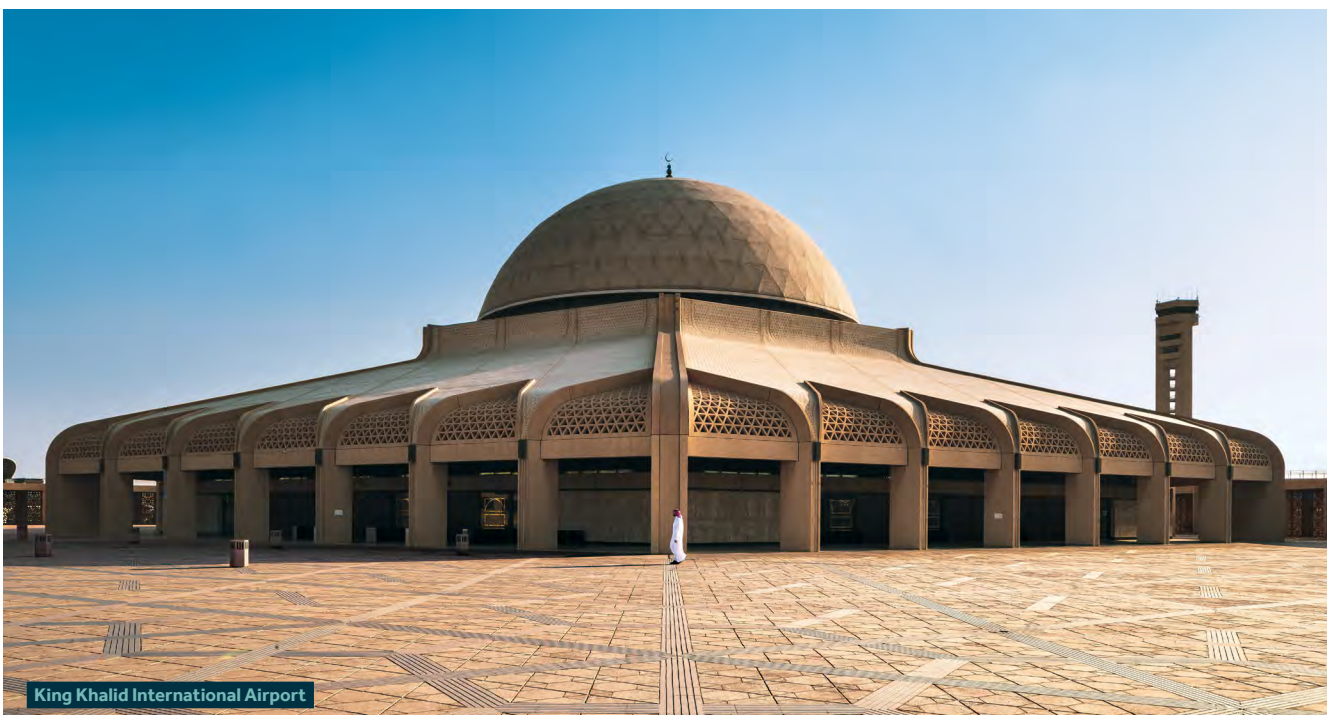
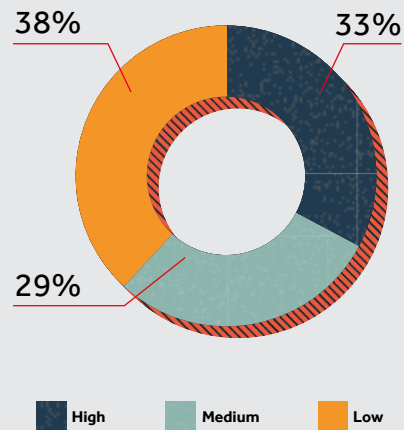
## Impact on Number of Employees

According to survey results, 33% of firms perceive a high impact on the number of employees as a result of the newly introduced laws. Consequently, firms may have been facing resource shortages, thus affecting their ability to deliver and pursue new projects.

Perceived impact on business continuity & number of projects.



Perceived impact on number of employees.



King Khalid International Airport

## Impact on Revenues

As a result of the previous factors, firms have been generating fewer revenues compared to previous periods. According to survey results, 53% of firms stated that they experienced a 'high and medium impact' as a result of the labor market laws and regulations.

## Impact on Expenses

Expenses, on the other hand, experience a far higher direct impact on firms' expenditure. This is mainly due to the higher costs of labor generated from the introduced laws and regulations; 84% of firms believe that they experienced a high impact on their expenses, further squeezing their margins.

## Contractual and Compensation Methods

Additionally, 73% of firms favor full-time contracts as their preferred contractual method, with 72% of them preferring fixed salaries as an employee compensation system.

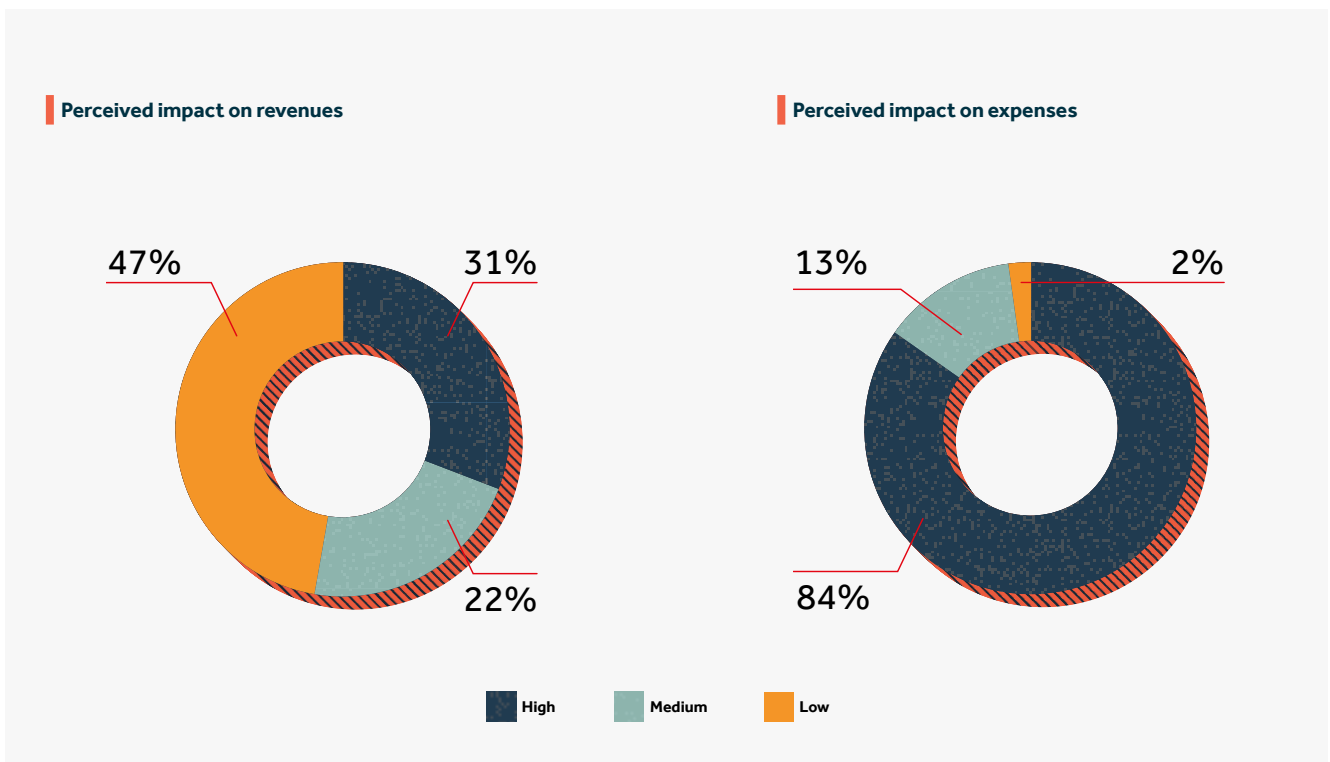
## Firms Ranked their most Preferred Contractual Method as Follow:

1. Full-time contract	73%
2. Project-based contract	20%
3. Part-time contract	5%
4. Consultancy contract	2%

## Firms Ranked their Preferred Employee Compensation System as Follow:

1. Fixed salary	72%
2. Allowances and Benefits	14%
3. Percentage of sales	14%

## Labor Laws and Regulations are Squeezing Firm's Margins



## A&D Firms on Market

The market needs to further promote continuous development and establish a vast creative space for firms. Currently, only 31% of firms somewhat agree that the market supports them on the above-mentioned points.

## Involvement in Major Projects

Only 22% of firms are involved in major KSA projects (e.g., NEOM, Red Sea), a low percentage for A&D local content involvement in the Kingdom's major projects. This calls for governing entities and regulators of local content to support their involvement and further support their growth.

## Architectural Practices Ranked their Activity Focus as per the Below:

1. Residential.
2. Commercial.
3. No specific focus.
4. Industrial.
5. Infrastructure.

## Pricing

From a pricing perspective, firms often follow a fixed pricing methodology for projects, regardless of the expected duration and any incurred variable expenses, an approach that is aligned with the overall market pricing methodology. However, only 2% of firms are satisfied with the current levels of market prices, suggesting that firms are facing further contracted margins.

## Project Focus

Most Architectural firms engage in focused activities and undertake residential or commercial projects, rather than industrial and infrastructure projects.

## Graphic Design Practices ranked their Activity Focus as per the Below:

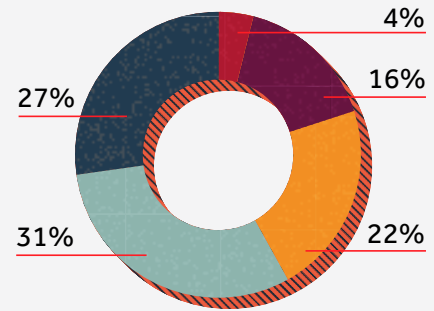
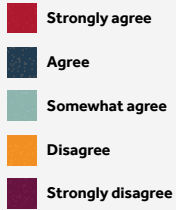
1. Architecture & Interior Design.
2. Visual Identities & Logos.
3. Books & publications.
4. Advertising Material.
5. Websites.



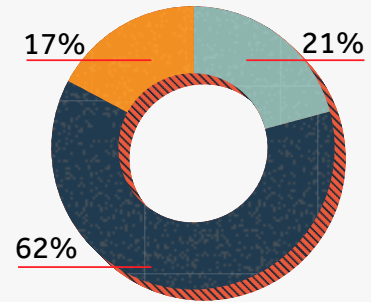
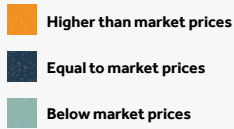
Tuwaiq Palace

# There is a Need to Further Increase the Firms' Contribution to Local Projects with Suitable Pricing

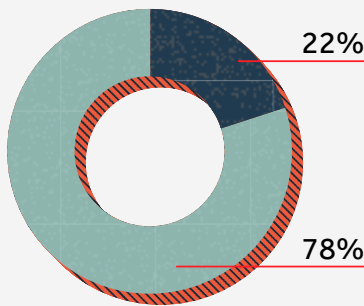
## Market contribution to firms' development.



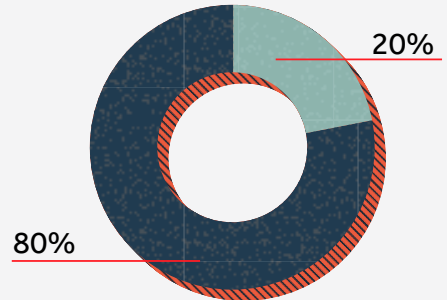
## Alignment of prices with that of market .



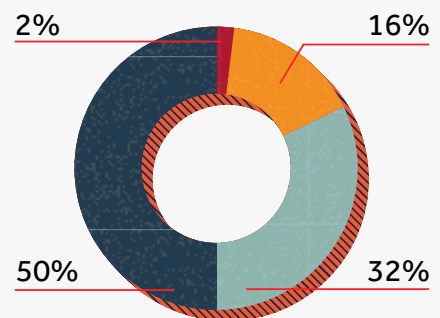
## Involvement in major KSA projects.



## Following fixed pricing methodology for projects.



## Satisfaction with prices of A&D services.



## A&D Firms on Financials

There is an evident impact on the top and bottom lines of A&D firms, due to labor market laws and regulations, as well as pricing.

## Revenues and Operating Expenses

Only (2%) very satisfied firms, (4%) satisfied, and (42%) somewhat satisfied with their revenues and operating expenses for the past 3 years. This sentiment suggests that only half of the businesses in the sector managed to safely balance their top line and protect their bottom line throughout the pandemic.

## Profitability

Firms in the sector are experiencing low levels of profit margins. The survey shows that 58% of firms say that their profitability levels are below 10% (18% are below 5% and 40% are between 5% and

10%). The low profitability in the sector presents a threat to business continuity and innovation, as firms are focused on streamlining their operations. Measures to support margin uplift, and cost baseline interventions are required to reach the benchmarked average of leading European countries e.g., the UK, where profitability levels reach 25%.

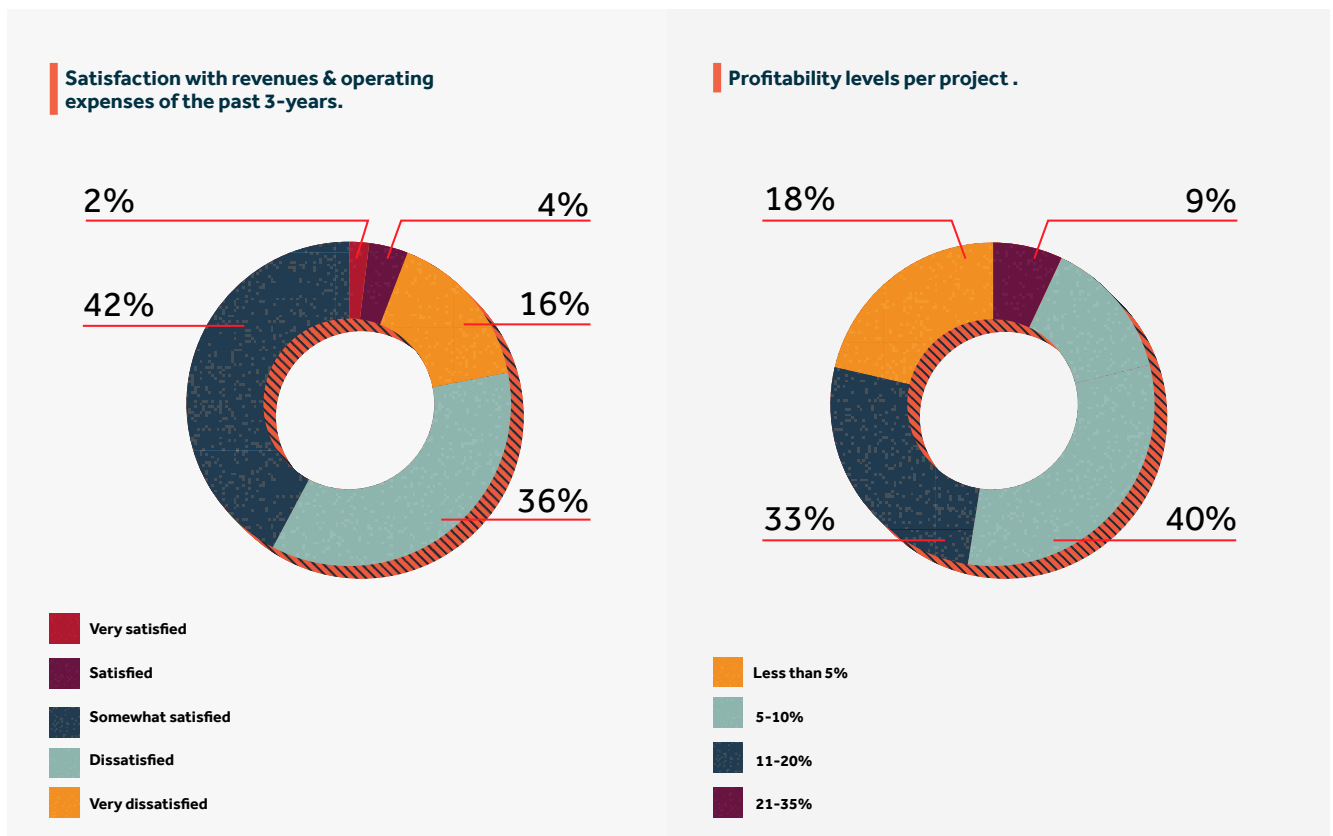
## Project Pricing Methodology

Though firms are following a fixed methodology in project pricing, the type of pricing can vary.

## When Asked about their Main Pricing Methodology, Firms Answered:

1. By Product or Project type	27%
2. By calculating Employee/Day	26%
3. Per hour	21%
4. Other	18%
5. By consultation	8%

## Profitability levels are very low and present a threat to business continuity



## A&D Firms on Education & Training

### ■ Gaps Between Academia & Market:

There is room for improvement for academic institutions, mainly universities, as (5%) are very satisfied, (14%) are satisfied, and (43%) are somewhat satisfied, with the overall alignment of academic programs and market requirements. This signals a need to understand the existing gap between academic and job market requirements and lead the reconciliation effort to ensure that academic programs equip graduates with the right tools to succeed in the job market.

### ■ Local Training Institutions:

Following the survey, (71%) of firms disagree with the overall number & alignment of training centers and institutions in the Kingdom. This suggests that universities should further align their curricula with market needs and support the Continuous Professional Development.

### ■ Financial Aid:

When it comes to financially aiding educational programs for employees, only (13%) of firms provide financial support to their employees. Therefore, A&D firms should provide more incentives to employees to upskill and update their skillset, to actively contribute to the sector's growth and innovation.

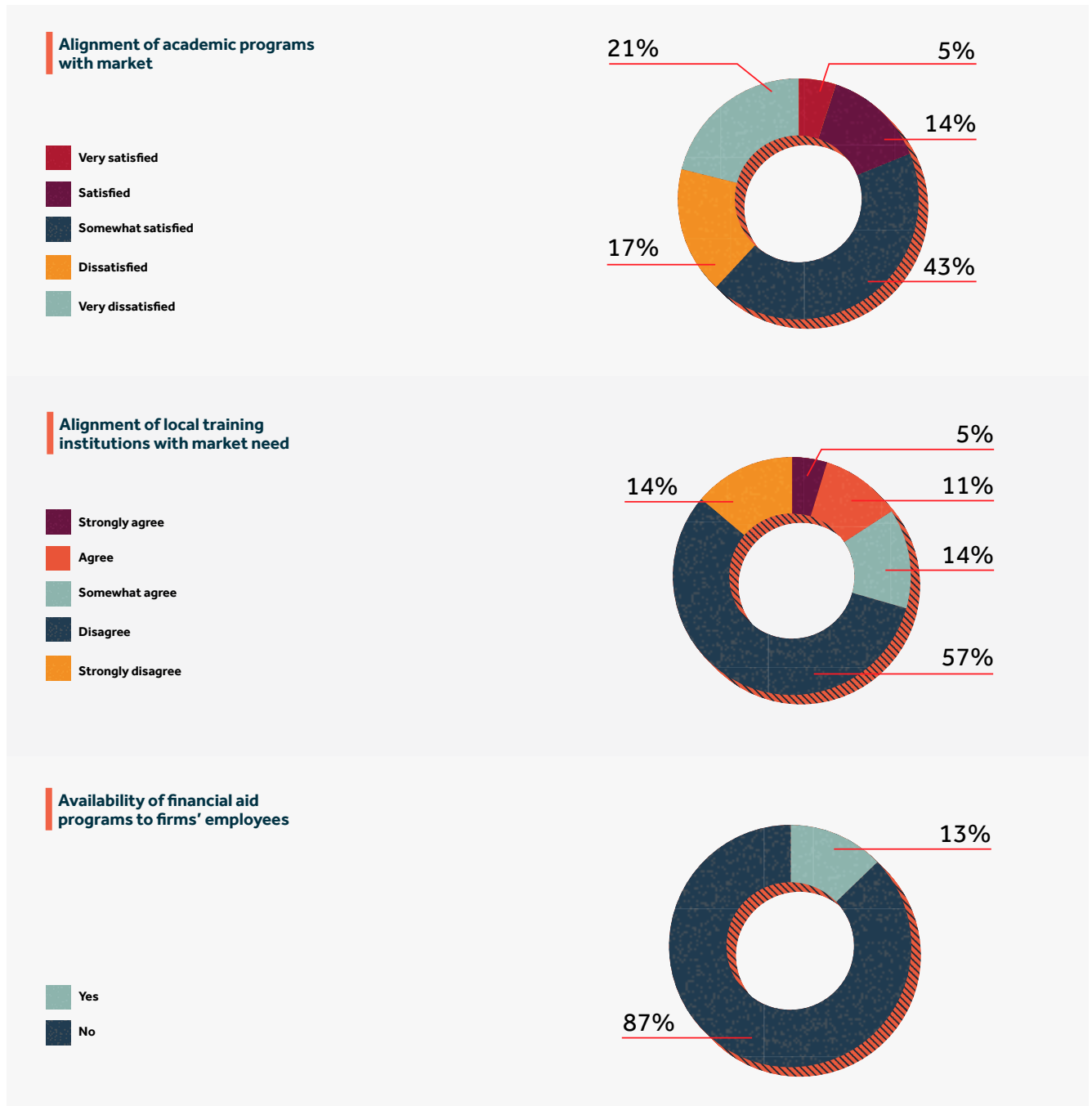
### ■ Training Methods:

Most firms rely on using their internal staff as the preferred training method for employees. This might suggest that, due to already tight margins, firms are utilizing their expenses on business essentials, which leaves training as a secondary priority. In the long run, this pattern might hinder the development of the sector.





# Training Scene in the Sector Needs to be Lifted to Support the Growth and Future Demand



## Firms Ranked their Preferred Training Methods for Employees as per the Below:

1. Using the firm's internal staff	42%	4. Contracting with training centers outside KSA	9%
2. Contracting with training centers inside KSA	23%	5. Government entities (e.g. SCE)	7%
3. Contracting with digital platforms	19%		

## A&D Firms on Cadres and Recruiting

### ■ Satisfaction with the Competency of Saudi Graduates:

The satisfaction level of graduates from local institutions is 75% (Very Satisfied (4%), Satisfied (20%), and Somewhat Satisfied (51%). Whereas its 90% (Very Satisfied (8%), Satisfied (41%), and Somewhat Satisfied (41%)) for international graduates. This presents an opportunity for local universities and institutions to review and improve their programs to match and increase satisfaction levels of their graduates for firms.

### ■ Satisfaction with the Competency of Non-Saudi Practitioners:

Firms are more satisfied with Saudi graduates than non-Saudi practitioners (71%) (Very Satisfied (7%), Satisfied (24%), and Somewhat Satisfied (40%)), highlighting the slight contrast of the qualities and capabilities of Saudi practitioners firms, should

thus empower Saudi graduates with continuous learning opportunities in order to unleash their potential and enable the sector to flourish.

### ■ Recruitment Methods:

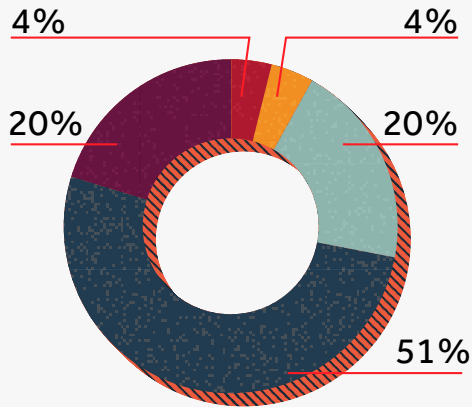
From a recruiting perspective, only 9% of firms use freelancers in more than half of their projects, indicating a strong reliance on full-time employees. However, the average time of switching jobs for Saudi full-time employees, as per the firms' answers, is mostly 1-2 years (62%). In addition, firms are geared towards a network approach to recruiting. When asked about their favorite recruiting methods, firms ranked referrals and social media as their top two methods of recruiting. As a result, students and graduates need to actively expand their network and activities in the field to increase their chances of landing a suitable job.

## When Asked about Top Methods Used for Recruiting, Firms Ranked them as Follows:

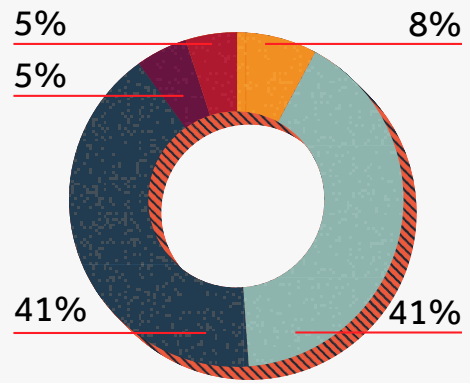
1. Nominating by connection (Referrals).
2. Social Media (e.g. LinkedIn).
3. Firm/Office website.
4. Employment support programs.
5. Employment agencies.



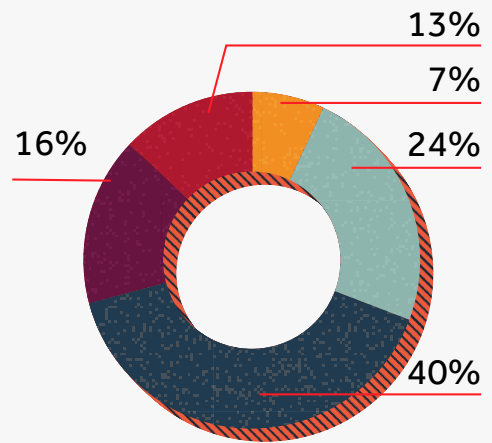
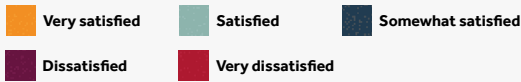
Satisfaction with graduates from local institutions.



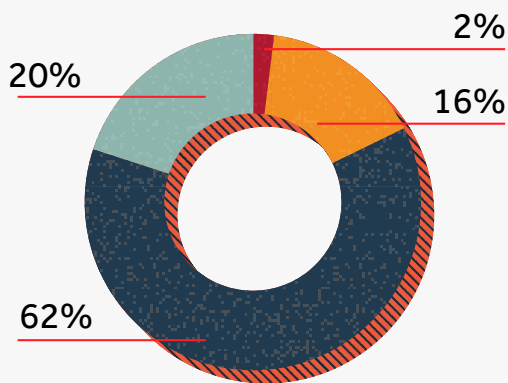
Satisfaction with graduates from international institutions.



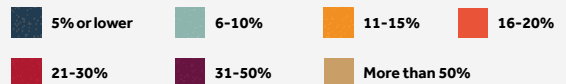
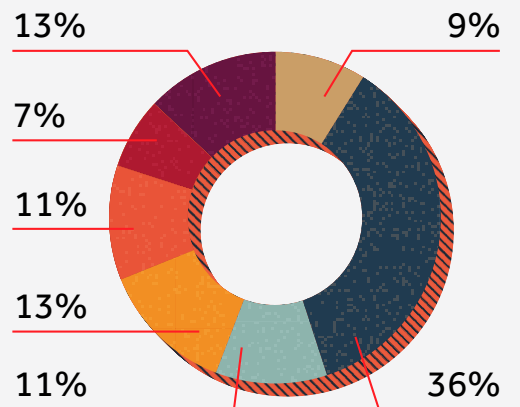
Satisfaction with non-Saudi practitioners in the local market.



Average time to switch jobs for Saudi practitioners.



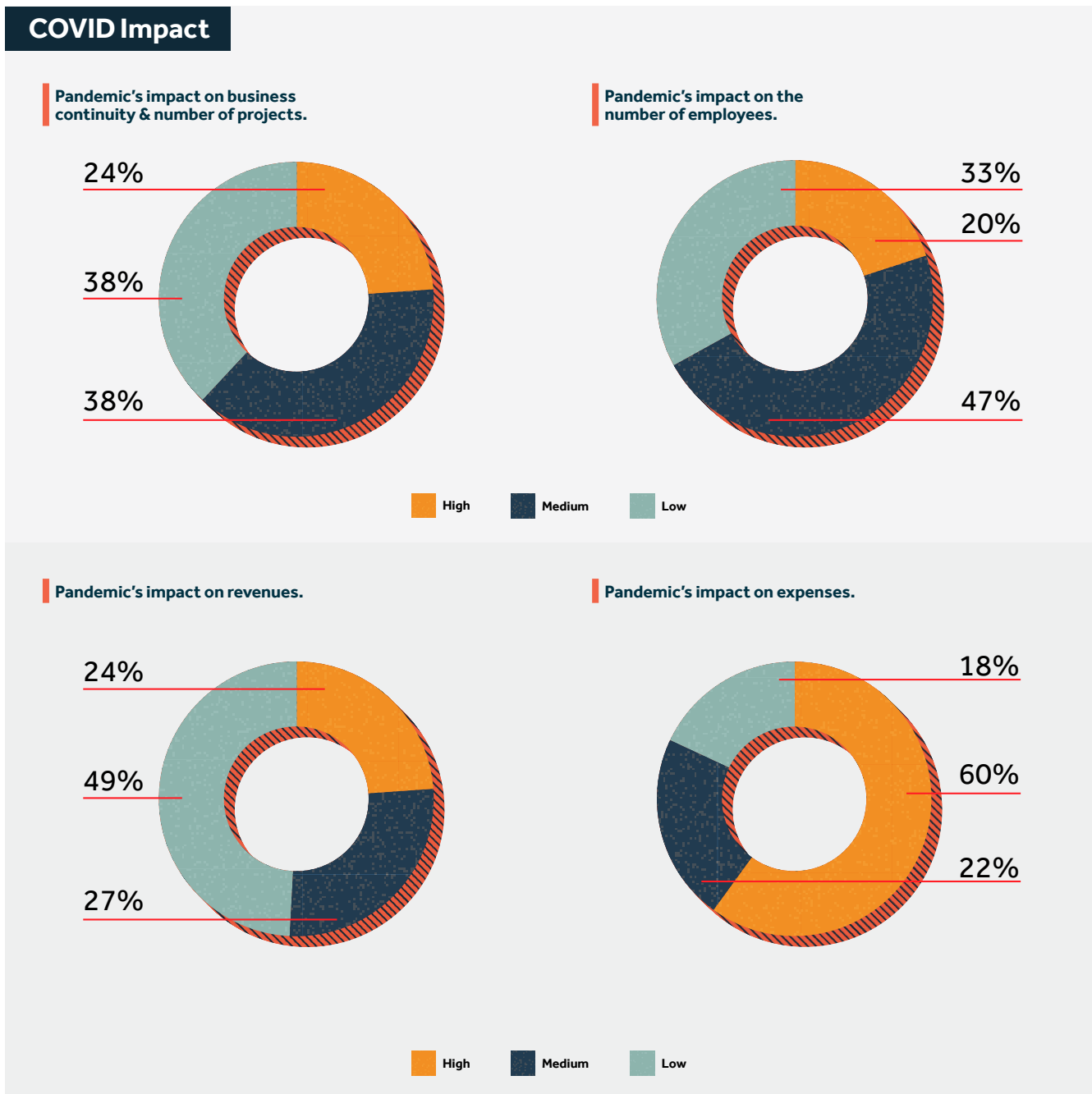
Percentage of projects outsourced to freelancers.



# The Impact of Covid-19 was Absorbed by Government Support

The pandemic's impact on firms varies across the factors of business continuity & number of projects, number of employees, revenues, and expenses. The first categories (Business continuity & number of projects, number of employees, revenues) did not experience severe adverse effects, primarily as a result of the swift and robust support offered by the government; between 33% – 49% of survey

respondents noted that that the pandemic had a low impact on these factors. The last factor (i.e., expenses – 60%) is mostly affected by the increase of VAT from 5% to 15% on July 1st, 2020, which caused the increase in operational expenses, as the business in the sector found it hard to pass the increased cost baseline to consumers.



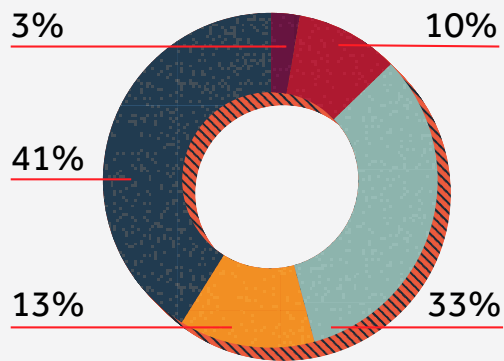
# SCE Processes

A survey was conducted to obtain the opinion of practitioners on the general services provided by the Saudi Council of Engineers, in addition to the clarity of the procedures for registering local firms.

The results showed that there are many areas for improving the registration processes and enabling firms to use the provided service catalog to achieve the targeted benefits.

## SCE Processes

Satisfaction level with the current general services provided by SCE.



Very satisfied    Satisfied    Somewhat satisfied    Dissatisfied    Very dissatisfied

Satisfaction level with the clarity of internal firm registration processes of SCE.



Very satisfied    Satisfied    Somewhat satisfied    Dissatisfied    Very dissatisfied

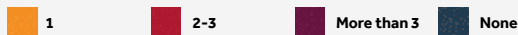
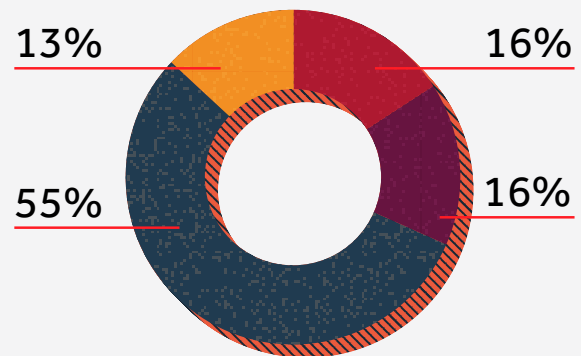
## Conferences, Events, and Fairs

The participation of firms in conferences, events, and job fairs is lower than expected, as only 45% of firms participated in any events in the past 3 years. Furthermore, only 18% of firms participated in any job fair in the past 3 years. This number indicates

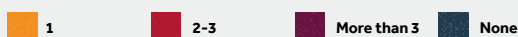
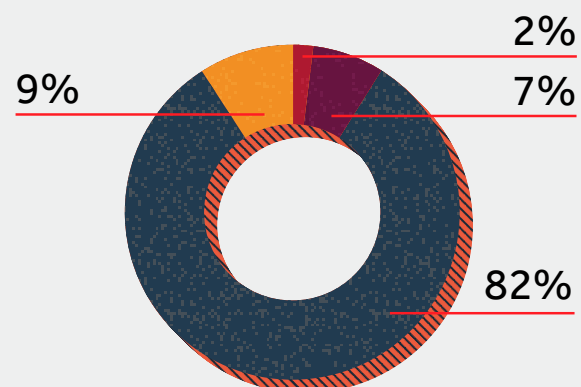
a significant gap in job fair participation where ADC could champion and coordinate improved job matching and employment support amongst fresh graduates and practitioners.

### Events and Fairs

Participation in any job fair in the past 3 years.



Participation in any event in the past 3 years.



# Call-outs for Action: Business

## # Call-out for Action

- 1 The current governance ecosystem poses a challenge for firms who must interact with several stakeholders, which suggests having an entity with an end-to-end view on the entire process for better efficiency and oversight.
- 2 There is an opportunity to leverage lessons learnt and simplify the licensing exercise for all A&D sub-sector firms in order to attract and lure further players in the industry.



King Abdulaziz Historic Center

5

Practitioners



# The A&D Practitioners

This section looks at the current practitioners' governing regulatory entity and then reviews, in detail, the demographics of the A&D professionals, as well as the different trends while touching on the importance of having a balanced and diversified workforce. Additionally, this segment highlights some of the limitations of the A&D landscape and recommends actions to be taken to improve the industry's maturity and output.



## In 2021, We Estimate a Total of 24,646 A&D Practitioners; SCE Has Been Responsible for Registering Built Environment Practitioners, and MHRSD is the Only Entity Tracking Graphic & Industrial Designers

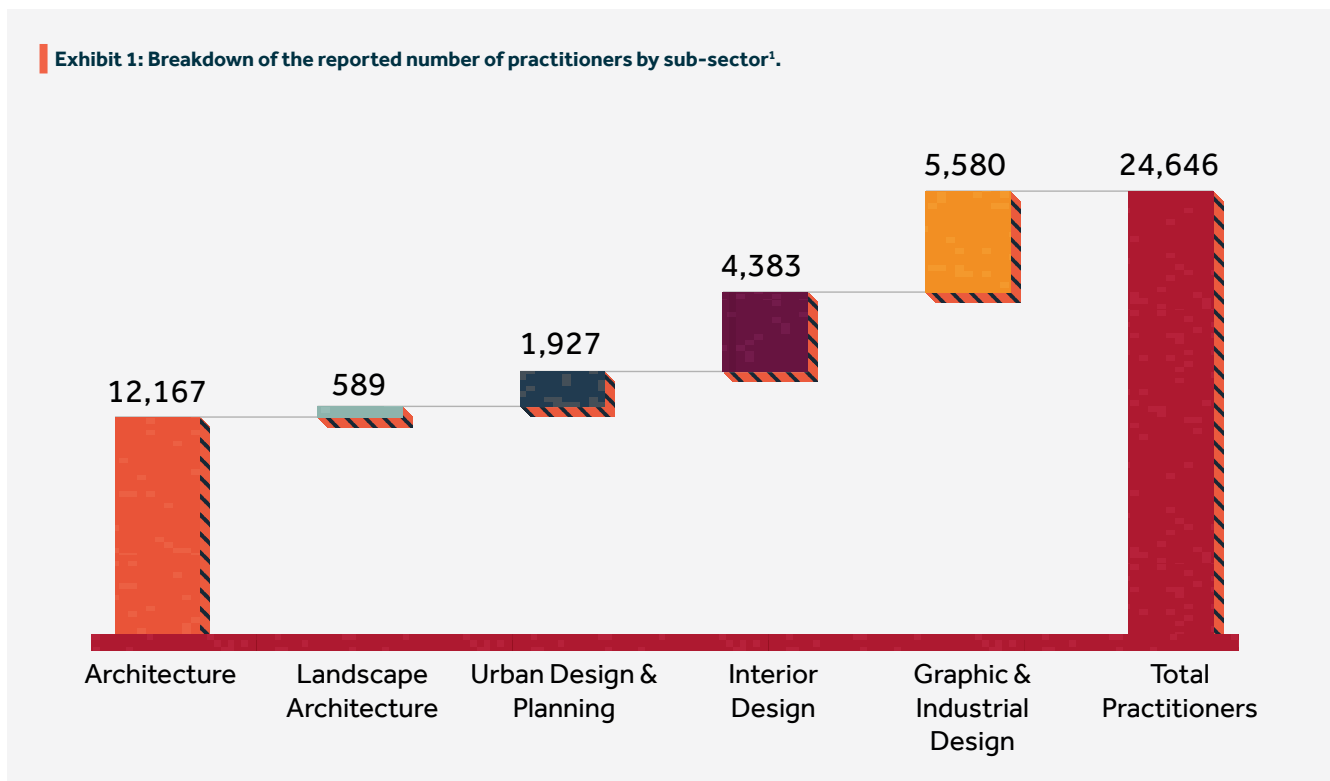
Historically, all the built environment professions have been overseen by the Saudi Council of Engineers (SCE), therefore data regarding registered built environment practitioners was collected from SCE. However, data related to the total number of practitioners, including graphic and industrial designers, was captured through MHRSD.

SCE registers Built Environment practitioners (architecture, interior design, landscape architecture, and urban design & planning) based on a specific set of academic and professional exam criteria. Registrants benefit from services provided by SCE, such as:

- Conflicts & disputes resolution.
- Professional examination.
- Continuing Professional Development (CPD) courses.
- Reduced Professional Indemnity Insurance (PII) tariffs via partnerships.
- Event Organization.

Overall, SCE has succeeded in increasing the level of registration within A&D and supporting the upskilling of A&D practitioners.

Of the total practitioners, architecture (49%)<sup>3</sup> and graphic & industrial design (23%) are the most dominant sub-sectors representing more than 70% of professionals, which highlights the attractiveness of those industries (exhibit 1).



# According to Industry Practitioners, the Current Registration Process and the Regulatory Environment Have Led to Several Unregistered Practitioners

## A Non-exhaustive registration process:

Despite SCE’s best efforts to keep track of A&D professionals in the Kingdom, a large part of the population is still unregistered due to gaps within its registration process (cf exhibit 2):

1. A significant portion of the architect population is comprised of government employees, most of whom are not registered.
2. Low rigor in compliance monitoring.
3. Leakage into other fields, such as academia; in these cases, architects may return to the field once better protection of the title is offered.

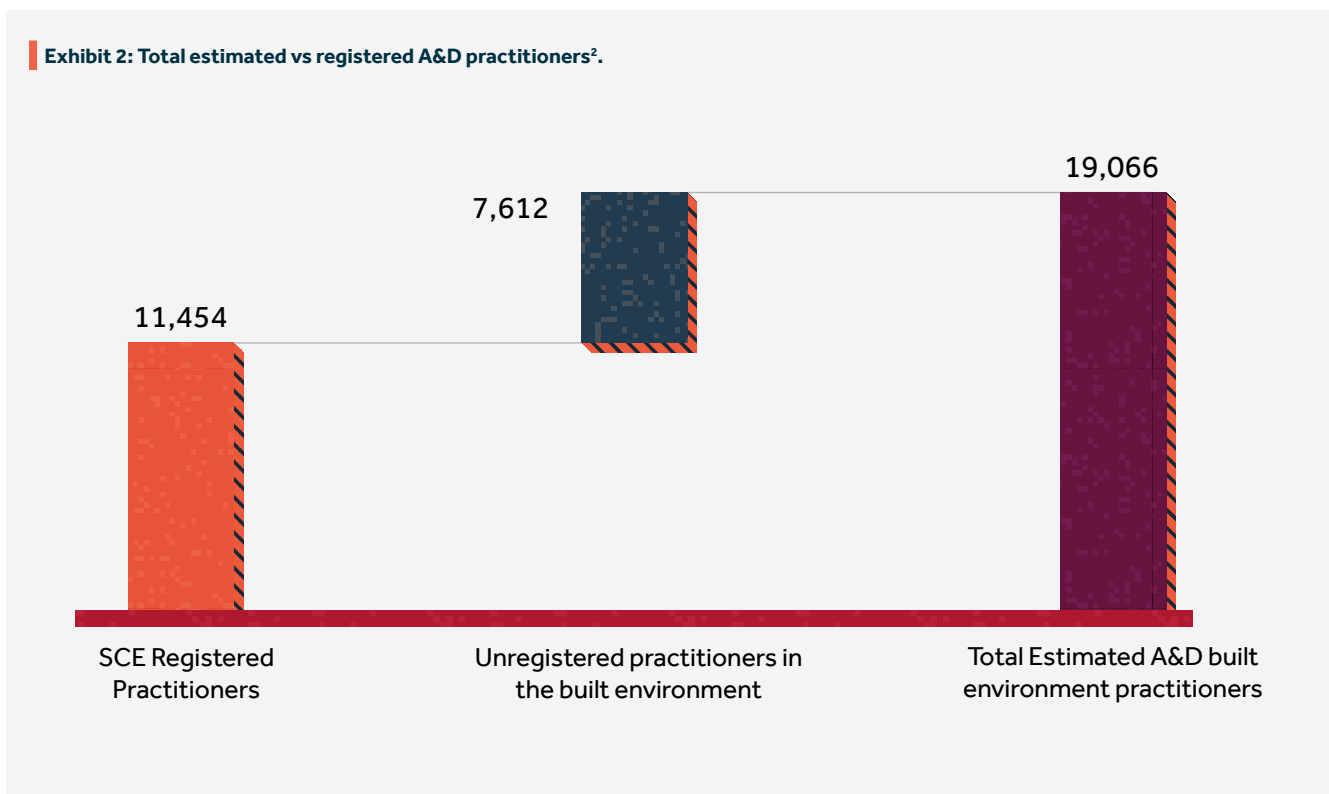
## B Legal shortcomings within the sector:

Those gaps are further accentuated by a limited regulatory environment characterized by:

1. Lack of title protection and proper oversight in A&D: There are currently no laws in the Kingdom protecting the A&D function, leading to some sub-sectors being falsely represented (e.g. engineers identifying as Architects, or amateurs identifying as Interior or Graphic Designers).
2. Lack of streamlined qualification procedures: There are currently no strict academic requirements to help qualify and certify A&D professionals. This will decrease the entry barriers in the industry and potentially jeopardize its output.

## C Unregistered practitioners within the A&D population:

We have estimated today a total of 7,612<sup>3</sup> non-registered BE practitioners in the Kingdom, making up almost half of the total A&D population in KSA (cf exhibit 2).



## Despite those Challenges, the Number of Built Environment Practitioners Has Been Growing Steadily over the Past Years, Across All Sub-Sectors

Despite the previously mentioned challenges and the recent COVID-19 pandemic, the overall number of practitioners across sectors in KSA has been increasing significantly, achieving a CAGR of 18.9%<sup>4</sup> since 2016 (exhibit 3).

We also observe a rapid increase in the number of newly registered practitioners in KSA between 2020 and 2021 (exhibit 4). From a sub-sector perspective, the growth in the number of professionals is driven by the Built Environment (Architecture, Landscape Architecture, Urban Planning, and Interior Design)

which is in line with the growth in the number of businesses observed over the same period and highlights the dynamism of the A&D sector. This is linked to the growth of the construction sector, which has been picking up after the pandemic (the value of construction contracts awarded in 2021 increased by 78% compared to 2020<sup>5</sup>). The increase was also driven by other factors, such as the decrease in the unemployment rate between 2020 and 2021 (the overall unemployment rate in KSA decreased from 7.4% to 6.9% after the pandemic<sup>6</sup>).

Exhibit 3: Number of registered A&D practitioners by sub-sector<sup>4</sup>.

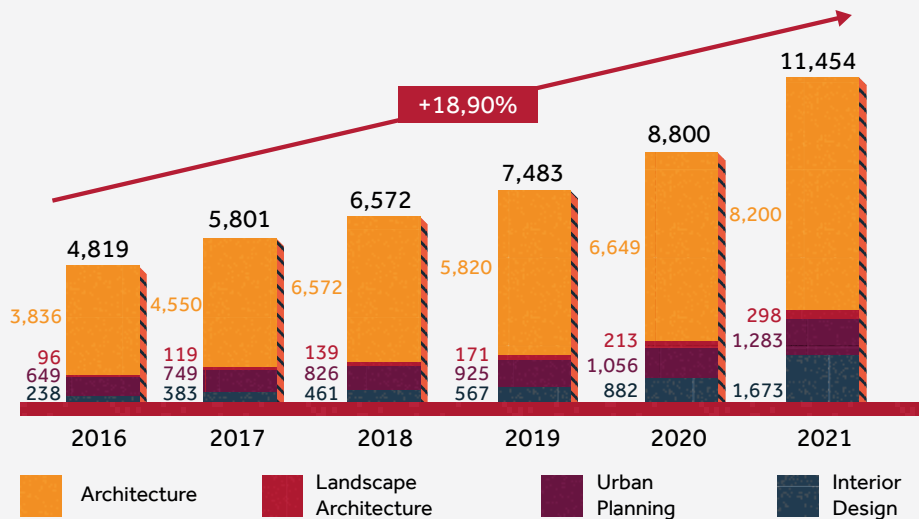
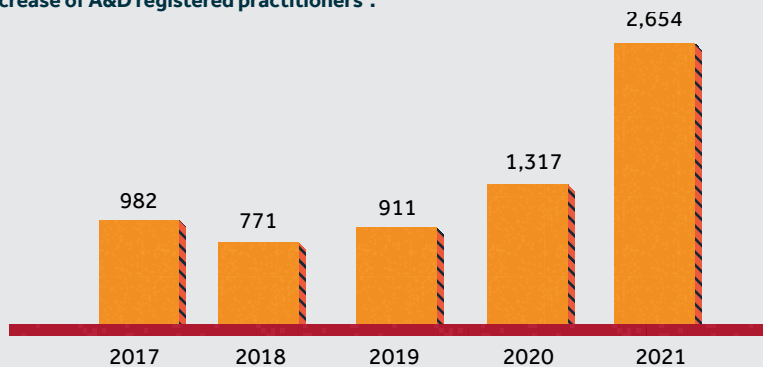


Exhibit 4: Yearly net increase of A&D registered practitioners<sup>4</sup>.



# A High Portion of Professionals are Unclassified in KSA, Which Can Be Attributed to Recent Graduates and Constrained Job Responsibilities

A particular level of classification is required from Built Environment practitioners in order to be allowed to perform two key activities:

1. Sign on projects to obtain construction permits.
2. Establish their own business practice and diversify the services offered beyond their initial specialization (e.g. a professional Architect can provide Urban Planning and Design Services).

As expected, architecture, landscape architecture, and urban planning<sup>7</sup> have the highest share of classified professionals (exhibit 5 ). This is due to the nature of their profession and responsibilities.

The Engineer classification, a category that designates unclassified professionals, which also applies to architects, has been steadily increasing since 2016 to reach almost three-quarters of professionals in 2021<sup>7</sup>. This is due to the following reasons: (exhibit 6).

1. The relatively high number of recent Built Environment graduates who have not yet acquired the minimum years of experience to achieve the classification status.
2. The career path chosen by built environment professionals is mostly directed towards jobs not requiring them to obtain a classification, i.e. professionals who do not occupy positions where they need to sign building permits and/or are not interested in entrepreneurial paths (establishing their own practice).

Exhibit 5: Total Registered Practitioners<sup>(A)</sup> in 2021 by Profession & Classification Levels<sup>7</sup>

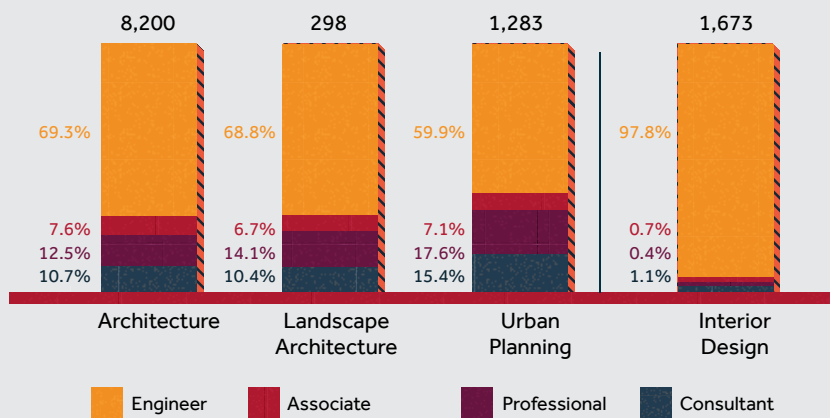
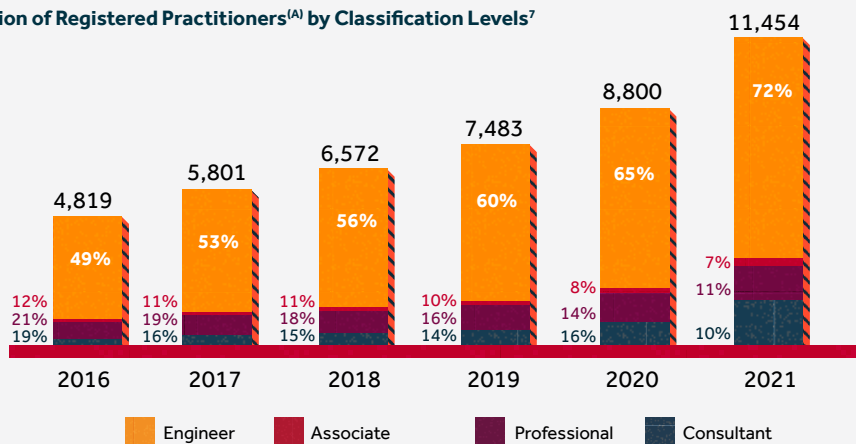


Exhibit 6: Evolution of Registered Practitioners<sup>(A)</sup> by Classification Levels<sup>7</sup>



Note(s): (A) Registered practitioners are based on SCE practitioners' databases (excluding graphic & industrial designers as not registered through SCE)  
 (B): Engineer [registered], Associates [4+ years of proven relevant experience], Professional [8+ years of proven relevant experience], Consultant [5+ years of practice in Professional classification]  
 Source(s): (7) SCE

# We Identified Two Market Trends with Respect to Gender and International Diversity, that Could Negatively Impact the Sector's Quality in the Medium to Long Term



## International Diversity

Due to the recent reforms in the labor market, the number of working Saudi nationals is increasing. However, this has added pressure on the financials of companies resulting in the recruitment of foreign professionals earning low salaries.



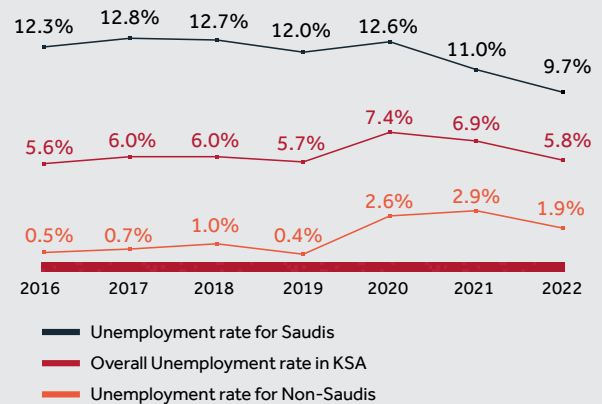
## Gender Diversity

Although the A&D sector is male-dominated in the Kingdom, large opportunity gaps still exist in education for both genders

### A Recent series of labor reforms had an impact on unemployment levels for Saudis

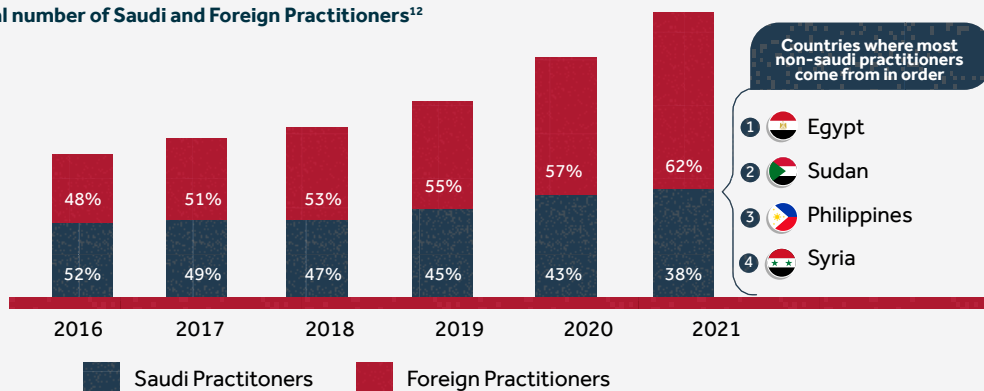
1. In 2018, the Kingdom started imposing a monthly expat fee on companies of SAR400 per employee. This was increased to SAR600 per Employee in 2019 and to SAR800 since 2020<sup>8</sup>. This decision has reportedly pushed more than 1 million foreign workers to leave the Saudi labor market<sup>8</sup>.
2. In 2018, the Ministry of Human Resources and Social Development (MHRSD) announced the localization of 20% of engineering fields available in the Kingdom, including the Architecture sector<sup>8</sup>.
3. Finally, in 2019, the Kingdom passed a local content agenda to stimulate the development of the national economy across all economic segments<sup>10</sup>.

### B Exhibit 7: Breakdown of unemployment rate in Saudi Arabia<sup>11,(A)</sup>



### C As evidenced below, companies are relatively recruiting less foreigners driven by cost dynamics

Exhibit 8: Total number of Saudi and Foreign Practitioners<sup>12</sup>



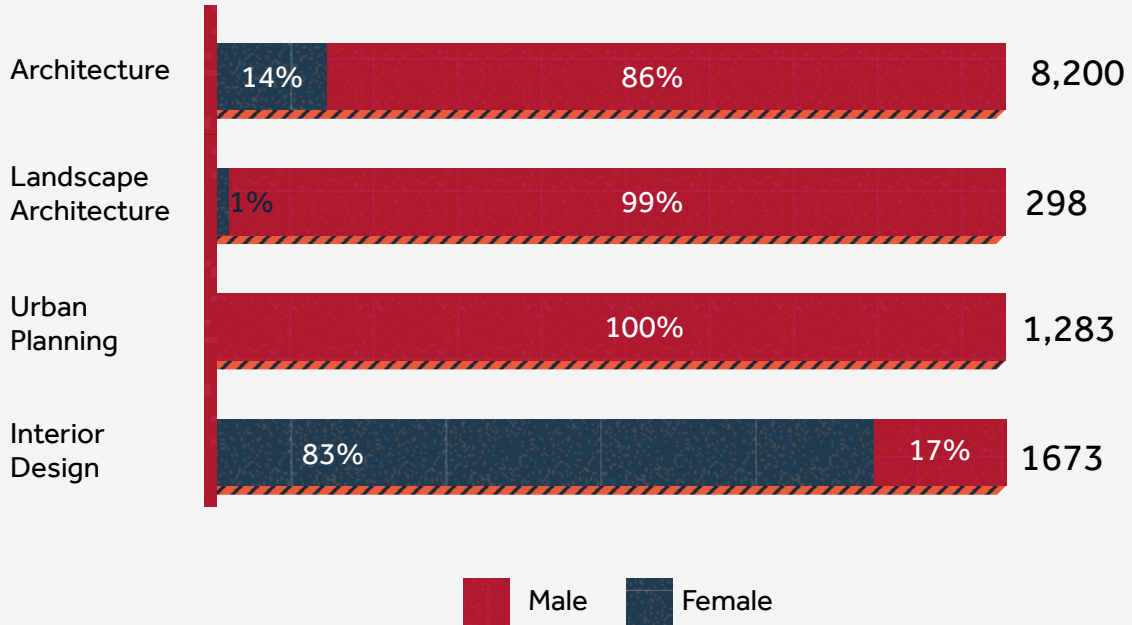
# Women's Contribution to the A&D Sector Has Been Growing Significantly due to the Government's Female Empowerment Initiatives

1. The Built Environment sector is largely male-dominated with men representing 78% out of the total registered A&D practitioners in 2021<sup>13</sup>. This high figure has been historically linked to the fact that most Built Environment degrees in the Kingdom have been directed only to men, with very few programs catering to women.
2. As a result of recent government reforms since the launch of Vision 2030, the participation of women in workforce, specifically within A&D, has risen from 22% to 36% in three years, exceeding the 30% target set<sup>14</sup>. Those reforms allow to foster an inclusive environment in the workplace and facilitate the entry of women into the labor market. Similarly, GSTAT's Labor Market Publication for Q2 2022, reveals that the unemployment rate for women reached its lowest in 20 years as of Q2 2022, falling to 19.3% compared to 22.3% during the same time in 2021<sup>15</sup>.
3. Whilst the A&D sector is largely male-dominated, Interior Design is the female-dominated field among the A&D sub-sectors by 83%<sup>13</sup>.
4. Substantial effort is still required to increase the participation of women in the A&D workforce and have an overall equal distribution between men and women, thus aligning with the national average (one-third of the workforce occupied by women<sup>16</sup>). Additional effort will be needed to align with the international A&D figures, where in 2020, women represented more than 40% of the population in Europe<sup>17</sup> and more than 45% in the US<sup>18</sup>.

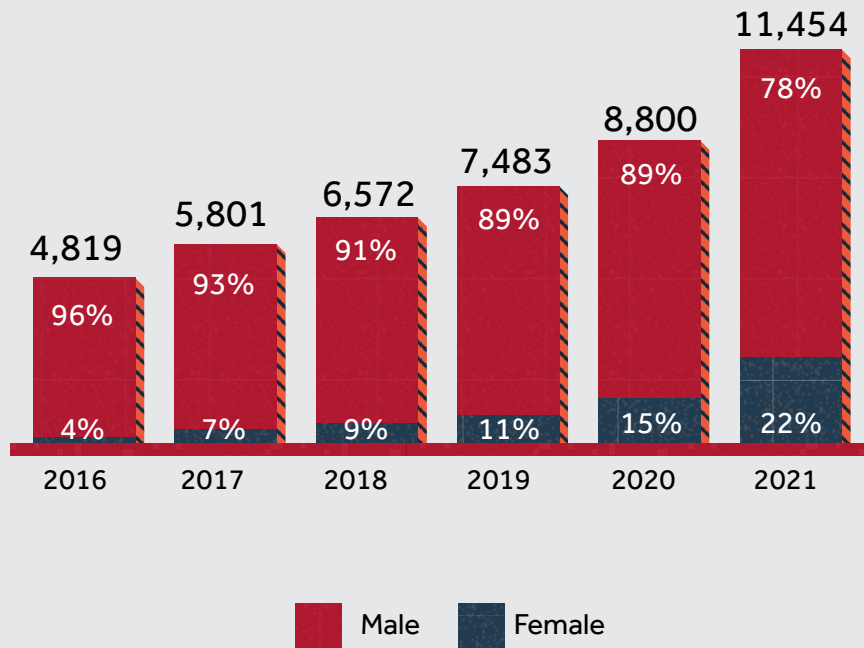
## Key Takeaways for the Kingdom's A&D Sector

- Stakeholders need to play an active role in ensuring the sector's dynamics are aligning with national objectives.
- Given the creative side of the A&D sector, it is vital to guarantee a diverse ecosystem. This can be done by recruiting both locals and foreigners from leading A&D countries to push creative boundaries, adopt best practices, and facilitate knowledge sharing and transfer.
- Recruitment of international talent should be encouraged further as it is currently affected by the increase in the overall number of Saudis in the labor market. This leads to firms recruiting low-cost labor to balance their costs at the expense of a higher quality.
- It is essential to provide academic programs for both genders in all sub-sectors of Architecture and Design to ensure a balanced and healthy growth of the sector.

**Exhibit 9: Registered Practitioners Gender split per sub-sector in 2021 as per SCE provided data<sup>13</sup>.**



**Exhibit 10: Registered Practitioners Gender evolution<sup>13</sup>.**



Source(s): (13) SCE, (14) Arab News, (15) GSTAT, (16) World Economic Forum, (17) ACE Report, (18) EY



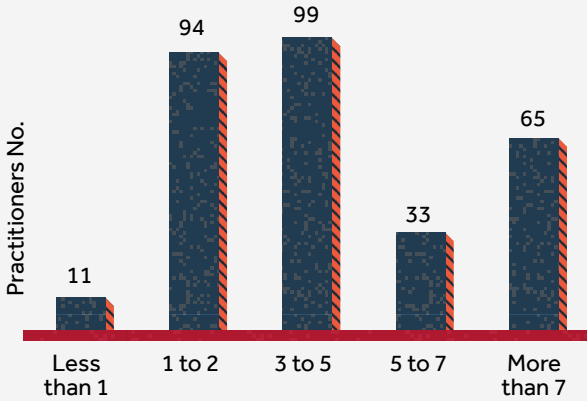
# A&D Practitioners Survey



# The Median Tenure for A&D Practitioners is 3-5 Years, Mainly due to Unsatisfactory Salaries

Exhibit 11: Practitioners by years of experience, average job duration, average job movements, and monthly salary in SAR.

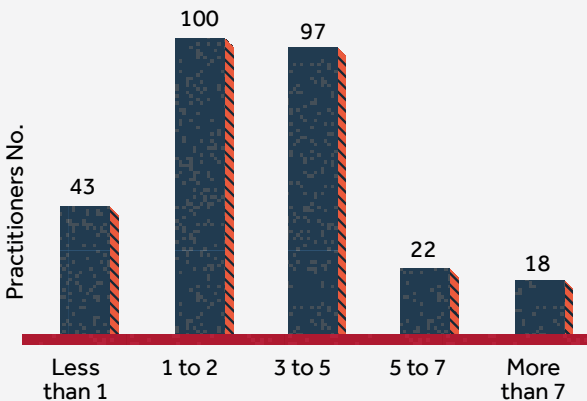
### Practitioners' Years of Experience.



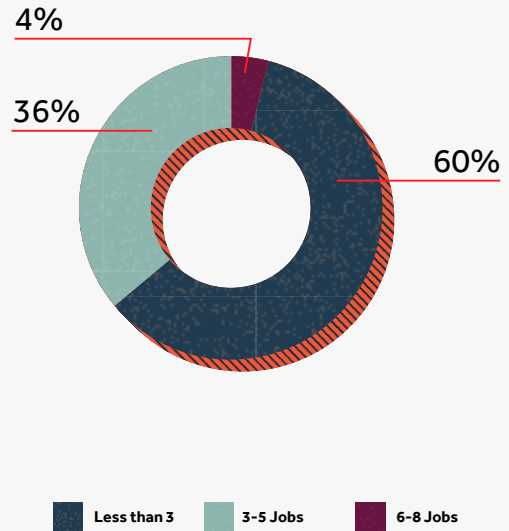
**Note:**

Based on the 312 practitioners who participated in the survey.

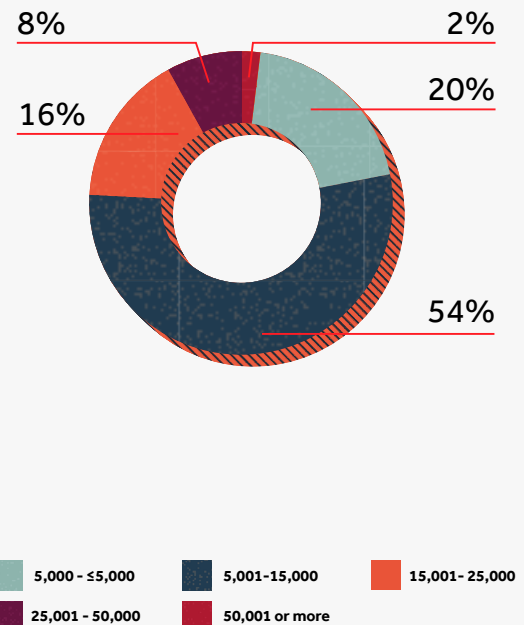
### Practitioners' Average Job Duration.



### Practitioners' Average Job Movements.



### Practitioners' Monthly Salary in SAR.



## A&D Practitioners, Professional Experience

One-third of A&D practitioners surveyed have a professional experience between 3-5 years. Similarly, 36% of A&D practitioners had a median tenure of 1-2 years in a particular job, and 55% moved on average between 1-2 jobs. Several factors can affect the median tenure of practitioners. The following were the leading reasons for A&D practitioners:

### 1. Compensation Packages

Short tenure of A&D practitioners may result from the desire to earn more money to cover living costs. This reason was supported by our analysis: we calculated that 54% of A&D practitioners receive a salary ranging between SAR 5,000 and SAR 15,000. Additionally, when practitioners were asked about the reason for shifting career, "Unsatisfactory Salaries" was ranked the first among other reasons by practitioners.

### 2. Job Dissatisfaction

A&D practitioners can frequently shift occupations to achieve a feeling of job satisfaction. "Demotivating Environment" was ranked as the fourth reason for A&D practitioners to look for another job opportunity, with multiple underlying reasons supporting it, such as: poor onboarding, lack of leadership presence, or low investments on practitioner's growth and training.

### 3. Irrelevance of Jobs to Majors and Backgrounds

The second reason for A&D practitioners to move from their current job is the "Lack of Job Opportunities." This sheds light on the challenges faced by A&D practitioners in finding employment opportunities aligned to their majors and backgrounds, which in turn explains their relatively short tenure.

### 4. Population Age

64% of practitioners surveyed have a professional experience between 1-5 years. Although this number could be a selection bias due to the age of practitioners who responded to this survey, it still validates the high percentage of young practitioners in the Kingdom (71% of the Kingdom's population are youth -aged 35 or under).

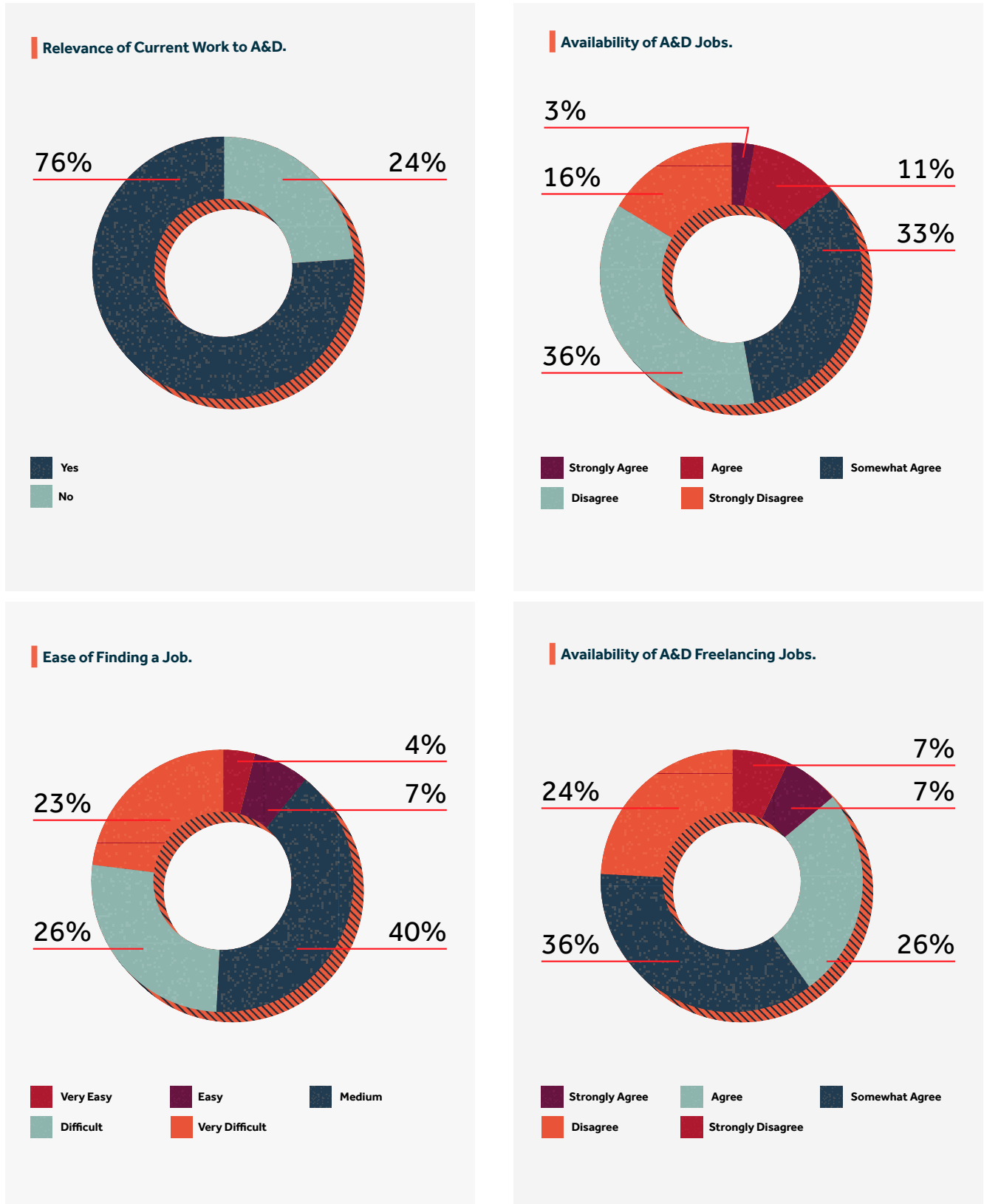
#### Exhibit 12: Key reasons for practitioners to shift their jobs.

1. Unsatisfactory Salaries.
2. Lack of Job Opportunities.
3. Other (Company acquisition or merger, unsatisfactory relation with superior and colleagues ...etc).
4. Demotivating Environment.



# Lack of Clarity in Job Applications and Employee Value Propositions Could Potentially Influence the Availability of A&D Jobs

Exhibit 13: Practitioners' take on the relevance, easiness, and availability of A&D jobs and A&D freelancing jobs.



Source(s): Sector survey

## Availability of A&D Jobs

Despite the fact that 49% of A&D practitioners find it difficult to find a job, 76% of practitioners hold a job that is related to A&D. In terms of job availability, 52% of A&D practitioners strongly believe that there aren't sufficient A&D jobs in the market. This challenge in finding adequate jobs does not only hinge on the number of jobs available, but also on the quality of proposed jobs. The variation in responses primarily falls under the following reasons:

### 1. Lack of Clarity on Job Applications Processes

An ambiguous job application process can hinder practitioners from finding new job opportunities and drive away top talent. In today's world, it is vital for companies to leverage multichannel recruitment strategies to attract top talent. As such, companies that are still relying on legacy recruitment strategies will face difficulties, leading to a mismatch between their needs and practitioners' expectations.

### 2. Generic Job Postings

Today, most graduates are looking for more than just a job, they want to make a difference in the world. On top of satisfactory salaries and other traditional benefits, candidates are interested in employers whose values are in line with theirs. This creates a need for companies in the Kingdom to rebrand themselves to attract top talent and stay away from the generic job postings.

### 3. Preference of Selecting Candidates by Referrals

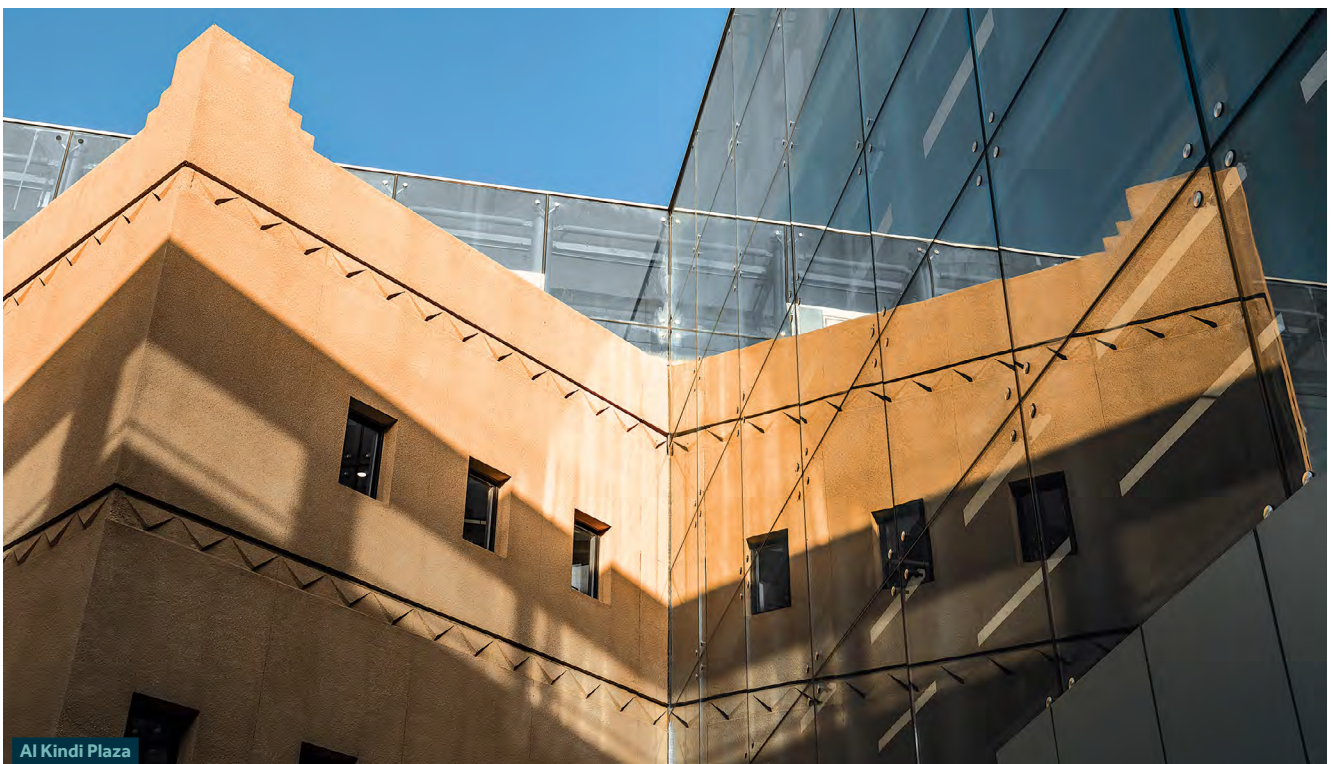
Our survey found that employee referrals have proven to be one of the best ways to recruit new staff. Building effective networks is important for the candidate to facilitate access to necessary resources that will strengthen and enhance the career development. Even though this way is faster and cheaper than other alternatives, it could also limit the opportunity to recruit candidates who applied through the standard hiring processes.

### 4. Lack of Effective Job Search Awareness

Given that most Saudi population is young, it is safe to assume that there are many young graduates who are looking to enter the job market but do not possess the necessary tools. Thus, it is vital for universities and other relevant A&D entities to prepare graduates and improve their job search strategies to efficiently and effectively manage their resources.

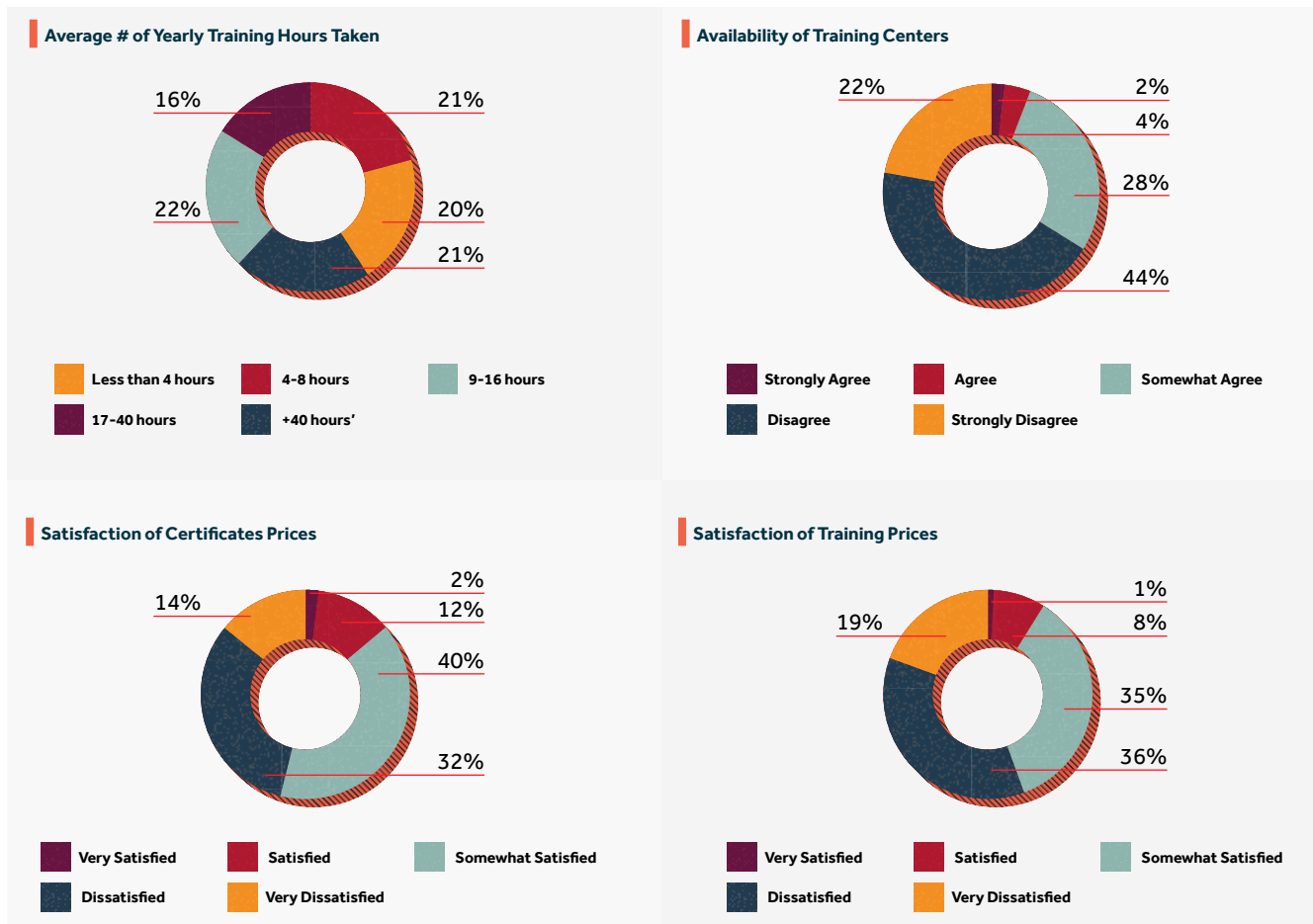
Exhibit 14: Preferred channel by practitioners when searching for a job.

1. Social Media (e.g. LinkedIn).
2. Company's Website.
3. Nomination by Connection.
4. Employment Support Programs.



# Despite the Differing Views of Practitioners on the Availability and Efficacy of Training, there is Consensus on the Financial Burden it Generates

**Exhibit 15: Average A&D trainings duration, availability of training centers, and satisfaction of certificates and training prices.**



**Exhibit 16: Preferred certificates to be pursued by practitioners.**

1. A&D Specialized Certificates.
2. PMP Certificates.
3. Government Entities Certificates.
4. Sustainability Certificate.

## A&D Trainings

20% of A&D practitioners reportedly spend less than 4 hours on training per year. However, approximately 66% of respondents stated that there aren't sufficient training centers, which could be related to the economic development disparity between Riyadh, Makkah, and the Eastern Region compared to other regions in the Kingdom. According to our findings, 46% of A&D practitioners were dissatisfied with the cost of certificates and 55% were dissatisfied with the cost of trainings.

### High Cost of A&D Professional Trainings and Certificates:

The cost for A&D professional Courses and Certificates falls between SAR 2,500 to SAR 5,000. Similar price ranges are observed for other categories, such as management certificates and training courses, e.g., the PMP and Prince2.

This explains the variation in practitioners' answers, where getting training and certificates will differ from one practitioner to another based on employers' budget on training and practitioner's interest and income level.

Moreover, the low number of trainings is in direct correlation with the employers' view, as approximately 70% of the surveyed firms believe that there are no local training institutes available (Business section).

# Call-outs for Action: Practitioners

#	Call-out for Action
1	There is a need to encourage equality in opportunities in the A&D sector to strive for diversity based on male and female preferences and the current market demand.
2	An opportunity arises whereby the trainings for professionals are stimulated through setting up the Continuous Professional Development system and standards, including defining the criteria and selecting the courses and trainings that count towards the minimum requirements for the profession. This can be achieved by qualifying relevant private sector providers as well as creating customized programs by themes, such as sustainability and new A&D technologies and techniques.



6

Education



# Education

The A&D Education section looks at the governing education regulatory entities and then analyzes in detail the demographics of the A&D education ecosystem, as well as the education programs offered within the Kingdom. Additionally, this section sheds light on the importance of adapting educational programs to the labor market and the impact of practical training. Finally, it highlights actions taken to address certain gaps in order to improve the sector's maturity and output.



# Four Main Entities are Currently Regulating the Education Sector in the Kingdom







The education landscape in the Kingdom is overseen by four main regulatory authorities:

**1. Ministry of Education (MoE)<sup>1</sup>:** Regulates higher education and approving the establishment of institutions programs and the educational system's position globally.

**2. Education & Training Evaluation Commission (ETEC)<sup>2</sup>:** Ensures proper evaluation of public and private education performance in the Kingdom and the national accreditation of higher education.

**3. Technical & Vocational Training Corporation (TVTC)<sup>3</sup>:** National accreditor of all programs providing quality technical and vocational training for citizens of the Kingdom of Saudi Arabia and in charge of approving new vocational training programs It reports to the Ministry of Human Resources and Social Development.

**4. National eLearning Center<sup>4</sup>:** Provides programs licenses for institutions that provide eLearning and training programs.

 <b>Vision</b>	 <b>Mission</b>
 <p>وزارة التعليم Ministry of Education</p> <p><b>"Distinguished, high-quality education with qualified educational cadres to build proud citizens and global competitors".</b></p>	<p><b>"Making education accessible to all and raising the quality of its processes and outputs [...], Providing learners with the necessary values and skills to become good citizens, and aware of their responsibilities towards the family, society, and homeland".</b></p>
 <p>هيئة تقويم التعليم والتدريب Education &amp; Training Evaluation Commission</p> <p><b>"Play a leading role in enhancing the quality and efficiency of education and training in the Kingdom to reach outstanding international levels".</b></p>	<p><b>"Develop and update standards, accreditation, licensing and certification, share knowledge and expertise, ensure evaluation, assessment and registration (SAQF) and support improvement and development based on evaluation results".</b></p>
 <p>المؤسسة العامة للتدريب التقني والمهني Technical and Vocational Training Corporation</p> <p><b>"Actively contribute to economic, social, and environmental development by providing quality technical and vocational training for citizens of the KSA".</b></p>	<p><b>"Provide, develop, and license technical and vocational training programs according to the quantitative and qualitative demand of the labor market for both males and females. In addition, enact the regulations relevant to the quality and efficiency of these programs and supervise them".</b></p>
 <p>المركز الوطني للتعليم الإلكتروني National eLearning Center</p> <p><b>"Trusted online learning for all".</b></p>	<p><b>"To enable globally competitive citizens through flexible, engaging and trusted lifelong learning".</b></p>

# Important Gaps are Identified in Terms of Human Development

- A** Low alignment between the education outcomes and the labor market needs.
- B** Minimal A&D vocational training is available across the Kingdom compared to other leading countries.
- C** Limited data related to current and future labor supply and demand dynamics. Additionally, some of the university data is unclear.



# Leading to the Kingdom Dedicating an Entire Program to it, as Part of its Vision 2030

The Human Capability Development Program (HCPD), under the Vision Realization Programs, seeks to develop a globally competitive labor force. To that end, the strategy was defined around three main pillars covering all capability development phases, from early childhood to post-retirement.

Regarding the tertiary education, the HCPD Program has set five main ambitious targets to safeguard the future of Saudi Arabia<sup>5</sup>:

-  Improvement of basic education outcomes.
-  Building an integrated educational journey.
-  Improvement of equal opportunities in accessing education.
-  Ensuring the alignment of education outcomes with the needs of the labor market.
-  Expansion of vocational training to meet the needs of the labor market.

# Following this Strategy, the Council of University Affairs has Put in Place Recent Reforms to Respond to the Identified Gaps



As part of its mandate to organize and approve policies and strategies, the Saudi Council of Universities (established under the MoE) has recently published three key development decisions<sup>6</sup> to help improve university efficiency and output, and keep the pace with the rising demand for skilled labor across the Kingdom:

01

## Increase the number of student admissions

This decision concerns specific colleges such as health, engineering, technical, applied and business administration. Additionally, the Council is requesting universities to reduce admissions into disciplines that no longer match the labor market demands, which would help absorb the aforementioned increase.

### Impacts on the A&D sector

We could potentially observe an increase in the number of A&D students as well as the number of faculty per program, boosting the reputation of the sector and meeting the demand of the labor market.

02

## Expand the professional certification offering

The objective of this decision is to raise the skill level of both male and female students enrolled in universities to ensure that they're better equipped to meet the needs of the current labor market. Additionally, the Council is requesting universities to track the number of professional certifications delivered.

### Impacts on the A&D sector

This decision can upskill the A&D population & increase A&D educational offerings, thus better equipping market participants with the required tools to meet job demands. This eventually will help tackle unemployment in the sector.

03

## Improve performance measurement in the sector

Finally, the council is requesting universities to report on the following metrics to stimulate competitiveness within the education sector both locally and internationally:

- % of employment of their graduates per major, including part-time vs full-time.
- % of graduates who are employed in their field of study.
- Average basic and total monthly salary of working graduates.

### Impacts on the A&D sector

This initiative will allow for better tracking and understanding of the job market, its attractiveness and competitiveness at the national and international levels.



## Additionally, TVTC Has Also Taken Steps to Bolster and Broaden its Offerings through its Recent Strategic Partnership Program

TVTC is the dedicated government agency for technical and vocational training in the Kingdom. The entity provides qualitative and quantitative learning opportunities, for both male and female students in Saudi Arabia, to upskill themselves in line with labor market needs.

TVTC offers 250 specializations and training programs<sup>7</sup> through its various facilities (such as Secondary Industrial, Architecture and Construction Institutes):

1. Training programs in the TVTC's units, such as colleges, institutes, institutes of strategic partnerships, and international technical colleges.
2. Training programs in private training facilities.
3. Flexible supportive social programs.

To further attract and encourage students to enroll in technical programs, TVTC has been partnering with several private and governmental entities. These partnerships will play a vital role and facilitate graduates' employment as they train the candidates in specific skills and industries and prepare them to join the workforce as soon as they graduate.

Currently, the partnerships are mainly in collaboration with:

- **Governmental entities:** such as the Ministry of Culture and the Saudi Contractors Authority.
- **Large companies:** such as Saudi Aramco and the Saudi Electricity Company.
- **Private businesses:** such as Al Hokair Group and ACWA Power.
- **Foreign firms:** such as Toyota and Mitsubishi.



# In Turn, ADC Took Action and Planned a Series of Initiatives, to be Launched by 2025 in KSA Across all Education Levels to Boost the A&D Sector

- In an effort to address the educational gaps that the A&D sector is facing in the Kingdom, ADC has taken an active role to support A&D education across the full journey of learning, covering all levels, ranging from primary education to university levels and professional experience.
- Currently, the "Youth A&D Creativity Development", the "Educational Enrichment Programs" and "A&D Academic Development" are the three initiatives already being implemented, while the remaining three initiatives are being planned for the near future.
- ADC is planning on setting up six A&D Educational initiatives to be activated by 2025<sup>8</sup>, targeting a 22% reduction in the talent gap for architecture and design disciplines by 2035.



## Primary & Secondary Education

### 01 Youth A&D Creativity Development

- A&D children's content.
- A&D summer camps.
- Design as a life skill.
- Design courses.
- Portfolio Development.



## Undergraduate & Graduate Education

### 02 A&D Academic Development

Improved academic programs and curricula in line with international best standards.

### 03 Educational Enrichment Programs

Special training opportunities, workshops, and studios for A&D educators to improve their skill-sets.



## Training & Internship Opportunities

### 04 Internship & Advisory Programs

Student local and international internships offerings for +2,000 A&D graduates.



## Higher Continuing Education

### 05 Najdi Architecture Academy

Graduate studies and continuing education institution with recognized A&D courses.

400+ student enrolled annually.



### 06 Continuous Professional Development

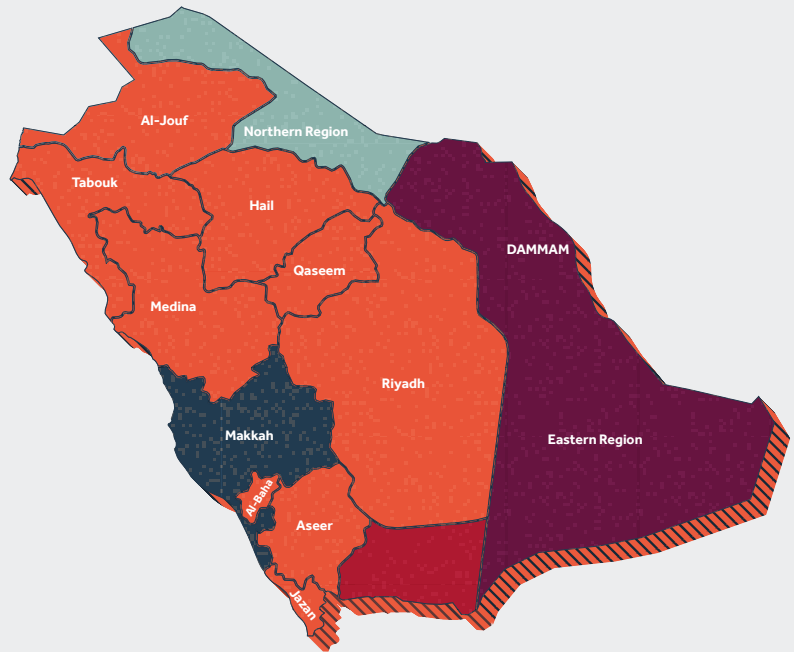
Introducing Continuous Professional Development platform and regulations Providing 15 hours per practitioner annually.

# The Current A&D Education Landscape in the Kingdom is Unevenly Spread out, with Activity Primarily Focused on the Regions of Riyadh, Makkah, and the Eastern Region

**Exhibit 1: Representative geographical distribution of KSA's A&D students and Universities<sup>9</sup>.**

The total number of A&D students enrolled in 2021 in the Kingdom is estimated to be around 7,585 across 34 universities<sup>(A)</sup> and 87 programmes<sup>9</sup>.

	 NO universities	 NO programmes
Makkah	8	28
Medina	3	4
Riyadh	7	17
Eastern Region	7	24
Aseer	2	2
Jazan	1	2
Al-Baha	1	1
Tabouk	1	2
Al-Jouf	1	1
Qaseem	2	5
Hail	1	1



**Legend**

 0	 Major Cities	 Architecture	 Landscape Architecture
 1-99		 Interior Design	 Industrial Design
 100-499		 Urban Design	 Graphic Design
 500-999			
 1000-1499			

**Key Figures<sup>9</sup>**

<b>65%</b>	<b>79%</b>	<b>33%</b>	<b>78%</b>	<b>119</b>
of universities offering A&D programs are in Riyadh, Makkah and the Eastern Region in the Kingdom.	of the A&D programs are concentrated in Riyadh, Makkah and the Eastern Region in the Kingdom.	of the available programs are dedicated fully to Architecture, followed by Interior Design and Graphic Design programs.	of the programs are Bachelor programs, 17% are Masters and 5% are PhD programs.	Scholarships abroad have been granted to Architecture and Design students in 2021 by the Ministry of Culture.

Notes(s): (A): The universities considered include the newly established Al-Fayha University  
 Source(s): (9) Internal Analysis

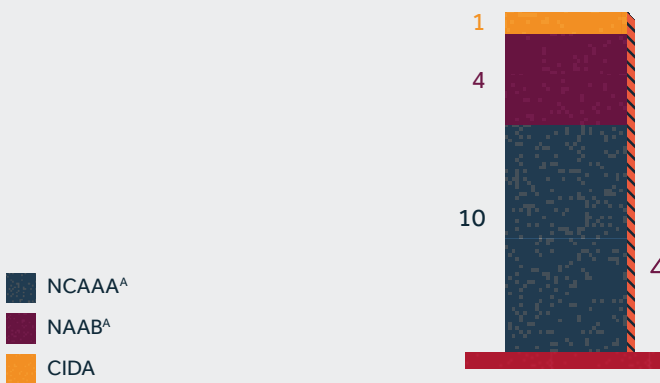
# The A&D Education Landscape in the Kingdom Has a Limited Number of Accredited Institutions and Academic Programs

- Today, less than half of the 34 architecture and design universities in the Kingdom offer NAAB (US-based Architecture specific accreditation) and/or NCAAA fully accredited<sup>(A)</sup> programs.
- Only King Saud University, Effat University and Imam Abdulrahman bin Faisal University hold both accreditations.
- Additionally, Prince Mohamad bin Fahad University is the only university to hold the CIDA accreditation for its Bachelor of Science in Interior Design.
- This translates into 25 programs out of 87 only being fully accredited (22 NCAAA, 4 NAAB and 1 CIDA).
- Furthermore, the fully accredited programs can be found only in Riyadh, Makkah, and the Eastern Region, reinforcing the uneven geographical spread emerging from the program's distribution.
- Finally, most of the accredited programs are offered at the Bachelor's level only (22 out of the overall 25 accredited programs); this mostly correlates with the maturity of the sub-sector and the initiation of the type of education.

The split by sub-sectors is as follows:

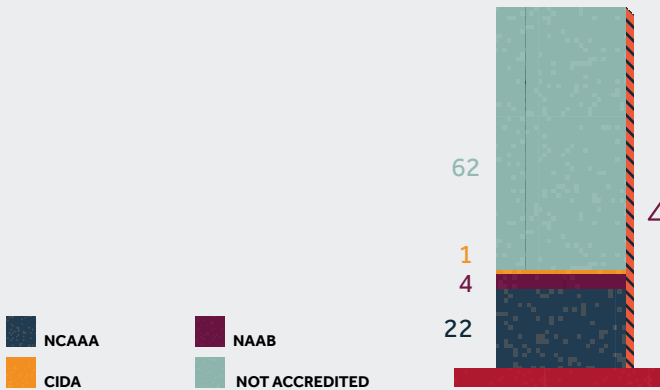
- ✓ **Architecture:** 8 programs.
- ✓ **Interior Design:** 7 programs.
- ✓ **Urban Design & Planning:** 4 programs.
- ✓ **Graphic Design:** 3 programs.
- ✓ **Industrial Design:** 1 program.
- ✓ **Landscape Architecture:** 2 programs.

Exhibit 2: Numbers of Universities with Accredited A&D Programs<sup>10</sup>.



**University Characteristics**  
12 out of 34 universities in the Kingdom offer fully accredited programs.

Exhibit 3: Numbers of A&D Accredited Programs<sup>11</sup>.



**Program Characteristics**

- 79% of those programs are offered in three regions only Riyadh (17), Makkah (28), and the Eastern region (24).
- 22 out of the 25 programs are Bachelors.

Note(s): (A) NAAB accreditation duration is up to eight years NCAAA accreditation duration is up to seven years  
Source(s): (10) (11) Internal Analysis



# To Further Safeguard the Educational Landscape in the Kingdom, We Have Identified Two Market Trends to be Mindful of: Educational Offering and Gender Diversity



## Educational Offering

The Kingdom's A&D Educational programs are highly focused on Architecture, compared to other sub-sectors, and are largely made-up of undergraduate degrees with limited advanced degree offerings (post-graduate and PhDs).



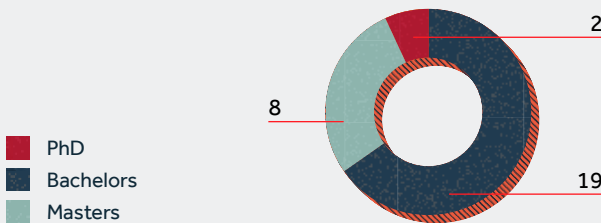
## Gender Diversity

The architecture and design student population is largely dominated by Saudi male citizens due to historical structural issues.

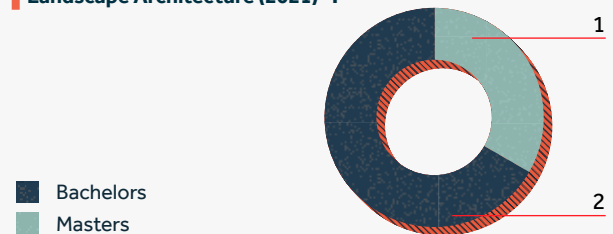
# The Current A&D Higher Education Offering in the Kingdom is Skewed towards the Built Environment, Both in Terms of Sub-Sectors Addressed and Degree Level

Distribution of academic programs for each sub-sector by academic degree:

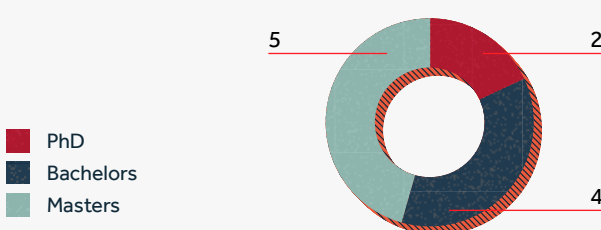
**Exhibit 4: Distribution of Programs across Architecture (2021)<sup>12</sup>.**



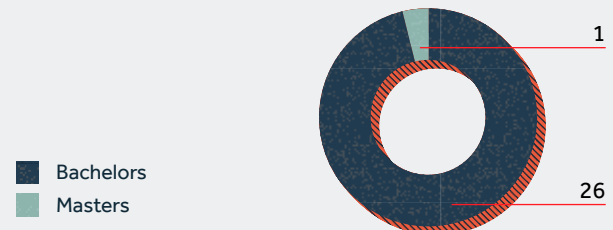
**Exhibit 5: Distribution of Programs across Landscape Architecture (2021)<sup>13</sup>.**



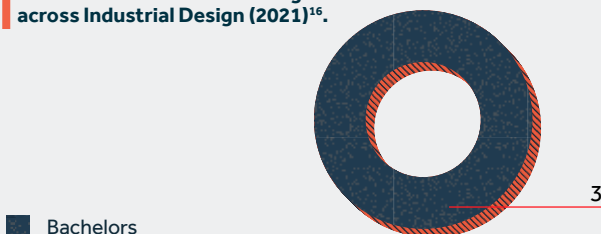
**Exhibit 6: Distribution of Programs across Urban Design and Planning (2021)<sup>14</sup>.**



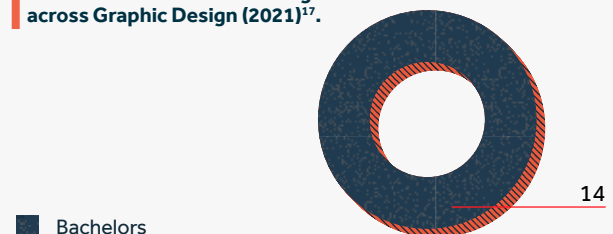
**Exhibit 7: Distribution of Programs across Interior Design (2021)<sup>15</sup>.**



**Exhibit 8: Distribution of Programs across Industrial Design (2021)<sup>16</sup>.**



**Exhibit 9: Distribution of Programs across Graphic Design (2021)<sup>17</sup>.**



Source(s):(12) (13) (14) (15) (16) (17) Internal Analysis



## Educational Offering

- Currently, 87 architecture and design programs are on offer in the Kingdom. Architecture has the highest representation, with 29 degrees on offer, followed by Interior Design (27), and Graphic Design (14). Combined, these make up 80% of the total A&D programs offered, highlighting their popularity.
- Regarding the degree levels, around 68 programs are offered at the undergraduate level, with only four out of 34 universities (12%) in KSA offering PhD programs.
- The above imbalance and relatively small number of post-graduate degrees could be due to the following reasons:
  1. The current Saudi labor market does not require candidates to be experienced specialists to enter the labor force.
  2. The urgent rapid development of the Kingdom and the high expectations of the vision 2030 are leading to an increased demand of A&D talent, causing a clear gap between the available A&D skills required and the market demand.

### Key takeaways for the Kingdom's A&D Sector

Going forward, the Kingdom will need to develop experienced architect and designer profiles in-house to lead transformation projects from conception all the way to realization. This will require the development of multiskilled (academic, theoretical, practical, social, etc) professionals. Therefore, ADC and other A&D stakeholders have an important role to play by:

- Strengthening their university's partnerships programs and knowledge sharing with leading A&D universities.
- Bridging the gap between education outcomes and industry requirements.
- Improving the standards of A&D education to increase competitiveness.
- Broadening the coverage of MSc degrees in line with educational objectives and the needs of the Kingdom.
- Creating tailored post-graduate tracks to help address future challenges.

## The Following Analysis is Based on Data Received from the Below 17 out of the 34 A&D Universities

 <p>جامعة دار الحكمة DAR AL-HEKMA UNIVERSITY</p>	 <p>جامعة الإمام عبد الرحمن بن فيصل IMAM ABDULRAHMAN BIN FAISAL UNIVERSITY</p>
 <p>جامعة الملك فهد للبترول والمعادن King Fahd University of Petroleum &amp; Minerals</p>	 <p>جامعة الملك فهد للبترول والمعادن King Fahd University of Petroleum &amp; Minerals</p>
 <p>جامعة الملك سعود King Saud University</p>	 <p>جامعة تبوك University of Tabuk</p>
 <p>UBT جامعة الأعمال والتكنولوجيا UNIVERSITY OF BUSINESS AND TECHNOLOGY</p>	 <p>جامعة الأعمال والتكنولوجيا UNIVERSITY OF BUSINESS AND TECHNOLOGY</p>
 <p>جامعة أم القرى UMM AL-QURA UNIVERSITY</p>	 <p>جامعة المجمعة Majmaah University</p>
 <p>جامعة أم القرى UMM AL-QURA UNIVERSITY</p>	 <p>جامعة الأمير سلطان PRINCE SULTAN UNIVERSITY</p>
 <p>جامعة جدة University of Jeddah</p>	 <p>جامعة خالد KING KHALID UNIVERSITY</p>
 <p>Qassim University جامعة القصيم</p>	 <p>كلية ينبع الجامعة Yanbu University College</p>





## Gender Diversity

- Saudi students make up 88% of the student population. Non-Saudi students are mostly enrolled in private universities (28% of students enrolled in private universities are non-Saudis, while only 8% of students enrolled in public universities are non-Saudis). The low percentage of international students enrolled in A&D programs could be due to linguistic and cultural barriers, despite the fact that more than 50% of foreigners are from Arabic speaking countries.
- 34% of the programs are offered to males only, 31% are only for females, with the rest of programs being available to both genders. Interestingly, most programs offered to women are graphic, industrial and interior design, with few universities surveyed offering Architecture degrees to women. The opposite trend can be observed for male students, for whom Architecture degrees are mostly offered.
- Recently, the Kingdom’s main focus has been towards a more balanced distribution and more opportunities for both genders.
- 2018 data from the MoE on the gender split per degree topic highlight that the percentage of female students in the “Engineering & Construction” specialization is the lowest among all other specializations, 7.9% vs 75% in “Education” or even 55% in “Health” highlighting the lack of A&D programs dedicated to females in KSA<sup>20</sup>.

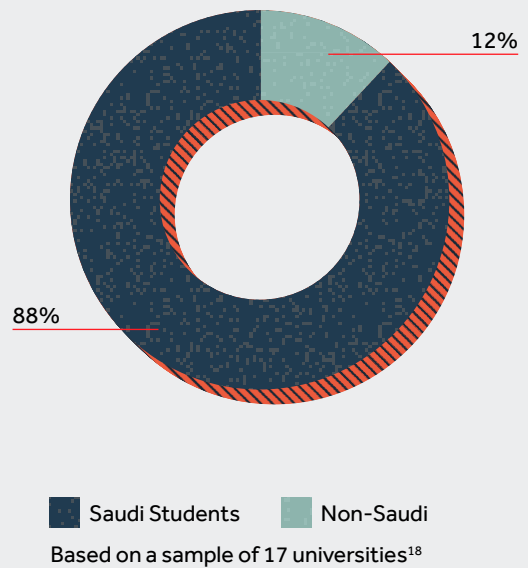
### Key Takeaways for the Kingdom’s A&D Sector

- ADC can play an important role, along with other stakeholders, in creating a dynamic, diverse, and rich A&D sector by:
  1. Upgrading the educational offerings in collaboration with ETEC-NCAAA and the Saudi Universities.
  2. Developing more partnerships with leading universities to attract more foreign talent.
  3. Ensuring proper equity in the type of degrees on offer for men vs women across all sub-sectors.

## The Architecture and Design Student Population is Largely Dominated by Saudi Males

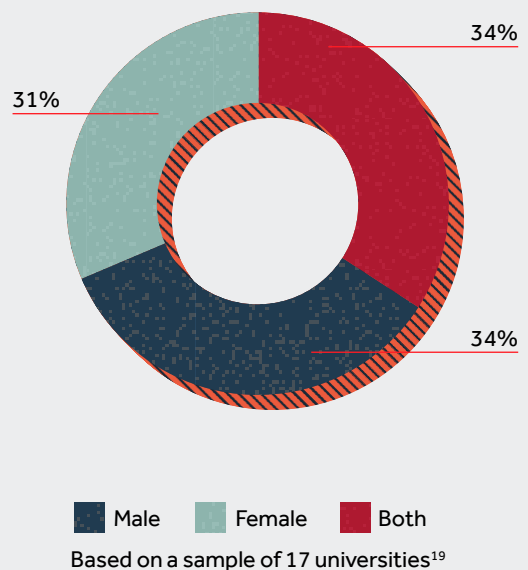
The A&D student population is overwhelmingly dominated by Saudis.

Exhibit 10: Ratio of Saudi to Non-Saudi Students (2021).



Most programs dedicated to male students.

Exhibit 11: Ratio of Male to Female-dedicated programs (2021).



# The overall Number of A&D Students Have Been Decreasing in the Last Few Years

In order to have a view on the total number of A&D students in KSA, a survey was shared with universities offering A&D programs. 17 out of the 34 A&D universities shared their data. An extrapolation was conducted to estimate the overall number of students across all 34 A&D universities in the Kingdom. The estimated total number of A&D students in KSA added up to 7585 students.

The evolution of the number of A&D students has exhibited an overall downward trend over the past five years.

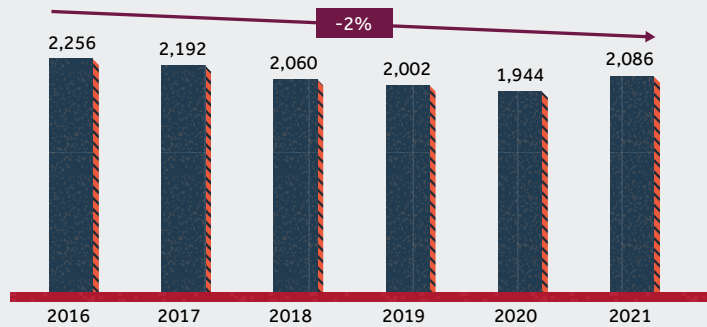
Between 2016 and 2021, the number of A&D students decreased by 8% at a cumulative pace of 2% every year. This decrease is in stark contrast to the overall number of students in higher education, which has been increasing between 2016 and 2018 to reach 1.6 million in total.

This trend could be the result of the uneven geographical spread and the immaturity of the A&D sector education, as previously outlined, or the reduction of student intake by universities compared to other majors and career paths in the Kingdom.

Regarding the split of public and private universities, an upward trend in the intake of students in public universities is observed, driven by new programs established in recent years, such as interior design, graphic design and industrial design programs dedicated to female students.

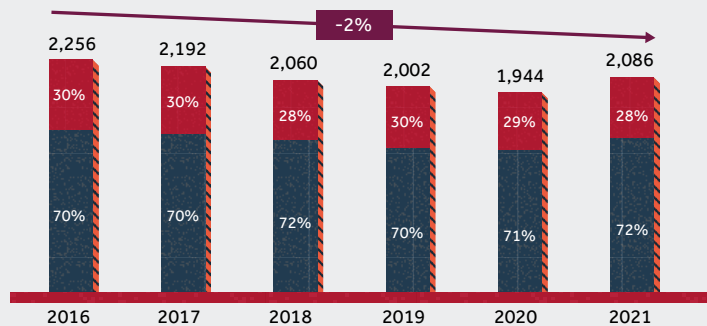
Overall, the number of students in private universities is expected to increase in the coming years, driven by the Kingdom's privatization efforts in the Education sector led by the National Center for Privatization & Private Public Partnerships (PPP). The private sector's overall share in education (14% in 2018) has historically been the lowest in Saudi Arabia compared to its GCC peers. However, in recent years, the private sector grew faster than the public sector at a CAGR of 3% between 2015 and 2018<sup>21</sup>.

**Exhibit 12: Total number of students enrolled in the programs (across all program levels)<sup>(A)</sup>.**



Based on a sample of 12 universities<sup>22</sup>

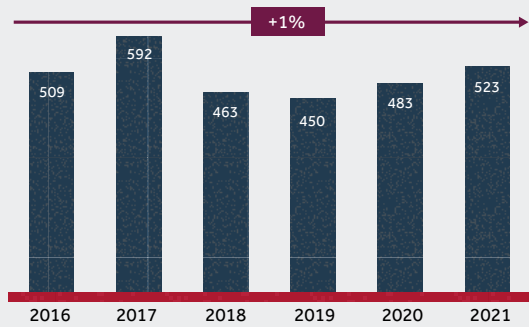
**Exhibit 13: The evolution of A&D students numbers by school type<sup>(A)</sup>.**



Based on a sample of 12 universities<sup>23</sup>

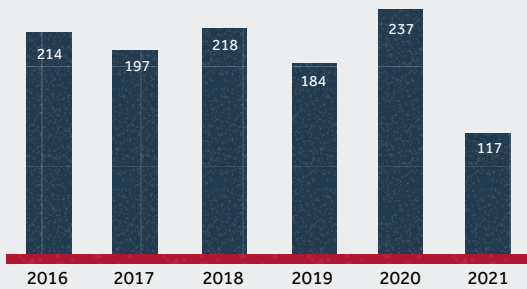
Note(s): (A) The numbers are extracted directly from the University Forms; no assumptions were made  
 Source(s): (21) EY, (22) (23) University forms

**Exhibit 14: Total number of newly enrolled students in the program (first year in the program).**



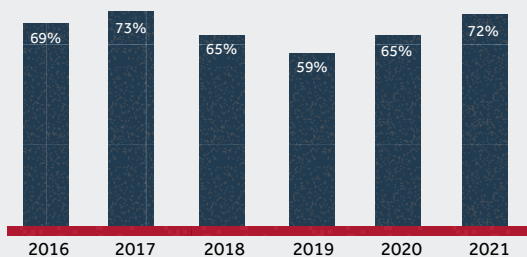
Based on a sample of 11 universities<sup>22</sup>

**Exhibit 15: Total number of program graduates<sup>(A)</sup>.**



Based on a sample of 6 universities<sup>25</sup>

**Exhibit 16: Retention Rate<sup>(A),(B)</sup>.**



Based on a sample of 5 universities<sup>26</sup>

## Students are Increasingly Enrolling in A&D Programs While the Number of Graduates Fluctuates on a Yearly Basis

- Between 2016 and 2021, the total number of newly enrolled A&D students in the program (students in their first year) has exhibited a fluctuating pattern, with the 2021 class intake being 2.8% higher than the 2016 incoming class size.
- This slight upward trend could be the result of the establishment of new universities or new programs in some universities as well as motivation to join the A&D industry following the ambitious and interesting Vision 2030.
- As for the number of graduates, 2021 was recorded as the year with the lowest number of graduates since 2016.
- Additionally, fluctuations are observed on a yearly basis, potentially due to students that are still enrolled in their respective programs and are not set to graduate yet.
- As for the retention rate, the lowest rate was recorded in 2019, similar to the number of newly enrolled students. This could be explained by the fact that, amid the COVID-19 pandemic, students were not able to enrol in A&D programs.

**These observed fluctuations could be due to several factors, such as the motivation to join the industry based on the projected projects of Vision 2030 post COVID-19 dip, or students still enrolled in their programs and expected to graduate yet.**

Note(s): (A) The trend might not be accurate as only very few universities were considered  
 (B) Percentage of first-year undergraduate students who continued at the program the next year to the total number of first-year students in the same year  
 Source(s): (24) (25) (26) University Forms

# A&D Education Section Survey

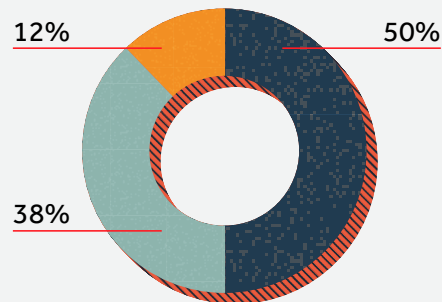


# The A&D Academic Faculty in the Kingdom is Technically Qualified as Evidenced by the Level of Education and the Years of Professional Experience

- The overall A&D Academic staff is highly technically qualified, with 50% holding a PhD in their field, which is 12% more than those holding a Masters degree. This demonstrates the high caliber and professionalism of the A&D faculty.
- Additionally, more than 80% of the Academic Faculty have more than 5 years of teaching experience, with a significant number totaling 15 years or more of experience in the field. As for their nationalities, 85% of academic faculty members are Saudi nationals. This is partly due to the difficulty to attract high-caliber international faculty, given the current pay scale for non-Saudi faculty members.
- Out of all the academic faculty surveyed, both the average and median income are in the SAR10-15k range, compared to the Kingdom's minimum monthly income at SAR4k. Based on the survey, only Saudi staff earn incomes higher than SAR30k, while most non-Saudis earn incomes ranging between SAR10k and SAR25k. Most of the academic staff earn at least 3-times higher than minimum wage.
- In Q1 2022, GSTAT reported that the average salary of an employee with a bachelor's degree is SAR10.1k per month. This increases to SAR17.7k and SAR24.1k for employees holding Master's and PhD degrees respectively. In comparison, most academic staff earn less than their practicing peers with the same degree level.

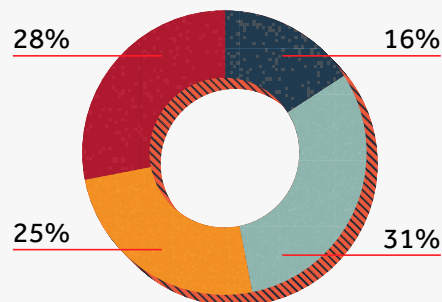
**Exhibit 17: Breakdown of Academic Staff by Level of Education (2021).**

■ PhD      ■ Master's      ■ Bachelor's



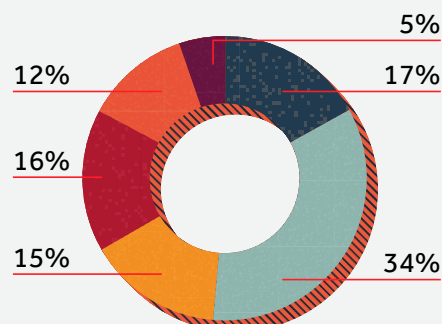
**Exhibit 18: Years of Experience Among Academic Staff (2021).**

■ 0-4 years      ■ 5-9 years  
■ 10-15 years      ■ 15+



**Exhibit 19: Academic Staff Monthly Income in SAR (2021).**

■ 5-10k      ■ 10-15k      ■ 15-20k  
■ 20-25k      ■ 25-30k      ■ 30k+



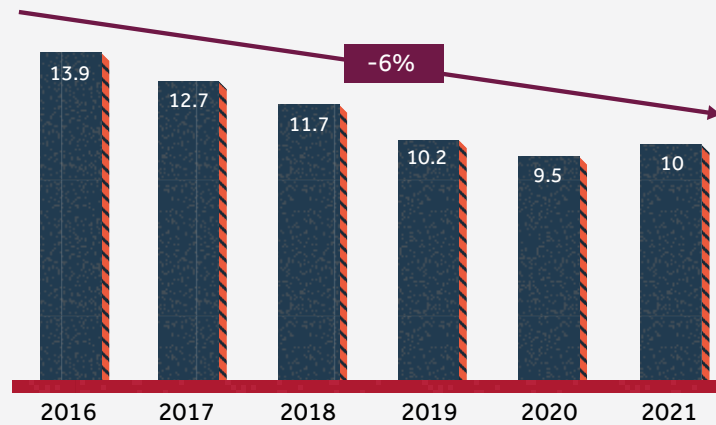
# Student-to-Staff Ratio Has Been Improving for the Past Five Years, while Almost Half of A&D Academic Staff Hold More than One Job

The faculty-to-student ratio has been improving since 2016, reaching 10 students per faculty-driven mainly by the overall decrease in the number of students rather than the increase in the number of faculty. Nevertheless, this improvement is vital considering the practical hands-on nature of A&D as it ideally leads to:

- Better student outcomes.
- Personalized learning experiences.
- Stronger bonds and networks.

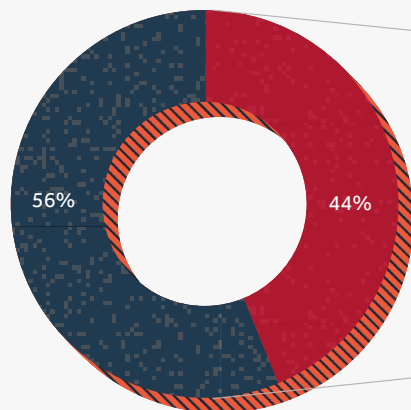
Out of all the staff surveyed, 44% responded that they are supplementing their income as well as diversifying their experience through industry connections and consulting. Out of these, 12% hold a bachelor's degree, 38% hold a master's degree and 49% hold a PhD degree.

**Exhibit 20: Student per Academic Faculty Ratio.**



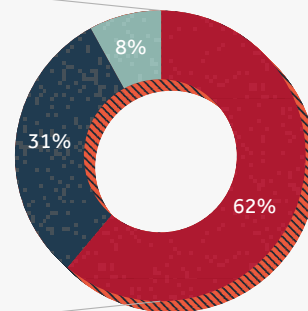
Based on a sample of 10 universities<sup>26</sup>.

**Exhibit 21: Academic faculty holding more than one job (2021).**



- Holds another job
- Does not hold another job

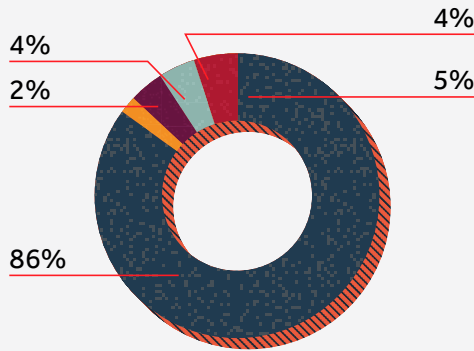
**Exhibit 22: Category of faculty's Other Jobs (2021).**



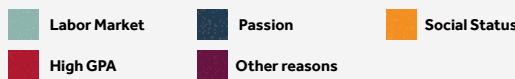
- Design Freelance
- Consultation
- Research



**Exhibit 23: Reasons to Choose the Program (2021) – Survey Results.**

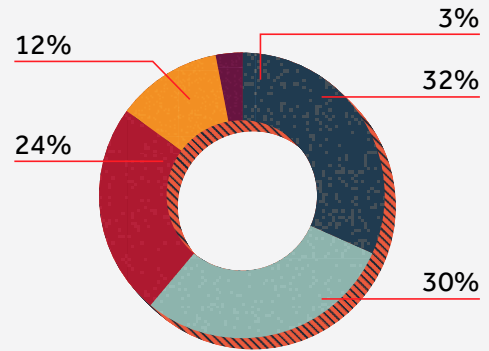


86% of A&D students choose their programs based on passion. Less than 15% of students chose their future careers based on their high GPA and the labor market demand among others.

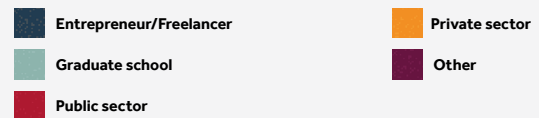


It is important to provide better orientation and raise awareness for students at an early stage while emphasizing the importance and value of the A&D disciplines.

**Exhibit 24: Post-University Destination Preference (2021) – Survey Results.**



Most students prefer to work independently as entrepreneurs or freelancers or pursue graduate school upon graduation. The tendency to lean towards the public sector could be due to the available visionary projects.



ADC could strive to create equal interest in both the public and private sectors, where expertise is well remunerated to encourage companies to produce content and attract talent.

## Students and Academic Programs

**86%**

of students are satisfied with the program-specific requirements needed to enroll in an A&D program in the Kingdom.

**71%**

of students agreed that their program experience met their pre-enrolment expectation.

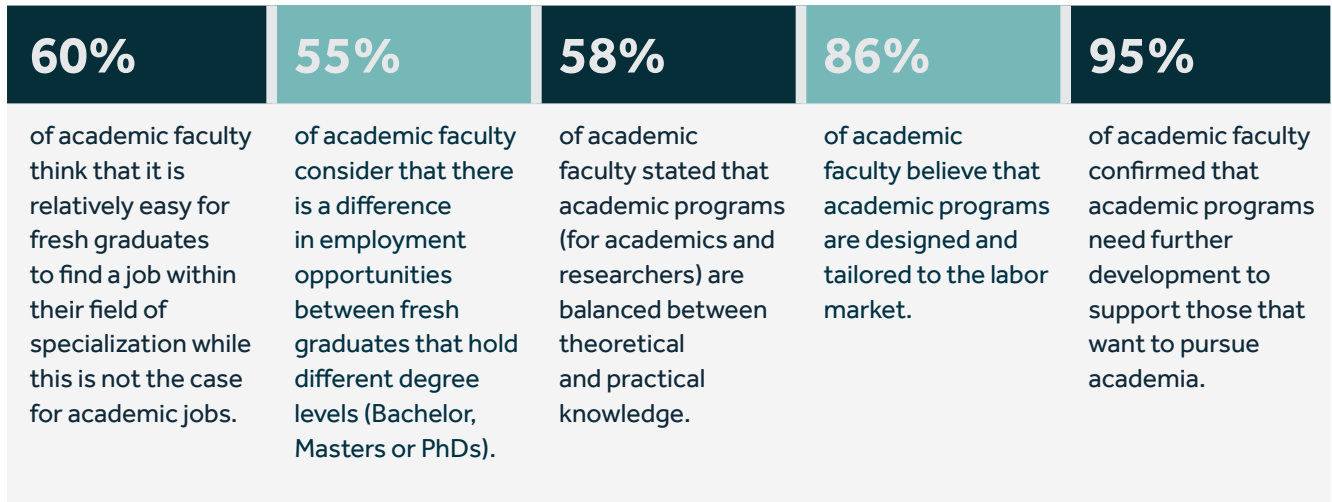
**67%**

of students were satisfied with the experience of remote learning during the COVID pandemic, as one-on-one practical interaction was reduced during this period.

**47%**

of students were dissatisfied with the teaching facilities their respective universities were offering (including studios, labs, classrooms, libraries, and learning resource(s) centers).

# Academic Faculty Voiceover: Overview

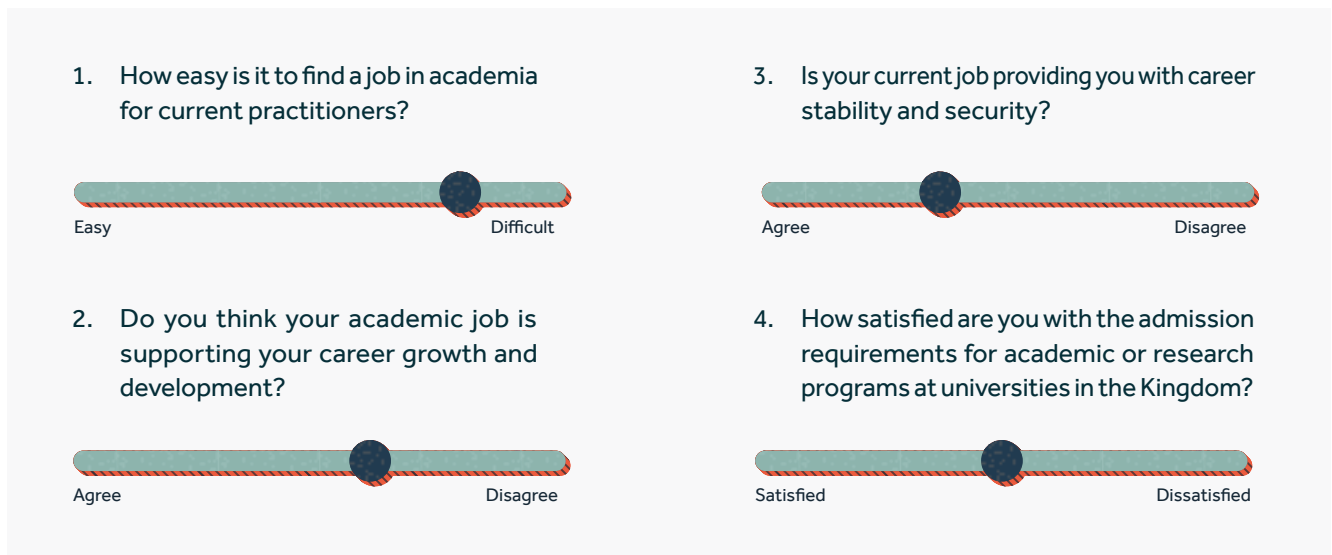


## Key Comments:

Overall, the Academic Faculty Survey highlights key mismatches between their beliefs and the current state (potentially due to academics not practicing) regarding the following topics:

- Job Market: 56% of faculty believe it is easy for graduates to get a job, however 63% of graduates stated that they find it relatively hard.
- Education level: 58% of Academic faculty believe A&D programs balance practical and theoretical knowledge, whereas in reality, the dominance of theory over application has been pointed out as a weakness on the national level according to HCPD.
- Labor market needs: 78% of faculty believe that programs are in line with market demands when in reality, most giga projects are currently led by international architecture and design companies.

## The participants, A&D academic faculty members, were asked about their views on their academic job. Here are some of their views:

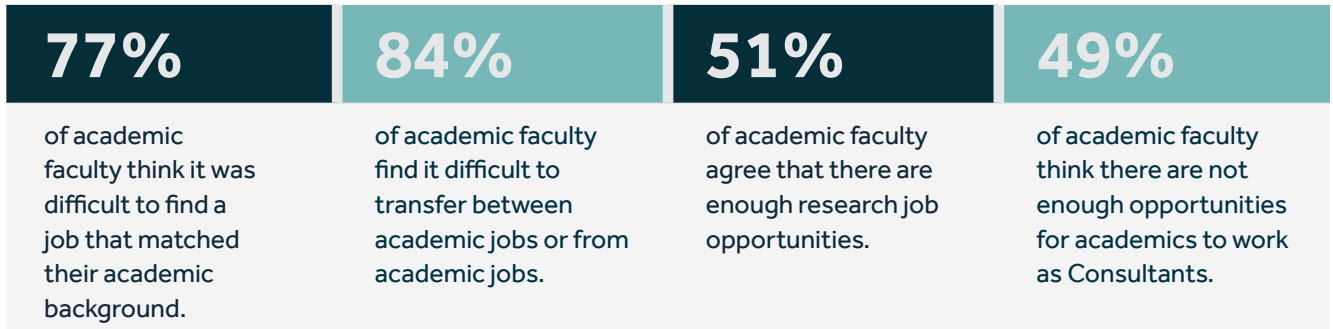


# Academic Faculty Voiceover: Overview

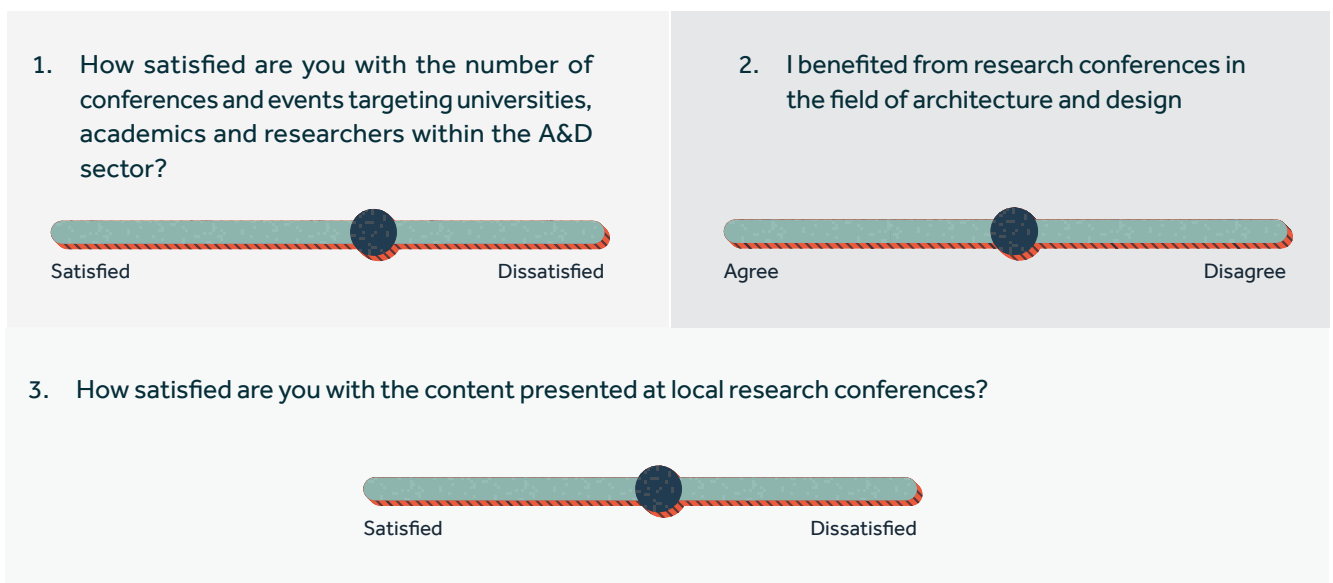
Following the survey, it can be observed that there is a sentiment of dissatisfaction within the Academic Faculty regarding the lack of job opportunities and the difficulty to transfer between or from their current jobs.

almost half of the faculty believed that there were not enough research opportunities. Moving from their existing job to another academic job or a role outside of the academic field also proved to be difficult.

Most staff said that it was difficult to obtain a job with their academic background in the first place. Additionally, once they obtained the teaching role,



## The participants were asked about the events, conferences, and training opportunities in the Kingdom. Here are some of their responses:



## Graduate Voiceover – Job Market Dynamics

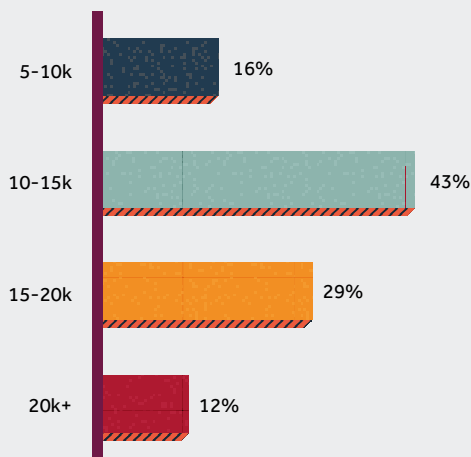
Most graduates expressed that their expectation for the minimum salary, two years after graduation, should be in the range of SAR5-15k 72% expressed that their minimum expectation is in the 5-10k range, 26% expect a minimum salary to be between 10-15k, while the remaining 2% expected a salary higher than 15k.

Out of the students surveyed, 43% answered, saying that their maximum salary expectations in the first two years of employment, after graduation, would be between SAR10-15k, while 29% of students expect a higher salary in the SAR15-20k range. This suggests that when hiring graduates, companies should, on average, offer a monthly compensation package between SAR10-15k, while some more highly skilled graduates should be better compensated (exhibit 25).

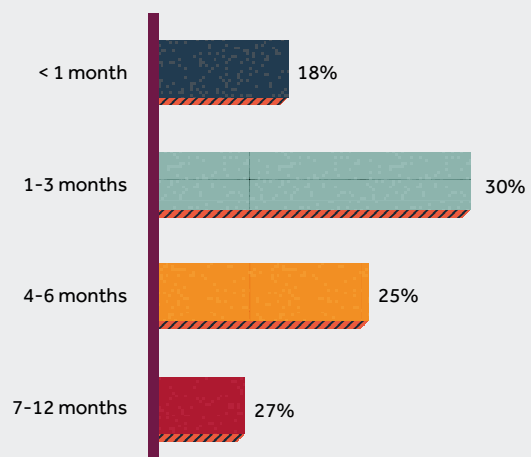
Out of all of those who answered the question regarding the average time taken for getting a job offer, 73% of the graduates said they spent less than six months to secure a job (exhibit 26). More than half of the graduates said they have attended training courses that help with job qualification during their time at the university, showing that there is room for improvement to engage more students in these training courses.

The most often quoted challenge in job application was hiring professionals instead of fresh graduates, followed by unsatisfactory salaries. Other quoted reasons include lack of job and growth opportunities, and non-motivating environment (exhibit 27).

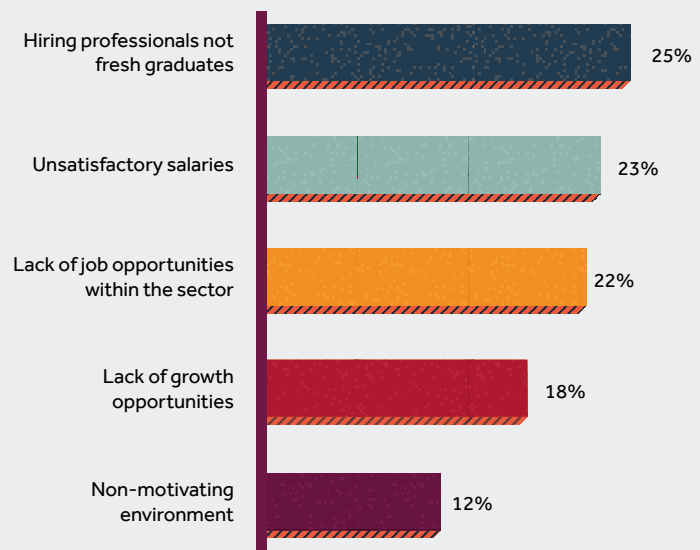
**Exhibit 25: Graduate Maximum Salary Expectation 2 Years After Graduation (in SAR)**



**Exhibit 26: Average Time Needed for Graduates to Find a Job**



**Exhibit 27: Main Barriers in Job search**



# Call-outs for Action: Education

## # Call-out for Action

- 1 There is an opportunity to further improve the TVTS's current programs' contents as well as identify their shortage areas and develop programs based on market demand. These programs could help develop skilled graduates who will boost and enrich the workforce.
- 2 It has been observed that most educators do practice in a personal capacity, which has translated to improved educational experience to their students. As such, this creates an opportunity to develop a policy that institutionalises this approach in all public and private academic institutions.
- 3 Giga projects have the opportunity to localise know-how by implementing internal human capital and procurement policies that ensures local talent is engaged and included in these projects.



King Fahad National Library

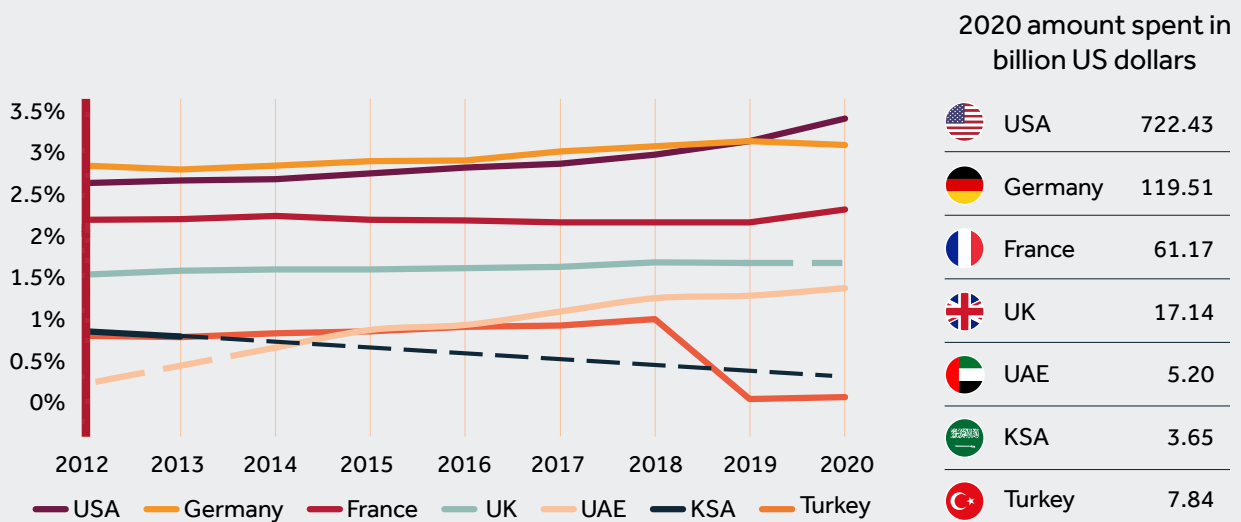
7

Research








# Research

The A&D research section aims to examine the current performance of the A&D research capability in the Kingdom as a whole and at the architecture and design industry level. This section also deep dives into and assesses the primary driving force behind A&D research, across six main enablers. It also proposes actions required to increase the sector's maturity going forward and provides a big picture of what's to come in the future.



**Exhibit 1: Research and development expenditure as a percentage of GDP (World Bank data)<sup>1</sup>.**

2020 amount spent in billion US dollars

	USA	722.43
	Germany	119.51
	France	61.17
	UK	17.14
	UAE	5.20
	KSA	3.65
	Turkey	7.84

## Historically, the Kingdom Has not Been Heavily Investing in R&D Compared to Leading Countries, and Lacks a Comprehensive Strategy for the Sector

Over the past decade, the Kingdom's expenditure (as a % of GDP) on R&D has been steadily decreasing from its 0.88 % peak in 2012 to 0.52% in 2020 as per the data provided by the World Bank. This figure is between five and seven times less than France's, the UK's, and the US's expenditures in the field showcasing the gap between KSA and some of the leading countries in R&D.

Overall, the downward trend regarding the Kingdom's investments in R&D is in stark contrast to other benchmarked countries, except Turkey, where their allocated budgets have been steady or decreasing over the same period.

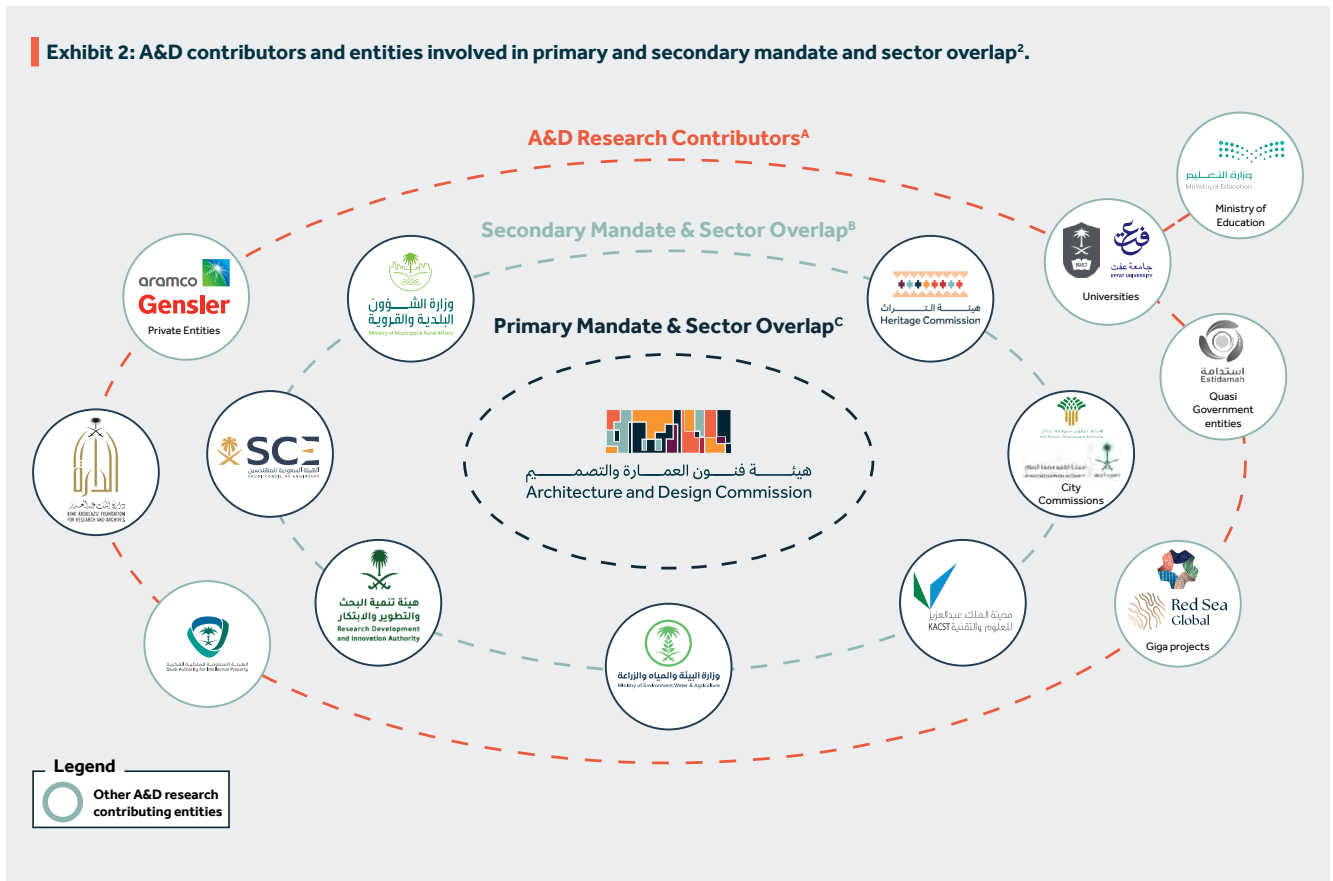
Additionally, the Kingdom has lacked a clear national overarching strategy to guide research efforts and increase the Kingdom's competitiveness in the Research and Development field.

## Which Led to a Fragmented Ecosystem with an Overlapping Mandate and Unclear Direction

- Today, the architecture and design sector's R&D ecosystem is fragmented, with several entities involved by their mandate, as illustrated in exhibit 2.
- Entities are working in silos, with minimal coordination and a lack of strategy, which cascades down to the A&D sector particularly. More importantly, the current structure of the ecosystem highlights a clear gap with a lack of end-to-end view on the state of R&D.
- While the Research, Development and Innovation Authority (RDIA) owns the research mandate in the Kingdom, RDIA's primary sector coverages do not directly articulate nor influence the A&D sector.



Exhibit 2: A&D contributors and entities involved in primary and secondary mandate and sector overlap<sup>2</sup>.



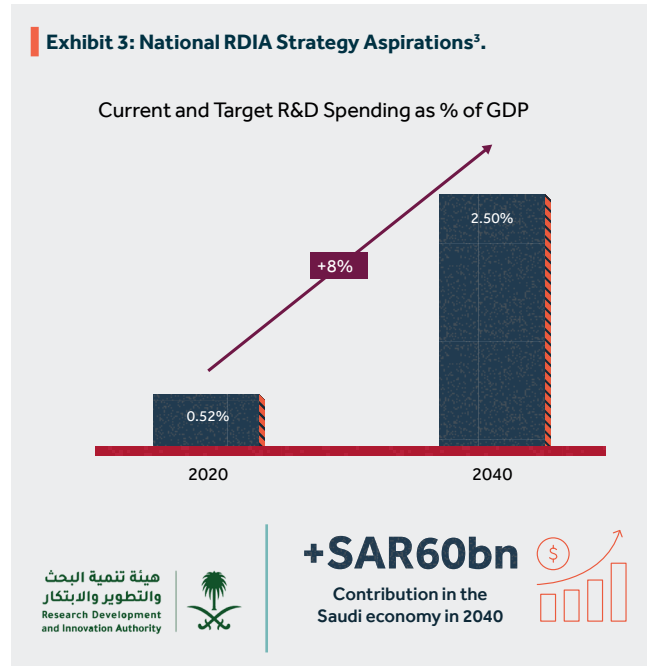
## The Current Gaps Across the Research & Development Sector Have Clearly Been Spotted by the Government, Who Recently Responded by Outlining its National Research Strategy Objectives for 2040

On June 30th, 2022, Saudi Arabia announced its national aspirations and priorities for research, development and innovation. They set the national target of increasing the spending on these activities to 2.5%<sup>3</sup> of the 2040 GDP (x5 vs 2020 values). The announcement also laid the four national priorities of research:

1. Health and Wellness.
2. Sustainable Environment & Supply of Essential Needs.
3. Energy and Industrial Leadership.
4. Economies of the Future.

These aspirations, overseen by RDIA, are in alignment with Vision 2030 to strengthen the Kingdom's competence and leadership in the region. Nevertheless, ADC still has a major role to play to champion R&D efforts within the A&D sector to complement RDIA's wide coverage.

Exhibit 3: National RDIA Strategy Aspirations<sup>3</sup>.



Note(s): (A) A&D research contributors are private or governmental, institutions, universities, projects and other entities that have an indirect effect on A&D and overlap with ADC by virtue of their function, leading with sub-sector coverage and related research  
 (B) Secondary mandate entities represent secondary governmental organizations and entities that have an indirect effect on A&D and overlap with ADC by virtue of their function, leading with sub-sector coverage and related research  
 (C) Primary mandate entity is ADC, whose mandate is directly related to A&D  
 Source(s): (2) Internal Analysis - (3) Saudi Press Agency

# There is a Great Opportunity to Orchestrate the Research Efforts in the A&D Sector in Line with ADC’s Mandate and Strategic Objectives

Given KSA’s plan and Vision 2030, ADC would oversee the development of a strategy to stimulate all the A&D enabling enablers. This will be in line with RDIA and Vision 2030 objectives and priorities (exhibit 4) and ADC’s strategic objectives (exhibit 5), particularly with regards to the development of

talent and the creation of a community of innovation. Ultimately, ADC has a central overarching role to play in leading, regulating and developing the A&D research ecosystem in KSA across all sub-sectors to drive the A&D research agenda forward.

Exhibit 4: RDIA & Vision 2030’s overlapping objectives with the A&D sector<sup>4</sup>.



### A&D-Related Objectives:

- Plant 10 billion trees across KSA by 2040.
- Going beyond smart cities, and establish 5 cognitive cities in KSA.
- Built a self-sustainable deep-sea base to drive underwater exploration.
- Establish habitats on Mars.
- Demonstrate sustainable large scale fusion power plant.
- Improving urban landscapes in Saudi cities.
- Localizing technologies and knowledge through Public Investment Fund.
- Reduce all types of pollution.
- Conserve and promote the national heritage of the Kingdom.
- Enable suitable home ownership among Saudi families.

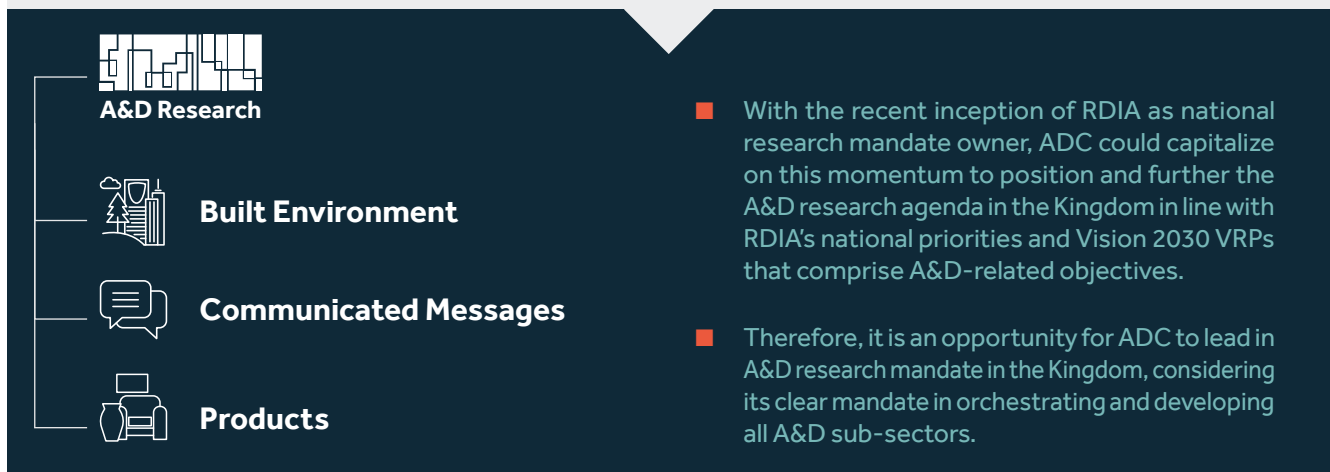


Exhibit 5: Related ADC’s strategic objective<sup>5</sup>



### Community of Innovation:





Foster and promote innovation and research to shape the future of the sector.

# ADC Has Been Defining the A&D Sector's Research Target Aspirations and Goals in Line with the National Objectives<sup>6</sup>

ADC understands the importance of research, which is part of its many initiatives, and is working towards creating a vibrant architecture and design research culture for a sustainable social, economic, and environmental impact. Through its four main research objectives (exhibit 6), ADC has put together a roadmap to accelerate the development of research ecosystem enablers. In line with these goals, the Commission identified several initiatives to drive the A&D sector forward. These initiatives are already part of the strategy, which is heavy on research components, either supporting research or conducting research<sup>7</sup>:

- 1. National Center for Documentation of A&D:**  
Create a comprehensive A&D documentation center that includes archiving A&D publications, research papers, and materials library. In addition, the center will have a centralized digital portal for easy access to A&D-related topics available to all.
  - 2. Encyclopedia of A&D:**  
Creating a national research and documentation effort to create a knowledge base in the form of an encyclopedia dedicated to the history, evolution, and regional features of KSA's A&D industry.
  - 3. Documenting KSA Regional Identities:**  
Document and promote the A&D identity of KSA by defining regional identities and demographic characteristics of major Saudi cities through R&D efforts. This includes documenting the narrative and devolution of Saudi's regional identities and contextualizing it to modern-day applications.
  - 4. A&D Sustainability Task Force & Summit:**  
Set up a Sustainability Task Force to improve KSA's overall built environment by driving awareness and encouraging sustainable designs, building, and manufacturing. Additionally, organizing an annual sustainability summit to enable knowledge sharing and encourage sustainable practices.
  - 5. A&D Research Strategy:**  
Develop an A&D research strategy to set the national research direction within the A&D sector. The strategy will support centralizing research, being directional in providing financial resources, and granting access to shared facilities to all researchers in the field.
- Overall, ADC's ambition is to be the leading central entity for A&D research, to drive discussions, to offer training and fellowships, and to streamline the use of technologies, infrastructure and information.

**Exhibit 6: ADC's research objectives<sup>8</sup>.**

 <p><b>Develop Research Infrastructure</b></p> <p>Streamline access to research facilities and labs, and increase research accessibility to create a stimulating research environment.</p>	 <p><b>Attract R&amp;D Investment</b></p> <p>Enable research and development activities across the ecosystem and attract investment contributions to boost research and drive innovation.</p>	 <p><b>Foster Research Talent &amp; Capabilities</b></p> <p>Grow and enhance research capabilities and skillset among A&amp;D practitioners, whilst nurturing research culture that cultivate a strong A&amp;D research talent pool.</p>	 <p><b>Participate in Architecture &amp; Design Dialogue</b></p> <p>Increase engagement and collaboration through events and publications that raise awareness and promote national A&amp;D research, and recognize KSA in the global architecture and design scene.</p>
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# The Lack of an Overarching Research Strategy at the National Level Limits the Activation of the Required A&D Research Enablers

We have identified six main enablers indispensable to establishing a vibrant and efficient research ecosystem and assessed their maturity within the Kingdom through a survey of their existing condition to understand their gaps and limitations (exhibit 7):

## 1. Grants and funding:

Amount of funding that any institution would give for A&D research and development.

## 2. Talent & capabilities:

Research training to build the required A&D research capabilities for the sector.

## 3. Infrastructure:

Basic research facilities that are needed to conduct and develop the architecture and design's R&D.

## 4. Technology:

Adoption and application of knowledge for practical purposes to support research efforts.

## 5. Intellectual property:

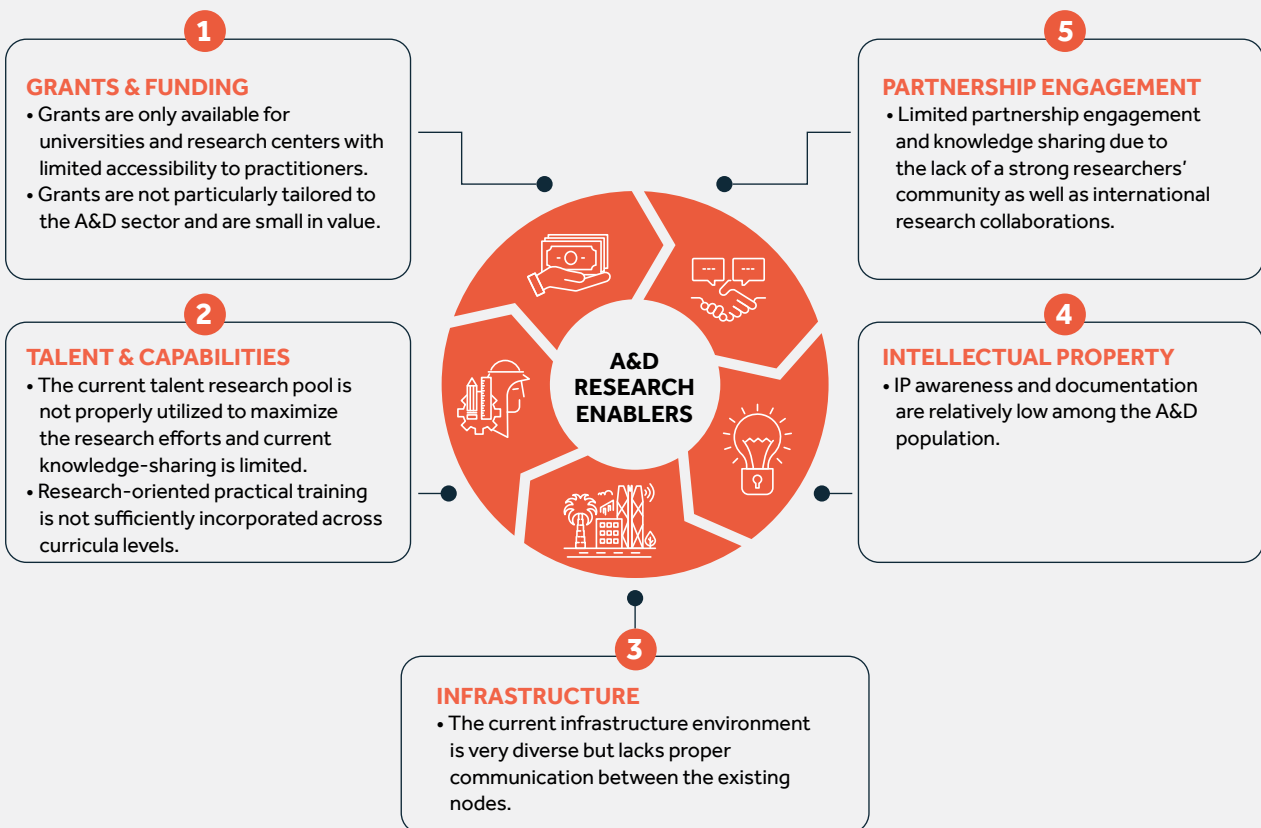
Intangible creations of the human intellect, the best-known types of copyrights, patents, trademarks, and trade secrets.

## 6. Partnership engagement:

Collaboration between A&D stakeholders to boost and grow the R&D network.

Overall, the lack of a national research strategy, lack of R&D funding, and the absence of an orchestrator overseeing the R&D within A&D have failed to enable key research and development enablers necessary to develop a mature environment.

Exhibit 7: Six main A&D research enablers key findings<sup>9</sup>.



# There are Currently Limited A&D Specific Research Grants Provided Across the Kingdom, the Largest of which is Capped at SAR7M

Currently, the MoE's Research and Development Office (RDO) offers two types of grants in KSA: The research grants, which include public, private and academic grants; and infrastructure development grants consisting of R&D facilities and programs.

Most research grants (cf exhibit 8), are not specifically tailored to A&D. Instead, they are scattered across multiple disciplines and are mostly dedicated to universities and research centers with little to no focus on practitioners. They are limited in size, with the biggest one, mainly a public sector-funded grant led by the King Abdulaziz City for Science and Technology's

(KACST) Research & Development Grant. This grant provides funds for researchers directly or through national universities or research centers, with a focus on national interest in the short and medium-term, reaching a maximum of SAR7M.

Similarly, the RDO's Social Science Research Initiative is the largest private sector grant, offering a budget of up to SAR3M over one to two years. As for academic grants, a wide selection of university grant schemes are provided; they are, however, multi-disciplinary and do not prioritize funding for A&D research.

**Exhibit 8: Research grants awarded across the A&D research ecosystem<sup>10</sup>.**

**MoC's 1139 Foundation Day Research Grant**

Grants for scientists and researchers aimed at knowledge production and research on the founding of the first Saudi state including social, political and cultural history and urbanization of the first Saudi state.

20,000 SAR

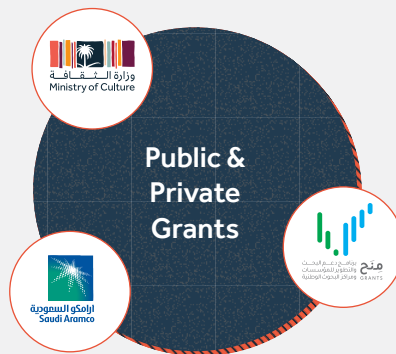
9 Months

**Saudi Aramco Grants**

Mock's for cultural, and scientific purposes in line with Saudi Aramco's business It is only available to non-profit charitable and philanthropic organizations registered with local authorities.

Not available

Not available



**KACST's Research & Development Grants**

Funds dedicated to developing scientific skills and capabilities, centered around national interest in short and medium-term eg **Giga projects development, establishment of 14 research centers around the world.**

Up to 7M SAR

Not available

Up to 2.5M SAR

Not available

**Social Science Research Initiative**

Funding varies depending on the project size and covers thematic areas, including urban development, planning and design.

Up to 3M SAR

12-24 months

Up to 1M SAR

12 months



**Prince Sultan University's Research & Initiatives Center (RIC) Publication Fees & Incentives**

Funds to encourage open-access publications of quality journal papers covering A&D in PSU or externally (eg ISI and SCOPUS).

Up to 52,500 SAR

Not available

**Universities in KSA**

Most universities have their own way of disseminating funds given for research through the application of their governing laws or the mandates put in place, typically via a vice president A&D reserved funds are very little compared to engineering and medical fields.

Not available

Not available

**KAUST's Competitive Research Funds**

Funds the university's internal projects and helps identify research programs that advance scientific knowledge in the Kingdom and worldwide.

Up to 1.5M SAR

Not available

**Annual Futures Research Grant**

Prince Mohammad Bin Fahd University, in association with the World Future Studies Federation, fund researchers to expand their disciplines with methods of future studies in the area of future world adaptability and sustainability covering smart cities.

18,000 SAR

12 months

**Legend**



Duration



Value of grant

Source(s): (10) Ministry of Education, Saudi Gazette

## A Similar Situation Can Be Observed Regarding Infrastructure Grants, with the Largest Grant Reaching SAR900k at Most

Just as research grants, infrastructure development grants are also sector agnostic. Various organizations across the Kingdom provide infrastructure grants to support the acquisition of equipment, supplies, and technology.

Infrastructure grants and funding are limited to three main initiatives (exhibit 9):

1. Research and Development Office (RDO).
2. The Cultural Projects Incentive Program under the Cultural Development Fund (CDF).

3. King Abdulaziz City for Science & Technology (KACST) research & development programs.

Lastly, the size of the grants is limited to a maximum of SAR900k, with only the Cultural Projects Incentive Program under CDF providing grants for infrastructure development for the A&D sector.

Exhibit 9: Infrastructure grants awarded across the A&D research ecosystem<sup>11</sup>.

 <p>وزارة التعليم Ministry of Education</p>	<p><b>Research &amp; Development Office (RDO) *</b></p> <ul style="list-style-type: none"> <li>Targets researchers and teams in public or private universities, and offers 2-3 years of funding that covers research equipment and consumables.</li> </ul> <p style="text-align: right;"><b>Grants up to SAR500k</b></p>
 <p>برنامج دعم البحث والتطوير للمؤسسات ومراكز البحوث الوطنية منح GRANTS</p>	<p><b>KACST Research &amp; Development Programs</b></p> <ul style="list-style-type: none"> <li>Funds human resources, equipment, and scientific trips for universities, research centers, and researchers through a variety of programs.</li> </ul> <p style="text-align: right;"><b>900k or more</b></p>
 <p>الصندوق الثقافي الثقافي CULTURAL DEVELOPMENT FUND</p>	<p><b>The Cultural Projects Incentive Program under CDF</b></p> <ul style="list-style-type: none"> <li>Provides support to qualified cultural projects across various fields, including cultural research and studies.</li> <li>Provides infrastructure support, including purchasing equipment/tools for private sector enterprises, incubators, associations, and NGOs.</li> <li>Provides support services that are specific to the industry, and technology and infrastructure needed to serve the sectors.</li> <li>Supported sectors include architecture and design (A&amp;D).</li> </ul> <p style="text-align: right;"><b>Grants to be decided upon evaluation</b></p>



### Survey Insight

69% of researchers find it hard to access financial support for scientific research in the areas of architecture and design.

# ADC is Developing Projects to Enhance the Saudi Researchers' Skill Sets

ADC Strategic Mandate includes the Vision, Mission and Strategic Objectives towards A&D research in the Kingdom. As a result, several projects were developed in three priority groups: Transformational Changes, Leading Projects, and Futuristic Ideas.

The research Skillset Development project aims to provide trainings for researchers to improve their research capabilities. Strategic partnerships with education and research entities and local government entities are vital to project success (exhibit 10).

## The project includes two components:

1. Providing researchers and practitioners with training modules on the topics of A&D research value chain throughout their career path, which will be conducted through workshops, seminars, and online courses.
2. Organizing a research writing retreats that aims to provide researchers with a supportive environment dedicated to writing.

Other A&D initiatives that ADC plans to develop include the launch of the Najdi Architecture Academy, a non-degree educational institution in charge of developing Architecture programs with a focus on practical implementation and application of the A&D frameworks and theory. Additionally, more hands-on skills are to be infused in exciting curricula to practically prepare the existing talent to drive the research sector forward.

Exhibit 10: Strategic Partnership<sup>12</sup>.

### Education & Research



Partner to jointly deliver training programs consisting of modules in A&D research and providing senior faculty academia and research writing advisors as mentors in research writing retreats.

### Local gov. Entities



الهيئة السعودية للملكية الفكرية  
Saudi Authority for Intellectual Property

Partnership with SAIP in addressing skillset gap in research translation and commercialization among A&D practitioners and researchers.

# The Kingdom’s Ecosystem Offers a Wide Range of Capabilities and Resources to Support Research Efforts but Lacks a Centralized Repository to Collect, Preserve and Share Knowledge

The A&D infrastructure is very diverse, ranging from public entities to academic and private entities such as laboratories, knowledge repositories and libraries, exhibitions, innovation centers etc.

Yet, the sector’s infrastructure is hardly accessible due to the lack of promotion of existing capabilities, operational skills, and/or collaboration, and suffers

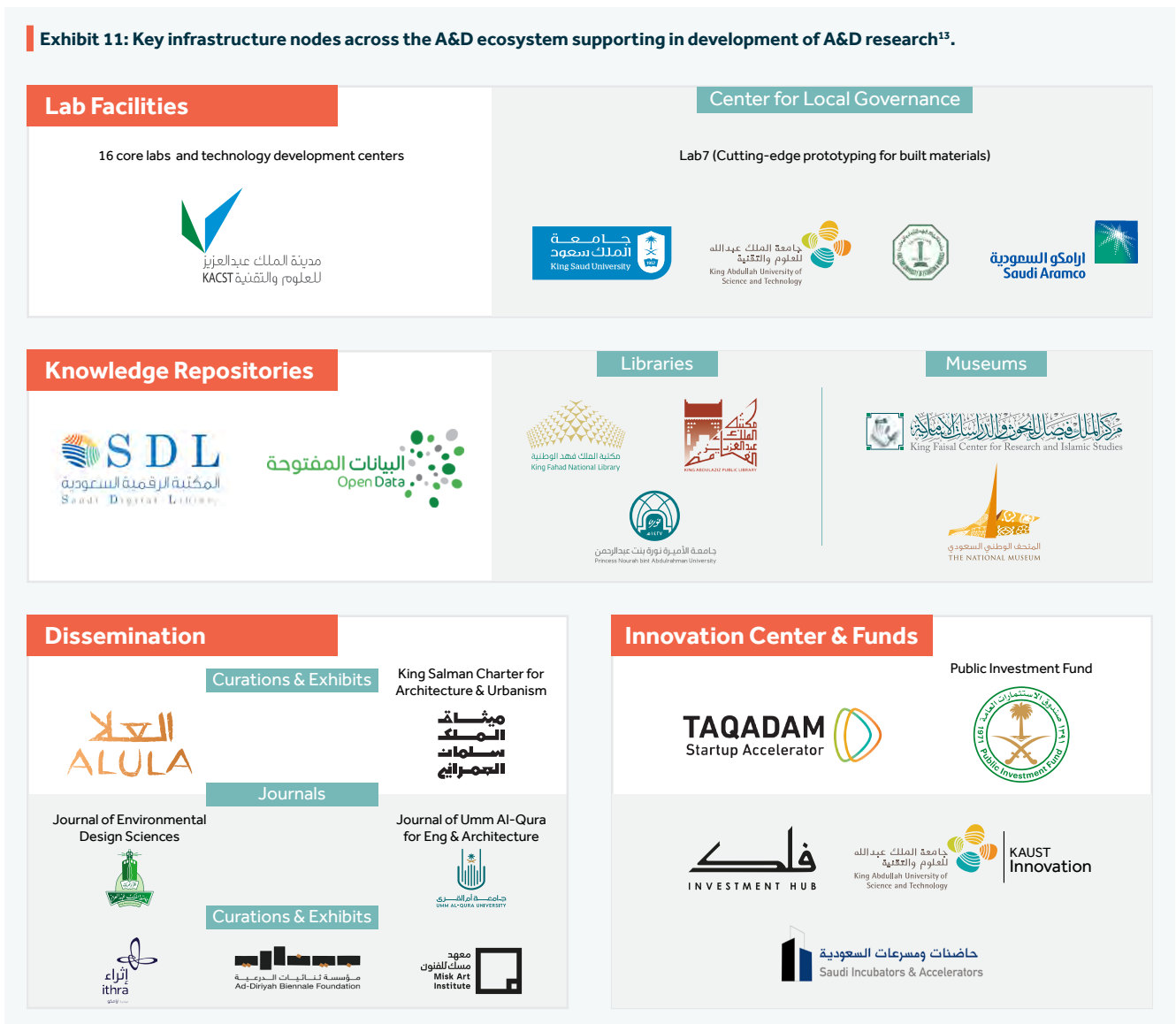
from limited communication across different infrastructure nodes.

Geographically, most of the research lab facilities are located within the King Abdulaziz City for Science and Technology (KACST), Saudi Aramco and universities specialized in A&D research, hindering the equitable spread of research-enabling facilities throughout the Kingdom.

## Survey Insight

62% of researchers are satisfied with the current level of infrastructure readiness of local universities.

Exhibit 11: Key infrastructure nodes across the A&D ecosystem supporting in development of A&D research<sup>13</sup>.



Source(s): (13) Public, academic and private entities websites



# The Kingdom Has Made Noticeable Efforts to Develop and Enrich its Intellectual Property Regulations but Still Lacks Suitable IP Protection Awareness and Focused Incentives

Today, the Kingdom has a fairly mature intellectual property (IP) ecosystem governed by the Saudi Authority of Intellectual Property (SAIP), who's in charge of granting IP Rights (IPR), including design patents and copyrights for architectural works

Currently, SAIP recognizes six main types of IPs, including Copyright, Plant Varieties, Industrial Prototypes, Trademarks, Integrated Circuits and Patents<sup>14</sup>.

1

## Copyright

A literary, visual, audio or material creative work that gives the author(s) the right of use, benefiting of the work as well preventing others from use without permission.

2

## Plant Varieties

A botanical product of a specific genotype or a set of genotypes distinguished by its characteristics and traits.

3

## Industrial Prototypes

A physical product or a design that has artistic or creative aspects that can be two-dimensional like colours or three-dimensional like shapes or surfaces.

4

## Trademarks

A symbol or word(s) registered for a specific entity or product.

5

## Integrated Circuits

An electronic circuit that performs a specific function for electronic devices.

6

## Patents

An invention stemmed from a product or process providing new features.

From a sub-sector perspective, more than half of IP applications are architecture focused (56%), followed by interior design with 19%, with the remaining 25% split across the other sub-sectors.

The majority of the A&D IPs are made up of industrial design and prototypes (83%), with the rest, split between trademarks and copyrights. The number of A&D industry samples and prototypes approved remains consistently below 10 per year, however, a

significant increase was recorded in 2021, when 31 designs were approved.

Today, the main challenge the Kingdom is facing when it comes to IP, is the lack of awareness of IP protection. Efforts are recommended to educate Saudis on the importance of protecting their IP and of having their work recognized and deposited in national libraries.



### Survey Insight

**62% of researchers are unsatisfied with the clarity of systems and procedures for registering designs and patents, and 58% of researchers find the process long and difficult.**

# Currently, the Partnership Engagement Status in the Kingdom Has Not yet Reached the Desired Maturity Level

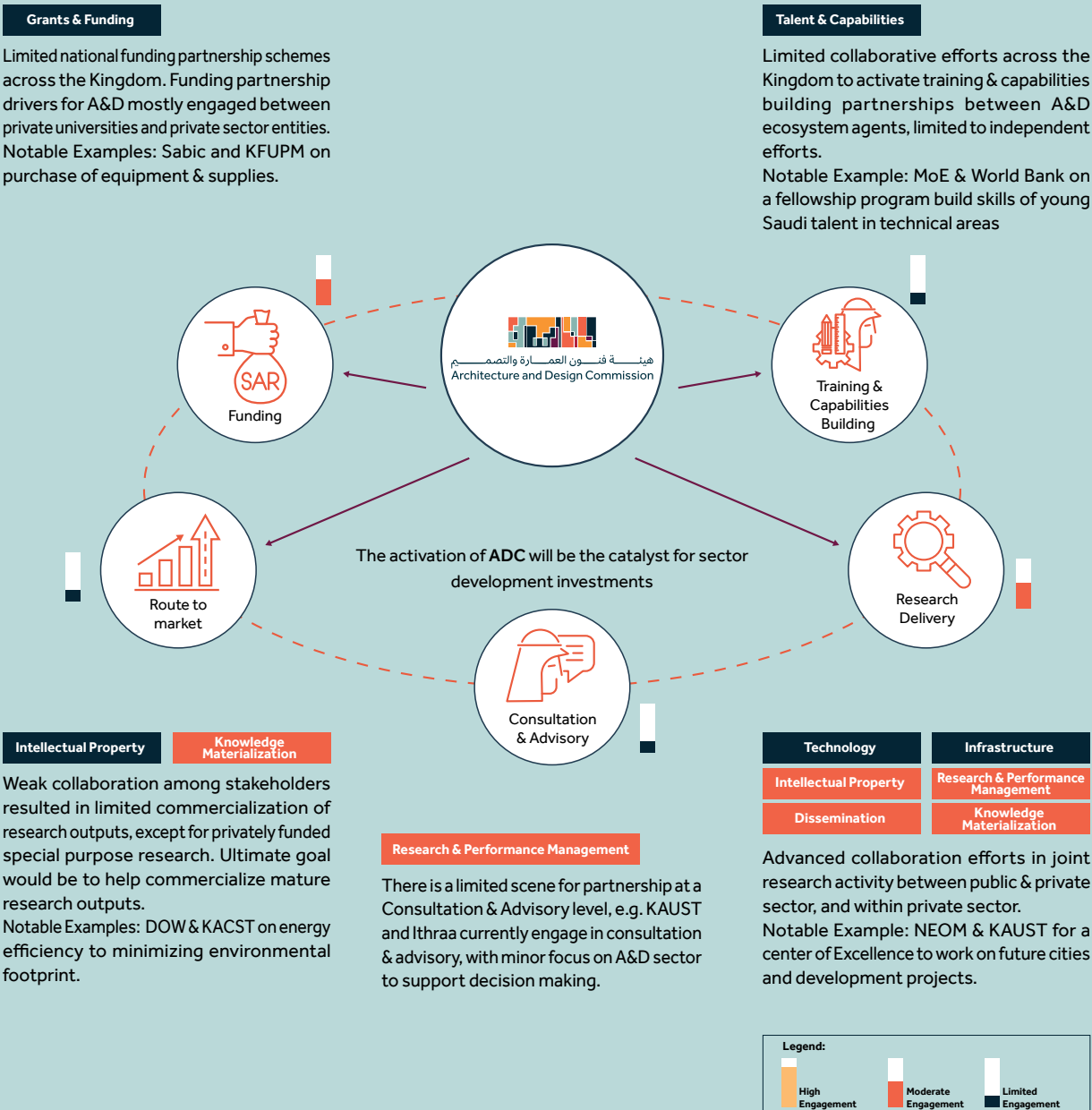
Engagement with external partners spans across knowledge sharing, research enablement, and funding topics, with ADC taking on the role of mandate owner, A&D research orchestrator, and playing an active role in partnership management.

of partnerships and collaborations (exhibit 12). Yet, stakeholders need to join forces in order to fulfil the required objectives.

Assuming the role of the activator would require ADC to build the ecosystem and lead the way in terms

Currently, in the Kingdom, the overall partnership impact levels in sector development are moderate with limited engagement from the public sector (mostly driven by the private sector universities).

**Exhibit 12: Current partnership model contribution in the Kingdom<sup>15</sup>.**



# Call-outs for Action: Research

## # Call-out for Action

- 1 With the introduction of RDIA as a national champion leading the research agenda, there is an opportunity to collaborate and include the architecture and design sector in the national focus.
- 2 Strategic partnerships with public and private sector entities can provide an opportunity to design and develop more A&D-focused research grants, with a particular focus on less privileged researchers who typically lack access to such resources. This can create a more inclusive and diverse research ecosystem that benefits both the A&D sector and the broader community.



King Fahad National Library

8

Community

Engagement

# Community Engagement

The A&D Community Engagement section details the varying A&D engagements across the national and international levels that are facilitated by both ADC and other local A&D stakeholders.

The section describes how and where local A&D communities can continue to scale their support to the Kingdom's mission across the sector, in addition to how ADC's past activities and the planned 2023 initiatives are driving this endeavour.



A&D Educators' Forum

# Overview of A&D Community Engagements in KSA



# Today, the A&D Sector in the Kingdom Consists of Various Community Engagements and Events Driven by Both ADC and the Local A&D Community at Both International and National Levels

## 01

ADC values its community and launches surveys to capture inputs and insights to help the community thrive. At present, ADC’s international and national engagements are well-balanced in covering the majority of the sub-sectors. However, being heavily involved in the sector output and demand areas of the A&D landscape highlights the potential for further involvement in the education, research, profession and business areas by offering additional platforms & opportunities for students, researchers and practitioners to connect/network.

## 02

The private sector and local community involvements appear to be lower in volume, despite their impact across all the areas of the A&D landscape. This creates a desire to be closer to the community by increasing the volume of local A&D community events, mainly through potential public/private partnerships and the launching of additional interviews, conferences, networking opportunities ...etc. These could be accomplished through hosting recognized talents and veterans to address the additional sub-sectors and drive the sector forward.

Non-Exhaustive

Exhibit 1: Mapping of all A&D engagements across the A&D Landscape<sup>1</sup>.

Education	Research	Profession	Business	Sector Output	Demand
Covers students, educators and education infrastructure	Covers researchers and research infrastructure	Covers practitioners as individuals & their qualifications and continuous development	Covers architecture and design firms and freelancers	Covers the service outcome and products produced	Covers direct demand from the general public & private
Bawtaqah <sup>2</sup>	World Urban Forum (WUF) <sup>5</sup>	Ithra <sup>8</sup>	London Design Biennale <sup>9</sup>	UAE – Expo 2020 <sup>11</sup>	
Misk Art Institute <sup>3</sup>	Saudi Architecture <sup>6</sup>		ALMASHTAL <sup>10</sup>	Venice Biennale <sup>12</sup>	
Adhlal <sup>4</sup>	Center For Local Governance <sup>7</sup>				Valencia Design Policy Conference <sup>13</sup>
		King Salman Charter Exhibition <sup>14</sup>			
		ADC Competitions & Awards <sup>15</sup>			
		Jameel Community <sup>16</sup>			
		Abdullatif Al Fozan Award for Mosque Architecture <sup>17</sup>			

### Legend

Architecture	Interior Design	Landscape Architecture	Urban Design	Industrial Design	Graphic Design	Opportunity	National	International	Community

Note(s): (A) The A&D landscape mapping is based on a sample across MoC & ADC provided data, (B) The presented community overview of events and engagements is not exhaustive  
 Source(s): (1) Internal Analysis, (2) Bawtawah, (3) Misk Art Institute, (4) Adhlal, (5) WUF, (6) Saudi Architecture, (7) Center For Local Governance, (8) Ithra (9) London Design Biennale, (10) Almashtal., (11) UAE Expo, (12) Biennale Arte, (13) Design Policy Conference, (14) KSCAU, (15) ADC, (16) Jameel Community, (17) Abdullatif Al Fozan Foundation

# ADC's International & National Engagements





# ADC Has Been Active at Both the International and National Levels to Promote the Kingdom’s A&D Sector

## 01 International Engagements

The Architecture and Design Commission has been active in pursuing several international engagements and events across the globe by participating in and promoting the local A&D Sector through various conferences, exhibitions, festivals and fairs.

The type of events span across the A&D landscape, with the sector output and demand areas being the most popular (Exhibit 2).

## 02 National Engagements

ADC has organized numerous events and competitions for the local community, particularly within the sector output and demand areas of the A&D landscape ( Exhibit 2). This helped expand the exposure and opportunities provided to the local A&D community through various financial incentives, networking events, upskilling local talent, etc.

Resulting in increasing the opportunities for the local A&D community across the general public and private stakeholders to engage in a selection of exciting and notable competitions and awards offered across the sub-sectors.

Non-Exhaustive

Exhibit 2: Mapping of ADC’s engagements across the A&D landscape<sup>18</sup>.

Education	Research	Profession	Business	Sector Output	Demand
Covers students, educators and education infrastructure	Covers researchers and research infrastructure	Covers practitioners as individuals & their qualifications and continuous development	Covers architecture and design firms and freelancers	Covers the service outcome and products produced	Covers direct demand from the general public & private
Bawtaqah	World Urban Forum (WUF) <sup>19</sup>	Itbra	London Design Biennale <sup>20</sup>	UAE – Expo 2020 <sup>21</sup>	
Misk Art Institute	Saudi Architecture		ALMASHTAL	Venice Biennale <sup>22</sup>	
Adhlal	Center For Local Governance			Valencia Design Policy Conference <sup>23</sup>	
				King Salman Charter Exhibition <sup>24</sup>	
				ADC Competitions & Awards <sup>25</sup>	
				Jameel Community	
					Abdullatif Al Fozan Award for Mosque Architecture

### Legend

Architecture	Interior Design	Landscape Architecture	Urban Design	Industrial Design	Graphic Design	Opportunity	National	International	Community

Note(s): (A) The A&D landscape mapping is based on a sample across MoC & ADC provided data  
 Source(s): (18) Internal Analysis, (19) WUF, (20) London Design Biennale, (21) UAE Expo, (22) Biennale Arte, (23) Design Policy Conference, (24) KSCAU, (25) ADC

# ADC Leads the Way in Promoting the Local A&D Sector by Actively Engaging and Participating in Numerous Renowned International Events

Through attending and participating in a variety of global conferences, exhibitions, festivals and fairs across multiple sub-sectors.

Non-Exhaustive



## London Design Biennale

London Design Biennale is a global stage for world-leading contemporary design, design-led innovation, creativity and research through promoting international collaboration and the global role of design with exhibitions and installations<sup>26</sup>.

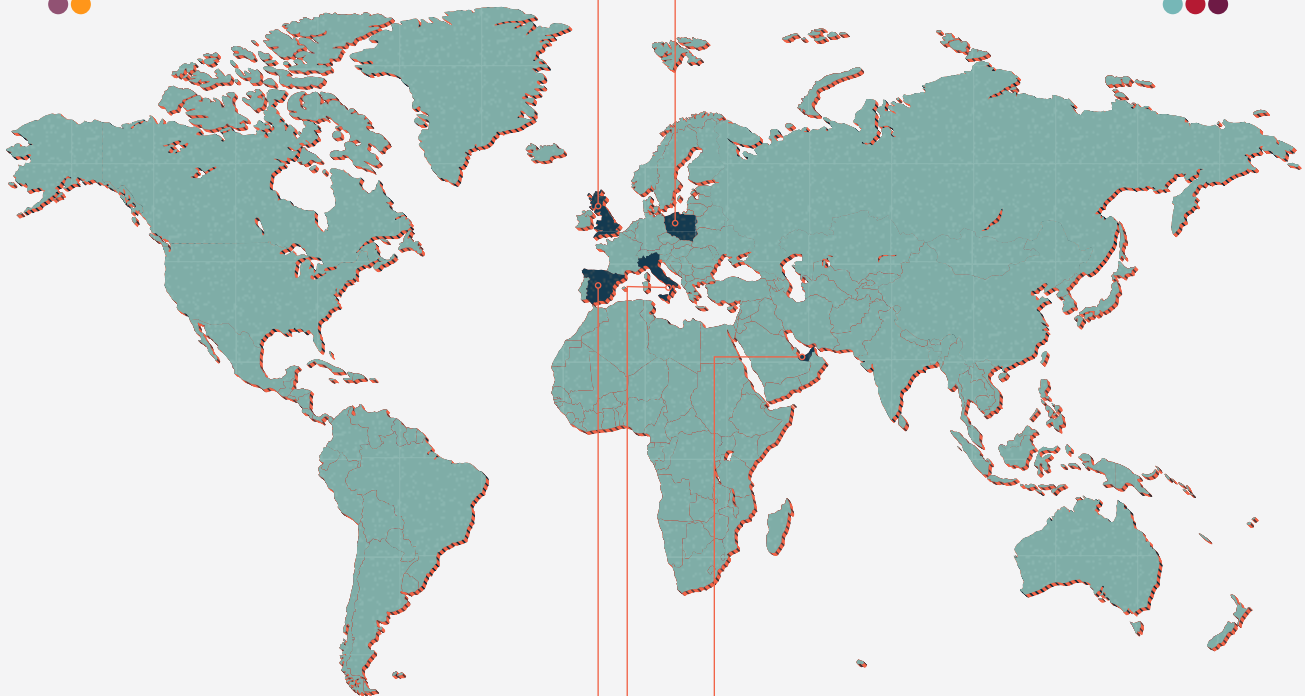
**ADC Role:** Attended the conference and networked with speakers, experts, and policymakers to collect best practices to implement in their own initiatives, as well as discuss future participation plans<sup>31</sup>.



## World Urban Forum

The World Urban Forum (WUF) in Katowice, Poland, 2022, examines rapid urbanization and its impact on cities, communities, economies, and climate change<sup>27</sup>.

**ADC Role:** Presented the King Salman Charter for Architecture and Urbanism (KSCAU) Book in the Urban Library session of 11th WUF in June 2022<sup>31</sup>.



## Valencia Design Policy Conference

The Conference provides a global platform for the exchange of ideas, insights, and best practices from different countries, regions, and cities that are developing, launching and maintaining effective design policy<sup>28</sup>.

**ADC Role:** Attended the conference and networked with speakers, experts, and policymakers to collect best practices to implement in their own initiatives, as well as discuss future participation plans<sup>31</sup>.



## United Arab Emirates – Expo 2020

The goal of the exhibition is to bring together countries, organizations, and individuals from all over the world to showcase their achievements, exchange ideas, and explore solutions to global challenges under the slogan "Connecting Minds, Creating the Future." Expo 2020 lasted for six months and hosted over 24 million visitors<sup>29</sup>.

**ADC Role:** Participated in the EMNY exhibition of the King Salman Charter within the pavilion<sup>31</sup>.



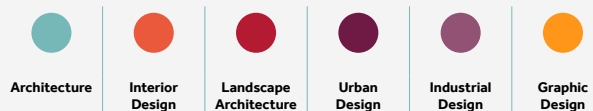
## Venice Biennale

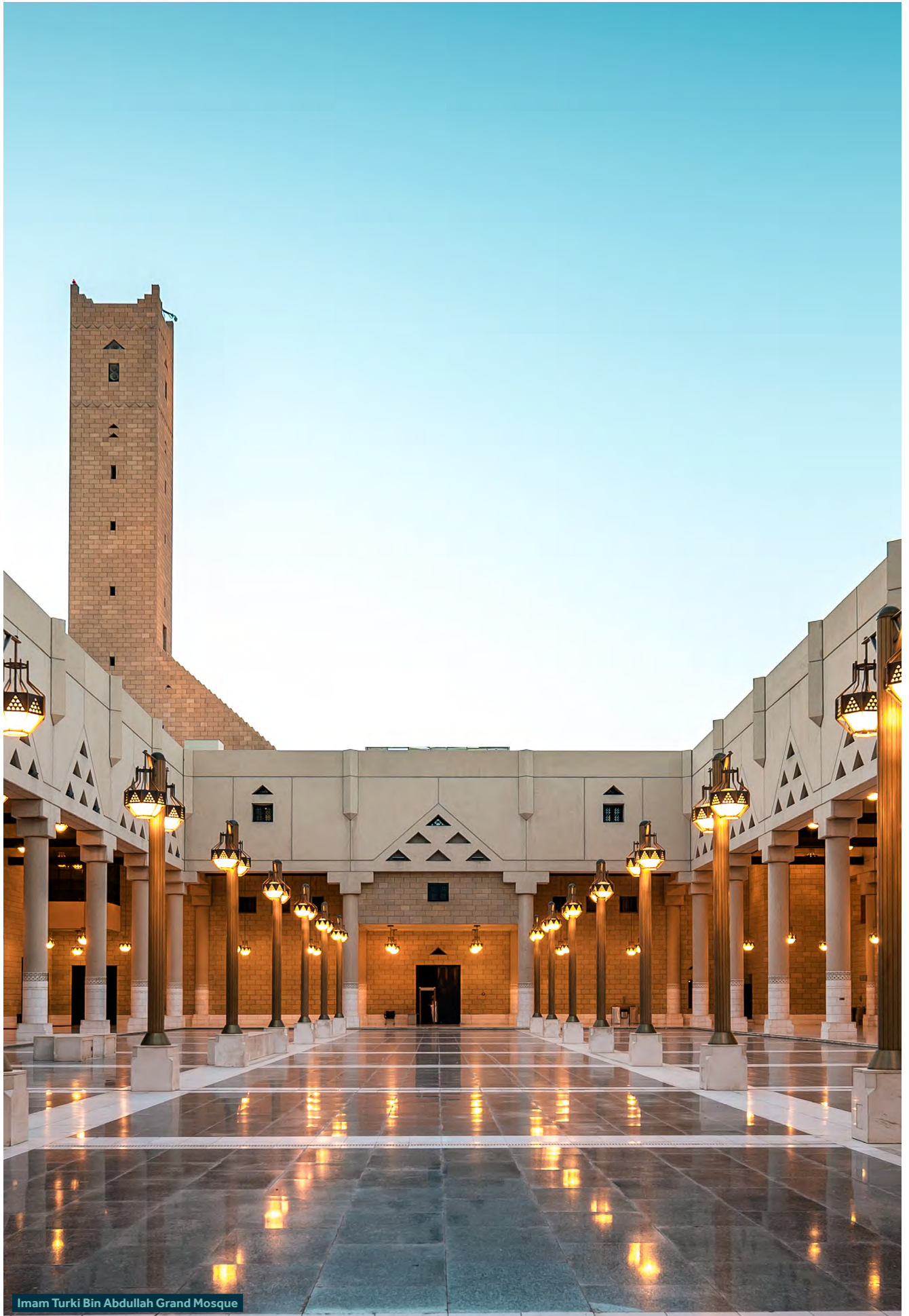
The Venice Biennale is an international cultural exhibition hosted annually in Venice, Italy, by the Biennale Foundation<sup>30</sup>.

**ADC Role:** In May 2021, ADC managed the 'Saudi National Pavilion' in the 17<sup>th</sup> edition of the Venice Biennale of Architecture named "How Will We Live Together"<sup>31</sup>



### Legend





Imam Turki Bin Abdullah Grand Mosque

# Local Community Engagements



King Fahad National Library

# The Local A&D Community Has Also Been Contributing to the Development of the Sector through Various Initiatives, yet Opportunities for Additional Involvement Remain

A variety of local community entities have been important in supporting the development of the A&D Sector through various activities.

## 01

To date, the wider local community has succeeded in enhancing the A&D sector through the active involvement of key entities offering annual conferences and events across the A&D landscape.

However, further efforts are required to increase the volume of engagements conducted across the sub-sectors to ensure the community has access to more engagement opportunities in the sector via additional partnerships, conferences, networking opportunities, events, etc (Exhibit 3).

Out of all A&D community engagements, the Misk Art institute is one of the local community's prominent players in terms of engagements. It offers the local A&D community an interconnected ecosystem of artistic support and education services and conducted over 20+ events across Art, Architecture, and Design.

Yet, to sustain the development of the A&D sector in the Kingdom, more support from the local community is needed.

Non-Exhaustive

Exhibit 3: Local A&D engagements across the A&D Landscape<sup>32</sup>

Education	Research	Profession	Business	Sector Output	Demand
Covers students, educators and education infrastructure	Covers researchers and research infrastructure	Covers practitioners as individuals & their qualifications and continuous development	Covers architecture and design firms and freelancers	Covers the service outcome and products produced	Covers direct demand from the general public & private
Bawtaqah <sup>33</sup>	World Urban Forum (WUF)	Ithra <sup>38</sup>	London Design Biennale	UAE – Expo 2020	
Misk Art Institute <sup>34</sup>	Saudi Architecture <sup>36</sup>		ALMASHTAL <sup>39</sup>	Venice Biennale	
Adhal <sup>35</sup>	Center For Local Governance <sup>37</sup>			Valencia Design Policy Conference	
				King Salman Charter Exhibition	
				ADC Competitions & Awards	
			Jameel Community <sup>40</sup>		Abdullatif Al Fozan Award for Mosque Architecture <sup>41</sup>

### Legend

Architecture	Interior Design	Landscape Architecture	Urban Design	Industrial Design	Graphic Design	Opportunity	National	International	Community

Note(s): (A) The A&D landscape mapping is based on a sample across MoC & ADC provided data  
 Source(s): (32) Internal Analysis, (33) Bawtawah, (34) Misk Art Institute, (35) Adhal, (36) Saudi Architecture, (37) Center for Local Governance, (38) Ithra, (39) Almashtal, (40) Jameel Community, (41) Abdullatif Al Fozan Foundation

# The Misk Art Institute Offers the A&D Community Appealing Events across Architecture, Art, and Design...



Misk  
Art Institute  
معهد مسك للفنون

## Overview

Misk Art Institute is a non profit cultural organization that empowers local artists through an interconnected ecosystem of support, expertise, and education to unlock opportunities and elevate the arts sector.



Architecture



Interior  
Design



Landscape  
Architecture



Urban  
Design



Industrial  
Design



Graphic  
Design

## Vision

"To empower the growth of a thriving, creative community. Making the arts accessible to all".

## Artistic Support & Education Services

The Institute offers numerous support and education services to the local A&D community, such as:

- Misk Art Grant.
- Organize Events.
- Publish Art Libraries.
- Promote Exchange through Art Residences.
- Offer Training & Development Programs.

# 20 Exhibitions

since 2019, with eight in 2022

## Exhibition Figures

Since 2019, the Misk Art Institute exhibitions have offered A&D enthusiasts opportunities to channel their creativity and ideas in contemporary conversations to express the potential of the Kingdom and the vibrancy of the region.















Misk Art Institute<sup>42</sup>

# Along with a Series of Other Local Community Entities that Have Also Contributed to Growing the Kingdom’s A&D Ecosystem across Several Sub-Sectors

The local A&D community has been important in backing the efforts across the sector through notable involvements by prominent players and 3<sup>rd</sup> party interest stemming from outside of the sector.

Non-Exhaustive

The Entity	Who They Are	Their Services
 <p>إثراء ithra</p> 	<p><b>King Abdulaziz Center for World Culture (Ithra)</b> is a Cultural Center created by Saudi Aramco aimed at promoting cross-cultural talent development and experiences through events, workshops, exhibitions etc to propel the Kingdom’s creative industries forward.</p>	<ul style="list-style-type: none"> <li>✓ Organize exhibitions</li> <li>✓ Offer Art &amp; Design courses</li> <li>✓ Organize conferences and competitions</li> <li>✓ Promote access to knowledge</li> </ul> 
 <p>العمارة السعودية</p> 	<p><b>The Saudi Architecture initiative</b> is an independent organization led by the community that aims to document and research the architectural landscape in Saudi Arabia.</p>	<ul style="list-style-type: none"> <li>✓ Produce research content on Saudi Architecture</li> <li>✓ Document and Archive Saudi Architecture</li> </ul> 
 <p>بوتقة</p> 	<p><b>Bawtaqah</b>, a youth initiative launched by Saudi students in London, was brought back to Kingdom with the aim of enriching the architectural community through various knowledge services.</p>	<ul style="list-style-type: none"> <li>✓ Organize events</li> <li>✓ Conduct weekly forum</li> <li>✓ Produce Bawtaqah Magazine</li> <li>✓ Develop educational programs</li> </ul> 
 <p>مركز الإدارة المحلية Center for Local Governance</p> 	<p><b>The Center for Local Governance</b> is the first non-profit research center that combines theory and practice, making it a partner for decision makers in setting goals across specialities in institutional building capacity and urban regional governance.</p>	<ul style="list-style-type: none"> <li>✓ Arranges annual lectures, meetings, workshops, and conferences to cover key A&amp;D topics e.g., sustainability and innovation in urban development</li> </ul> 

## Legend

Architecture	Interior Design	Landscape Architecture	Urban Design	Industrial Design	Graphic Design	Sponsored Entity	Local A&D Entity

# Along with a Series of Other Local Community Entities that Have Also Contributed to Growing the Kingdom's A&D Ecosystem Across Several Sub-Sectors

The local A&D community has been important in backing the efforts across the sector through notable involvements by prominent players and 3<sup>rd</sup> party interest stemming from outside of the sector.

Non-Exhaustive

The Entity	Who They Are	Their Services
<p>47</p>  <p>Community Jameel SAUDI</p>	<p><b>Community Jameel</b>, seeks to create job opportunities for Saudi youth in line with best global practices across various fields, including Small and Medium enterprises development, Saudisation, and training programs as per the job market demands.</p>	<ul style="list-style-type: none"> <li>✓ Support young men and women in obtaining job opportunities.</li> <li>✓ Provide training programs for employment, as well as interest-free loans.</li> </ul>
<p>48</p>  <p>Abdullatif Al Fozan Award for Mosque Architecture</p>	<p><b>Abdullatif Al Fozan Award for Mosque Architecture</b> targets the architectural, urban, and technical aspects of mosques all over the world by encouraging architects to create new designs that represent mosques in the 21st century.</p>	<ul style="list-style-type: none"> <li>✓ Offers award competitions for the A&amp;D sector for contemporary mosque designs with an architectural and social connection and the technological and the architectural forms that mosques should reflect.</li> </ul>
<p>49</p>  <p>ADHLAL</p>	<p><b>Adhlal</b> contributes to the growth and success of the Saudi design industry by tackling complex challenges in various areas ranging from education, supply chain, government regulation, career progression and business development.</p>	<ul style="list-style-type: none"> <li>✓ Raises awareness in the community, through research projects, public programs and workshops.</li> <li>✓ Serves as an anchor point between design communities and experts.</li> </ul>
<p>50</p>  <p>المشطل - ALMASHTAL -</p>	<p><b>AlMashtal</b> is a dynamic creative community, which includes workshop areas, open workspace, a library, dedicated labs and ample outdoor spaces. It serves as a home to a diverse range of talent from sectors including fashion, interiors, media and the visual and performing arts.</p>	<ul style="list-style-type: none"> <li>✓ Aims to provide practical building blocks for its members e.g., resources, tools, spaces and networks.</li> <li>✓ Stimulates members and furnishes them with an environment where their talent and creativity can thrive.</li> </ul>

## Legend



Architecture



Interior Design



Landscape Architecture



Urban Design



Industrial Design



Graphic Design



Sponsored Entity



Local A&D Entity



## Below is a Snapshot of Various A&D Events that the Local A&D Ecosystem has Experienced to Date

The local A&D community has been active in the sector through a series of engagements, events and conferences.

Non-Exhaustive

Organizing Entity	Event Name	Description	Location
<b>Ithra</b>	Graphics & Communication	A webinar where speakers examined and discussed the trends, strategies, and technologies driving the sector.	<b>Dhahran, Saudi Arabia</b>
<b>Ithra</b>	Tanween	A conference featuring a mixture of 10 international and local experts discussing and exploring "Collaboration" as a creative process.	<b>Dhahran, Saudi Arabia</b>
<b>Bawtaqah</b>	Placemaking: City Design for Public Health	A webinar for architects and urban planners with guests Dr Deepti Adlakha and Dr James Sallis.	<b>Jeddah, Saudi Arabia</b>
<b>Center for Local Governance</b>	Making Places – New Trends in Public Space Planning and Reinvention	A lecture aimed to introduce the concepts of urban innovation and public space development, by shedding light on the foundations and approaches for urban design.	<b>Saudi Arabia</b>
<b>Abdullatif Al Fozan Award</b>	International Competition of Innovation in Mosque Accessories	An innovative design competition for accessories and equipment that will help to enhance the improvability of prayer, worship, ablution, movement, visuals, audio and tangible essentials.	<b>Saudi Arabia</b>
<b>Abdullatif Al Fozan Award</b>	Future Mosque Architecture	A competition for students whereby each participant is required to propose an architectural design for a future mosque within the proposed 3D rectangular mass.	<b>Saudi Arabia</b>
<b>Almashtal</b>	RY Jumpstart Program	A three-month incubator for serious young creative professionals who are launching their own creative projects or ventures via mentorships and networking opportunities.	<b>Riyadh, Saudi Arabia</b>
<b>Misk Art Institute</b>	Misk Art Grant	The 2022 grant themed 'Saraab', called on artists across MENA to improve their artistic practices, work closely with a selection of curators and mentors, increase creative production, and provide technical & financial support to the selected applicants.	<b>Riyadh, Saudi Arabia</b>
<b>Index Saudi Arabia</b>	Index Design Talks	The INDEX Design Talks programme is an annual conference that brings together a broad range of industry stakeholders to debate key technical, aesthetic, market and strategic issues and dynamics affecting the A&D industry.	<b>Riyadh, Saudi Arabia</b>
<b>Future Landscape &amp; Playspaces</b>	The 4 <sup>th</sup> Future Landscape & Playspaces KSA	Future Landscape & Playspaces KSA is an annual event that provides a unique platform for key A&D stakeholders and decision-makers to meet, network, and discuss trends and challenges to help shape the Kingdom's future.	<b>Riyadh, Saudi Arabia</b>

Organizing Entity	Event Name	Description	Location
<b>Art Jameel</b>	Project Space Jeddah	Project Space Jeddah, supported by the British Council, hosted a three-week printmaking program that included exhibitions, talks and workshops, presented in collaboration with Highland Print Studio – a printmaking and digital imaging facility based in the Scottish Highlands.	<b>Jeddah, Saudi Arabia</b>
<b>NEOM</b>	The Line Exhibition	The Line Exhibition, hosted at the Diriyah Biennale Foundation in the Jax district, showcases detailed designs, architectural models, and informative films explaining the project in all its glory.	<b>Riyadh, Saudi Arabia</b>
<b>University of Yamamah</b>	Ongoing Events	The University of Yamamah offers students numerous opportunities to develop their skills and industry knowledge through various events to meet professionals, and innovators from the Kingdom and beyond.	<b>Riyadh, Saudi Arabia</b>
<b>Prince Sultan University</b>	Ongoing Events	Prince Sultan University facilitates a variety of themed lectures on A&D from globally renowned individuals on topics such as “the latest technologies in traditional and local construction to preserve heritage”, and “Contemporary Issues in Architecture”.	<b>Riyadh, Saudi Arabia</b>
<b>Effat University</b>	The 2 <sup>nd</sup> Memaryat International Conference	The conference focused on two central A&D themes, “Resilient Buildings and Structures: Challenges and Solutions”, and “Resilient Cities: Challenges and Solutions”.	<b>Jeddah, Saudi Arabia</b>



Wadi Hanifah



Imam Turki Bin Abdullah Grand Mosque

# 2023 ADC Initiatives & Outlook



Designthon Event

# Finally, ADC’s Calendar of Initiatives, Alongside the Ongoing local Community Efforts, Will Continue to Contribute to the A&D Ecosystem within the Kingdom and Beyond

ADC is planning a rich pipeline of exciting events to continue fuelling its contributions to creating a vibrant A&D community going forward.

## ADC Community Engagement Outlook

ADC’s calendar of initiatives showcases upcoming events as part of a five-year strategy, that will address the existing gaps in the A&D landscape<sup>54</sup>, particularly across the Education, Research and Profession areas (Exhibit 4) These will also reinforce the Sector Output and Demand areas via the promising ‘DESIGNathon’, ‘KSCAU’ and ‘Sustainability Task Force & Summit’ initiatives.

Non-Exhaustive

Exhibit 4: List ADC’s 2023 planned initiatives across the A&D landscape<sup>53</sup>.

Initiative	Sub-sectors						A&D Landscape Influence					
	Architecture	Landscape Arch	Interior Design	Urban Design & Planning	Industrial Design	Graphics Design	Education	Research	Practitioners	Business	Demand	ADC Initiatives
Educational Enrichment Programs			✓	✓	✓	✓	✓	✓	✓			
Design for Good			✓	✓	✓	✓	✓		✓			
A&D Research Strategy	✓	✓	✓	✓	✓	✓	✓	✓	✓			
A&D Events	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓
Design Masterclass & Talk Series			✓			✓	✓		✓			
Designed in Saudi (DIS)			✓	✓	✓	✓			✓			✓
National A&D Research Conference	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Saudi Design Festival			✓	✓	✓	✓			✓	✓	✓	
Design Educators Forum				✓		✓	✓					
Launching Event			✓	✓	✓	✓					✓	
King Salman Charter for Architecture & Urbanism	✓	✓									✓	✓
Sustainability Task Force & Summit	✓	✓	✓		✓		✓		✓	✓		✓
KSCAU Online Course	✓	✓					✓					
International & Local Events to Showcase Saudi Design			✓	✓	✓	✓			✓	✓	✓	
KSCAU Ambassadors	✓	✓					✓	✓	✓			
Design Leadership Program			✓	✓	✓	✓			✓			
Designathon			✓	✓	✓	✓					✓	✓
KSCAU Curriculums			✓	✓	✓	✓	✓	✓	✓			

## Subsector Legend

Architecture	Landscape Arch	Interior Design	Urban Design & Planning	Industrial Design	Graphics Design	Sector Outlook	Business	Demand	Practitioners	Research	Education	Derived Events	ADC Initiatives

Source(s): (53) Internal Analysis, (54) ADC

# ADC's Calendar of Initiatives was Developed to Continue Growing and Safeguarding the A&D Ecosystem Across All the Sub-Sectors and Affect Multiple Beneficiaries in the Process

Non-Exhaustive

Initiative <sup>55,56,57</sup>	Initiative Focus	Objectives
<b>Educational Enrichment Programs</b>	Support the A&D sector by creating special training opportunities, workshops, and studios, and offering scholarships for education and research purposes. These can be offered to design educators, professors, and decision-makers to share knowledge & improve skills.	<ul style="list-style-type: none"> <li>✓ To strengthen KSA's A&amp;D sector by developing the skills and knowledge of future practitioners as well as their educators.</li> <li>✓ Encourage more students to study and pursue a career in the A&amp;D sector and ultimately build an internationally competitive sector.</li> </ul>
<b>Design Masterclass &amp; Talk Series</b>	Design talks and masterclasses focused on the fields of graphic design and industrial design.	<ul style="list-style-type: none"> <li>✓ Bring inspirational future foresight and industry trends to increase excellence in design.</li> <li>✓ Educate students by introducing them to career starters and practicing professionals.</li> <li>✓ Engage career starters and practicing professionals on contemporary challenges that impact local communities.</li> </ul>
<b>Design Educator's Forum</b>	A program that includes workshops, forums, discussions, etc, for A&D educators in higher education institutions (HE) to improve the quality of A&D teaching and bridge the gap between the labour market and higher education provision.	<ul style="list-style-type: none"> <li>✓ Design talks and masterclasses, first focusing on the fields of graphic design and interior design.</li> <li>✓ Enhance collaboration by engaging industry and academia across the A&amp;D educational A&amp;D landscape.</li> <li>✓ Equip educators with knowledge, skills, and tools that can be implemented in the practice.</li> </ul>
<b>KSCAU Online Course</b>	KSCAU digitalized educational course that consists of a series of video lessons and practical activities to spread awareness about KSCAU approaches and practical value.	<ul style="list-style-type: none"> <li>✓ Spread awareness about KSCAU to educators in higher education.</li> <li>✓ Provide educational content to increase excellence in A&amp;D Higher Education curricula.</li> <li>✓ Provide tools and methodologies for educators to teach practical aspects of KSCAU's values.</li> </ul>

Initiative <sup>55,56,57</sup>	Initiative Focus	Objectives
<p><b>Design Leadership Program</b></p>	<p>An online program supporting practitioners across all A&amp;D sectors to develop their leadership skills.</p>	<ul style="list-style-type: none"> <li>✓ Create opportunity for leadership skills development of A&amp;D professionals.</li> <li>✓ Boost excellence in creative team management by managers' soft skills improvement.</li> <li>✓ Enhance collaboration, creativity, and innovation in the Kingdom's A&amp;D ecosystem.</li> </ul>
<p><b>Design for Good</b></p>	<p>An accumulation of various projects to encourage A&amp;D practitioners and students to use their design skills for the greater good of their communities creating social impact.</p>	<ul style="list-style-type: none"> <li>✓ The engagement will strengthen KSA's design sector through promoting and educating the community on design, encouraging locals to study and practice design, and creating a powerful name for KSA for design in the process.</li> </ul>
<p><b>Designed in Saudi (DIS)</b></p>	<p>The "Designed in Saudi" seal is an opportunity for local industrial designers to submit their designs for production and sale by applying the seal's standards, which are supervised by the Commission and monitored for compliance.</p>	<ul style="list-style-type: none"> <li>✓ Strengthen the value proposition of Saudi products.</li> <li>✓ Establish a quality control mechanism for local products.</li> <li>✓ Encourage more designers to produce locally as well as more consumers to buy from the Kingdom.</li> </ul>
<p><b>Launching Event</b></p>	<p>Launch the seal, communicate what it truly is, and promote it to stakeholders.</p>	<ul style="list-style-type: none"> <li>✓ Position the seal as the utmost design icon, highlight its benefits &amp; potential, and the certification process.</li> <li>✓ Communicate and promote DIS efforts to lead the ecosystem's growth and development.</li> <li>✓ Position DIS as a platform for quality design exposure, acknowledgment, and celebration.</li> </ul>
<p><b>International &amp; Local Events to Showcase Saudi Design</b></p>	<p>The products that get certified with the Designed in Saudi Seal and their designers will be promoted and showcased locally and internationally.</p>	<ul style="list-style-type: none"> <li>✓ To give the rightful recognition to the people behind the creation of each product, supporting them to gain visibility in the market and to boost their products' sale.</li> </ul>

Initiative <sup>55,56,57</sup>	Initiative Focus	Objectives
<b>A&amp;D Events</b>	Promotes the sector and its players by organizing and participating in A&D events locally and internationally.	<ul style="list-style-type: none"> <li>✓ Elevate the recognition of A&amp;D practitioners and their work.</li> <li>✓ Strengthen public awareness about the local A&amp;D sector.</li> <li>✓ Create opportunities for practitioners to progress in their careers.</li> </ul>
<b>Saudi Design Festival</b>	The Saudi Design Festival signifies ADC's commitment to the strategic sustainable development of the design community of the Kingdom.	<ul style="list-style-type: none"> <li>✓ Propel the Kingdom's Design Sector &amp; the local talent globally by bringing together creative international designers and industry leaders to engage, discuss and celebrate outstanding design in the Kingdom &amp; globally.</li> </ul>
<b>DESIGNATHON</b>	The Design-A-Thon initiative is an event where teams compete to solve some of the biggest social challenges in the Kingdom by bringing together representatives across the sub-sectors of design.	<ul style="list-style-type: none"> <li>✓ This initiative will support innovation in the design sector and aid in developing a generation of solutions to current challenges the industry is facing.</li> <li>✓ It aims to encourage the participation of more local talents in the sector and provide better visibility into local talents and their skills.</li> </ul>
<b>A&amp;D Research Strategy</b>	Establish a best-in-class collaborative research ecosystem to enable advancement and growth for architecture and design in the Kingdom and position ADC at the forefront of A&D research globally.	<ul style="list-style-type: none"> <li>✓ Frame national A&amp;D research policies for the research agenda.</li> <li>✓ Provide grants &amp; incentives to researchers and access to facilities &amp; equipment.</li> <li>✓ Upskill researchers, practitioners, and students through internships, teaching opportunities, and research fellowships.</li> </ul>
<b>National A&amp;D Research Conference</b>	Organizing an annual research conference for the architecture and design sector in Saudi Arabia to showcase research in the different aspects of the sector, encourage discussion, and enrich knowledge among researchers.	<ul style="list-style-type: none"> <li>✓ Promoting discussions and knowledge sharing among researchers in the field of research and development.</li> <li>✓ Publishing and showcasing the outputs of Saudi A&amp;D research by researchers locally and internationally.</li> </ul>
<b>KSCAU</b>	Create an Architectural Identity for KSA by identifying core values and key principles that resemble the "Salmani Architecture." The initiative is dedicated to the launch, projects, and service roll-out.	<ul style="list-style-type: none"> <li>✓ Elevate the quality of the Built Environment in the Kingdom.</li> <li>✓ Act as a reference for professionals and practitioners.</li> <li>✓ Encourage a design approach that is centered around people to ultimately create harmony in KSA's Architectural identity.</li> </ul>



Initiative <sup>55,56,57</sup>	Initiative Focus	Objectives
<b>KSCAU Ambassadors</b>	Increase demand and knowledge for the values of the charter.	<ul style="list-style-type: none"> <li>✓ Create a sense of agency in the citizens, feeling they have control over their Built Environment .</li> <li>✓ Contribute to creating an impact within the community by sharing expertise and knowledge .</li> <li>✓ Building an expert network.</li> </ul>
<b>KSCAU Curriculums</b>	Activate KSCAU and develop Saudi talents by providing educational opportunities.	<ul style="list-style-type: none"> <li>✓ Spread awareness about KSCAU to TD's target audience.</li> <li>✓ Promote educational content about KSCAU's values.</li> <li>✓ Provide an opportunity to investigate and practice KSCAU's values.</li> </ul>
<b>Sustainability Task Force &amp; Summit</b>	Set up and institutionalize a Task Force to drive awareness and inspire sustainable design, building & manufacturing by offering advice to local practitioners/Giga projects in KSA via stimulating research on sustainability topics and creating dedicated research chairs.	<ul style="list-style-type: none"> <li>✓ Improve KSA's overall Built Environment by supporting sustainability in the sector.</li> <li>✓ Increase practitioner's and firms' exposure to knowledge on sustainable building.</li> <li>✓ Encourage universities to include sustainability in their A&amp;D programs to inspire the youth on sustainable A&amp;D.</li> </ul>

## Finally, a Series of International A&D Events Have Been Planned for 2023

ADC's pipeline for 2023 consisted of continued efforts to engage on the international level and promote the Kingdom's A&D sector in the process.

Non-Exhaustive

Event Name	Description	Location	Dates
<b>Maison &amp; Objet</b>	At the January edition in 2023, the "Take Care!" theme will bring over 80,000 industry professionals to contribute to exceptional product offerings, illuminating the most styling and future-oriented full home decoration and design objects.	Paris, France	19 <sup>th</sup> – 23 <sup>rd</sup> January 2023
<b>Milan Triennale</b>	The Milan Triennale, is an international exhibition of art and design hosting design, architecture, and the visual, scenic and performing arts exhibitions.	Milan, Italy	8 <sup>th</sup> January - 1 <sup>st</sup> February 2023
<b>Venice Biennale of Architecture</b>	An Italian arts institution that specializes in supporting contemporary arts and holds festivals to display works of contemporary art such as painting engraving, sculpture, music, design and architecture.	Venice, Italy	18 <sup>th</sup> May - 26 <sup>th</sup> November 2023
<b>London Design Biennale</b>	The 4th edition theme will be 'The Global Game: Remapping Collaborations' The Artistic Director will be Het Nieuwe Instituut, the Dutch national museum and institute for architecture, design and digital culture, led by its General and Artistic Director, Aric Chen.	London, United Kingdom	1 <sup>st</sup> – 25 <sup>th</sup> June 2023
<b>AIGA Design Conference</b>	The annual AIGA Design Conference in 2023, brings together like-minded designers from around the world and is organized by the American Institute of Graphic Arts.	New York, United States	12 <sup>th</sup> – 13 <sup>th</sup> October 2023
<b>Design Miami</b>	Design Miami returns for its 18th edition to Miami Art Week, displaying five public shows over five days. The exhibition's curatorial director will be Wava Carpenter, as the program looks to explore the theme of 'Human-Kind, spotlighting design-led visions for a more equitable and interconnected future'.	Miami, United States	30 <sup>th</sup> November - 4 <sup>th</sup> December 2023



The curators team for Venice Biennale 2023

9

ADC

Strategy



هيئة فنون العمارة والتصميم  
Architecture and Design Commission

# ADC's Strategy Has Been Pivotal in Driving A&D Efforts Across the Sector

In line with Vision 2030, the Commission's Defined North Star Statement Will Continue to Support the Development and Empowerment of the ADC Sector for Years to Come.

We seek to support excellence in the architecture and design ecosystem, shaped by our culture, re-imagined by our ambitions, and empowered by local talent, to improve the lives of our communities, while being at the forefront of the global creative scene.



King Fahad National Library



هيئة فنون العمارة والتصميم  
Architecture and Design Commission

# ADC's Strategy Key Objectives

Actively Guiding and Supporting the A&D Community and its Initiatives Towards Six Ambitious Goals.



## Sector Development

Integrate and regulate the A&D ecosystem, and create a vibrant and healthy dialogue facilitating collaboration across the A&D landscape.



## GDP Contribution

Support the diversification of Saudi Arabia's economy by growing the Creative Industries sector:

A&D should become a major contributor to GDP and to the realization of Vision 2030.



## Talent

Educate future professionals to gain a stronger voice, improve design skills, and align their talents with evolving needs of the profession, providing them with the best opportunities and reSource(s) to thrive on the local market and global scene.



## Global Recognition

Build a regional A&D powerhouse drawing international attention to the quality of Saudi designers' achievements in A&D.



## Sustainability

Position Saudi Arabia as the regional environmental sustainability leader in A&D.



## Community of Innovation

Foster and promote innovation and research in A&D to shape the future of the sector, collaborating with the most brilliant minds and always reminiscent of the Saudi history.



هيئة فنون العمارة والتصميم  
Architecture and Design Commission

# ADC's Strategy Beneficiaries and Ecosystem Support

The Six Ambitious Objectives Set Will Benefit the Whole A&D Ecosystem and Play a Key Role in Furthering the Success of Our Ambitious Sector Going Forwards

	Government	Academia	Practitioners	Market Stakeholders	Community	Engagement
How the Ecosystem Benefit	Support in shaping A&D sector regulations.	Support in shaping A&D curricula.	An empowering environment.	Higher productivity and efficiency of A&D.	Better Built Environment and quality of life.	Increased interest in A&D topics.
How the Ecosystem Supports?	Enforce the application of A&D regulations and laws.	Promote higher quality in A&D education.	Support the A&D sector growth.	Grant better opportunities to local A&D.	Embrace Saudi local identity in A&D.	Promote a sense of national identity.



10

Appendices



# A&D Education Section Appendix



## Data Received from 17 A&D Universities through the Universities Forms Surveys

Name of University	Region	Number of A&D Students
Dar Al-Hekma University	Makkah Region	103
Effat University	Makkah Region	360
Imam Abdulrahman Bin Faisal University	Eastern Region	907
Jeddah University	Makkah Region	329
King Abdulaziz University	Makkah Region	32
King Fahd University of Petroleum and Minerals	Eastern Region	70
King Khaled University	Asir Region	98
King Saud University	Riyadh Region	512
Majmaah University	Riyadh Region	27
Prince Sultan University	Riyadh Region	168
Qassim University	Al-Qassim Region	169
Tabuk University	Tabuk Region	289
Taibah University	Medina Region	175
Umm Al-Qura University	Makkah Region	300
University of Business and Technology	Makkah Region	127
University of Hail	Ha'il Region	228
Yanbu University College	Medina Region	122
<b>Total</b>		<b>4016</b>

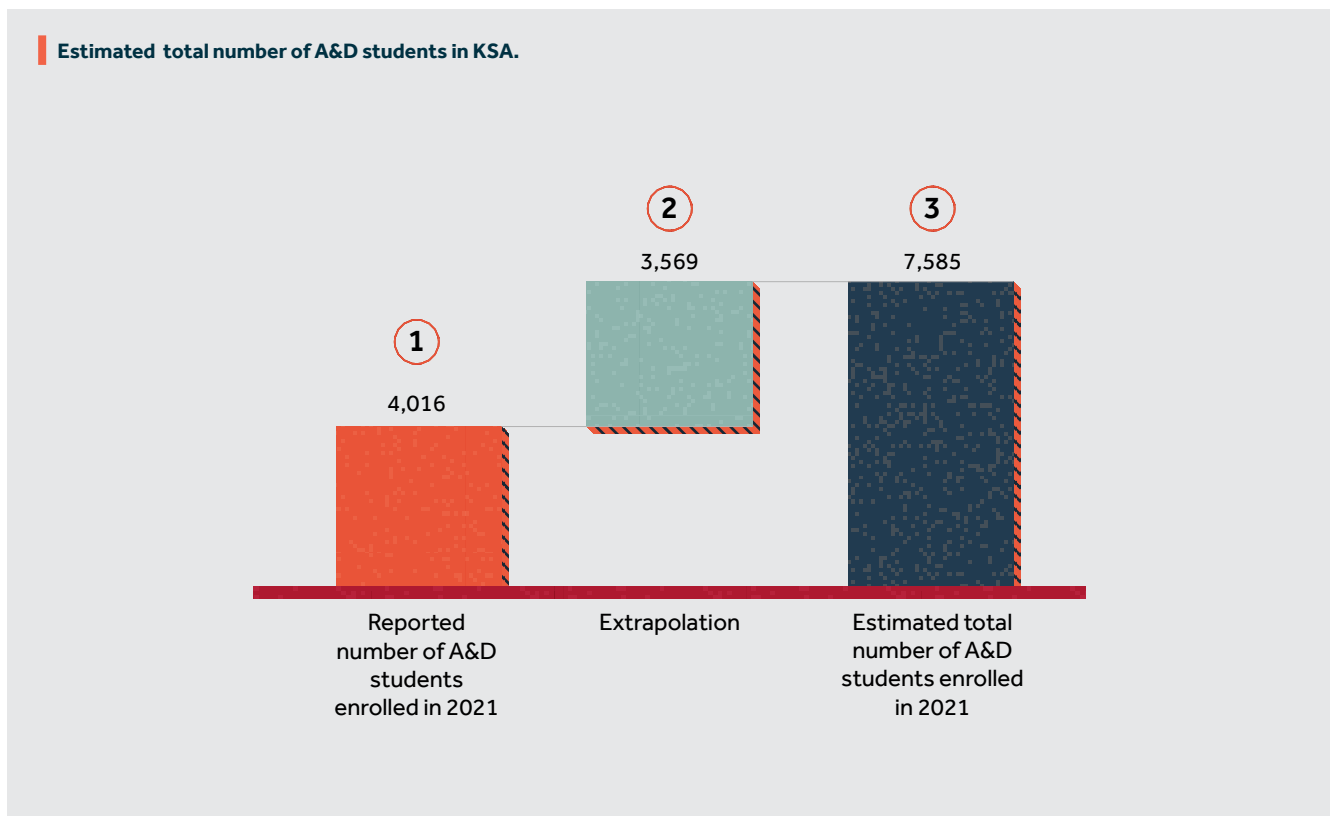
## List of Completely Accredited Programs

Name of University	Degree Program	Sub-Sector	Degree	Local Accreditation	International Accreditation
<b>Dar AlUloom University</b>	Bachelor in Architecture Engineering	Architecture	Bachelors		NAAB
<b>Effat University</b>	Bachelors of Science in Architecture	Architecture	Bachelors	NCAAA	NAAB
<b>Effat University</b>	Bachelors of Science in Design (Can choose between two tracks: Interior Design or Product Design)	Interior Design	Bachelors	NCAAA	
<b>Effat University</b>	Bachelors of Science in Design (Can choose between two tracks: Interior Design or Product Design)	Industrial Design	Bachelors	NCAAA	
<b>Effat University</b>	Masters of Science in Urban Design	Urban Design & Planning	Master	NCAAA	
<b>Imam Abdulrahman bin Faisal University</b>	Bachelor of Interior Design (BSc)	Interior Design	Bachelors	NCAAA	
<b>Imam Abdulrahman bin Faisal University</b>	Bachelor of Graphic Design and Multimedia (BSc)	Graphic Design	Bachelors	NCAAA	
<b>Imam Abdulrahman bin Faisal University</b>	Bachelor of Architecture	Architecture	Bachelors		NAAB
<b>Imam Abdulrahman bin Faisal University</b>	Bachelor of Urban and Regional Planning	Urban Design & Planning	Bachelors	NCAAA	
<b>Imam Abdulrahman bin Faisal University</b>	PhD in Urban and Regional Planning	Urban Design & Planning	PHD	NCAAA	
<b>Imam Abdulrahman bin Faisal University</b>	Bachelor of Landscape Architecture	Landscape Architecture	Bachelors	NCAAA	
<b>Imam Abdulrahman bin Faisal University</b>	Bachelor of Interior Architecture	Architecture	Bachelors	NCAAA	
<b>Jazan University</b>	Bachelors in Architecture	Architecture	Bachelors	NCAAA	

Name of University	Degree Program	Sub-Sector	Degree	Local Accreditation	International Accreditation
<b>Jubail University College</b>	Bachelor of Science in Interior Design	Interior Design	Bachelors	NCAAA	
<b>King Saud University</b>	Bachelor in Architecture	Architecture	Bachelors	NCAAA	NAAB
<b>King Saud University</b>	Bachelors of Urban Planning,	Urban Design & Planning	Bachelors	NCAAA	
<b>King Fahad University of Petroleum and Minerals</b>	Bachelor of Architecture	Architecture	Bachelors	NCAAA	
<b>King Abdulaziz University</b>	Bachelors in Landscape Architecture	Landscape Architecture	Bachelors	NCAAA	
<b>King Abdulaziz University</b>	Bachelors in Interior Design and Furniture	Interior Design	Bachelors	NCAAA	
<b>King Abdulaziz University</b>	Masters in Interior Design and Furniture	Interior Design	Master	NCAAA	
<b>Prince Sultan University</b>	BS in Architecture	Architecture	Bachelors	NCAAA	
<b>Prince Sultan University</b>	BS in Interior Design	Interior Design	Bachelors	NCAAA	
<b>Princess Noura Bint Abdulrahman University</b>	Bachelor's Degree in Art and Design, Major: Graphic Design and Digital Media	Graphic Design	Bachelors	NCAAA	
<b>Prince Mohamad bin Fahad University</b>	Bachelors of Science in Interior Design (BSc)	Interior Design	Bachelors		CIDA
<b>University of Business &amp; Technology</b>	Bachelor of Science in Graphic Design	Graphic Design	Bachelors	NCAAA	

# Student Number - Approach

- 1 Reported number of A&D students, based on the University Forms filled by A&D universities. This number only covers 17 universities out of a total of 34 A&D universities for the academic year of 2021/2022
- 2 To estimate the remaining number of students enrolled in the remaining 17 A&D universities who did not complete the university forms, we:
  - Grouped the universities as per their geographical location
  - Extrapolated the total number of A&D students per region based on the total number of students per university and the total number of students holding a Bachelor's degree, as provided by the MoE
- 3 This figure represents the total estimated number A&D students in the Kingdom for the 34 universities in 2021



# A&D Community Engagement Section Appendix



# In Line with its Vision, ADC Established Six Key Strategic Programs to Cover the End-to-End A&D Sector, Impacting Education, Practitioners, Businesses and Events



## A&D Sector Regulation

A program focused on the development of a clear and comprehensive set of regulations and guidelines for the A&D sector.

### INITIATIVES

- A&D Policy Development.
- A&D Academic Development.



## A&D Engage

A program about developing an attractive calendar of A&D events, awards, exhibitions, etc both at the national and international scene.

### INITIATIVES

- A&D Events.
- Design for Good.
- A&D Competitions & Awards.
- A&D Design-A-Thon.



## A&D Sector Development

A program that stimulates sector development and enables industry practitioners to create a greater impact on the communities & society.

### INITIATIVES

- King Salman Charter for AU.
- Designed in Saudi.
- A&D Sector Professional Associations.
- A&D Sustainability Task Force & Summit.
- Cultural Assets Enrichment.
- Urban Transformation.
- Center for Arabic Typography.



## A&D Content Development

A program that fosters consolidation, creation and promotion of new cultural content about architecture and design in the Kingdom.

### INITIATIVES

- A&D Research Strategy.
- National Center for Documentation of A&D.
- Architectural Tourism.
- Documenting KSA Regional Identities.
- Encyclopedia of A&D.
- Audio Visual Content Development.
- Architecture & Design Museum.
- Design Magazine.



## A&D Activation

A program about activating the Commission, focusing on communication and internal initiatives to ramp up the operating model.

### INITIATIVES

- A&D Practitioner & Firm Registration.
- ADC Communication Strategy.
- ADC Market Research.
- Strategic Partnerships Activation.



## A&D Education & Career

A program dedicated to supporting local practitioners on the end-to-end professional journey from education to career progression.

### INITIATIVES

- A&D Incubator & Accelerator.
- National A&D Platform Add-Ons.
- Youth A&D Creativity Development.
- Internship & Advisory Programs.
- Continuous Professional Development.
- Educational Enrichment Programs.
- Najdi Academy for Architecture.

# 11

## Methodology, Glossary, and Sources



# Data Source(s) – Entities

Number	Entity
1	Education and Training Evaluation Commission (ETEC)
2	General Authority for Statistics (GSTAT)
3	Ministry of Commerce (MC)
4	Saudi Council of Engineers (SCE)
5	Zakat, Tax & Customs Authority (SCE)
6	Ministry of Municipal & Rural Affairs (MoMRA)
7	Saudi Authority for Intellectual Property (SAIP)
8	Ministry of Human Resources and Social Development (MHRSD)
9	Ministry of Education (MoE)
10	King Abdulaziz & his Companions Foundation for Giftedness & Creativity
11	Saudi Conventions & Exhibitions General Authority
12	Small & Medium Enterprises General Authority

# Data Source(s) – Universities

Number	University
1	AlFaisal University
2	Aljouf University
3	Beeshah University
4	Dar Al-Hekma University
5	Effat University
6	Hafr Al Batin University
7	Imam Abdulrahman Bin Faisal University
8	Jazan University
9	King Abdulaziz University
10	King Fahd University of Petroleum & Minerals
11	King Khaled University
12	King Saud University
13	Majmaah University
14	Najran University
15	Northern Border University
16	Prince Mohammad Bin Fahd University
17	Prince Muqrin University
18	Prince Sattam Bin Abdulaziz University
19	Prince Sultan University
20	Princess Nourah University
21	Qassim University
22	University of Tabuk
23	Taibah University
24	University of Business and Technology
25	Umm Al-Qura University
26	University of Hail
27	University of Jeddah
28	Yanbu University College

# Glossary

Term	Definition
ADC	Architecture and Design Commission
A&D	Architecture and Design
Bn	Billion
Built	Architecture, Urban planning, Landscape architecture and Interior design
c	Circa
CAGR	Cumulative Annual Growth Rate
CDF	Cultural Development Fund
CIDA	The Council for Interior Design Accreditation (CIDA) is an independent, non-profit accrediting organization for interior design education programs at colleges and universities in the United States and internationally
CPD	Continuing Professional Development
EETEC	Education and Training Evaluation Commission
FDI	Foreign Direct Investments
GCC	Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE)
GDP	Gross Domestic Product
Giga project	Costing more than \$10B and have nonlinearities that mega projects do not
GOSI	General Organization of Social Insurance
GSTAT	General Authority for Statistics
HCDP	Human Capability Development Program
IP	Intellectual Property
IPR	Intellectual property rights
K	Thousand
KACST	King Abdulaziz City for Science and Technology
KAUST	King Abdullah University of Science and Technology
KFUPM	King Fahd University of Petroleum & Minerals

# Glossary

Term	Definition
KSA	Kingdom of Saudi Arabia
KSCAU	King Salman Charter for Architecture and Urbanism
LEED	Leadership in Energy and Environmental Design
M	Million
MC	Ministry of Commerce
MHRSD	Ministry of Human Resources and Social Development
MICE	Meetings, incentives, conferences and exhibitions
MISA	Ministry of Investment of Saudi Arabia
MoC	Ministry of Culture
MOH	Ministry of Health
MoMRAH	Ministry of Municipal and Rural Affairs
MSc	Master of Science
NAAB	The National Architectural Accrediting Board is the oldest accrediting agency for architectural education in the United States
NCAAA	National Commission for Academic Accreditation and Assessment is the school accreditation facility for the nation of Saudi Arabia
PhD	Doctor of Philosophy
PIF	Public Investment Fund
PII	Professional Indemnity Insurance
Practitioner	Any person practicing architecture and design job
R&D	Research & Development
RDIA	Research, Development & Innovation Authority

# Glossary

Term	Definition
RDO	Research & Development office
RIC	Prince Sultan University's Research & Initiatives Center
SABIC	Saudi Basic Industries Corporation
SAIP	Saudi Authority of Intellectual Property
SAR	Saudi Arabian Riyal
SCE	Saudi Council of Engineers
SCEGA	Saudi Conventions and Exhibitions General Authority
SDC	Saudi Downtown Company
Sqm	Square meter
Tn	Trillion
TVTC	Technical & Vocational Training Corporation
USGBC	the United States Green Building Council
VAT	Value-added tax
ZATCA	Zakat, Tax and Customs Authority

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# Report Sources

To Build the Report, We Collected and Analyzed Several Sets of Data from Numerous Governmental Entities, Universities, International Organizations and Public Platforms

Non-Exhaustive

## Government Entities

هيئة تقويم التعليم والتدريب  
 Education & Training Evaluation Commission

الهيئة العامة للإحصاء  
 General Authority for Statistics

وزارة التجارة  
 Ministry of Commerce

الهيئة السعودية للمهندسين  
 SAUDI COUNCIL OF ENGINEERS

هيئة الزكاة والضريبة والجمارك  
 Zakat, Tax and Customs Authority

وزارة الشؤون البلدية والقروية  
 Ministry of Municipal & Rural Affairs

الهيئة السعودية للملكية الفكرية  
 Saudi Authority for Intellectual Property

الموارد البشرية والتنمية الاجتماعية  
 Ministry of Education

مؤسسة الملك عبدالعزيز ورجاله للموهبة والإبداع  
 King Abdulaziz & his Compagnons Foundation for Giftedness & Creativity

الهيئة العامة للمعارض والمؤتمرات  
 SAUDI CONVENTIONS & EXHIBITIONS GENERAL AUTHORITY

منشآت  
 monsha'at  
 الهيئة العامة للمنشآت الصغيرة والمتوسطة  
 Saudi Small and Medium Enterprises General Authority

هيئة تنمية البحث والتطوير والابتكار  
 Research Development and Innovation Authority

## International Organizations



## Public Platforms



Survey Responses



Focus Groups

- Practitioners.
- Students.
- Academics & Researchers.
- Beneficiaries.

# This Report Followed a Four-Step Methodology to Deliver a Comprehensive View of the A&D Sector Landscape in the Kingdom

**01** Scope Definition

## Identification and definition of the report's scope

Benchmarked over 20 A&D industry reports across seven countries to learn and apply best practices in order to identify and define the right scope and structure of this Report:

- A&D Outlook.
- Business.
- Practitioners.
- Education.
- Research.
- Community Engagement.

**Outcome**

Defined scope & structure




**02** Scope Definition

## Identification and definition of the report's scope


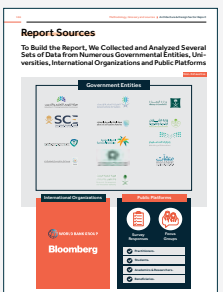
Collected the relevant Data for the A&D sector through the following:

1. Sending out data requests to relevant governmental entities.
2. Developing and sending industry surveys co-developed with ADC to all the architecture and design Stakeholders.
3. Desktop research leveraging data from leading international organizations.

Please cf further details on survey data on the next page

**Outcome**

Data collected from all stakeholders

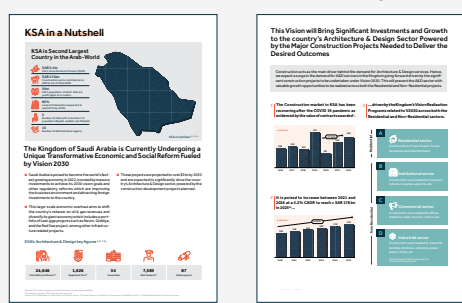
**03** Data Reconciliation

## Clean-up and rationalization of the received data

Cleaned and reconciled all the received data from step 2, and leveraged market sizing exercise where needed to prepare the data for analysis and application.

**Outcome**

Clean and structured data for analysis



**04** Data Analysis

## Report development leveraging the cleaned-up data

Finally, analysed and applied the structured and cleaned data to the development of this Report through creating a comprehensive storyline, supporting the findings, and providing insightful analysis.





**Outcome**








Completed analysis



# The Survey Followed a Four-Step Methodology to Ensure Accuracy and Easiness of Data Collection and Processing

We have identified the four sections of the survey that will be used across surveys formats. For the objective of narrowing down the most essential information to capture during the surveying process, we have identified the following two key dimensions to match the surveys questions against them through developing the below matrix and identifying the key questions for each area for the targeted surveys.

 <p><b>Introduction &amp; Participant Consent</b></p> <p>Brief introduction about ADC, market research initiative and consent that participant agrees to participate in the survey.</p>	 <p><b>Classification</b></p> <p>Identifying questions to help segmenting the surveys responses to different categories.</p>	 <p><b>Surveys Questions</b></p> <p>Survey targeted question segmented based on the focus areas.</p>	 <p><b>Closing</b></p> <p>Thanking paragraph to the participants for the time taken to fill in the survey and links to ADC website and other social media channels.</p>
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	 <b>Beneficiaries</b>				
	Professionals	Academic Staff & Researchers	A&D firms	Students & Fresh Graduates	Community & End users
 <b>Focus Areas</b>	<ul style="list-style-type: none"> <li>Challenges facing job seeker.</li> <li>Average duration to find a job.</li> <li>Average salaries and benefits.</li> <li>Quality of workplace.</li> <li>Satisfaction of career growth support.</li> </ul>	<ul style="list-style-type: none"> <li>Excepted required market capabilities.</li> <li>A&amp;D disciplines and overall satisfaction and coverage.</li> <li>Most common research topics in the filed.</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction of the overall market Professionals.</li> </ul>	<ul style="list-style-type: none"> <li>Average A&amp;D graduates' salaries.</li> <li>Top ten skills required for A&amp;D fresh gradates.</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction of the overall A&amp;D professionals in the local market.</li> <li>Easiness of feting the services.</li> </ul>
 <b>Labor Market</b>	<ul style="list-style-type: none"> <li>Satisfaction of career growth support.</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction with the overall education curriculum.</li> <li>Challenges facing A&amp;D educational community.</li> <li>Most common A&amp;D training courses.</li> </ul>	<ul style="list-style-type: none"> <li>Missing market trainings, capabilities and skills.</li> <li>Clarity and alignment .</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction of the provided academic curriculum.</li> <li>Perception of the A&amp;D majors .</li> </ul>	<ul style="list-style-type: none"> <li>Understanding of different A&amp;D academic Specialties.</li> </ul>
 <b>Academia &amp; Training</b>	<ul style="list-style-type: none"> <li>Educational curriculum and required market experience .</li> <li>Average training hours per year.</li> <li>Overall Satisfaction.</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction with the overall education curriculum.</li> <li>Challenges facing A&amp;D educational community.</li> <li>Most common A&amp;D training courses.</li> </ul>	<ul style="list-style-type: none"> <li>Missing market trainings, capabilities and skills.</li> <li>Clarity and alignment .</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction of the provided academic curriculum.</li> <li>Perception of the A&amp;D majors .</li> </ul>	<ul style="list-style-type: none"> <li>Understanding of different A&amp;D academic Specialties.</li> </ul>
 <b>Business Environment</b>	<ul style="list-style-type: none"> <li>How many competitions.</li> <li>Journey satisfaction/ quality of the competitions/ rewards.</li> </ul>		<ul style="list-style-type: none"> <li>Expected revenues and operational losses.</li> <li>Understanding of requirements.</li> <li>Contracts templates/ top reasons of conflicts.</li> </ul>		<ul style="list-style-type: none"> <li>Average services prices.</li> <li>Challenges faces before/ during/after the services selling process.</li> <li>Most required A&amp;D services in the market.</li> </ul>
 <b>Governmental Services</b>	<ul style="list-style-type: none"> <li>Registration process clarity of requirements (e.g., levels, exams, etc).</li> <li>Sectors specific polices fit.</li> </ul>		<ul style="list-style-type: none"> <li>Satisfaction rate with registration process.</li> <li>Overall feedback on the related A&amp;D policies.</li> </ul>	<ul style="list-style-type: none"> <li>Easiness applying for job finding support services (MHRSD/Hadaf).</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction of the government monitoring process.</li> </ul>
 <b>Events, Conferences &amp; Associations</b>	<ul style="list-style-type: none"> <li>Number of total events attended.</li> <li>Common topics and overall experience evaluation and knowledge gained.</li> </ul>	<ul style="list-style-type: none"> <li>Number of evets targets academic staff and researchers.</li> <li>Common topics and overall experience evaluation and knowledge gained.</li> </ul>	<ul style="list-style-type: none"> <li>Number of events targets A&amp;D firms and freelancers.</li> <li>Common topics and overall experience evaluation and knowledge gained.</li> </ul>	<ul style="list-style-type: none"> <li>Number of evets targets students and fresh graduates.</li> <li>Common topics and overall experience evaluation and knowledge gained.</li> </ul>	<ul style="list-style-type: none"> <li>Number of evets targets overall awareness about the sector.</li> <li>Common topics and overall experience evaluation and knowledge gained.</li> </ul>



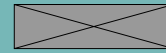
# The Survey Was Launched in April 2022 and Data Was Collected from A&D Business Owners, Practitioners, Students Graduates and Researchers



No of visitors

**18,565**

Total number of users that entered the website  
(Based on Google Analytics)



No of views

**21,273**

Total number of users views on the website  
(Based on Google Analytics)



Total participation

**1,013**

Total number of users participation on the website  
(Based on Razeen system)



Launch date

**18 - 04 - 2022**

- 52 A&D construction and design beneficiary.
- 53 A&D business owners or A&D office.
- 312 A&D practitioner.
- 458 A&D students and recent graduates.
- 138 A&D researcher.

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