



Quality Of Life  
Program

# QUALITY OF LIFE PROGRAM 2020 DELIVERY PLAN





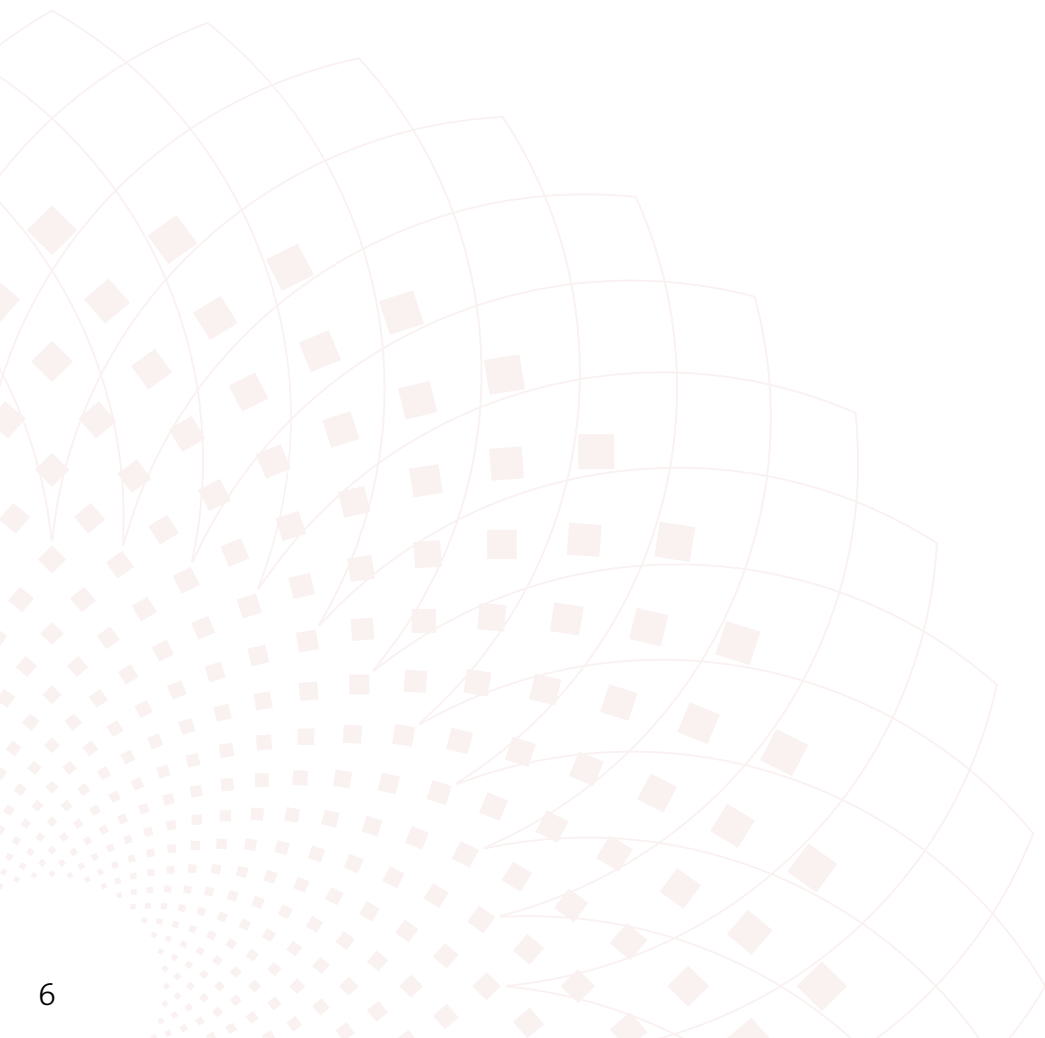
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# PROGRAM (VRP) SCOPE



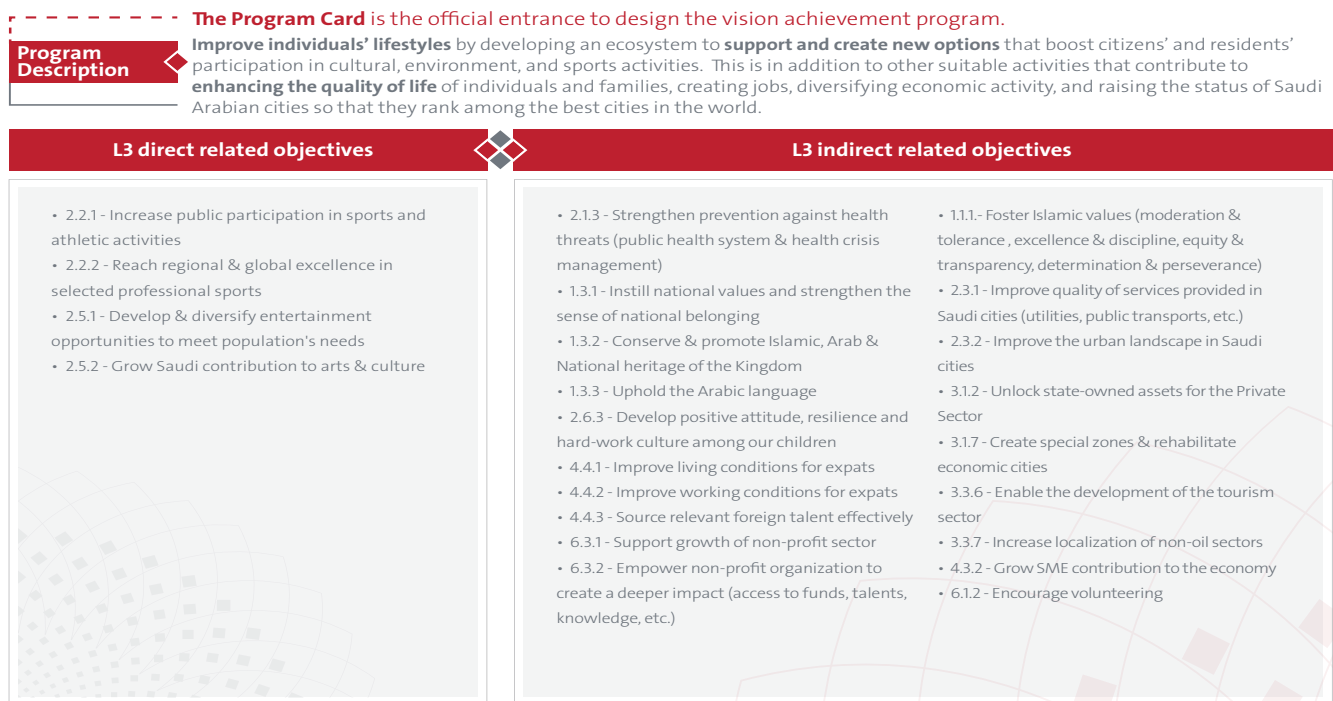
# 1. The Quality of Life Program 2020 Scope

## 1.A. Introduction to the Quality of Life Program 2020

The Council of Economic Affairs and Development has defined 12 Vision Realization Programs (hereinafter VRP) of strategic importance for the government of Saudi Arabia in order to achieve the objectives established in Vision 2030. Among those 12 Programs is the Quality of Life Program 2020. This Program mainly focuses on making Saudi Arabia a top living destination for both Saudi citizens and residents. Based on the Program description within the Program card (see Figure 1), this Program will focus on two aspects:

- **Improving individuals' lifestyle** – Developing an ecosystem to support and create new options that boost citizens' and residents' participation in cultural, entertainment, and sports activities.
- **Enhancing quality of life** – Developing suitable activities that contribute to enhancing the quality of life of individuals and families, creating jobs, diversifying economic activity, and boosting the status of Saudi Arabian cities so that they rank among the best cities in the world.

Figure 1: Program Card



While the Program description mentions both lifestyle and quality of life, the Level 3 direct objectives assigned to the Program focus mostly on improving lifestyle (through sports, entertainment and arts and culture). Initially the Program used this lifestyle concept as the main concept for developing its strategy and building the delivery plan. However, based on guidance from the Strategic Management Committee (SMC), it was decided that realizing the full Program vision requires a broader focus that encompasses all aspects of quality of life. Consequently, the VRP identified “Quality of Life” as the central underlying concept of the Program. As an immediate consequence, it was proposed that the Program changes its name from the Lifestyle Improvement Program to the Quality of Life Improvement Program. Additionally, focusing on Quality of Life had implications on all dimensions of the Program: the scope, the aspirations, the strategy, the initiative portfolio and even the overall approach, which shifted from a narrow bottom-up approach to a comprehensive top-down approach. This document outlines the delivery plan for the Quality of Life Program 2020 to achieve the broad objectives aligned with the focus on Quality of Life as the central concept of the Program.

## 1.B. Definition of Quality of Life

Quality of life is a broad and complex concept that is defined in many ways. In brief, quality of life measures satisfaction in the “most valued” aspects of a citizen’s life. However, this definition can be highly subjective. In order to determine a definition of quality of life relevant for the Kingdom of Saudi Arabia, the Program conducted thorough research to identify the most common definitions of quality of life. This preliminary research identified several global indices defining and measuring quality of life from different angles. Each of those indices was examined in detail to identify the common components.

As a reference, six of the most comprehensive and internationally recognized global indices were used:

- 1. The Economist Intelligence Unit’s (EIU) Global Livability Ranking** which ranks 140 cities for their urban quality of life based on assessments of stability, healthcare, culture and environment, education, sports and infrastructure.
- 2. The Mercer Quality of Living Survey** which ranks 231 cities based on the following dimensions: transportation, political and socio-cultural environment, public service, health, economic environment, schools and education, natural environment, housing, media availability, theaters and cinemas, sports, consumer goods and restaurants and leisure.
- 3. The Monocle Magazine’s Annual Lifestyle List** which lists the top 25 most liveable cities and assesses the following criteria: international connectivity, environmental issues, access to nature, architectural quality, urban design, medical care, business conditions, safety crime, culture, restaurants, tolerance and proactive policy developments.
- 4. The World Happiness Index 2017** which ranks 155 countries based on happiness levels explained with the following dimensions: corruption, freedom of choice, life expectancy, GDP per capita, freedom of choice, social support and generosity.
- 5. The OECD Better Life Index** which compares well-being across countries, based on 11 topics the OECD has identified as essential: safety, health, income, jobs and work-life balance, and education and life satisfaction, housing, environment, community and civic engagement.
- 6. The ARRP Livability Index** which is a signature initiative of the Public Policy Institute to measure the quality of life in American communities across multiple dimensions: transportation, health, economy and education, housing neighborhood, environment, engagement and equal opportunities.

**Figure 2: Overview of quality of life global indices (1 / 2)**

Index	Livability					Lifestyle				
	Infrastructure & Transportation	Housing, Urban Design & Environment	Healthcare	Economic & Education Opportunity	Security & socio-environment	Sports	Heritage, Culture & Arts	Entertainment	Recreation	Social Engagement
<b>EIU Liveability Ranking</b>	Infrastructure	Environment	Healthcare	Education	Stability	Sporting availability <sup>1</sup>	Culture availability <sup>1</sup>			F&B and Consumer goods <sup>1</sup>
<b>Mercer Quality of Living Index</b>	Transportation <sup>2</sup>	Natural Environment Housing	Health	Economic Environment Schools & Education	Security & Socio-environment <sup>3</sup> Public Service <sup>2</sup>	Sports <sup>9</sup>		Media Availability <sup>4</sup> Theaters & Cinemas <sup>5</sup>	Consumer Goods Restaurants & Leisure <sup>5</sup>	
<b>Monocle Quality of Life</b>	Int'l Connectivity Public Transport	Environment & Nature & Arch. quality urban design <sup>6</sup>	Medical Care	Business Conditions	Safety/ Crime		culture	Restaurants	Tolerance	Pro- active Policy

1. Part of Culture and Environment Parameter, 2. Part of Public services & Transportation , 3. Grouped together from Political and environment and from Socio- cultural environment, 4. part of socio-cultural environment, 5. Part of Recreation, 6. Grouped together from Architectural quality and from Urban Design.

**Figure 3: Overview of quality of life global indices (2 / 2)**

Index	Livability					Lifestyle				
	Infrastructure & Transportation	Housing, Urban Design & Environment	Healthcare	Economic & Education Opportunity	Security & socio-environment	Sports	Heritage, Culture & Arts	Entertainment	Recreation	Social Engagement
<b>World Happiness Report</b>			Life expectancy	GDP per capita	Corruption Freedom of choice					Social support Generosity
<b>OECD Better Life Index</b>		Housing Environment	Health	income, jobs & a-life balance Education & Life satisfaction <sup>2</sup>	Safety					community المشاركة المدنية
<b>AARP Livability Index</b>	Transportation	Housing & Neighborhood Environment	Health	Opportunity				Social Engagement		Civic Engagement

1. Grouped together from income from jobs from work-life balance, 2. Grouped together from Education and from Life satisfaction .

Based on the analysis of the six indices, two main concepts can be directly linked to the concept of quality of life:

**1.Livability:** The basic living standards for leading a satisfactory life

**2.Lifestyle:** The options provided for people to live pleasant and comfortable lives.

Both aspects are critical to improving quality of life. For example, large cities like New York or London can provide a wide range of lifestyle options, but they fall short in providing satisfactory living conditions for all citizens across specific dimensions (e.g. housing and transport options are expensive). On the other hand, cities like Geneva can provide very high living standards but do not offer extensive lifestyle options.

The analysis also revealed 10 sub-components divided equally between the broader concepts of lifestyle and livability, referred to as “categories.”

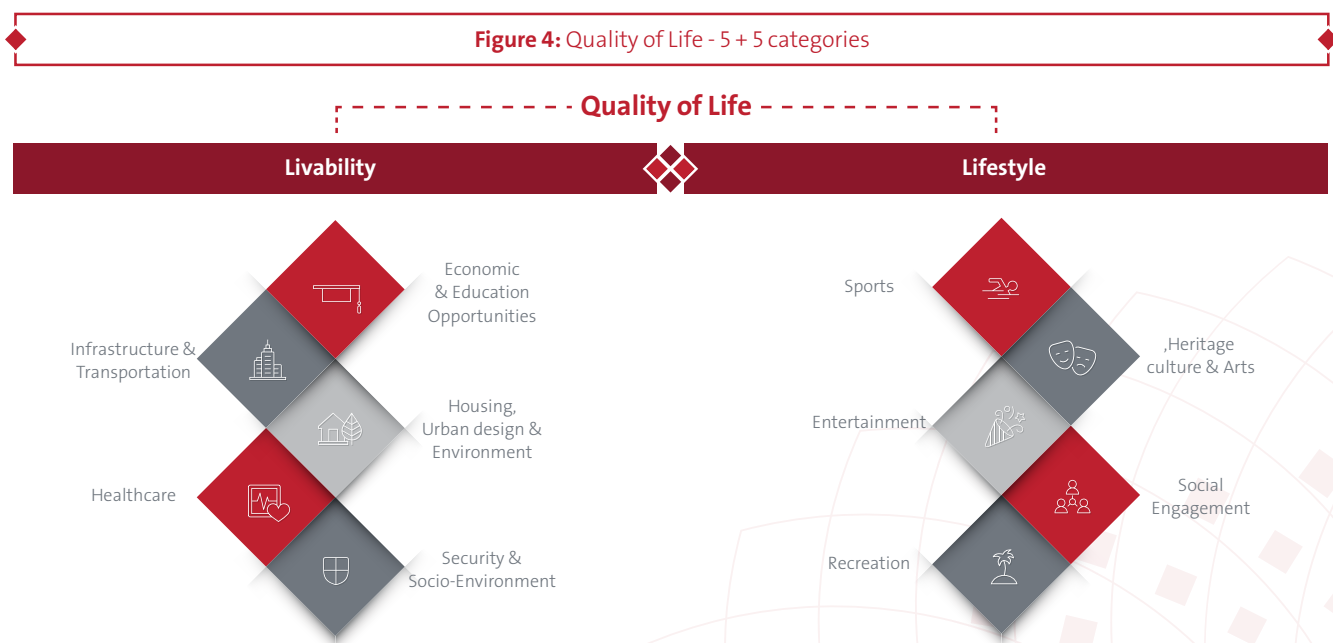
Under the concept of livability, five categories that cover all key aspects of life required to achieve a satisfactory level of living were specified:

- Infrastructure and Transport:** Infrastructure and transport are key to increasing social equity as they provide access to jobs, housing, services, and recreation, and open up and connect all regions including isolated ones.
- Housing, Urban Design and Environment:** Great communities provide housing opportunities for people of all ages, incomes, and abilities, allowing everyone to live in a quality neighborhood regardless of their circumstances. Additionally, a good urban design and environment context allows citizens to have higher access to services and job opportunities and fosters healthy habits (such as walking).
- Healthcare:** Health is an essential part of the quality of life of citizens. Health conditions are mainly measured using health outcome indicators such as life expectancy, the availability of hospital beds, the prevalence of diabetes and obesity, and household expenditure on healthcare.
- Economic and Education Opportunities:** Material living standards are measured based on key sub-dimensions such as employment, education and overall access to economic opportunities.
- Security and Socio-environment:** Security, along with socio-environment, are crucial aspects of citizens’ lives that enables them to interact unhindered in society. Security is mainly measured through low crime rates, reliable law enforcement, and equity.

Additionally, under the concept of lifestyle, five categories that focus on the most relevant options and offering available for citizens to spend their free time were specified:

- Entertainment:** Entertainment activities either at home or out of home.
- Heritage, culture and arts:** Vibrant and diverse arts and cultural activities are an important contribution to the liveliness and vitality of society.
- Sports:** The participation of citizens and residents in diverse sports activities has a direct impact on health and wellness.
- Recreation:** Range of recreational activities from food and beverage services to shopping options.
- Social engagement:** A liveable community fosters interaction among residents. Social engagement and community participation create opportunities for individuals to connect and feel welcomed, help lessen social isolation, and strengthen the community bonds.

Figure 4: Quality of Life - 5 + 5 categories



Each of the ten categories has been further broken down to sub-dimensions, resulting in a total of 25 dimensions across the Program.



## Livability dimensions

**Figure 5: Livability Categories and Dimensions**

Livability				
Infrastructure & Transportation	Housing, Urban Design & Environment	Healthcare	Economic & Education Opportunity	Security & socio-environment
Transportation infrastructure	housing	Medical care	Education Opportunities	Crime
Public/shared transport	Urban design	Medical levels	Employment Opportunities	Governmental Services
Sustainable utilities	Quality of environment			Equality
Connectivity				Tolerance & justice
				Dimension
				Category

## Lifestyle dimensions

**Figure 6: Lifestyle Categories and Dimensions**

Lifestyle				
Sports	Heritage, Culture & Arts	Entertainment	Recreation	Social Engagement
Professional sports	Heritage	Out-of-home Entertainment	Food & beverage services	Third sector
Non-professional sports	Culture & Arts	At-home Entertainment	Leisure	Community engagement
				Dimension
				Category



A set of attributes has been further allocated to each dimension by analyzing a set of indices (e.g. Siemens – Green City Index, IESE – Cities in Motion).

For example, within the ‘Crime’ dimension, the three key attributes identified are:

- Homicide-free society
- Low violent crime rates
- Widespread perception of safety

**Figure 7: Mapping attributes to dimensions**



This hierarchy results in a total of 52 attributes and 58 key performance indicators (KPIs) covering both Livability and Lifestyle. In turn, targets have been set against each one of the identified attributes in order to quantify the aspirations of the Quality of Life VRP. The full set of attributes and corresponding KPIs are listed in chapter 2.

### 1.C. Beyond Definitions - The Human Side of Quality of Life and Regional Considerations

#### First: The Human Side of Quality of Life

The encompassing definition of Quality of Life heavily affects multiple aspects of society. As a result, the initiatives of the Quality of Life VRP have the potential to actualize profound and far-reaching improvements in the daily lives of KSA citizens and residents.

Countries that have been recognized to be among the most livable according to a wide selection of indices showcase improved outcomes in key aspects of human life, where citizens and residents enjoy longer and healthier lives. Another aspect is societal safety, which is powered by strong social structures, widespread economic opportunities, and efficient law enforcement. Furthermore, the most livable countries create high levels of prosperity for their citizens. They provide quality education systems that produce a highly-skilled workforce, strong infrastructure that enables innovation, and compelling lifestyle options that can attract global talent which contributes to economic growth. In order to realize the immense potential for impact on the lives of KSA citizens and residents, it is imperative for the Quality of Life VRP to consider the human side across all its initiatives and tailor it to the needs and wants of the society.

Figure 8: The Human Side

Results	Countries most suitable to live in	Countries suitable to live in
	Countries with cities among the top 10 most livable cities 	livable cities 100-Countries with cities among the top 80 
<b>High life expectancy</b> Average life expectancy at birth	79 years	69 years
<b>Low crime rates</b> Average homicide/100,000 population	1 crime	13 crimes
<b>Enhance prosperity</b> (GDP per capita (USD)	60,000 USD	7,000 USD
<b>Improve Happiness</b> Average happiness ranking	Rank 7	Rank 67

Source: World Health Organization, National Bank, World Happiness Report

## Second: Regional Considerations

Achieving the defined aspiration levels is critical in order to provide high quality of life to the citizens and residents of the Kingdom. However, considering the wide differences in the definition of quality of life and the inherently subjective meaning it has for each individual, it is crucial to consider regional characteristics in order to truly deliver relevant improvements throughout the Kingdom.

To this end, the specific socio-cultural and regional characteristics of the Kingdom will be taken into consideration when pursuing these aspirations.

### The Program engages regional considerations in two ways:

**From a quantitative angle –** The Program will ensure that its defined targets are translated regionally to ensure coverage of all populations. While targets are set at country level (e.g. number of cinemas in KSA), those targets are then translated to specific target per region to ensure that the entire relevant population is affected. For example, while there will be 114 museums built across the KSA, 34 of them will be implemented in Ash Sharqiyah region (considering the foreigner population currently residing in that region), and 33 in Makkah (considering the historical and religious relevance of this region). This is based on the quantitative assessment of the demand in each region, considering the available income spent on lifestyle activities.

**From a qualitative angle -** When implementing initiatives, the Program will ensure that local specificities are included in the design of the offering. For example, when designing cultural offerings, each region may require a different offering.

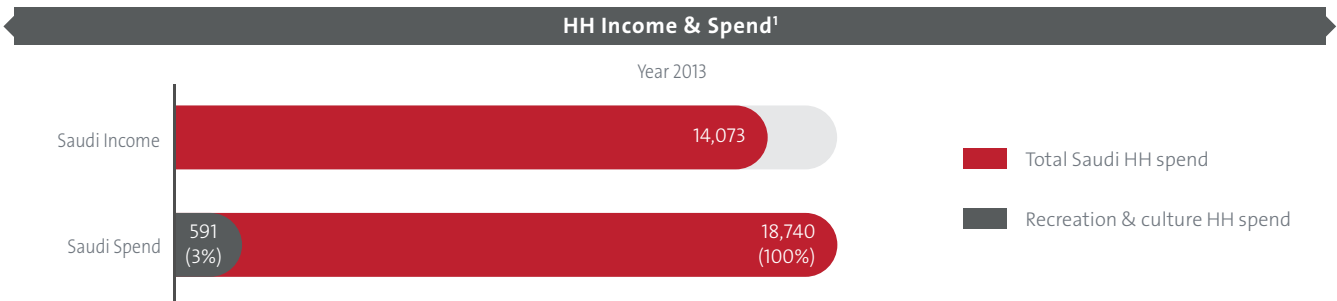
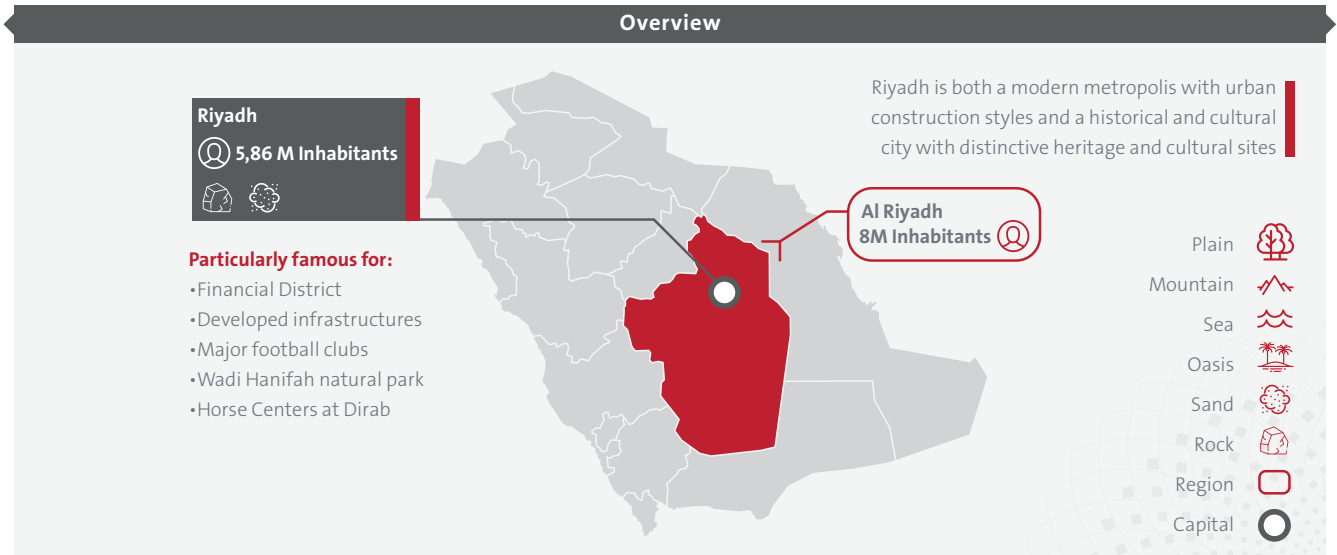
Therefore, the careful assessment of regions is an indicator for allocating projects accurately.

It should be noted that 5 key inputs have been taken into account when designing the offerings and necessary infrastructure in the 13 Saudi regions.

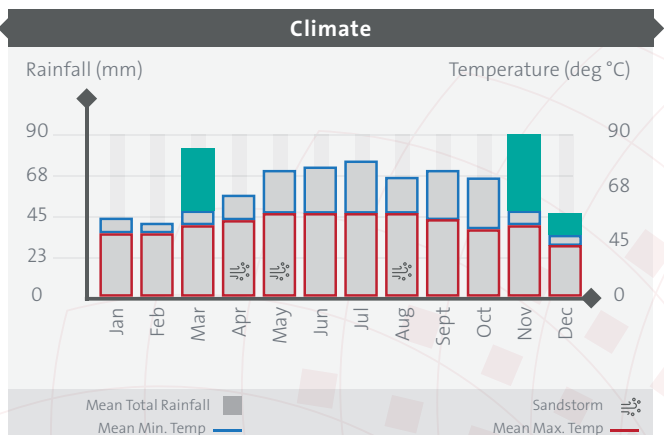
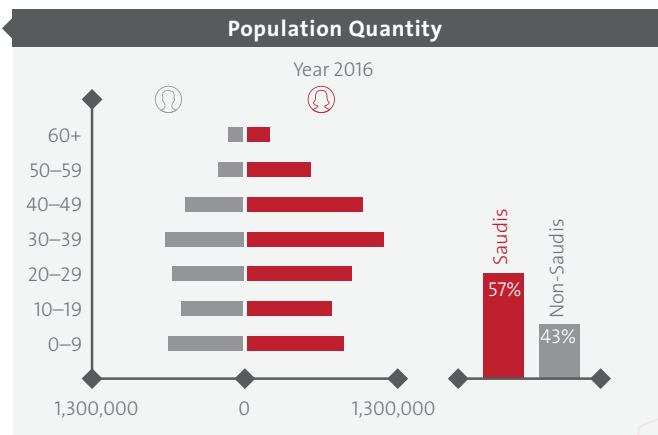
These inputs are:

1. Size of population
2. Average household income
3. Geography and climate
4. Population preferences
5. The key infrastructure required

**Figure 9: Inputs for Design Options, Ex. Riyadh Region**

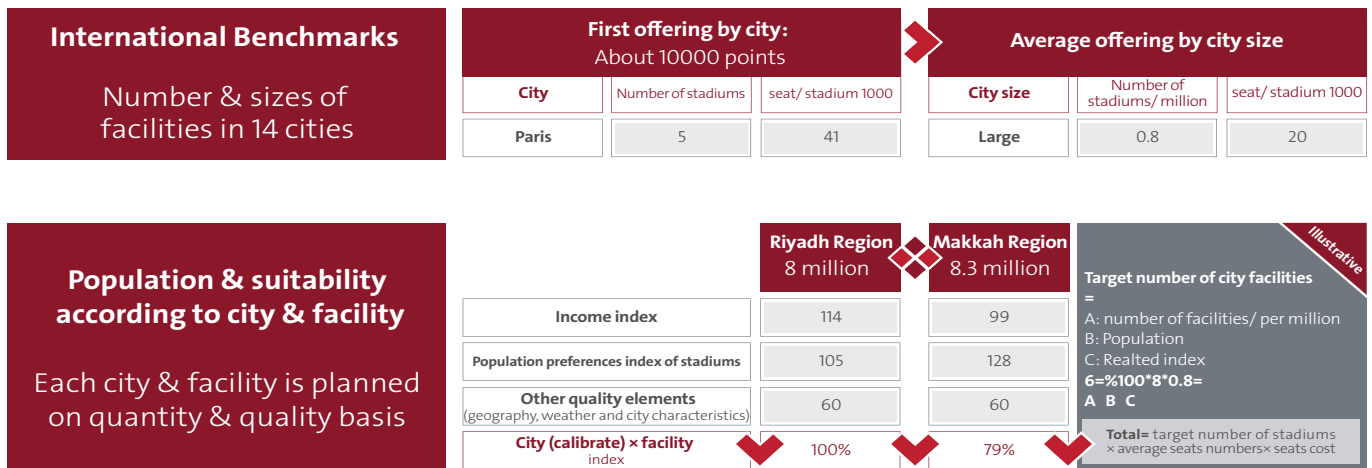


Note: Income, spend and population data are per region. Geographical areas are non-exhaustive  
 1. Average monthly household income and spend (SAR/month)



To illustrate the methodology used to calculate the targeted offering in a given city, details on the methodology used to calculate the number of sports venues in Riyadh are showcased below:

Figure 10: Methodology used to calculate the targeted offering



This is followed by a summary of the various offerings in Riyadh. Likewise, a study of offerings for all 13 regions was conducted and the details are included in the Appendix (8A):

Figure 11: Summary of the different offerings in Riyadh



Including Main

11.Natural reserves are not evaluated: depends on the nature of the KSA and does not require the investment of capital costs for facilities and control of access, maintenance etc. 2. including the electronic games centers  
 source: NACS, United Nations International Standard industrial classification of all Economic activities , team analysis

To activate this methodology, the Program had to integrate it into the initiatives delivery plan. This includes the General Entertainment Authority key initiative, which focuses on building a strategy for the development and delivery of recreational options and infrastructure in the entertainment sector. Five inputs were taken into account when designing the offerings. Similarly, the General Culture Authority initiative related to developing the required cultural infrastructure, adapted global benchmark studies to match the local needs of the people within each region.

The same inputs will be taken into account when designing the recreation strategy in KSA and creating offerings in the form of restaurants and shopping venues.

The impact of this methodology is manifest in the cooperation initiative with SAGIA. Specialized studies of each region have significantly contributed to marketing investment opportunities to foreign investors. This in turn will accelerate the signing of agreements and enhance the Quality of Life sectors.

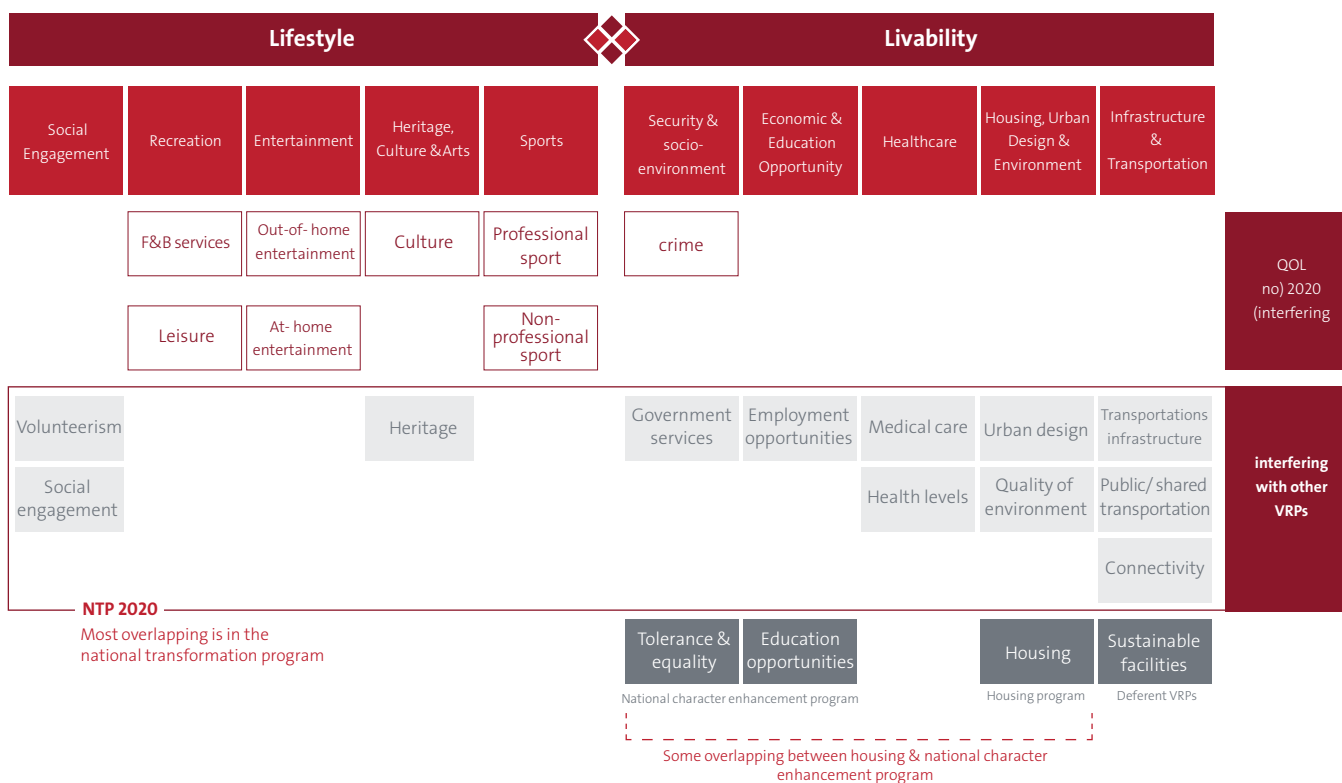
It must be noted that infrastructure targets are developed based on global studies and are in line with population needs. Program initiatives will cover part of these targets, while the private sector will contribute to cover the rest.



## 1.D. Definition's Implications on the Program's Scope

The broad definition of Quality of Life encompasses an extensive spectrum of activities, leading to a large number of interdependencies and shared objectives across numerous entities.

**Figure 12:** Program scope and overlaps with other VRPs and institutions



**This overlap can be divided into two types** depending on the overall impact on the QoL 2020

### High overlap

The overlap is classified as “high” when QoL 2020 initiatives are based on the implementation of other program initiatives, and the program KPIs are therefore affected by the failure of these initiatives.

### Low overlap

The overlap is classified as “low” when QoL 2020 initiatives do not depend on the implementation of other program initiatives, and the impact is limited to program KPIs.

**Figure 14:** Program governance clarification in case No (1): High Overlap

Example	Impact	Governance	QOL 2020 Responsibility
Initiatives of the Ministry of Housing to develop private housing complexes	The initiatives of developing community facilities in the residential complexes rely on the Housing Ministry's program initiatives; sports and entertainment KPIs are affected by the failure of the last initiative.	Joint responsibility	<input checked="" type="checkbox"/> QOL head communicates with the head of the concerned program office to implement the initiative and suggest solutions.
NTP initiatives to secure green areas	Community sports initiatives and entertainment plan initiatives rely on the NTP, sport and entertainment KPIs are influenced by the failure of the last initiative.		<input checked="" type="checkbox"/> QOL provide support for the settlement of the initiatives and is fully responsible for it.

**Figure 15:** Program governance clarification in case No (2): Low Overlap

Example	Impact	Governance	QOL 2020 Responsibility
MoMRA initiatives to reduce number of hours the passengers spends in traffic	Non of the QoL 2020 initiatives are based on MoMRA initiatives but program indicators (livability) are affected by the failure of such initiatives	Partial responsibility	<input checked="" type="checkbox"/> QOL head communicates with the head of the concerned program office to implement the initiative and suggest solutions
Saudi character enhancement program initiatives to raise the scores in the International Students Assessment Program	Non of QoL 2020 initiatives are based on MOE initiatives related to raising scores , but program indicators (livability) are affected by the failure of such initiatives		<input checked="" type="checkbox"/> QOL is not responsible for carrying out the necessary actions to resolve the initiatives, as this is the responsibility of the program concerned with initiative implementation.



The key outcome of the broad definition of Quality of Life is that this Program shares targets with other VRPs and government entities. More specifically:

- 17 dimensions (14 in livability and 3 in lifestyle)
- 7 dimensions (in lifestyle) do not have any targets shared with other VRPs
- 1 dimension (in livability) is outside the mandate of any VRP

The largest overlap is with the National Transformation Program (NTP) 2020. Overlaps also exist with the Housing VRP and the National Character Enrichment VRP. From the overlapping VRPs, only the Housing VRP had received strategic approval at the time of submission of this delivery plan.

To clarify the ownership (and accountability) for each dimension, an analysis at the attribute and KPI level was conducted. Within this analysis, the ownership of each attribute is determined along two axes: delivery entity scope, and the VRP role.

The first axis requires an understanding of the ‘natural’ allocation of attributes against the existing entity’s mandates. As an example, the “Widespread homeownership” attribute is naturally placed under the Ministry of Housing.

With regards to the VRP role on the other hand, objectives of other VRPs were taken into account. For example, the “Available green space” attribute of the Ministry of Municipal and Rural Affairs (MoMRA) has been proposed to be allocated under the NTP 2020, as MoMRA has multiple additional initiatives concerned with urban planning and improvement that can provide broader synergies.

Based on the above, the attributes and associated KPIs within the Quality of Life spectrum can be categorized in 4 clusters:

- 1. Owned by Quality of Life VRP 2020:** Attribute fully owned by the Quality of Life VRP 2020 and its delivery entities — 21 attributes
- 2. Owned by other VRPs:** Attributes owned by delivery entities under the umbrella of other VRPs — 27 attributes
- 3. Ownership gap:** Attributes that are currently not fully under any delivery entity or VRP — 3 attributes
- 4. Beyond Program control:** Attributes whose ownership lies with institutions at a higher government rank than VRPs — 1 attribute

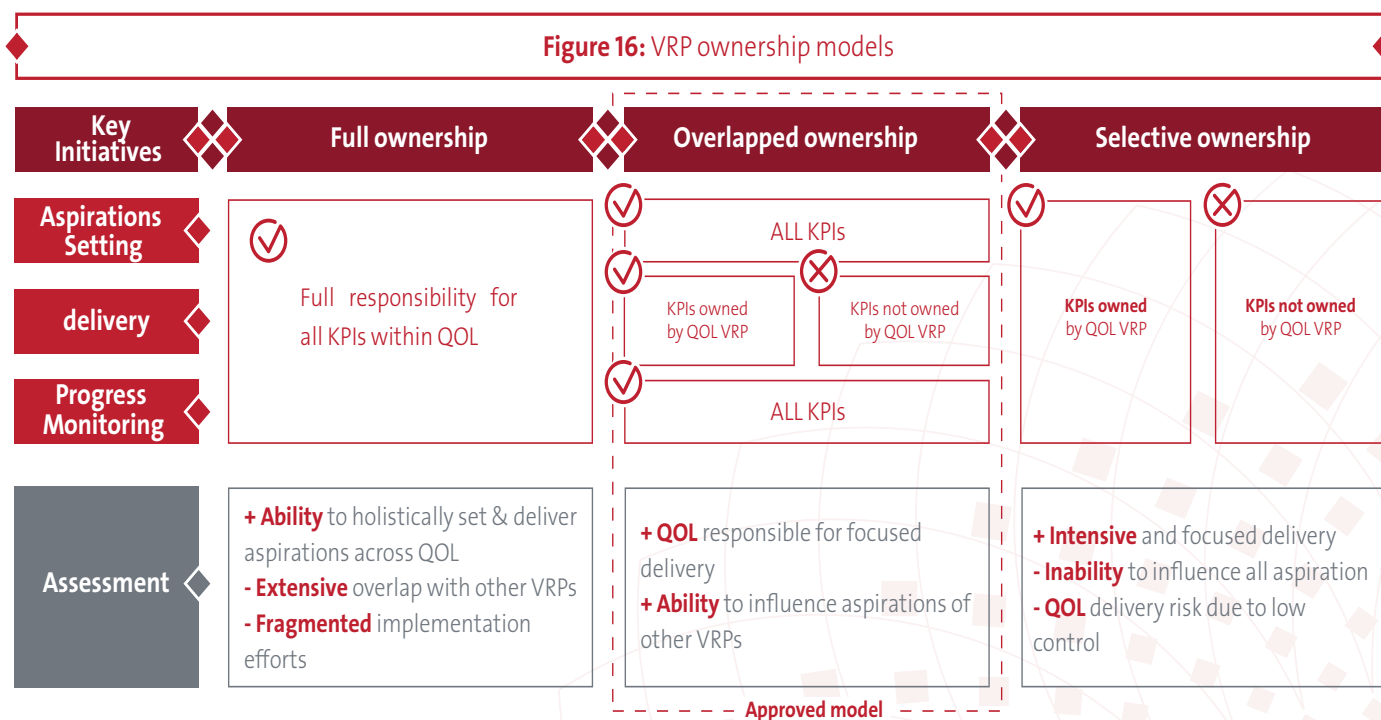
From the above clusters, the Quality of Life Program 2020 can select between three different scope options. These options seek to clarify the expected role of the Quality of Life Program 2020, particularly in relationship with the other VRPs. Such a role is defined through the following three key activities:



1. Setting aspirations.
2. Delivering the set aspirations.
3. Monitoring performance against the set aspirations.

The three different scope options are:

- 1. Full ownership:** The Quality of Life Program 2020 conducts all three activities (set aspirations, deliver the set aspirations, and monitor performance) for all categories and dimensions, including the ones currently not owned by the Program (e.g. housing). This would imply that the Quality of Life Program 2020 will take ownership of certain elements currently owned by other VRPs.
- 2. Overlapping ownership:** The Quality of Life Program 2020 sets aspirations and monitors the performance for all categories and dimensions, but only delivers the ones owned by the Program. In this model, the responsibility of defining and executing the action plan (and requesting the budget) in the dimensions owned by other VRPs remains with them.
- 3. Selective ownership:** The Quality of Life Program 2020 conducts the three activities only for the dimensions directly owned by the Program. Consequently, the Program does not become involved in any dimension related to other VRPs.



Implications of the delivery plan and next steps:

1.Regarding non-Quality of Life Program 2020 dimensions, commitments are still preliminary and can be confirmed only after the approval of other, relevant VRPs. It should be noted that the Quality of Life Program 2020 has been aligned with other VRPs to address these commitments.

2.Quality of Life Program 2020 next steps: Cooperation with the implementing entity regarding the delivery plan.

The proposed model for the Quality of Life VRP 2020 is the overlapping ownership model (matrix setup). Under this model, the Program takes full ownership of the attributes under its VRP umbrella while other VRPs are responsible for all Quality of Life attributes that fall within their scope. This model requires significant collaboration between this Program and other VRPs by aligning aspirations and providing inputs that integrate a quality of life perspective into the implementation of their programs.

Based on the above, the Quality of Life VRP 2020 scope is the following with regards to the defined attributes and the corresponding KPIs:

**1. Owned by Quality of Life VRP 2020:** The Program will take full responsibility of setting aspirations, delivering aspirations and monitoring progress.

**2. Owned by other VRPs:** The Quality of Life VRP 2020 will set aspirations and targets that correspond with its vision of Quality of Life. If the owning VRP has already obtained approval, as is the case of the Housing VRP, the aspirations and targets will be aligned and final. However, if the owning VRPs are still in the development phase, the Quality of Life VRP 2020 will work with the owning VRPs and entities to create initiatives that can deliver the targets that have been agreed upon. When the targets and corresponding initiatives are ratified by the Strategic Management Committee, the Quality of Life VRP 2020 will update its scope and aspirations accordingly and monitor the progress against them. The Quality of Life Program 2020 has shared all aspirations and criteria for targets with all concerned entities.

**3. Ownership gap:** The Quality of Life VRP 2020 proposed appropriate owners as implementing entities under other VRPs and set preliminary aspirations and targets. The SMC is suggested to review the proposed ownership structure and delegate responsibilities to the delivery entities and VRPs, as necessary. If the proposed allocation of attributes and targets is approved, the Quality of Life VRP 2020 will work with the respective entities to develop initiatives required to deliver against the approved aspirations and targets. As a result, this is a temporary category; should the suggested owners be approved, the related attributes and KPIs will transition to the “Owned by other VRPs” category.

**4. Beyond Program control:** Although attributes beyond the Program’s control have a clear impact on Quality of Life 2020, it is recognized that there are higher governmental and geopolitical considerations that shape their evolution. In addition, the control of such attributes lies beyond the VRP structure, . Therefore, the Quality of Life VRP 2020 will highlight potential areas of improvement according to international benchmarks and report on their evolution but will not set aspirations and targets.

**Figure 17: Quality of Life VRP 2020 role by category and attribute**

		Under QOL 2020 Entities		Not Under QOL 2020 Entities	
		Fully owned by QOL 2020	Owned by other VRPs	Ownership gap	Beyond Qol. 2020 scope
<b>Aspirations Setting</b>		Set & aligned aspirations with delivery entities	Set, discuss and aligned aspiration with delivery entities	Preliminary aspiration to be discussed & aligned with future owner	set aspirations to become in the ranking of the best cities in the world
<b>Delivery</b>	<b>Creation of delivery plan</b>	Coordinate with entities and include full details in delivery plan	Collect initiative list (detailed plan to be included in resp. VRPs)	Plan to be defined and budget to be requested by the corresponding VRPs based on SMC decision on ownership	Program not enabled
	<b>Budget request management &amp;</b>	Request budget and calculate economic impact associated	No role (to be requested by entities within their delivery plans)		
	<b>Execution of initiatives</b>	Oversee execution, provide resources	Monitor execution, provide insights and coordination opport.		
<b>Progress monitoring</b>		Monitor progress to ensure delivery of QOL final targets			

## 1.D.1 .Implication of the Delivery Plan

Given this scope of the Program, the delivery plan includes:

- The aspirations and targets for all attributes of quality of life. It is important to note that the aspirations for attributes owned by other VRPs and for attributes where ownership gaps have been identified are preliminary and require approval from the Strategic Management Committee.
- A fully-fledged and detailed initiative portfolio and the associated budget and economic impact for the initiatives are provided for attributes owned by the Quality of Life VRP 2020 only.
- A preliminary and high-level initiative portfolio to meet the preliminary aspirations of the attributes overlapping with other VRPs and of attributes with ownership gaps is also provided.
- The attributes that are beyond Program control will include the performance measures for countries with the highest quality of life and KSA's baseline

**Figure 18:** Implementation against delivery plan

Delivery plan chapters	Owned by QOL 2020	Owned by other VRPs	Ownership gap	Beyond QoL 2020 scope
Scope definition	Classification of scope across all attribute categories			
Aspirations & macro economic impact	Final agreed aspirations & economic impact	Preliminary aspirations		include the performance measures and the baseline
Baseline	Comprehensive view on current KSA situation across all attributes			
& Strategy governance	Strategic framework & description of key pillars & proposed governance model across all attributes			
Initiatives	Detailed initiatives and required budgets	High level initiatives	No initiatives	
Game changers		No game changers		
Enablers (budget)		No budget defined		

## 1.D.2. Achieving Vision 2030 Strategic Objectives

Due to its overarching nature, the Quality of Life VRP 2020 contributes to a wide range of objectives and targets set in Vision 2030:

23 Level 3 objectives of Vision 2030 are relevant for the Quality of Life Program 2020.

Out of the 23 Level 3 objectives, 4 focus exclusively on lifestyle elements:

- 2.2.1 - Increase public participation in sports and athletic activities
- 2.2.2 - Reach regional & global excellence in selected professional sports
- 2.5.1 - Develop & diversify entertainment opportunities to meet population's needs
- 2.5.2 - Grow Saudi contribution to arts & culture

Additionally, there are 19 objectives related to livability dimensions that have overlap with other VRP Programs:

- 1. Strengthen Islamic Values & national identity
  - 1.1.1.- Foster Islamic values (moderation & tolerance, excellence & discipline, equity & transparency, determination & perseverance)
  - 1.3.1 - Instill national values and strengthen the sense of national belonging
  - 1.3.2 - Conserve & promote Islamic, Arab & National heritage of the Kingdom
  - 1.3.3 - Uphold the Arabic language
- 2. Offer a fulfilling and healthy life
  - 2.1.3 - Strengthen prevention against health threats (public health system & health crisis management)
  - 2.3.1 - Improve quality of services provided in Saudi cities (utilities, public transports, etc.)
  - 2.3.2 - Improve the urban landscape in Saudi cities
  - 2.6.3 - Develop positive attitude, resilience and hard-work culture among our children
- 3. Grow & diversify the economy
  - 3.1.2 - Unlock state-owned assets for the Private Sector
  - 3.1.7 - Create special zones & rehabilitate economic cities
  - 3.3.6 - Enable the development of the tourism sector
  - 3.3.7 - Increase localization of non-oil sectors
- 4. Increase employment
  - 4.3.2 - Grow SME contribution to the economy
  - 4.4.1 - Improve living conditions for expats
  - 4.4.2 - Improve working conditions for expats
  - 4.4.3 - Source relevant foreign talent effectively
- 6. Enable social responsibility
  - 6.1.2 - Encourage volunteering
  - 6.3.1 - Support growth of non-profit sector
  - 6.3.2 - Empower non-profit organization to create a deeper impact (access to funds, talents, knowledge, etc.)

The Quality of Life VRP 2020 dimensions are linked to the L3 objectives, as follows:

Dimension	2030 Vision Objective
Professional sports	2.2.2 - Reach regional & global excellence in selected professional sports
Non-Professional sports	2.2.1 - Increase public participation in sports and athletic activities
Heritage	1.3.2 - Conserve & promote Islamic, Arab & National heritage of the Kingdom
Culture and Arts	2.5.2 - Grow Saudi contribution to arts & culture
Entertainment	
food and beverage services	2.5.1 - Develop & diversify entertainment opportunities to meet population's needs
Recreation	
Third Sector	6.3.1 - Support growth of non-profit sector
Social engagement	6.1.2 Encourage volunteering
Transport and infrastructure	
Public/shared transports	2.3.1 - Improve quality of services provided in Saudi cities (utilities, public transports, etc.)
Sustainable utilities	
Connectivity	3.3.2 Develop the digital economy
Housing	
Urban design	2.6.2 Enable suitable home ownership among Saudi families
Environmental quality	2.4.1 Reduce all types of pollution (e.g. air, sound, water, soil)
Medical Care	2.1.1 Ease the access to healthcare services
Health levels	2.1.3 Strengthen prevention against health threats
Educational Opportunities	4.1.1 Build a life-long learning journey
Employment opportunities	4.2.1 Improve readiness of youth to enter the labor market 4.2.2 Increase women participation in the labor market 4.2.3 Enable integration of people with disabilities in the labor market
Crime	2.3.3 Enhance the nation's immunity towards drug abuse
Governmental services	5.2.2 Enhance performance of government entities 5.2.4 Develop the e-government
Tolerance and equality	1.1 Foster Islamic values

# VRP Aspirations



## 2. VRP Aspirations

### 2.A. Introduction to aspirations, Program metrics and targets

The Quality of Life Program 2020's ultimate ambition is to include at least three Saudi Arabian cities in the Top 100 most livable cities by 2030. While the overall target refers to three cities in Saudi Arabia, the Program aims to improve quality of life of all citizens and residents across the whole country. Achieving this target requires tackling a wide range of components, ranging from the development of the entertainment infrastructure to the achievement of a long life- expectancy.

The VRP aspirations are derived from an exhaustive approach whereby the different dimensions and categories of Quality of Life are cascaded through a top-down analysis into relevant KPIs, attributes and targets. The attributes represent the desired outcome for a particular dimension (e.g. providing adequate transportation options). To measure each attribute, the Program will identify the best KPI, as well as the desired targets based on a benchmarking exercise to measure performance. This top-down approach identified a set of 65 KPIs and targets across the 10 categories that collectively represent the consolidated objectives of the Program. The KPIs and associated targets represent the level of progress required to achieve the desired Quality of Life in Saudi Arabia. As described in the Scope section, the role of the VRP in delivering against these targets depends on the ownership and level of control that the Program can exert. In this sense, this section clearly differentiates between the aspirations and targets that are fully owned by the Program (i.e. they are direct commitments), and the aspirations and targets that are not owned by the Program but that are necessary to meet the overall Program ambitions.

This chapter seeks to articulate the aspirations of the Quality of Life Program 2020 on two levels: first, through providing a qualitative overview of the aspiration levels (section 2.B) and second, by detailing such aspirations through the corresponding KPIs, targets and rationales (section 2.C).

Throughout this chapter, the aspirations and KPIs are comprehensive (e.g. cover all aspects of quality of life) and what is owned by the Quality of Life Program 2020 and by other VRPs is also clarified.



## 2.B. Aspirations for the Quality of Life Program 2020

Overall, the key aspiration of the Quality of Life Program 2020 is to make KSA the top living destination. This objective requires focusing both on enhancing livability and on developing lifestyle for both citizens and residents.

**Figure 19: Quality of Life Program 2020 Objective**



Although the Program focuses its aspirations to make the Kingdom of Saudi Arabia the best destination for living and to provide a satisfactory life for its citizens and residents, it equally recognizes the indirect impact of these efforts in attracting tourists and developing the Kingdom's tourism sector. More leisure and recreational options in the Kingdom, which are part of lifestyle development, will undoubtedly increase the internal spending of citizens and residents and enhance the image of the Kingdom internationally, making it an attractive destination to visit.

This macro-objective can be further detailed into aspirations for each of the 10 categories under lifestyle and livability. Determining the aspirations for each category requires setting targets for the 65 KPIs. These targets have been defined by selecting the most relevant benchmark, while the current baseline for Saudi Arabia was considered. Four types of relevant benchmarks were considered:

- The most livable nations, which show high performance across all aspects of livability and represent the highest level of aspirations.
- Countries featuring slightly higher livability levels compared to Saudi Arabia that represent the minimum required target.
- Regional benchmarks with a similar social, cultural and geopolitical background.
- Global guidelines illustrating best practices from reputable institutions.

Aspirations have been set for all 65 KPIs. However, in order to better facilitate the articulation of the aspirations of the Program, a sub-set of 30 representative KPIs was selected. The selected KPIs are representative indicators that reflect either:

- 1.The consolidated performance of the whole category, e.g. life expectancy in Healthcare
- 2.A significant issue for KSA, e.g. road traffic deaths in Transportation
- 3.An overall vision 2030 aspiration, e.g. the number of volunteers in Social Engagement

The following figure outlines the aspirations for representative KPIs, which provide an overview of the overall aspiration level of the Program. In this section, we have clearly separated between the ambitions that are directly owned by the Program and the ones that are owned by other Programs.

**Figure 20: Quality of Life VRP 2020 aspiration overview**

Have 3 cities in the top 100 most recognized cities in the world									
Lifestyle					Livability				
Social Engagement	Recreation	Entertainment	Heritage, Culture & Arts	Sports	Security & socio-environment	Economic & Education Opportunity	Healthcare	Housing, Urban Design & Environment	Infrastructure & Transportation
Mobilize volunteers to reach a thirtyfold increase KSA volunteer base	Maintain expenditure levels on Food and Beverage once additional lifestyle options are introduced	Reach levels of population engagement in entertainment of most livable countries	Match international engagement levels for culture and arts	Increase participation in sports by mobilizing KSA population to exercise on a weekly basis	Increase offering of e-government to reach top 3 of most livable countries	Reduce Saudi unemployment to reach top 5 most livable countries	Accomplish equivalent life expectancy to the top among top 5 most livable countries	Achieve home ownership equal to top 3 of most livable countries	Drive public transport use to reach the top 5 most livable countries
Increase # of NGO to median of countries in subsequent livable bracket <sup>3</sup>	Become global Food and Beverage reference with leading, high-quality offering	Provide entertainment offering comparable to most livable countries	Aspire for city cultural and artistic activities to compare to the top 10 worldwide culture hubs	Become regional leaders in summer Olympic attendance <sup>1</sup>	Increase gender equality to become top performer among countries in subsequent livable bracket <sup>3</sup>	Increase female employment to close the gap with most livable countries	Reduce the prevalence of diabetes in line with the rate achieved in the best living countries	Achieve WHO minimum suggested available green spaces	Reduce traffic deaths to reach top 5 most livable countries
Achieve twentyfold increase in community & neighborhood club engagement	Reach regional champion level by increasing retail space <sup>2</sup> & availability of top int'l brands	Make the kingdom a global hub for entertainment by building pioneering venues	Make the kingdom a regional hub for culture and arts through infrastructure development	Reach accessible sports infrastructure offering levels of most livable countries		Achieve PISA reading score to reach top 5 most livable countries	Install enough hospital beds to reach top most livable countries	Enhance people walking habits to reach the top 5 most livable countries	Follow evolution of connectivity to reach double the average global numbers of connected devices

1. Target set for the 2024 & 2030 Olympic games 2.target measured in meters square, 3. countries with cities between 8000- in EIU ranking

## 2.B.1. Aspirations owned by the Quality of Life Program 2020

The Program owns 12 aspirations related to lifestyle.

Category	Lifestyle Aspirations
Sports	Increase participation in sports by mobilizing KSA population to exercise on a weekly basis
	Become regional leaders in Summer Olympic participation
Heritage, Culture and Arts	Reach accessible sports infrastructure offering levels of most livable countries
	Match international engagement levels for culture and arts
	Aspire for city cultural and artistic activities to compare to the top 10 worldwide culture hubs
Entertainment	Make the Kingdom a regional hub for culture and arts through infrastructure development
	Reach levels of population engagement in entertainment of most livable countries
	Provide entertainment offering comparable to most livable countries
Recreation	Make the Kingdom a global hub for entertainment by building pioneering venues
	Maintain expenditure levels on food and beverages
	Become a global reference point for food and beverage with leading, high-quality offerings

## 2.B.2. Aspirations not owned by the Vision Realization Program

In order to meet the overall objective of improving the quality of life in KSA, there are several aspirations, related mostly to the livability dimension, that need to be achieved but which are not owned by the Quality of Life Program 2020.

There are 17 categories either owned by other Programs (e.g. traffic death reduction) or fall beyond the control of any VRP Programs (such as political stability).

Category	Livability Aspirations
Infrastructure and Transportation	Drive public transport use to reach most the top 5 most livable countries
	Reduce traffic deaths to reach the top 5 most livable countries
	Follow the evolution of connectivity to reach double the average global per capita share of connected devices
Housing, Urban Design and Environment	Achieve home ownership equal to top 5 of most livable countries
	Achieve WHO minimum for suggested available green space
	Enhance people's walking habits to reach the top 5 most livable countries
Healthcare	Accomplish equivalent life expectancy to the top among top 5 most livable countries
	Reduce diabetes prevalence at par with the average of the top 5 most livable countries
	Install enough hospital beds reach top 5 most livable countries
Economic and Education Opportunities	Reduce unemployment to reach top 5 most livable countries
	Encourage female employment to close the gap with most livable countries
	Achieve Program for International Student Assessment (PISA) reading scores to reach top 5 most livable countries
Security and Socio-Environment	Increase offering of e-government to reach top 3 of most livable nations
	Increase gender equality to become top performer among countries in subsequent livable bracket

Category	Livability Aspirations
Social Engagement	Mobilize volunteers to drastically increase KSA volunteer base
	Increase number of NGOs to surpass countries in subsequent livable bracket (i.e. with cities that fall (in the EIU Liveability ranking 100-between 80
	Achieve a 20x increase in interaction with the community and neighborhood clubs

The next sections provide a clear definition of the role of the Quality of Live VRP 2020 in meeting the objectives associated to the aspirations above.

## 2.C. VRP Indicators and Targets

Reaching the aspirations defined by the Program requires abiding by specific targets set for all the 65 KPIs.

The VRP has used rigorous criteria to select the Program KPIs. The KPIs selected comply with at least one of the following criteria: the KPI exists today, there is a baseline and/or there are sufficient benchmarks to be used to set targets.

This process has discarded several KPIs that cannot be used as Program KPIs but that should be considered during implementation to enhance the outcome of the Program. In particular there are two types of KPIs that will be considered:

**1. The Fulfilment Index and the Recreation Index.** These innovative indexes have been ideated as part of the Program to fill gaps within existing indexes. These KPIs, together with their baselines and benchmarks, will be developed as part of the Program.

**2. Initiative Specific KPIs. Detailed KPIs,** such as satisfaction with offering or utilization rates, were considered during the process but not included as Program KPIs mostly due to lack of benchmarks or due to the specificity of its definition (some definitions, such as ‘satisfaction,’ are very specific to the type of initiative). These types of metrics are not ignored and will be considered within the initiatives as operative metrics specific to the design of the initiative.

When developing the two indicators, the Quality of Life Program 2020 will rely on the existing global indicators, known as proxies. The World Happiness Index is deemed the most prominent indicator. This index will determine the development level of the KSA in the different aspects of the quality of life compared to 154 countries worldwide.

The VRP quantitative and qualitative aspects cover 65 KPIs:

- The quantitative KPIs prioritize most of the Program indicators in order to develop lifestyle sectors, i.e. increase the service offerings. Therefore, the number of locations, goods, and services in areas covered by VRP will be the most representative measures for improvement.
- The qualitative KPIs will be an indirect method of measuring the interests of Saudis and their level of satisfaction regarding the planned social activities (such as effective engagement of individuals and rate of family spending on entertainment). These KPIs will be complemented through surveys at the initiative level that will measure user satisfaction. For example, as part of initiative 8.2.1 ( Create out-of-home entertainment blueprint ), population satisfaction surveys will be conducted regularly to ensure that the quality of infrastructure and services lives up to the standards.

**Figure 21: KPI category overview**

KPIs categories	of KPIs #	Status/ progress level
Falls under the responsibility of QoL 2020	27	<b>Aligned</b> commitment to 2020 targets <b>Aligned</b> aspirations to 2030 targets
Falls under the responsibility of other VRP's programs	28	<b>Agreed</b> commitment to 2020 targets <b>Aspiration</b> to 2030 targets <b>Pending</b> approval of other VRPs
Outside the scope of QoL 2020	1	<b>Benchmark</b> and aspiration were identified <b>Obviously</b> , security and natural environment cannot be controlled through VRP
Unconfirmed responsible entities	3	<b>Preliminary</b> commitments and aspirations <b>Commitments</b> to be discussed and aligned with assigned owner

Figure 22: KPI category overview: KPIs by type of owner

Quality of Life											
Liveability					Lifestyle					Total	
Security & socio-environment	Economic & Education Opportunity	Healthcare	Housing, Urban Design & Environment	Infrastructure & Transportation	Social Engagement	Recreation	Entertainment	Heritage, Culture & Arts	Sports	Total	
Fully owned by QOL VRP	3	0	0	1	0	1	6	6	5	4	27
Owned by other VRPs	2	5	5	3	7	2	0	4	0	0	28
Unconfirmed owner	0	0	0	1	2	0	0	0	0	0	3
Beyond scope of QoL 2020	1	0	0	0	0	0	0	0	0	0	1

1. Includes one of the comprehensive initiatives KPIs Saudi cities within the top 100 livable cities

Not owned by the VRP

The targets for the different KPIs have been separated into two different sections:

- Section 2.C.1 – Quality of Life Program 2020 Commitments - This section outlines the 2020 commitments for the KPIs owned by the Program.
- Section 2.C.2 – This section outlines the 2020 commitments for KPIs not owned by the Program. As the KPIs are not owned by the Program, there is no direct commitment.

### 2.C.1. Vision Realization Program 2020 Commitments

The following table includes all the KPIs owned by the VRP. The table includes the 2020 commitments from the Program.

Within lifestyle, there are 27 targets across all five categories and one overarching KPI. All the KPIs related to lifestyle can be classified into three types:

- Offering related (e.g. number of venues),
- Engagement related (e.g. expenditure in Entertainment or number of active people) or
- Quality related (e.g. number of restaurants owned by Michelin starred chefs).

The categories of Sports, Culture and Arts, Recreation and Entertainment have KPIs across all three types of metrics.

**Gaps related to different types of infrastructure were identified on the short and long run**

**Places to be developed by 2020**

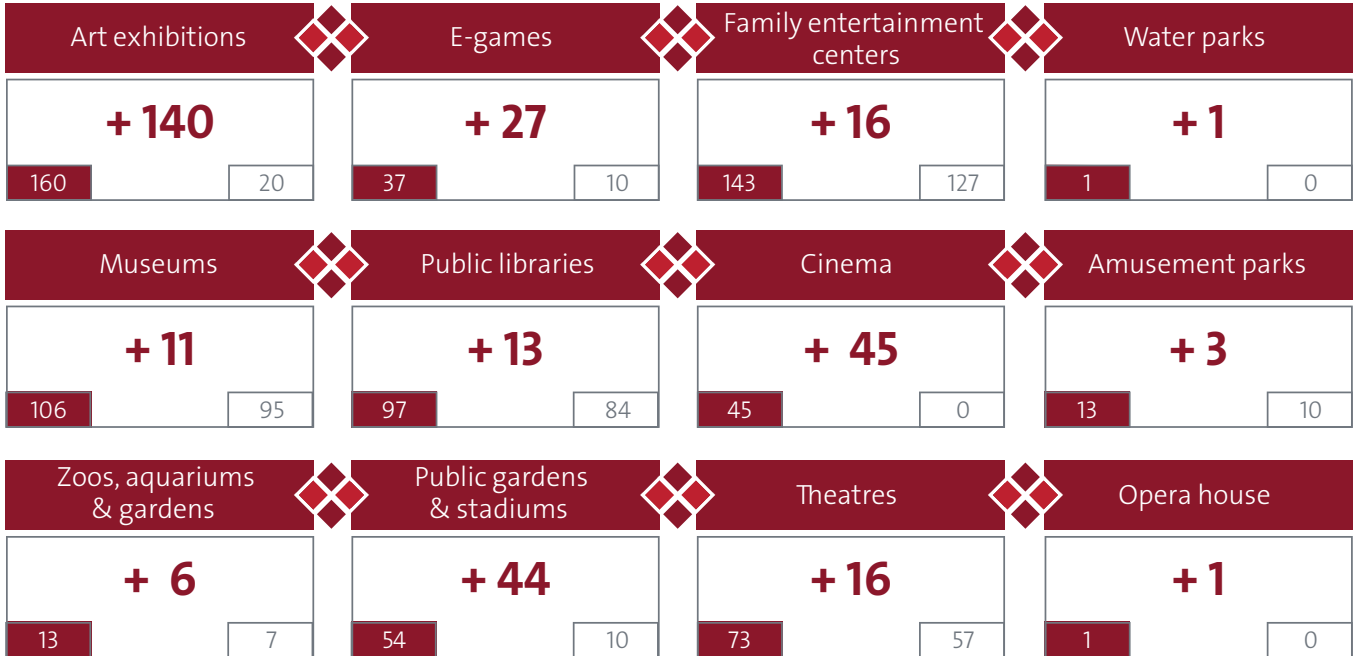


Illustration headline

**By 2020**

Target

Baseline

**Note:**

The expected pathway of infrastructure development is based on the current demand, expected economic impact and access to investors.  
 The Program is not responsible for museums but the Saudi Commission for Tourism & National Heritage (SCTH) is responsible for it along with other programs.

**The Program is mainly based on enabling the fulfillment of this gap** especially through private sector contribution, in addition to several outputs that the Program complies to achieve

Targets

Gap

Baselines

**The program is an implementer**

**The program as an enabler**

**The program is committed to have several outputs**, for example:

- ◇ 16 theatres, 140 art exhibitions 13 public libraries, and 1 opera house

**Building facilities and establishments will be enabled through several types of initiatives**

- ◇ Strategic and operational support
- ◇ Organizational support
- ◇ Supporting investment companies by private and public sectors (establishing investment council)
- ◇ Awareness and media support



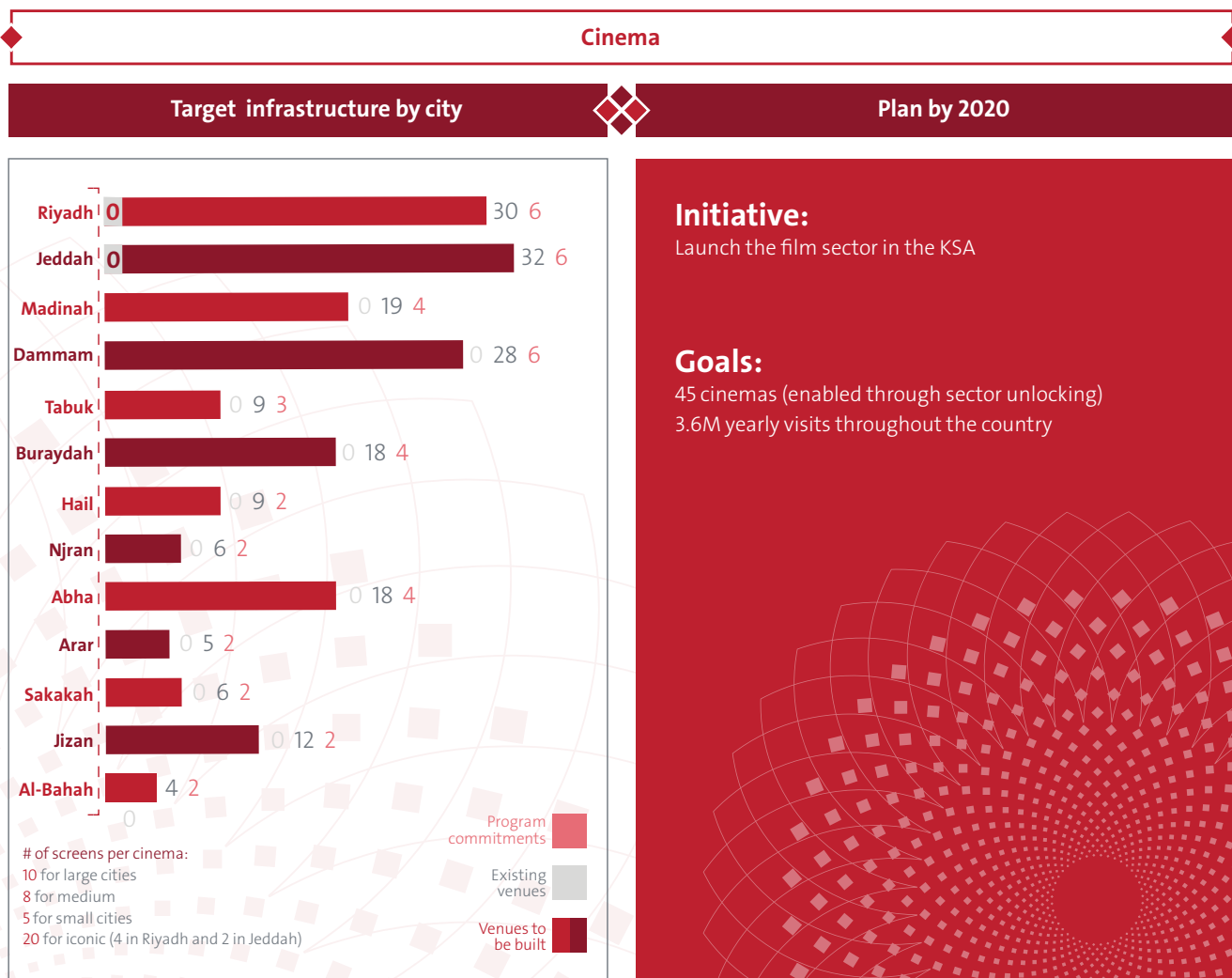
Having identified the gaps related to all types of infrastructure and based on the top-bottom methodology followed by the Program through determining aspirations and commitments based on global benchmarks, the Program suggested distributing those outputs to regions based on a number regional considerations, including size of population, average family income, climate and population preferences. The Program will align with executive bodies in this regard, and private sector investment and desire to invest in such regions is a significant aspect in approving infrastructure projects.

For example, as for opera houses, the Program aims to establish two opera houses; the first one in Riyadh as part of Royal Arts Complex project and the other in Jeddah on the Arts and Culture Island. As for public libraries, the General Culture Authority (GCA) is studying the expansion and development of a public libraries network instead of establishing new ones. Thus, delaying the regional distribution of new libraries is preferred.

As for electronic games, geographical distance is not a definitive element to access and utilize, as their activities can be implemented remotely.

As for arts exhibitions, the determination of every region needs will follow a comprehensive study by GCA including interaction with local creators and artists.

Commitments and regional distribution shall be detailed as explained below:

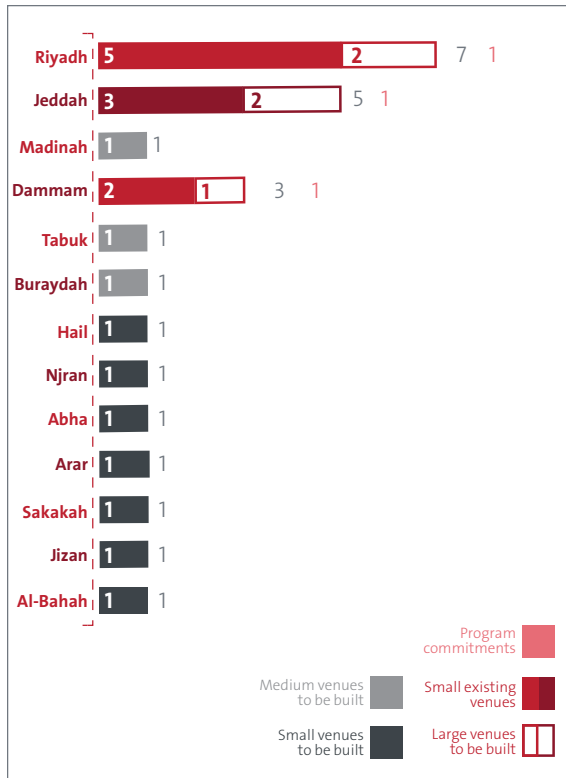


Source: Team analysis, company reports, press search, expert interviews



## Theme parks

### Target infrastructure by city



### Plan by 2020

#### Initiative:

Create out-of-home entertainment plan

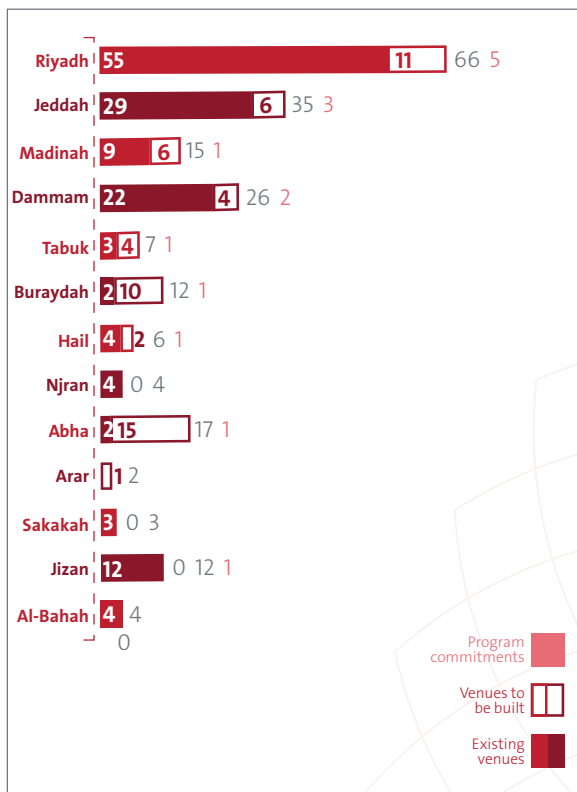
#### Goals:

3 theme parks (enabled through sector unlocking)  
Reach additional ~1M visits to all entertainment facilities, including theme parks

1. E.g., utilities, highways and roads, air and sea ports, public transportation networks  
Source: Team analysis, company reports, press search, expert interviews

## Family Entertainment Centers

### Target infrastructure by city



### Plan by 2020

#### Initiative:

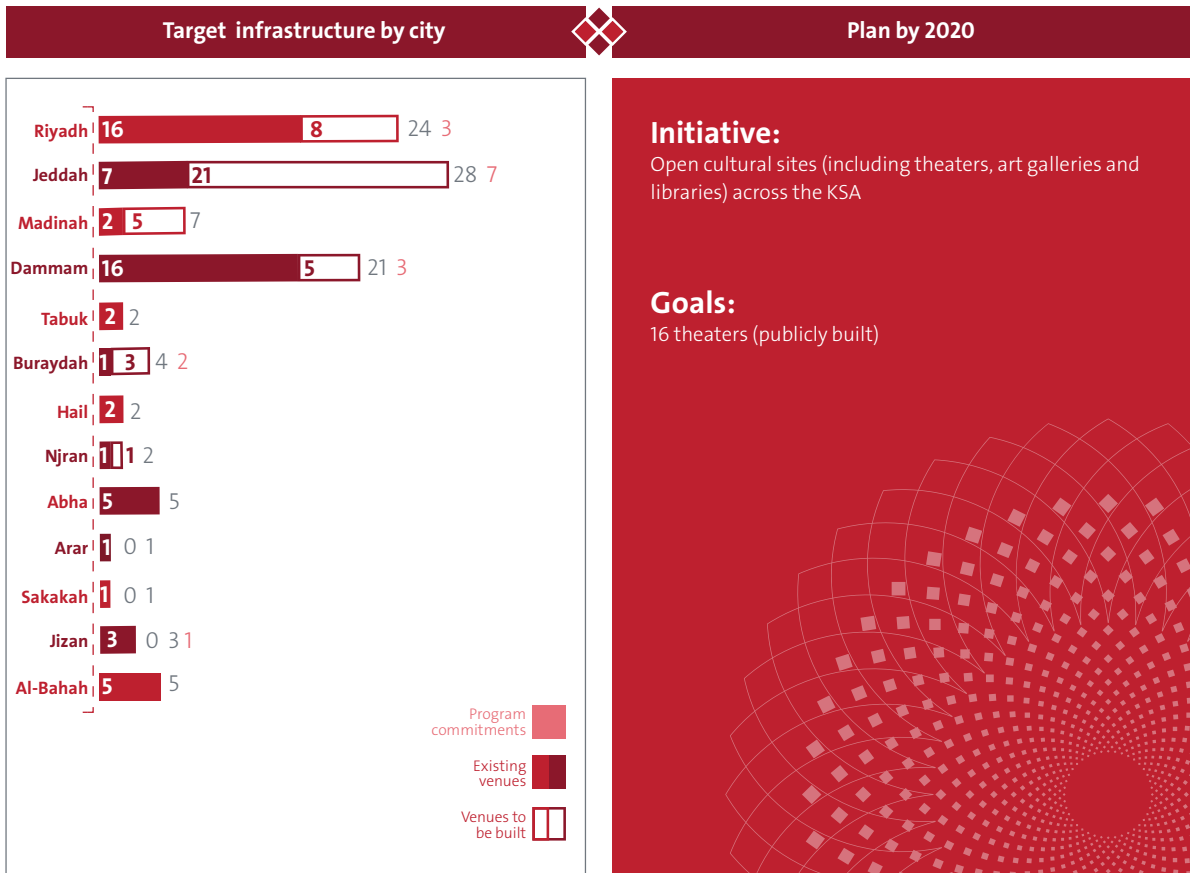
Create out-of-home entertainment plan

#### Goals:

16 Family Entertainment Centers (enabled through sector unlocking)  
(reach additional ~1M visits to all entertainment facilities, including family entertainment centers)

Source: Team analysis, company reports, press search, expert interviews

## Theaters



### Initiative:

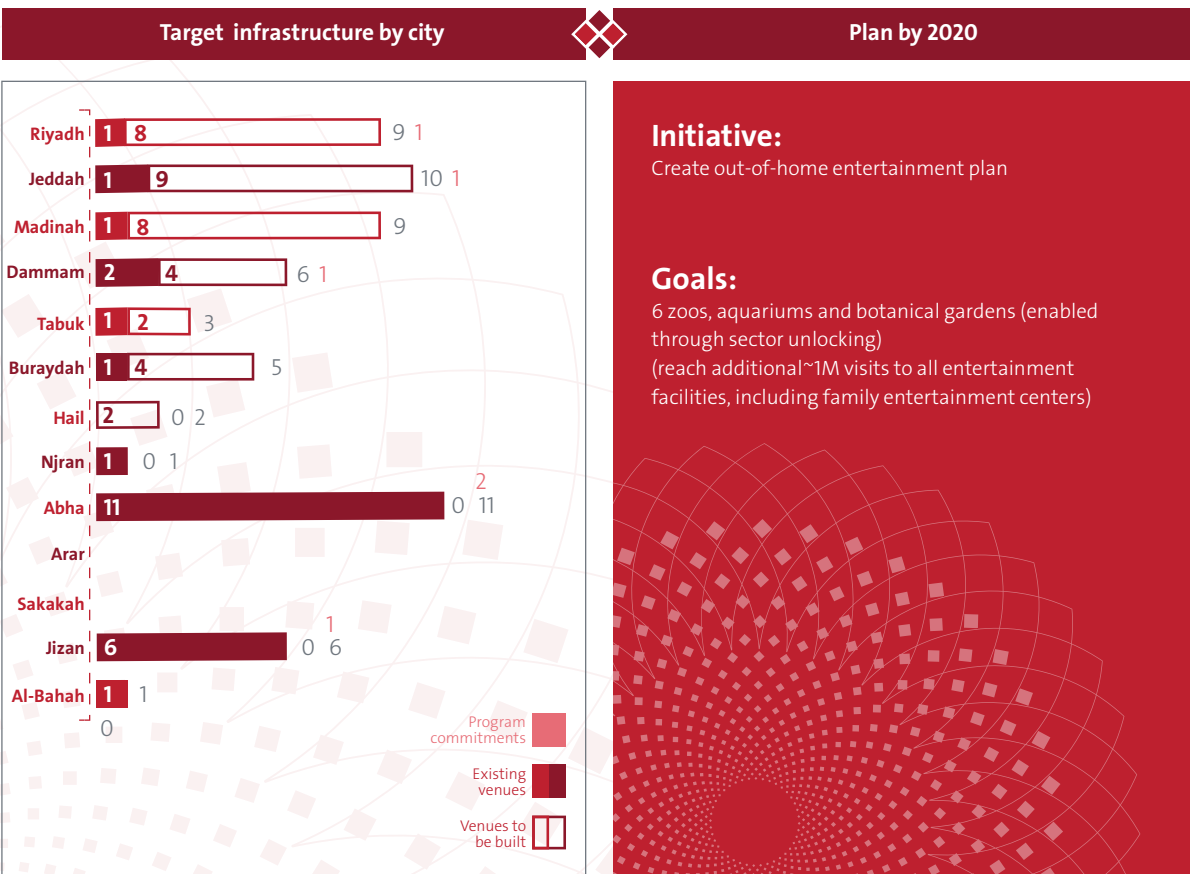
Open cultural sites (including theaters, art galleries and libraries) across the KSA

### Goals:

16 theaters (publicly built)

Source: Team analysis, company reports, press search, expert interviews

## Zoos, Aquariums, and Botanical Gardens



### Initiative:

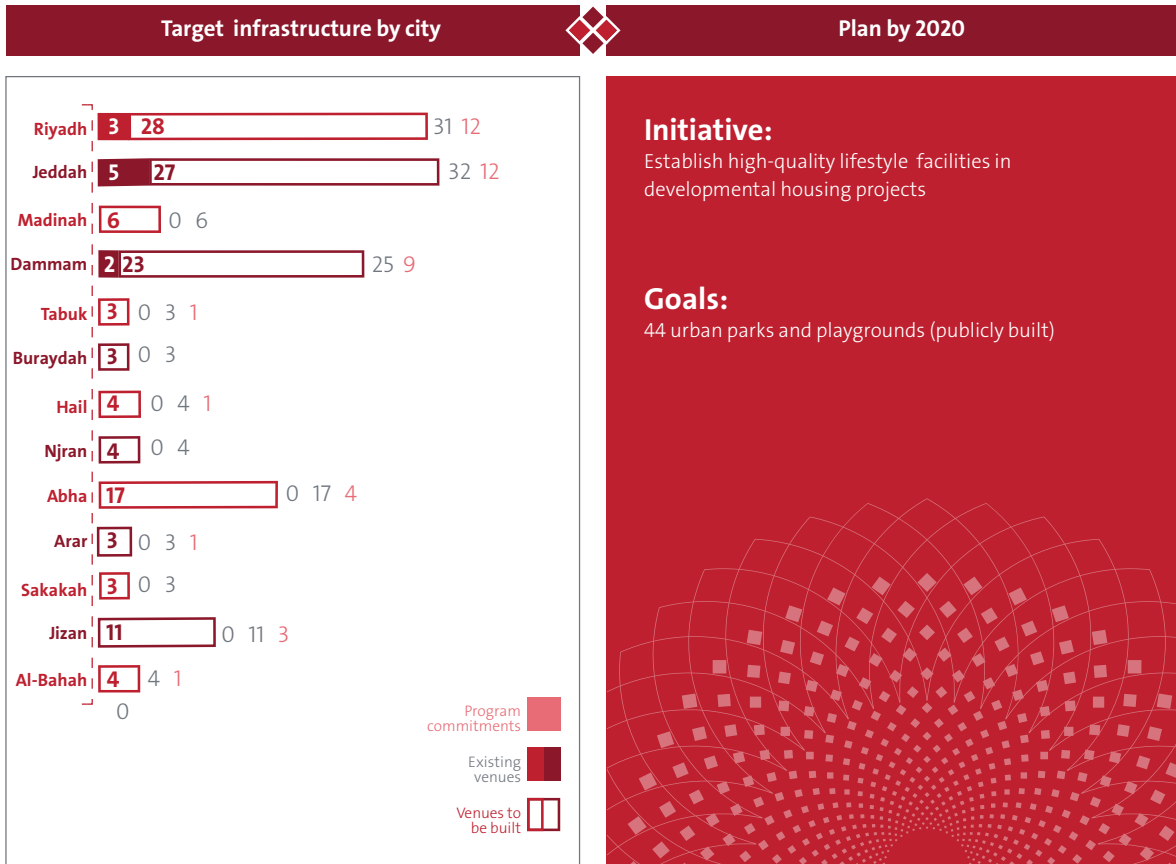
Create out-of-home entertainment plan

### Goals:

6 zoos, aquariums and botanical gardens (enabled through sector unlocking)  
(reach additional ~1M visits to all entertainment facilities, including family entertainment centers)

1. E.g., utilities, highways and roads, air and sea ports, public transportation networks  
Source: Team analysis, company reports, press search, expert interviews

## Urban Parks and Playgrounds



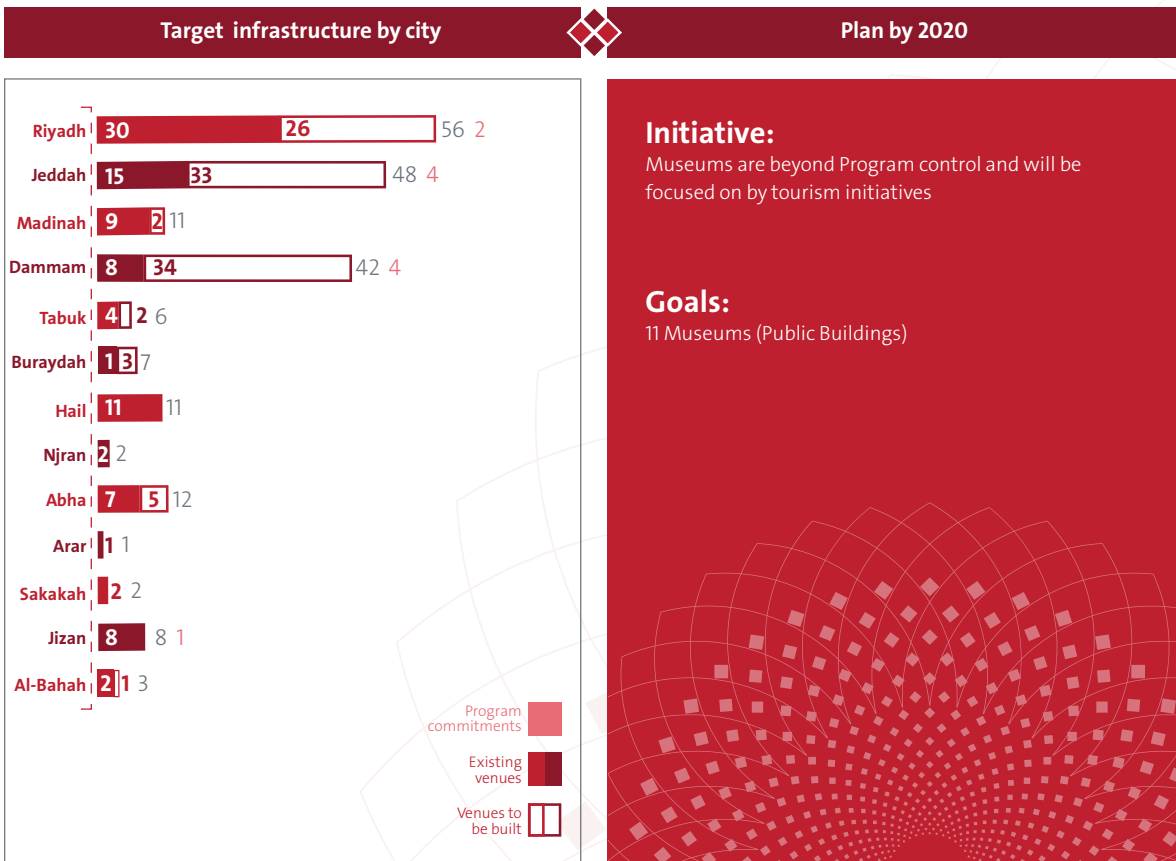
### Initiative:

Establish high-quality lifestyle facilities in developmental housing projects

### Goals:

44 urban parks and playgrounds (publicly built)

## Museums



### Initiative:

Museums are beyond Program control and will be focused on by tourism initiatives

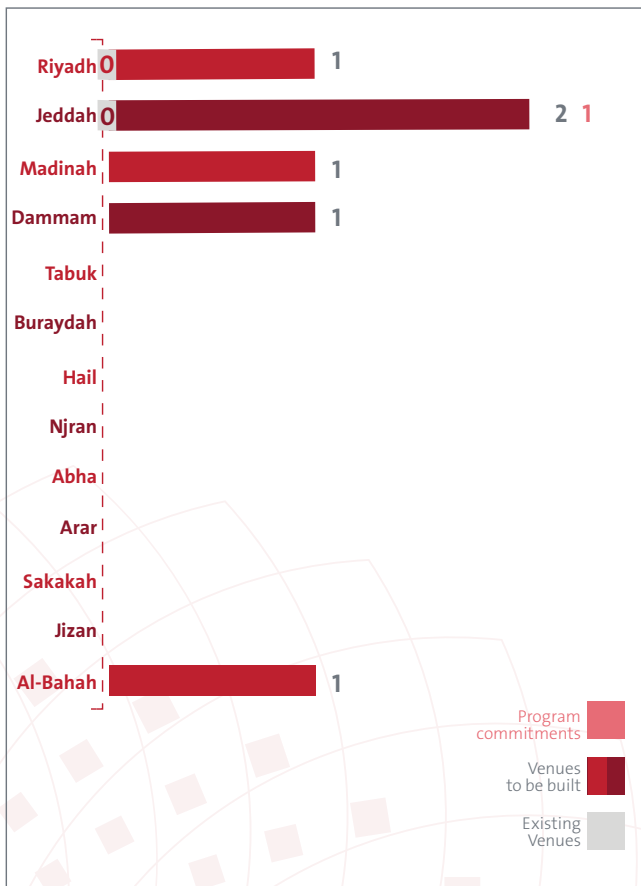
### Goals:

11 Museums (Public Buildings)

## Water parks

### Target infrastructure by city

### Plan by 2020



### Initiative:

Create out-of-home entertainment plan

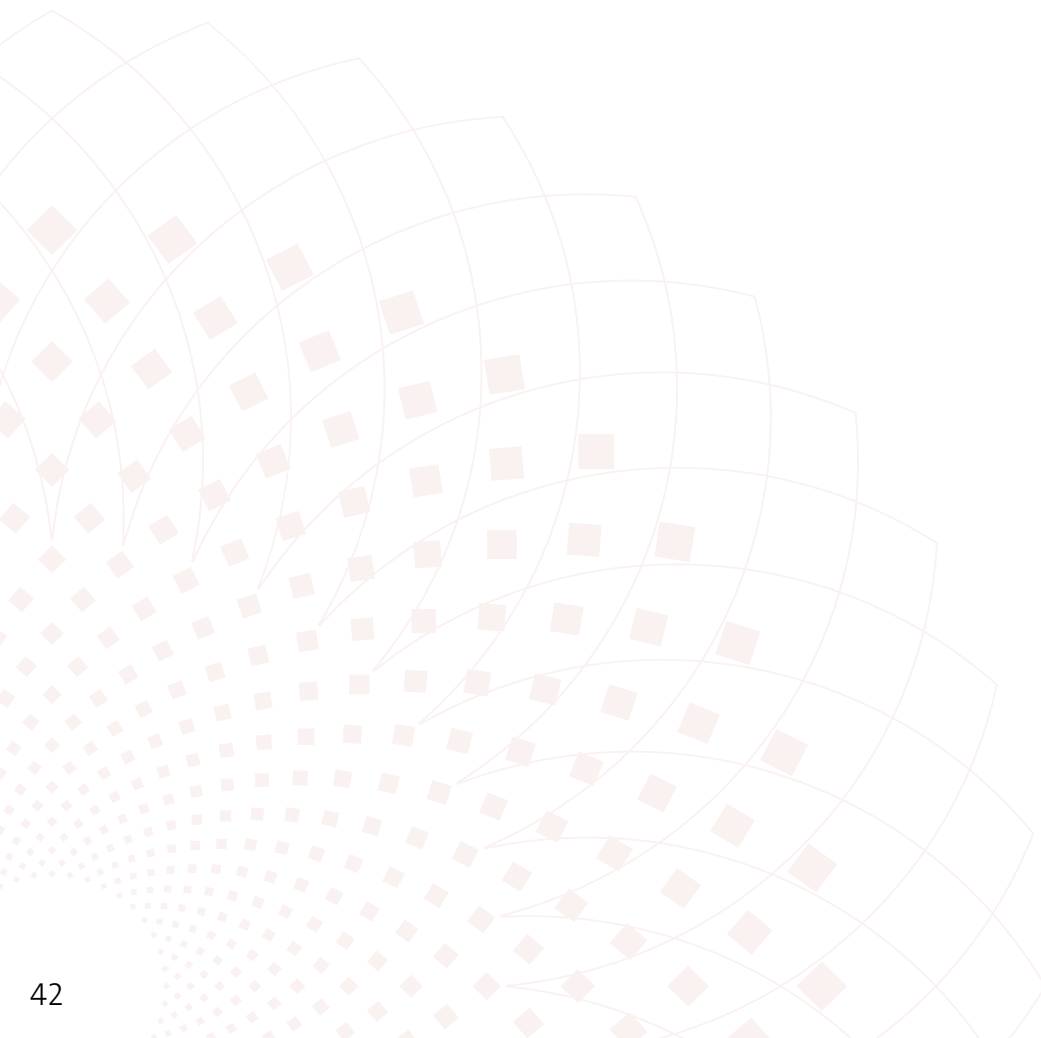
### Goals:

1 water park (enabled through sector unlocking)  
Reach additional ~1M visits to all entertainment facilities, including water parks

1. E.g., utilities, highways and roads, air and sea ports, public transportation networks  
Source: Team analysis, company reports, press search, expert interviews

	Strategic Objective	Associated attribute	Livability KPI	Baseline	2020 Targets	KPI Type	
Over-arching KPI							
Over-arching	2.2.1 Increase public participation in sports and athletic activities	Quality of Life in KSA	Number of Cities in the Top 100 Most Livable	0	1	Achieving the targets in partnership with NTP 2020	
	2.5.2 Grow Saudi contribution to arts & culture						
	2.5.1 Develop & diversify entertainment opportunities to meet population's needs						
Sports							
Sports	2.2.1 Increase public participation in sports and athletic activities	Comprehensive infrastructure	Number of activated sports venues	463,3	4,991	Owned by Quality of Life VRP 2020	
	2.2.1 Increase public participation in sports and athletic activities	Widespread public interest and participation	% of GDP spend on sports	0.1%	0.3%	Owned by Quality of Life VRP 2020	
	Professional Sports						
	2.2.2 Reach regional & global excellence in selected professional sports	International achievement	Number of athletes in Olympics (excl. wild cards)	7	7	Owned by Quality of Life VRP 2020	
	Non-professional sports						
	2.2.1 Increase public participation in sports and athletic activities	Widespread public participation	Percentage of individuals who exercise on a weekly basis	13%	18%	Owned by Quality of Life VRP 2020	

	Strategic Objective	Associated attribute	Livability KPI	Baseline	2020 Targets	KPI Type
Heritage, Culture and Arts	Culture and Arts					
	2.5.2 Grow Saudi contribution to arts and culture	Comprehensive cultural infrastructure	Number of cultural infrastructure	158	405	Owned by Quality of Life VRP 2020
		Full-spectrum of cultural activities	Number of cultural activities offered	278	5,167	
		Engaged public toward artistic offering	Percentage of consumer expenditure on cultural offerings	0.110%	0.120%	
		Supportive arts ecosystem	Participations in major international events	0	5	
		Competitive local content production	Number of published books	23,000	25,000	
Competitive local content production		Number of produced movies	0	13		



	Strategic Objective	Associated attribute	Livability KPI	Baseline	2020 Targets	KPI Type	
Entertainment	Entertainment						
		Widespread public interest	Household spending on total entertainment	1.70%	2.02%	Owned by Quality of Life VRP 2020	
	Out-of-home entertainment						
		Comprehensive infrastructure	Number of venues	154	260	Owned by Quality of Life VRP 2020	
		Full spectrum service offering	# of unique titles of entertainment events	216	358	Owned by Quality of Life VRP 2020	
	At-home entertainment						
	Comprehensive content offering	Number of accessible media channels (e.g. radio, TV and newspapers)	181	409	Owned by Quality of Life VRP 2020		
	Comprehensive content offering	Percentage of top titles (e.g. books, video games, board games, etc.) available within 3 months of global publishing	N/A	N/A	Owned by Quality of Life VRP 2020		
Recreation	2.5.1 Increase public participation in sports and athletic activities	Food and beverage services					
		International food and beverage offerings	Number of food and beverage outlets	28,410	30,859	Owned by Quality of Life VRP 2020	
		Globally renowned food and beverage offering	Number of premium restaurants (restaurants awarded the Michelin star)	1	3	Owned by Quality of Life VRP 2020	
		Outstanding participation in food and beverage offering	Percentage of consumer expenditure on food and beverage offering	5.57%	5.57%	Owned by Quality of Life VRP 2020	
	Recreation						
		State of the art leisure offering	Sq. meters of shopping mall retail space per capita	0.15	0.189	Owned by Quality of Life VRP 2020	
		State of the art leisure offering	Number of iconic developments	0	1	Owned by Quality of Life VRP 2020	
	Pervasive public participation in leisure offering	Percentage of global brand representation	N/A	N/A	Owned by Quality of Life VRP 2020		
Social engagement	Social Engagement						
		Volunteering	# of hobby groups	0	450	Owned by Quality of Life VRP 2020	

KPI referred to in Vision 2030

KPIs to be monitored in the second half of 2019

This section gives an overview of the strategic KPIs that enable monitoring progress of the Quality of Life in the Program 2020. Some KPIs, however, will only be monitored by ADAA when relevant strategies are designated (recreation and at-home entertainment). They will be monitored as of the second half of 2019. These relevant KPIs are as follows:

**•Recreation**

- Number of restaurants and cafes
- Percentage of consumer spending on food and drink offerings
- Number of high-end restaurants (restaurants awarded the Michelin star)
- Area of malls (measured by m2 per capita)
- Number of iconic projects
- Rate of international brand representation

**• At-home entertainment**

- Percentage of bestsellers available (books and video games) within 3 months of their release worldwide
- Number of available media outlets (such as radio, TV, and newspapers)

**• Lifestyle offerings are classified into 4 main types:**

- Infrastructure - Physical sites to be renovated and/or constructed to enable the provision of actual services (cinemas, amusement parks, sport facilities, museums, theaters, restaurants, etc.)
- Event - Hosting one-time events in KSA (festivals and concerts)
- Activity - Hosting regular activities in locations for every regional scope (each theater will host several plays, series, and/or shows every year)
- Content – Titles/entertainment material available in KSA (tablet games, books, movies, etc.)

The event targets for the entertainment, heritage, and culture categories are independently set. A clear distinction is necessary to better understand the difference between the goals in each category.

- Direct entertainment events will include a variety of different titles hosted all across KSA in any given year (for example, if the Royal Concertgebouw Orchestra concert is played more than once in many regions, it will be considered as one major direct entertainment event).
- Cultural, heritage, and religious events will include a multitude of festivals/conferences hosted in the KSA in any given year (such as Jenadriyah, Eid Al-Fitr and Eid al-Adha, Saudi National Day, amongst others).

Additionally, the Program owns 4 KPIs within Livability:

	Strategic Objective	Associated attribute	Livability KPI	Baseline	2020 Targets	KPI type
Housing						
Housing, Urban design, Environment		Provision of housing	Housing share (thousands of houses) to the population	0.99	0.99	Owned by the Ministry of Housing under the Housing VRP



	Strategic Objective	Associated attribute	Livability KPI	Baseline	2020 Targets	KPI type
Crime						
Security and socio-l environment		Homicide-free society	Intentional homicides by 100 000 population	1.5	1.3	Ministry of interior
		Low violent crime rates	Level of violent crime	1	1	Ministry of interior
		Widespread perception of safety	Level of violent crime	3	2	Ministry of interior

The Appendix (8 b) include further details about all of the KPIs, including:

- Definition of KPIs
- Benchmarks, Targets and Trajectories
- Detailed definition of sub-categories within the main dimensions (e.g. Entertainment and Culture)

## 2.C.2. Other 2020 Targets

This section includes the details of all the KPIs that are not owned by the VRP, but are critical to ensure a comprehensive delivery of the Quality of Life aspirations.

The 31 KPIs presented below have been color-coded according to the ownership and based on the three categories defined at the beginning of section 2.C:

- **Yellow:** Owned by other VRPs. The targets have been set by the Quality of Life Program 2020 and aligned with the respective VRPs. The delivery responsibility remains the other VRPs but the Quality of Life of VRP 2020 will monitor the performance to ensure that the overall targets are met. Alignment was achieved through several meetings with the stakeholders.
- **Red:** Undefined owners. The objectives associated to such KPIs are not owned by any entity. The targets will be confirmed once the owners are assigned.
- **Grey:** Owners beyond VRP structure. The KPIs go beyond the responsibility of any VRP. The targets have been set based on benchmarks from the most livable countries. The Quality of Life VRP 2020 will monitor the performance to understand the implications on the overall Quality of Life.

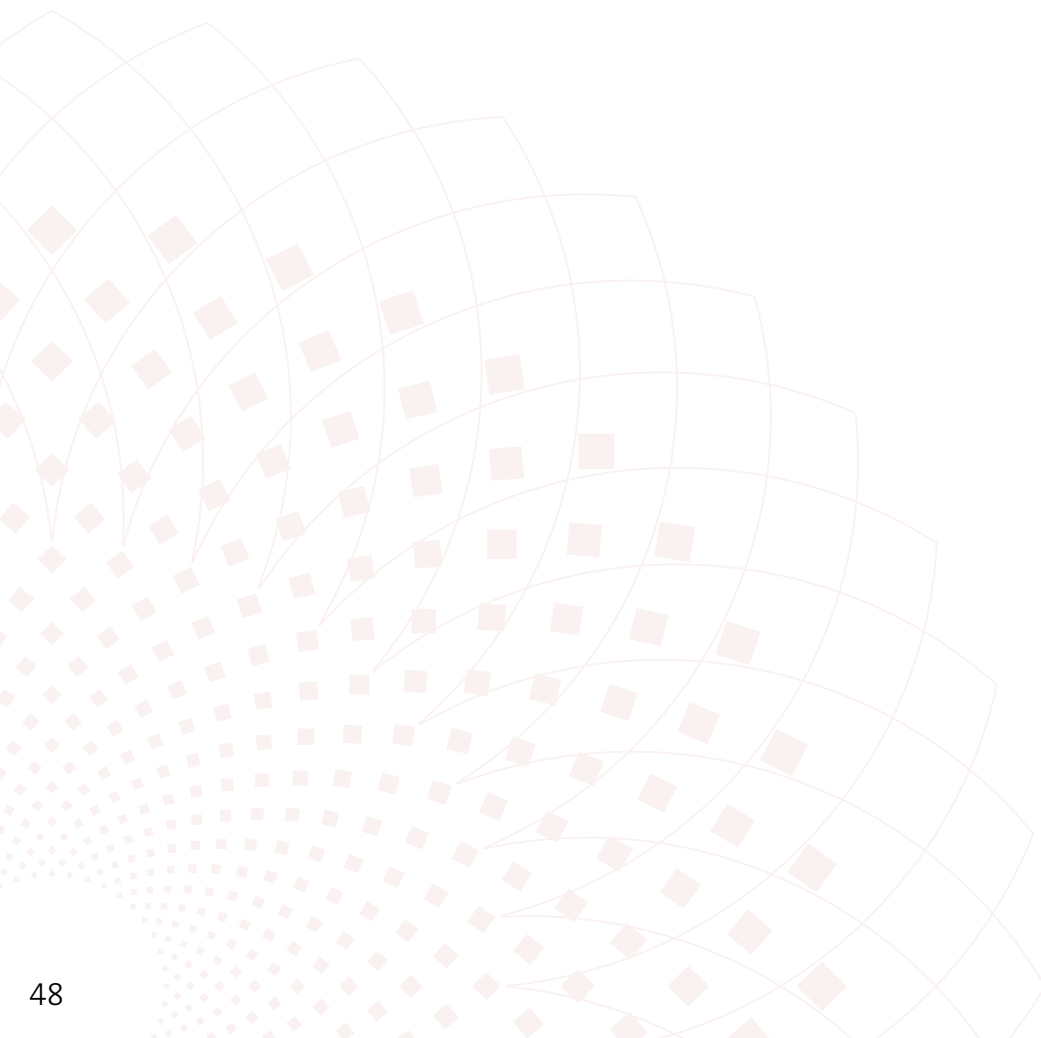
There are 25 KPI within livability that are not owned by the VRP:

	Associated attribute	Livability KPI	Baseline	2020 Target	KPI Type
Healthcare	Medical care				
	Medical care available to all	Hospital beds per 1,000 people	2.2	2.3	Owned by MoH under NTP 2020
	Affordable medical care	Out-of-pocket health expenditure	14.3	11.0	Owned by MoH under NTP 2020
	Health levels				
	Healthy longevity	Life expectancy ((years	74.3	76	Owned by MoH under NTP 2020
	Lack of nutrition-related conditions	Obesity rate	28.7%	28.7%	Owned by MoH under NTP 2020
	Lack of nutrition-related conditions	Diabetes prevalence	13.4%	13.4%	Owned by MoH under NTP 2020
	Housing				
Widespread homeownership	Percentage of population that is a homeowner	49.8%	60%	Owned by Ministry of Housing under Housing VRP	
Housing, Urban design and Environment	Urban design				
	Available green space	Green space sq. m/ capita	0.9	1.46	Owned by MoMRA under NTP 2020
	Walkability	Number of steps taken per person per day	3,807	4,040	Owned by MoMRA under NTP 2020
	Quality of environment				
	Clean air	CO2 emissions from fuel combustion estimates in tons per 1 million US dollars of GDP in 2014	106	93	Owned by MoH under NTP 2020
Education and Economic Opportunities	Education opportunities				
	Highly competent students	PISA score	460	460	Owned by MoE under National Character Enrichment VRP
	Globally recognized institutions	Num. of local universities that are ranked globally	3	3	Owned by MoE under National Character Enrichment VRP
	Employment opportunities				
	Country capacity to attract talent	Global Competitiveness Index Rank	39	37	Owned by MoH under NTP 2020
	Working population	Unemployment rate	13%	9%	Owned by MoH under NTP 2020
	Equal employment opportunities	Female employment rate	21%	28%	Owned by MoH under NTP 2020

	Associated attribute	Livability KPI	Baseline	2020 Target	KPI Type
Infrastructure and Transportation	Transportation and Infrastructure				
	Convenient access to international destinations	Direct international flights (city and frequency)	Jeddah: 84, Riyadh: 56, Dammam: 33	Jeddah: 84, Riyadh: 56, Dammam: 33	Owned by GACA under MoT's National Transportation Strategy
	Minimal traffic congestion	Hours/year that the average commuter spends in traffic	Jeddah: 29, Dammam: 12, Riyadh: 39	Jeddah: 29, Dammam: 12, Riyadh: 39	Owned by MoMRA under NTP 2020
	Accident-free roads	Road traffic deaths per 100,000 population	28	23	Owned by MoH under NTP 2020
	Public and Shared transports				
	Public transport used by everyone	Annual journeys in public transport per capita	0	15	Ministry of Transport/ Public Transport Authority
	Electric car sales	Penetration of electric cars	0%	1.5%	Owned by Saudi Energy Efficiency Center under NIDLP VRP
	Sustainable utilities				
	Sustainable energy provision	Percentage of renewable energy to total energy used	0%	4%	Owned by MEIM under NTP 2020
	Efficient waste disposal	Percentage of recycled waste from total waste produced	12.5%	40%	Owned by MoMRA under NTP 2020
	Connectivity				
	Connected society	Devices connected to internet / person	3.6	6	MCIT
	Availability of latest technologies	Network Readiness Index ((Rank	33	25	Owned by MCIT under NTP 2020
	Government services				
Effective e-government	e-Government Survey Index	44	24	Owned by MCIT under NTP 2020	
Minimal corruption	Corruption Perception Index (2016 (Rank	62	40	Owned by MEP under NTP 2020	
Tolerance and equality					
Complete gender equality	Gender Inequality Index	50	45	Monitoring only	

Additionally, there are 6 KPIs within lifestyle that are owned by other VRPs, in particular the ones related to Heritage, owned by SCTH within NTP 2020, and the ones related to volunteering, owned by MLSD within NTP 2020:

	Associated attribute	Lifestyle KPI	Baseline	2020 Target	KPI Type
Heritage, Culture and Arts	Heritage				
	Comprehension heritage infrastructure	Number of heritage infrastructures	246	450	Owned by SCTH under NTP 2020
	Profound heritage service offering	Number of hosted heritage events	23	40	Owned by SCTH under NTP 2020
	Widespread interest in national culture	Number of world heritage sites recognized by UNESCO	4	7	Owned by SCTH under NTP 2020
	Widespread interest in national culture	Number of intangible UNESCO cultural heritage elements	4	6	Owned by SCTH under NTP 2020
Social engagement	Third Sector				
	Volunteerism	Number of volunteers in KSA	23k	300k	Owned by MLS D under NTP 2020
	Number of NGOs	Number of NGOs per 1000 inhabitants	0.01	0.05	Owned by MLS D under NTP 2020

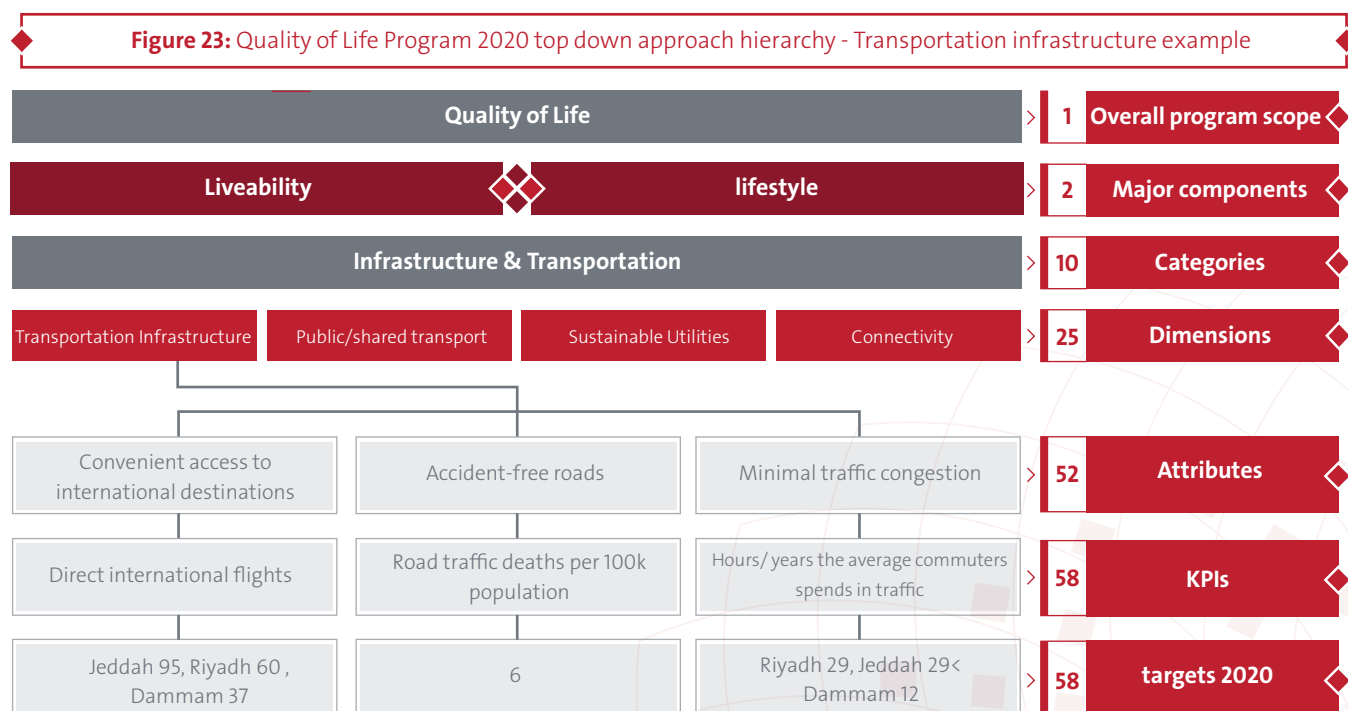


## 2.D. Target Setting Methodology

### Ambition, attributes and KPIs

Aspirations were defined for the selected KPIs against each attribute to achieve the overarching ambition of Saudi Arabia to include at least 3 cities in the top 100 most livable cities. Before developing attributes, we have first defined a set of underlying dimensions under each category. Essentially, the dimensions go one level deeper into the components of the different categories. For example, under the category “Infrastructure and Transportation,” there are multiple dimensions, one of which is “Transportation infrastructure.”

Following the definition of quality of life, the Program ended with a list of 10 categories and 25 dimensions. The dimensions were created based on an extensive benchmarking exercise (as described in section 1.B), which identified the most relevant sub-components of the quality of life indices. The objective of defining a list of attributes was to break down the dimensions into actionable, specific items that could easily be measured and associated with KPIs. Following the previous example, the attribute for Connectivity would be “Accident-free roads.” The final selection of the KPIs (associated to their relevant attributes) was developed based on indices, yearly publications from reputable databases and other similar programs, with the ultimate objective of measuring the overall performance in each category. Therefore, each attribute is represented by a KPI and corresponding aspirations and targets.



### Benchmarking and target setting methodology

After identifying the most relevant KPIs, clear targets were defined based on a three-layered benchmarking approach. The approach first identified sets of benchmarks at three stages: countries with the highest livability globally, countries in the next bracket of livability compared to Saudi Arabia and regional benchmarks. The corresponding sets of benchmark countries are presented below:

- Most livable countries which consistently rank at the top of the EIU Liveability Index both at country and at city level: Australia, Canada, Germany, Norway, Switzerland
- Countries in the subsequent bracket of livability with cities that rank between 80 and 100 in the EIU Liveability Index: Brazil, China, Romania, South Africa
- Regional benchmarks with similar socio-political and cultural conditions and geopolitical challenges
- Where benchmarks were not deemed representative, globally recognized guidelines were used to set targets for specific KPIs

The approach described can be illustrated for the Transportation and Infrastructure category under which the attribute “Accident-free roads” was identified. In this case, the KPI associated to this attribute is “Road traffic deaths per 100,000 inhabitants” (based on multiple sources, including WHO, AARP, etc.). The range of benchmarks for the most liveable countries ranges between 3.3 and 6 road traffic deaths per 100,000 inhabitants. Given the current baseline of KSA at 27.4 road traffic deaths per 100,000 inhabitants, the aspiration for 2030 was set at 6, aligning with the entry point of most livable nations.

To define 2020 targets, two key factors were taken into account: the required linear growth to reach the 2030 aspiration and the lead time required to affect the targeted outcome. To ensure a realistic target definition, the aspirations have been aligned (whenever possible) with the responsible entities. In the case of the road traffic deaths, the key bases that need to be activated, such as infrastructure improvements and changes in driving behavior, required long lead times. Hence, the 2020 target was set at 23, below the linear growth required to reach the 2030 aspiration. This is in line with the road death reduction trajectory that other countries which have achieved significant reductions have experienced (e.g. Spain).

## 2.E.Macro-economic metrics

The VRP team, in collaboration with various supporting entities, has defined the Program's contribution to the KSA's macro-economic metrics. This impact is driven by the Quality of Life VRP 2020 initiatives and their respective budget requirements. The table below summarizes the annual and cumulative impact of the Program.

Annual Fees	Metric	Unit	Baseline	2018	2019	2020
Macro-Economic Metrics	GDP	SAR billion	47	76	81	85
	Investment	SAR billion	4	21	19	21
	Development	SAR billion	0	9	11	10
	Consumption	SAR billion	43	47	50	54
	Private, total direct jobs	# thousands	290	310	327	346
	Contribution to local content	%	56%	59%	64%	67%
	Non-oil revenues	SAR million	0	1272	1653	1983
	Non-governmental investment	SAR billion	2	8	8	8
	Balance of payments*	SAR billion	-	-6.234	-7.032	-7.720
	Consumption rate	%	1.184%	0.526%	1.694%	2.051%
	Inflation rate	%	-0.114%	5.754%	1.981%	2.085%
Budget	SAR billion	0	15	16	17	

\*VRP was able to calculate the balance of payments

Developing an iconic Arts and Culture Island in Jeddah and building the Royal Arts Complex will require a budget exceeding that of 2021 and 2022 to complete the construction of infrastructure which will start in 2018.

The methodology for GDP and job creation in the private sector has been developed, following discussions with representatives from the Ministry of Finance, World Bank, International Monetary Fund, and supporting entities.

GDP and job creation assessed at the sector level provide a comprehensive view on direct, indirect, and induced impact. The methodology sums up the impact from 3 different levers:

- Investment in infrastructure development (both private and public) – planned investments to develop the infrastructure to enable lifestyle offerings. This includes both public investment (e.g. refurbishing stadiums, building libraries, developing facilities at schools or universities) and private investment (e.g. constructing theme parks, cinemas, gyms)
- Government spending on sector development – expenditure in promoting and marketing the newly developed lifestyle offerings (e.g. sports awareness campaigns, arts competitions) as well as carrying out operations (e.g. physical education classes, maintaining museums)
- Final consumption in the lifestyle sector – recurring value generated by household consumption of new offerings (e.g. revenues generated by theme parks, purchases of sports equipment)



For each lever, multipliers have been applied to determine GDP and job creation potential. These multipliers have been derived from input-output tables, which already incorporate the permeability of the economy (i.e. import and exports). As sectors are nascent in KSA, a blend of multipliers from a set of benchmark peers with developed sport, entertainment, arts and culture and recreation sectors have been used (e.g. Turkey, UK, US).

According to several metrics, there will be a huge leap from between the years 2020 and 2030, thanks to the nature of this Program. This VRP will invest in incentivizing new or underdeveloped sectors in KSA. Consumption in this particular sector will grow rapidly as it expands, keeping up with the overall growth projected for 2020 -2030 based on the total investments made in 2018-2020.

If we consider the GDP for example, the baseline GDP of the Quality of Life Program 2020 sectors constitutes around 2.5% of the total non-oil GDP in 2016. Based on Program initiatives, it is predicted that these sectors will grow by 20% annually until 2020, then by 10% until 2030. This is currently possible because the sector is too small with too many constraints (such as the lack of cinema permits). Once such restrictions are lifted and the Program initiatives are implemented, rapid growth is predicted.

For jobs, the Program worked closely with the Job Creation Commission and developed estimates of direct private sector job creation for each initiative in the Program. In total, 38 initiatives in the Program contribute directly to job creation, which accounts for the numbers in the table above. In addition to these jobs that are created directly through the activities of a given initiative, there is a broader effect that the initiatives have on lifestyle sectors and on the economy which would lead to additional job creation beyond what is captured in these figures, but which is difficult to estimate.

Local content at the Program level is similar to GDP after taking into account leakages out of the economy. The 3 main leakages considered are imports, expat remittances, and repatriated profits. First, imports are required for construction material and equipment to develop lifestyle offerings. Second, remittances stem from expatriate labor that will both develop and operate the sector. Third, foreign firms that will invest in lifestyle will repatriate a share of their profits. To increase local content, the Program will increase the share of locally-sourced material and equipment to reduce imports, increase the share of Saudi employees and increase the share of Saudi firms operating in the sector.

Non-oil revenues have been assessed for each initiative and are summed at the Program level. Overall, the Program non-oil revenues in 2018 are less than 1% of the total expected revenues for the same year. By 2030, these non-oil revenues will grow tenfold, but will still represent a slim contribution to the State revenues compared to other sources, such as the value added tax (VAT). It is noteworthy that the sector revenues will increase exponentially if we take into account Public Investment Fund (PIF) returns from the entertainment company and other recreational projects. Those returns were not included here to avoid double counting with PIF.

Non-governmental investment has been derived from the private sector contribution to investment in infrastructure. Private sector engagement is a key priority for the Program, and as previously indicated, we will generally depend on 4 pillars to guarantee maximum private sector engagement: (1) Improving public sector participation in fields where private sector participation is low, (2) providing financial incentives to make up for foregone profits in certain



sectors, (3) providing all necessary non-financial enablers to mitigate investment risks, and (4) managing private sector participation effectively in collaboration with SAGIA, which has already selected over 200 international investors.

As for the Balance of Payments, it includes three elements:

Current account: measures the state's balance of trade in addition to net income and direct payment.

Capital account: measures changes in domestic ownership of foreign assets and foreign ownership of domestic assets.

Financial account: measures financial transactions that do not affect the state's income, production or savings.

Given the nature of the Program, we believe that it will affect the current account only in KSA, especially the balance of trade. The last element is the difference between state's exports and imports. The Program will often rely on imports of goods and services to achieve the ambitious targets. At the same time, exports will not be generated directly because the Program's focus is currently on developing internal capabilities and infrastructure and delivering quality-of-life offerings. On this basis, the program ignored the value of exports.

As for imports, the Program developed a model for calculating the share of foreign products and services in capital expenditures and development/consumption (operational) expenditures. The share of foreign products and services is multiplied by the amount of investment and development/consumption to obtain the final import value.

The Program will contribute to Saudi balance of payments (BOP) as follows:

SAR billion	Baseline	2018	2019	2020
<b>Program contribution to BOP</b>	-7.03	-6.23	-7.03	-7.72

These figures represent the Program's BOP value and have been calculated as the net difference between Program exports and imports.




In addition, if the Program succeeds in achieving its aspirations across livability and lifestyle, there will be a broader halo effect on the economy as a whole. This would come from multiple sources, such as additional local and foreign private investment, increased retention of residents, and higher number of visitors and spending per visit. It is not possible to estimate this broader impact in a rigorous way, but to give a sense of the magnitude, we looked at the correlation between quality of life and gross domestic product (GDP) globally.

This has been estimated by evaluating the effect of improving the KSA's position on the EIU Livability Index. A regression analysis has shown that increasing 1 rank upwards is correlated with an increase in SAR1,780 in GDP per capita. Therefore, if KSA would be able to have 1 city in the top 100 list by 2020 and 3 cities by 2030, this implies that the impact on GDP in 2020 could be as high as SAR400 billion. If achieved, this impact would be due to efforts across livability and lifestyle, including efforts of other VRPs.

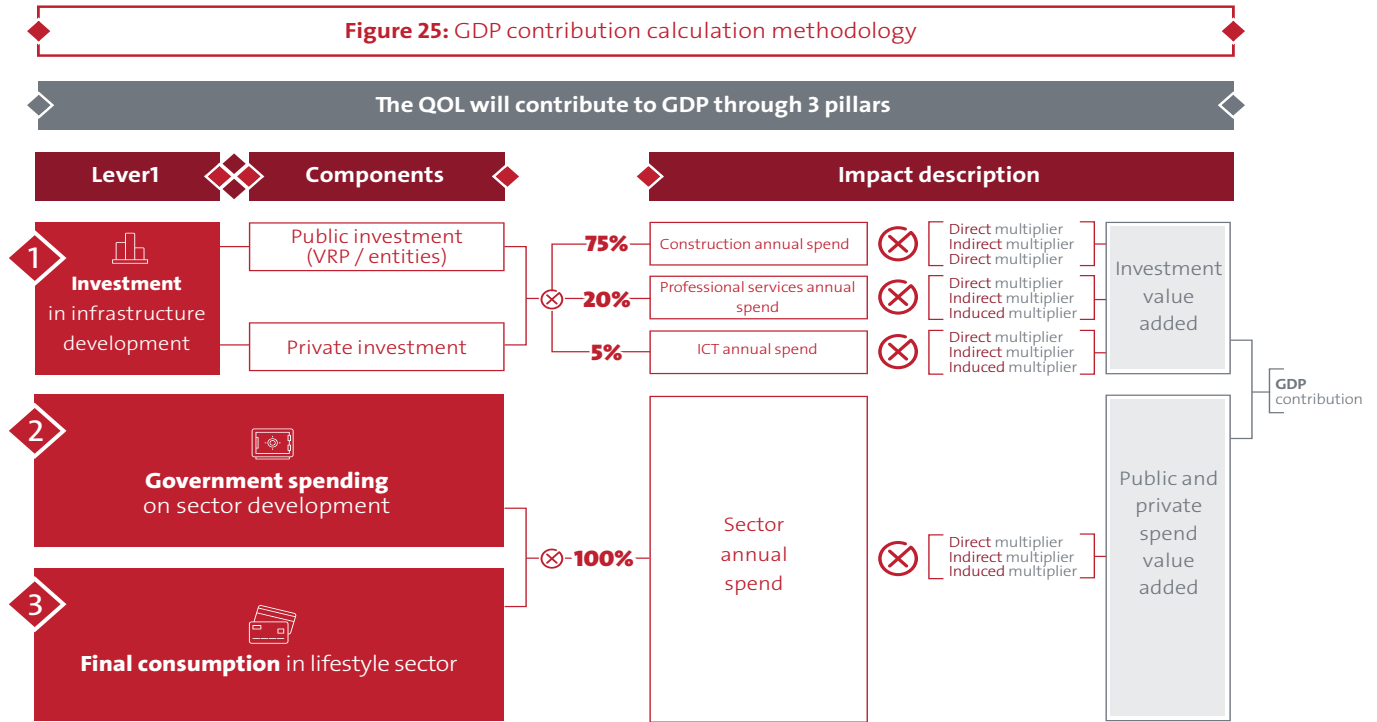
Starting early next year, the Program will enter into collaboration with the Ministry of Finance and the World Bank to assess the macro-economic impact of the Quality of Life Program 2020 in greater detail, using a general equilibrium model.

**Figure 24:** GDP and job creation contribution levers

The QoL VRP 2020 will contribute to GDP through 3 pillars

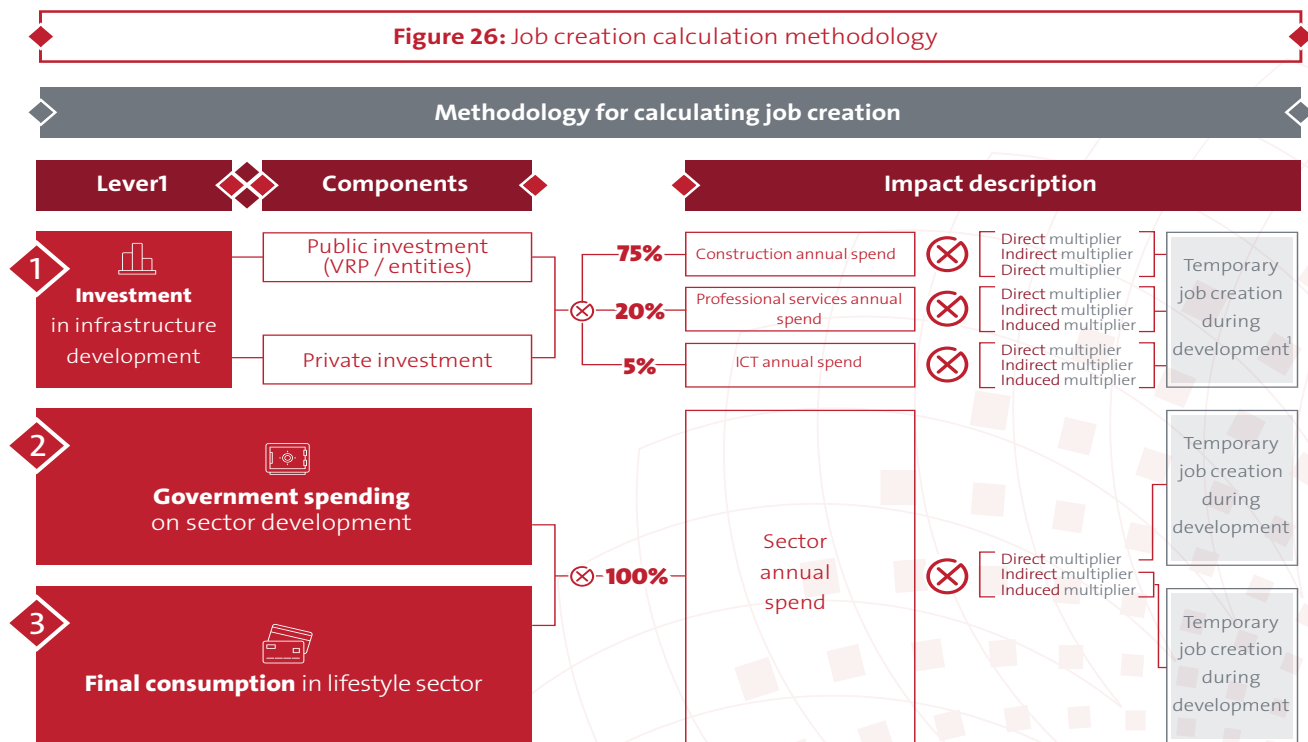
Lever	Description	Source of Impact	Timeline of Impact
<b>1</b>  <b>Investment</b> in infrastructure development	Investment to develop the necessary infrastructure to enable the lifestyle offering	Partially public, partially private investment. Requires government funds	Focus on initial years Non-sustainable impact (one-off construction)
<b>2</b>  <b>Government</b> spending on sector development	Expenditure in promoting and marketing the newly developed lifestyle offering	Public spend Requires government funds	Continuous impact but large on initial years (to facilitate market creation)
<b>3</b>  <b>Final consumption</b> in lifestyle sector	Recurring value of market generated by new offering (events, activities, and content)	Mainly private consumption Does not require government funds	Perpetual impact Impact on later years, requires ramp-up after initial investment and promotion

**Figure 25: GDP contribution calculation methodology**



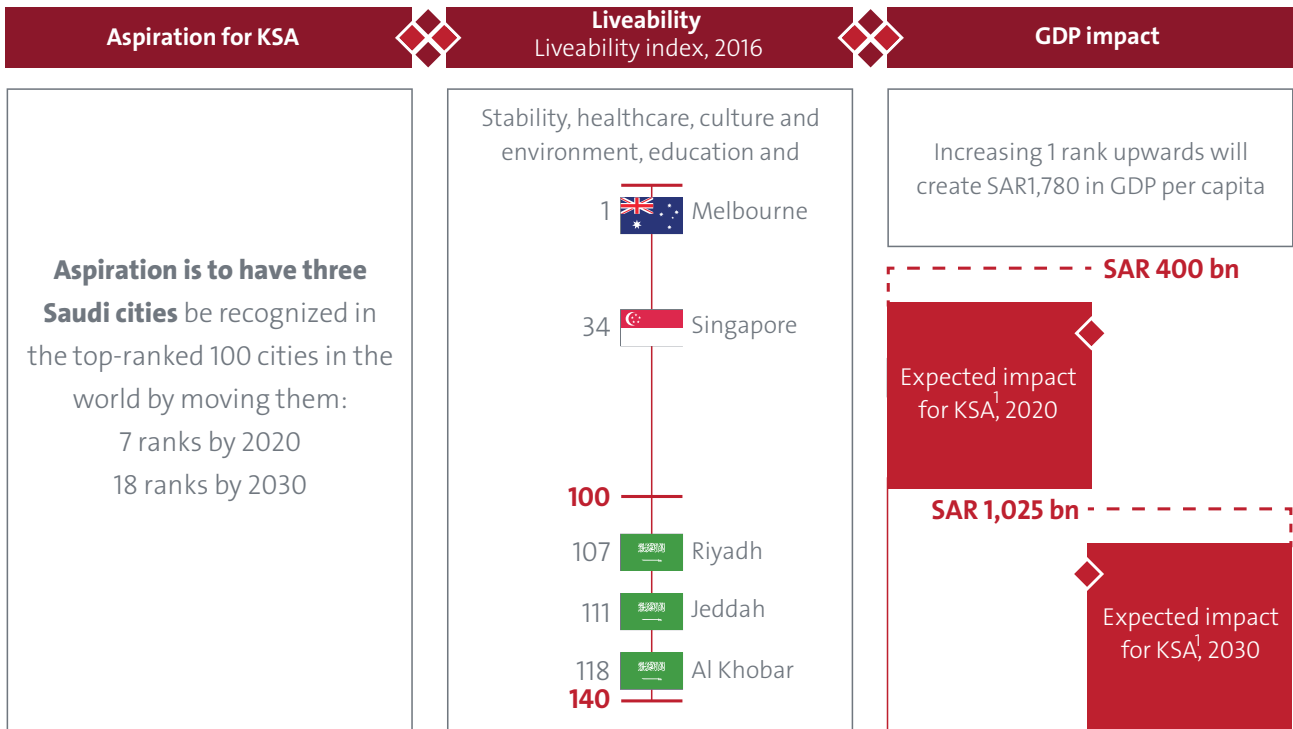
1. Import and export were included in investment, development, and consumption

**Figure 26: Job creation calculation methodology**



1. In the public and private sectors, Saudi and non-Saudi

**Figure 27 - Methodology of calculating the holistic impact on contribution to GDP**



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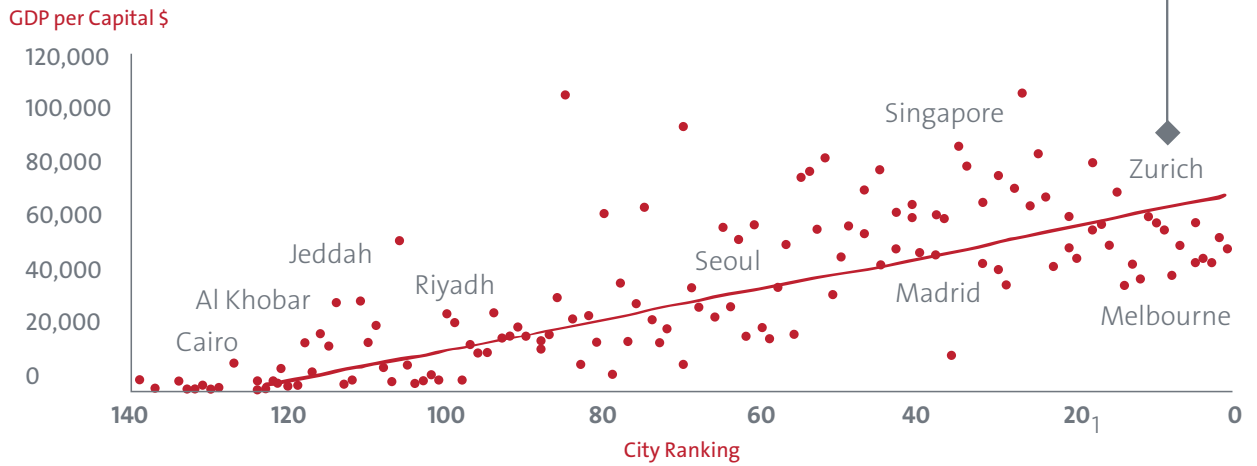
### KSA's aspirations:

The main aspiration is represented by having 3 Saudi cities amongst the top 100 livable cities in the world. That will be achieved by climbing:

- 7 ranks by 2020
- 18 ranks by 2030

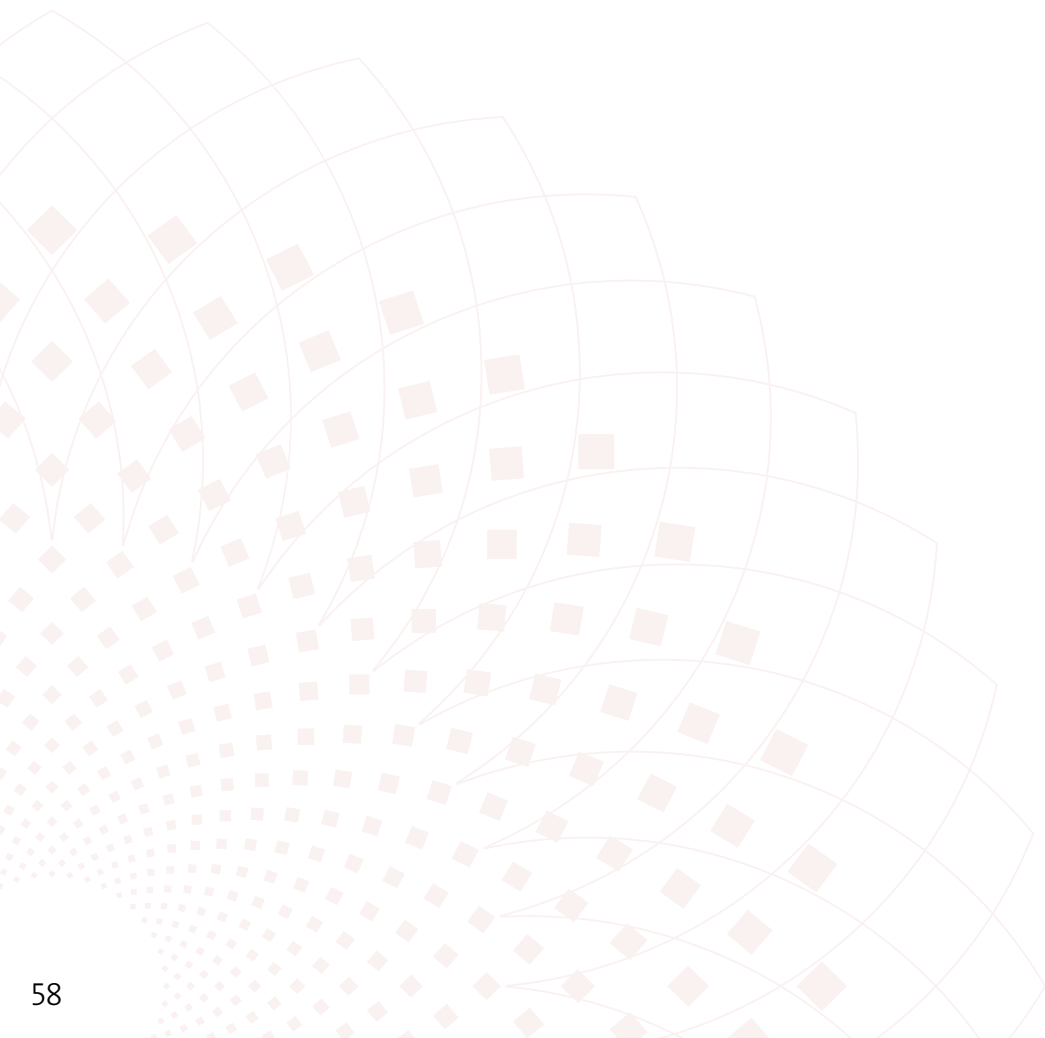
Figure 28 – EIU Liveability Index

(Regression analysis<sup>1</sup> of 1361 countries gives a coefficient of SAR1.780 (\$475 when increased 1 rank in livability index)



countries omitted due to lack of GDP per capita data 4 1  
Source: EIU; team analysis

# BASELINE



## 3. Baseline

Livability and lifestyle have experienced different stages of development in Saudi Arabia. In livability, recent efforts and investments have helped the country make some progress, particularly in healthcare, economic, and education. However, most of the lifestyle elements are still at a nascent state and require major improvements, especially regarding the availability of “basic” infrastructure and the development of the lifestyle service offerings.

The baseline relied on a clear methodology to assess the 10 quality of life components:

- **Current performance:** Evaluates performance of Saudi Arabia for each underlying dimension at current stage, including the main challenges
- **Benchmarking:** Compares the progress of Saudi Arabia with a list of best-in-class and relevant benchmarks
- **Initiatives in progress:** Identifies the initiatives currently addressing some of the challenges

### 3.A. Livability – Main challenges and current efforts

As one part of quality of life, livability comprises the living conditions required for citizens and residents to live a satisfactory life. These include infrastructure and transportation, security and political environment, healthcare, economic and educational opportunity, and housing, urban design and environment. Each of these factors is essential for a healthy cultural and social lifestyle to grow in the Kingdom. Large-scale investment efforts have seen the Kingdom make some progress in recent years, particularly in healthcare and economic and educational opportunities. Nevertheless, other aspects, most notably urban design and urban transit infrastructure, significantly lag behind peers. The Kingdom has the potential to catch up with peers in all these aspects, and provide a level of livability which is a source of pride to citizens and residents alike.

#### 3.A.1. Infrastructure and transportation

##### Current performance

The smooth functioning of the daily lives of citizens relies on a variety of infrastructure assets. This includes waste, water, energy, general connectivity and other critical urban assets. Internet and urban transit infrastructure are the primary drivers of connectivity in a city, and are particularly pertinent to improved livability standards.

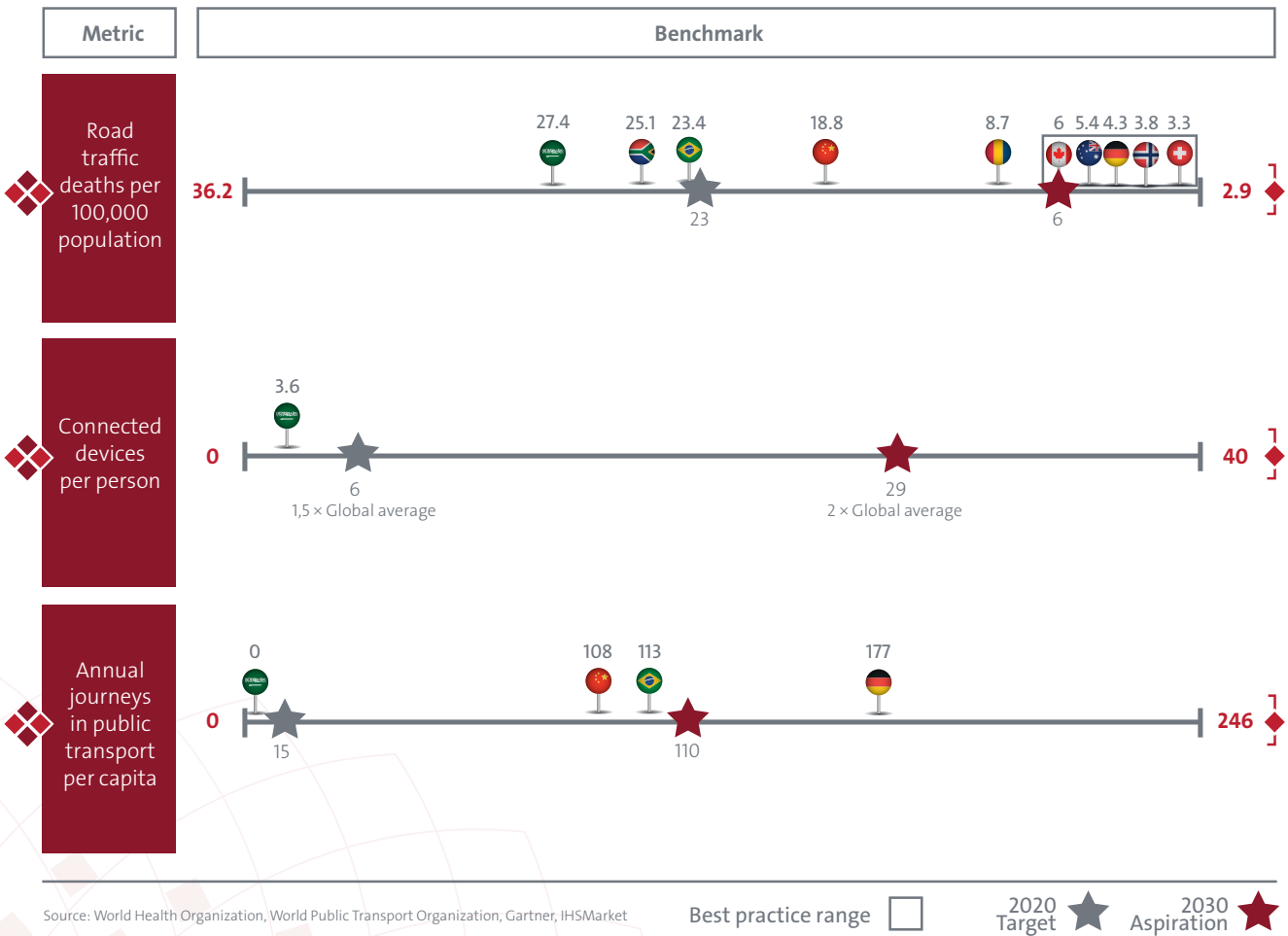
The KSA slightly lags benchmarks on connected devices per person, although the private sector has taken bold steps in the Kingdom to bridge this gap. In 2017, Zain Saudi Arabia and Nokia recently signed an MOU to develop next generation 5G and Internet of Things (IoT) applications to support the ambition to increase internet usage ratio from 75% to 85%.

With regards to improving urban transit infrastructure, the Kingdom faces two main challenges. First, there is a high use of private cars due to the lack of reliable or accessible public transportation in Saudi. Second, there is a substandard quality of roads.

## Benchmarking

Saudi Arabia significantly lags benchmarks in road traffic deaths and public transport usage but performs better in terms of traffic congestion. The Saudi road traffic death rate is among the worst 25 countries in the world (27.4 deaths per 100,000 inhabitants). Furthermore, Riyadh citizens spend approximately 16% of their driving time in traffic congestion vs. 10% in Chicago, and 9% in Johannesburg—both cities renowned for their long commutes. Therefore, and unsurprisingly, Saudi energy consumption on transportation is one of the highest in the world (1.42 tons of oil equivalent per capita), almost double that of France (0.75) or Sweden (0.87).

Figure 29: Infrastructure and transportation benchmarking



## Initiatives in progress

The KSA has initiated a national transportation strategy to enhance transportation safety and reduce congestion. The most well-known component of this strategy is the introduction of a public metro and an integrated bus system in Riyadh, Jeddah, Madina, Mecca, and Dammam. The Riyadh metro is expected to come into operation by 2019. In addition, traffic management centers are being built to monitor performance of traffic management authorities and to improve enforcement of traffic regulations. The target is to reduce road deaths from 27.4 deaths per 100,000 inhabitants to no more than 6 deaths per 100,000 inhabitants.

### 3.A.2. Security and Socio-environment

#### Current performance

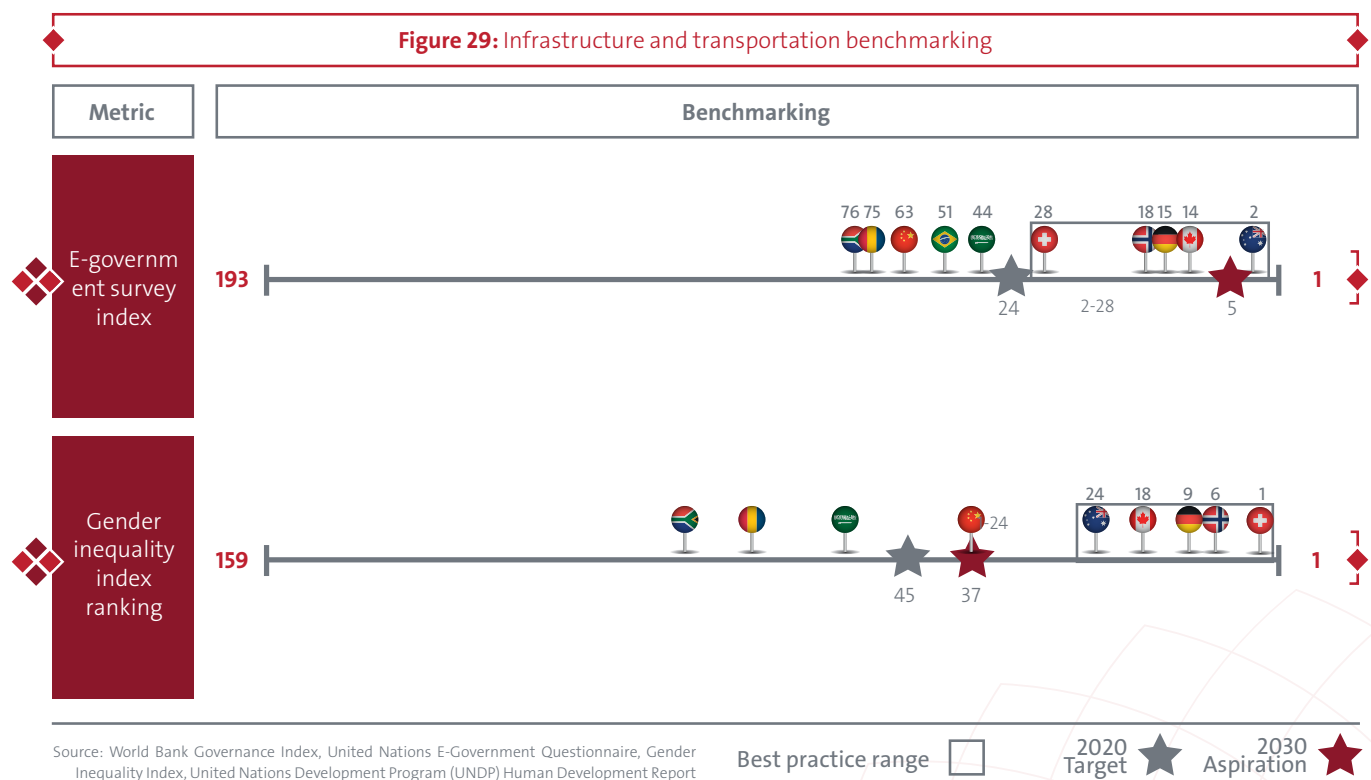
Saudi Arabia benefits from one of the lowest crime rates in the region. Riyadh is for instance one of the safest cities in the world according to the world's safest cities ranking (43rd). Saudi Arabia is also one of the most politically stable countries in the Middle East. In the areas



of e-Government services, Saudi Arabia has achieved significant progress across three main dimensions: availability, maturity and utilization of e-services. For instance, the National Saudi Portal currently offers over 2,500 government services, besides the m-Government application, which hosts more than 130 applications for 70 government agencies. Regarding tolerance and equality towards women, Saudi Arabia’s new policies are promising steps towards women’s full participation in society (e.g., right to drive).

### Benchmarking

The Program aims to use information and communication technologies to deliver public services which is illustrated by a good performance in the e-Government Survey index. When it comes to Gender Inequality, Saudi Arabia still lags behind countries with similar livability conditions.



### Initiatives in progress

The e-Government in Saudi Arabia was established by the Ministry of Communications and Information Technology (MCIT). One of the most important initiatives under MCIT is the “Yesser” Program which establishes, develops and manages most e-Government services and products. Other initiatives, led by the Ministry of the Interior, are trying to develop a digital ID system for Saudi citizens and residents. While most of the recent initiatives aimed at improving gender equality have been initiated by Royal decrees (e.g., right to vote, to drive), several entities such as the General Sports Authority have also helped remove barriers preventing women to participate or attend sports-related events.

### 3.A.3. Healthcare

#### Current performance

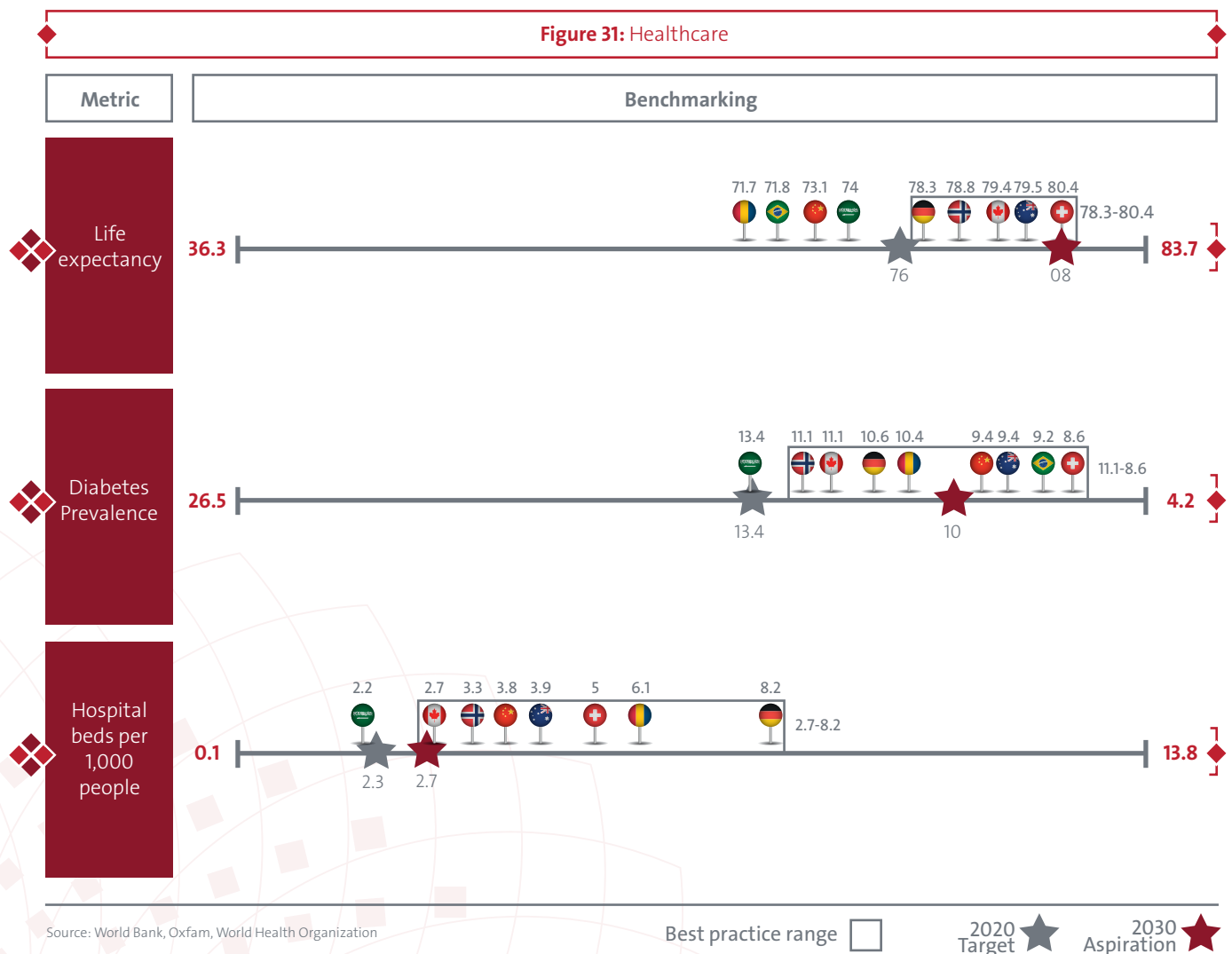
Over the last 25 years, the KSA has shown progress in health outcomes. The Quality of Life Program 2020 aims at developing 4 main aspects:

- 1) Reduce diseases related to lifestyle such as obesity (e.g. through encouraging exercise)
- 2) Facilitate access to healthcare

- 3) Educating and raising awareness on primary and home care
- 4) Improving and developing the workforce in the health care sector

### Benchmarks

Benchmarks show that KSA performance in healthcare is mixed. On the one hand, Saudi life expectancy (76 years) is within the range of best practice countries, but lags the current top performer (80 years). On the other hand, “healthy life expectancy,” which measures the equivalent number of years of life expected to be lived in full health, is ~8 years shorter than the average of top 10 countries (WHO, 2016). Aligned to this is diabetes prevalence, where KSA is significantly higher (17.9%) than most livable countries (~3-8% range). In other aspects, infant mortality is roughly 70% higher than OECD average, and there are ~30% fewer physicians per citizen than OECD average.



### Initiatives in progress

There is a strong focus on developing primary healthcare through building new primary care facilities and training physicians. KSA has begun implementing a national performance management transformation Program (Ada’a Health) to transform 70 of the biggest hospitals, collectively amounting to ~80% of patient flow. Furthermore, starting from early next year, three hospital clusters or ‘accountable care organizations (ACOs)’ will be established in Riyadh and Dammam, responsible for the overall health of their population rather than acute care delivery alone.

### 3.A.4. Economic and Education Opportunities

#### Current performance

The last few years have been challenging for Saudis looking for education and economic opportunities. One clear indication of this is that Saudi unemployment has increased, reaching 12.8% (General Authority for Statistics, 2017) in Q2 2017.

Unemployment is disproportionately concentrated in women compared to men in KSA, with unemployment reaching 33.1% for women vs. 7.4% for men (General Authority for Statistics, 2017). One set of root causes for this challenge is related to weak overall economic growth. In sectors that were hit especially hard, such as construction and retail, overall employment has fallen consistently over the last year. Most of this has resulted in layoffs of expatriate labor, but has also created a more difficult hiring environment for Saudis. This has resulted in many Saudis worrying about their job security.

#### Benchmarking

In education, the KSA does not currently does participate in PISA. Nevertheless, educational outcomes are on a par with countries that spend 25% - 75% less per student on K12 (World Bank database EdStats, PISA). Furthermore, KSA suffers from a low university completion rate, with 45% dropout rate vs 30% in OECD countries (Ninth Economic Plan, OECD). From an employment perspective, KSA's current unemployment rate is ~5% higher than the upper end of the benchmarks.

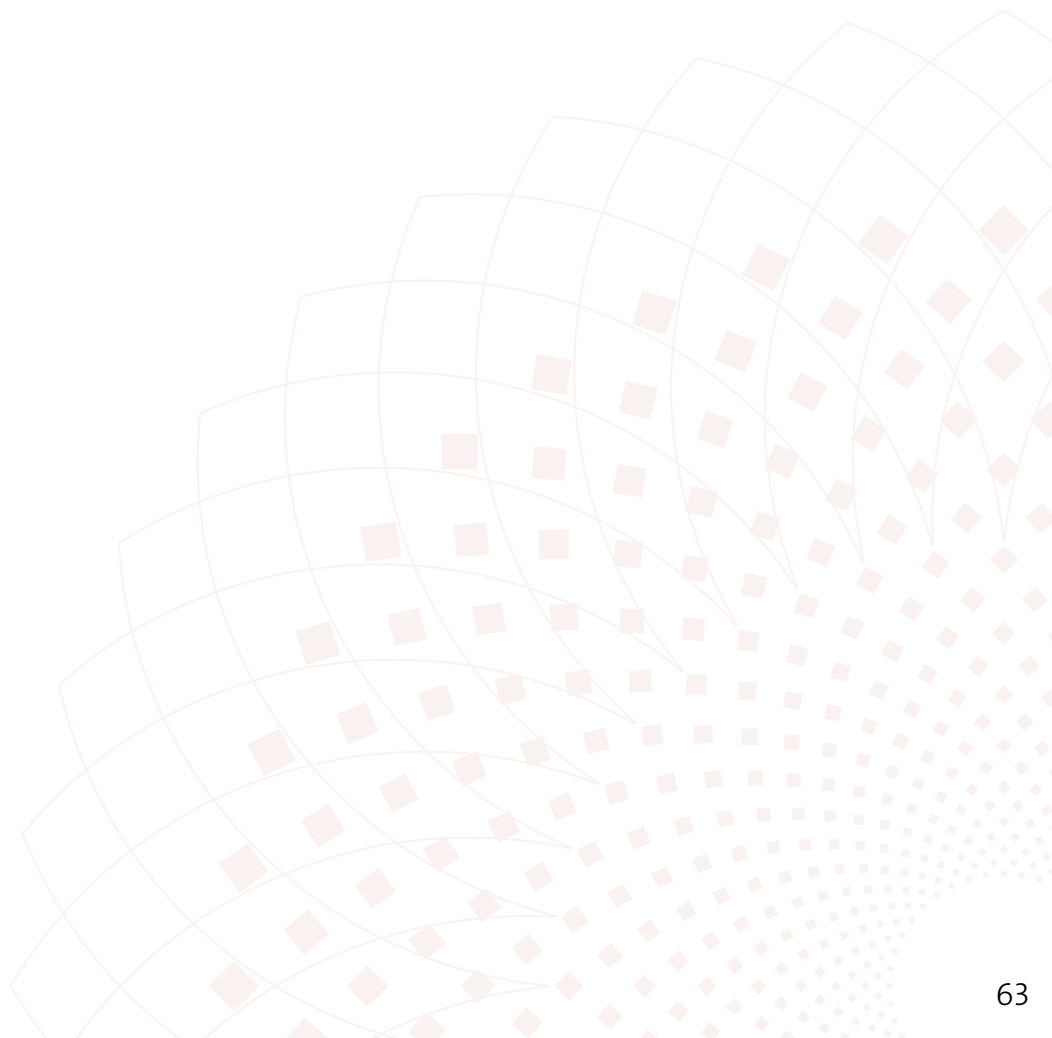
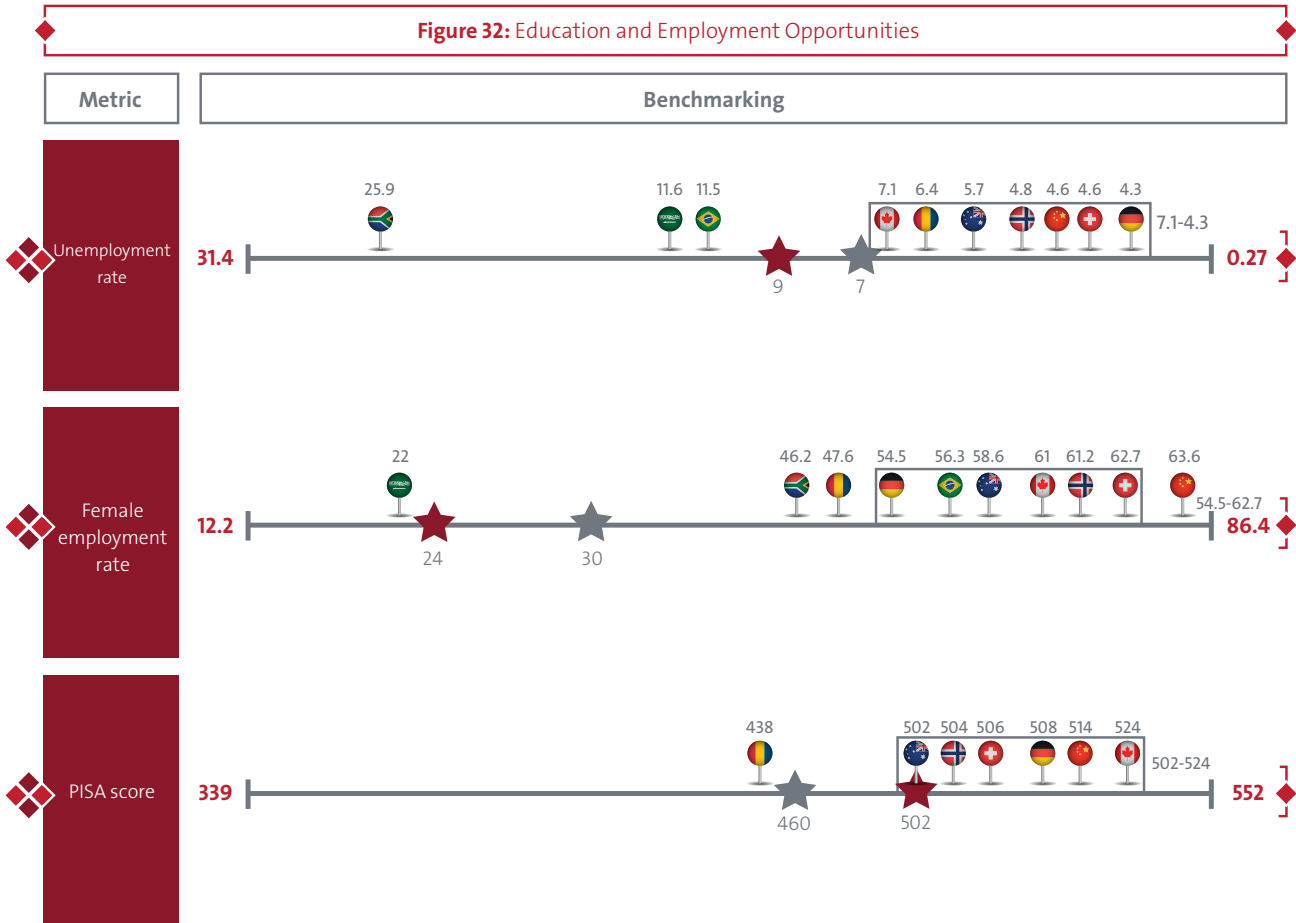


Figure 32: Education and Employment Opportunities



Source: International Student Assessment Program of the Organization for Economic Co-operation and Development, Shanghai Classification, INSEAD World Competitiveness Index of Talents, World Bank, Human Development Report of the United Nations Development Program

Best practice range

2020 Target 2030 Aspiration

### Initiatives in progress

Of the twenty transformative initiatives being planned by the MOE, three are most directly related to improving quality of life. New teacher pathways, including the reform of licensing and professional development regulation to ensure quality is brought up to global standards, are being introduced. Private sector participation, including strategic partnerships with employers to align curriculum to needs in technical, vocational education and training (TVETs), is increasing. A new curriculum is being developed, with a focus on shifting balance of time allocation to more practical/applied skills such as science, technology, engineering and mathematics (STEM) and broader competencies (career guidance).

It is worth noting that there are many ongoing efforts to improve economic opportunities in the Kingdom. Other VRPs will have significant impact on economic opportunities – especially the National Industrial Development and Logistics Program, the National Companies Promotion Program, the Strategic Partnerships Program, and the National Transformation Program, which are all explicitly focused on improving the economy. A fiscal stimulus program has also been announced last year, which will inject more than SAR 100 billion into the economy in the coming years. Taken together, these efforts aim to unlock the economic potential of key sectors in the economy, such as mining, logistics, manufacturing, and others. The Quality of Life Program 2020 also has ongoing efforts which will contribute to this area by growing the sports, cultural, and entertainment sectors.

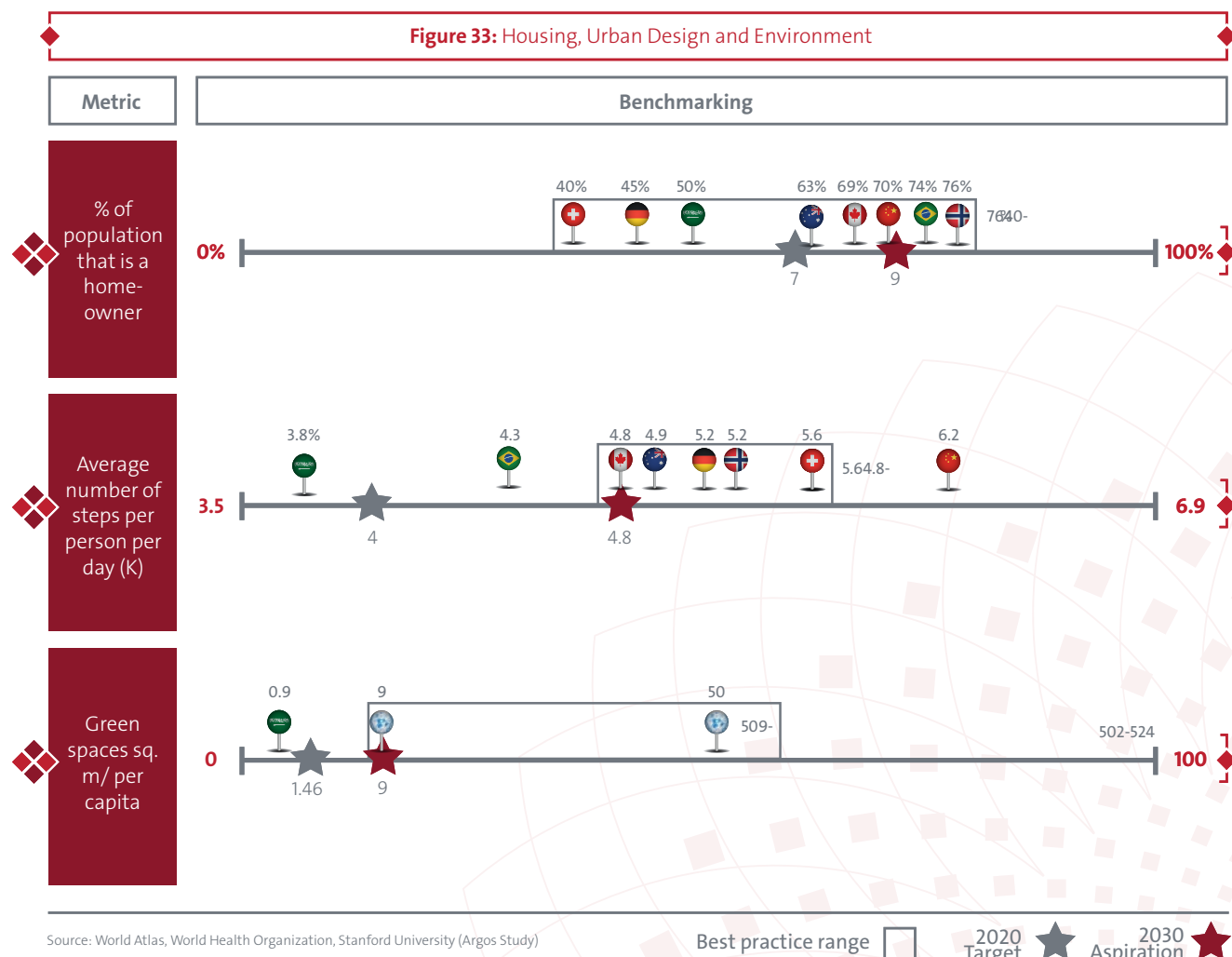
### 3.A.5. Housing, Urban design and Environment

#### Current performance

The KSA underperforms on access to nature, affordable housing, urban design and quality of environment, all of which are important for the everyday lived experience of citizens. For example, on an independent measure of walkability (“Walk score”), Riyadh is half as walkable as New York, Singapore and London. Air pollution in Riyadh is roughly 15 times the safe level according to WHO guidelines.

#### Benchmarking

The KSA lags benchmarks in multiple dimensions. One significant lag is in average steps per person per day, where KSA lags best practices by more than 1000 steps per day (3,800). In terms of available green space per capita, Riyadh is a third of that in Dubai and a tenth of WHO standards. In terms of house ownership, KSA is within range of best practice benchmarks, with 50% of population owning a home, but should aim to equal the top 5% of most livable countries in the world.



## Initiatives in progress

The government has introduced recent initiatives to ensure that citizens have more access to nature, affordable housing, and an improved air quality. For example, in 2016 the Arriyadh Development Authority inaugurated 10 new parks, covering 150,000m<sup>2</sup>, in Riyadh. The Ministry of Housing is currently developing affordable housing schemes encompassing 46 projects to provide 13,793 housing units (nine of these schemes have been delivered). Finally, MEWA launched an initiative to install air-quality measuring units in 7,000 industrial chimneys in August 2017, allowing for live monitoring of emissions.

### 3.B. Lifestyle – Main challenges and current efforts

Although core to improving quality of life, most elements of lifestyle are still at a nascent stage in Saudi Arabia, particularly regarding the availability of “basic” infrastructure and the development of lifestyle service offerings. As a result, current participation in lifestyle activities remains low.

#### 3.B.1. Sports

##### Current performance

The sports sector in the Kingdom is significantly under-developed on four main fronts. First, 13% of Saudis are physically active at least once a week compared to ~72% in the U.K., likely the result of limited high-quality facilities, low awareness, and social and regulatory impediments. Second, 2% of citizens are interested in volunteering in sports, compared to 15% in England, which speaks to underdeveloped sports community engagement (Sports England, 2017). Third, the KSA only had 12 athletes in the last Olympics, mainly in equestrian sports, as the development of elite athletes who can compete on the regional and global stage have lagged behind due to insufficient infrastructure, fragmented federations, and lack of support to pursue sport as a full-time career. Finally, the sports economy across the value chain, from light manufacturing in clothing and accessories, to heavy manufacturing in equipment and facilities, remains nascent due to low private sector involvement.

However, the sports sector shows promise in terms of economic and job growth as well as the ability to elevate Saudi athletes in the international arena. The sector is also undergoing major changes such as the official passing of the law to allow women in sports stadiums, which will promote mass participation.

##### Benchmarking

The number of Saudi Olympic sportsmen per million of the population is only 0.38. The aspiration is reach 2.81 Saudi Olympic sportsmen per million of the population by 2030, in line with high-performing countries. Additionally, number of pro and mixed venues per million of the population is only 4.3. While this is ahead of a regional peers, it is smaller than leading benchmark countries. Finally, the number of non-professional venues per million inhabitants is Saudi is 42, which is far lower than leading countries like Germany with 466 venues per million inhabitants.



Figure 34: Sports



### Initiatives in progress

A mass participation strategy has already been developed to guide the Kingdom on ways to improve activity among the greater public, and ultimately increase weekly participation in sport and activities to 40%. The journey towards mass participation involves motivating people through grassroots participation in PE classes, unregulated play, and recreational sports, as well as ‘activating’ cities through access to facilities, joint programs with MoMRA, and making the practice of sports or athletic activities a way of life.

To ensure that elite Saudi athletes are prepared to compete at the highest level in the Tokyo 2020 and Paris 2024 Olympics, GSA is developing programs to train and support athletes, building high performance training centers, and enacting the necessary federation infrastructure and governance.

In parallel, the sports sector will be enabled through a dynamic economy led by the private sector that actively invests and drives value for the Kingdom. For example, the simplification of licensing processes will allow the emergence of various sports studios and gyms. The digitalization of GSA will enable easier access to sport-related services for individuals and entrepreneurs. Finally, the development of sport-related manufacturing (e.g. sport shoes, sport abacas) and the growth of distribution channels will be supported to allow for easier equipment access for all.

KSA has already made progress towards promoting diversity and female inclusion in sports

(initiative 6.3.11). Women were recently allowed into football stadiums to enjoy watching matches with their families. The first women’s football match was held in January 2018 at King Abdullah Sports City, Jeddah. Other stadiums will be ready to welcome female fans by the start of next season.

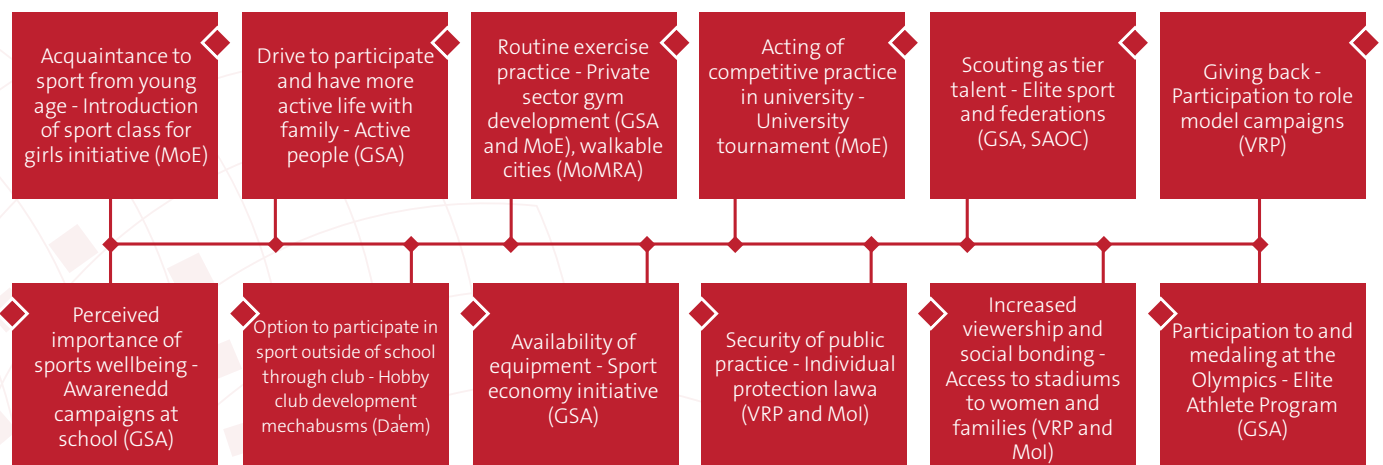
Example of Quality of Life integrated impact: Overview of a citizen’s “sport life journey”

Quality of Life will be an integrator of initiatives across ministries and entities - traditionally operating in silos - to deliver great livability and lifestyle.

The sports sector is a great case in point of how various entities will jointly deliver impact at various points in time in a citizen or resident’s life journey.

MoE and the VRP will participate in acquainting kids to sports and seeding practice habits from a young age through classes and awareness campaigns. This regular practice will be further enabled by the development of sport hobby clubs led by VRP (previously Daem), the availability of gyms enabled jointly by GSA, the MoI and private sector funding, the increased walkability of cities enhanced by MoMRA, MoI individual protection laws guaranteeing a safe practice, and the development of the ancillary services (e.g. equipment sales) led by GSA. Building on this increased mass participation and beyond healthy and amateur sport practice, the pipeline of potential sport professionals will be created by federations strengthened by GSA and Saudi Arabian Olympic Committee (SAOC) and opportunities to participate in university tournaments set up by MoE. Elite athletes will be offered financial (e.g. salary) and material support (e.g. training centers, access to world-class coaching) by GSA; closing the loop, the most prominent athletes will be able to give back to the community and foster mass-participation by becoming role models in the VRP’s awareness campaigns.

**Figure 35: Sport life journey**





### 3.B.2. Heritage, Culture and Arts

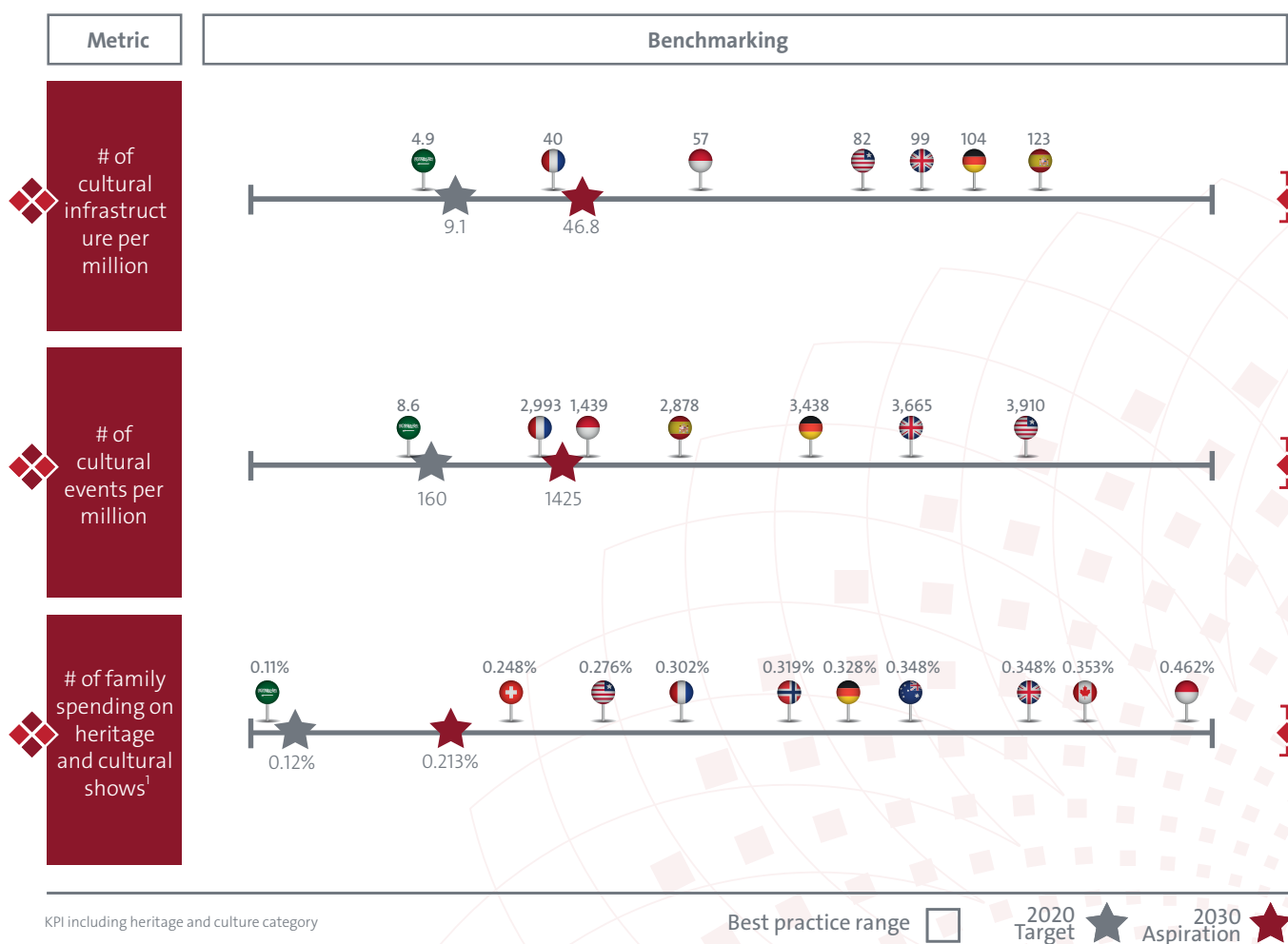
#### Current performance

The development of heritage and culture related activities is still in its infancy. The expansion of culture and arts has historically been hindered mainly by social/religious, educational and infrastructural factors. Today, only a handful of cities have a cultural offering. However, their activities are very limited in both quality and breadth (i.e., total number of culture and arts infrastructure, total number of hosted culture and arts activities). Culture and arts also suffer from a poor public image, which translates into low awareness and a wider structural lack of Saudi artists.

#### Benchmarking

The shortage of cultural and artistic activities is even more conclusive when comparing KSA to international benchmarks. KSA has 3 museums per million inhabitants. Similarly, the whole of Saudi Arabia only offers 190 cultural events compared to over 400 in London. Another major cultural gap is related to the “marginal” consumption and expenditure on the cultural offering.

Figure 36: Heritage, culture and arts



### Initiatives in progress

The role of heritage, culture and arts has been labelled as an important component of a diverse economic and social environment, as part of the Saudi Vision 2030. Consequently, several entities have started working on drafting initiatives aiming at making cultural and arts activities more available to Saudi citizens. For example, a new government body responsible for all cultural activities was established in 2016. In addition, other entities such as SCTH have been focusing on supporting the historical side of the cultural offering within KSA, through sponsorship of cultural events across the country and the promotion of national heritage sites. .

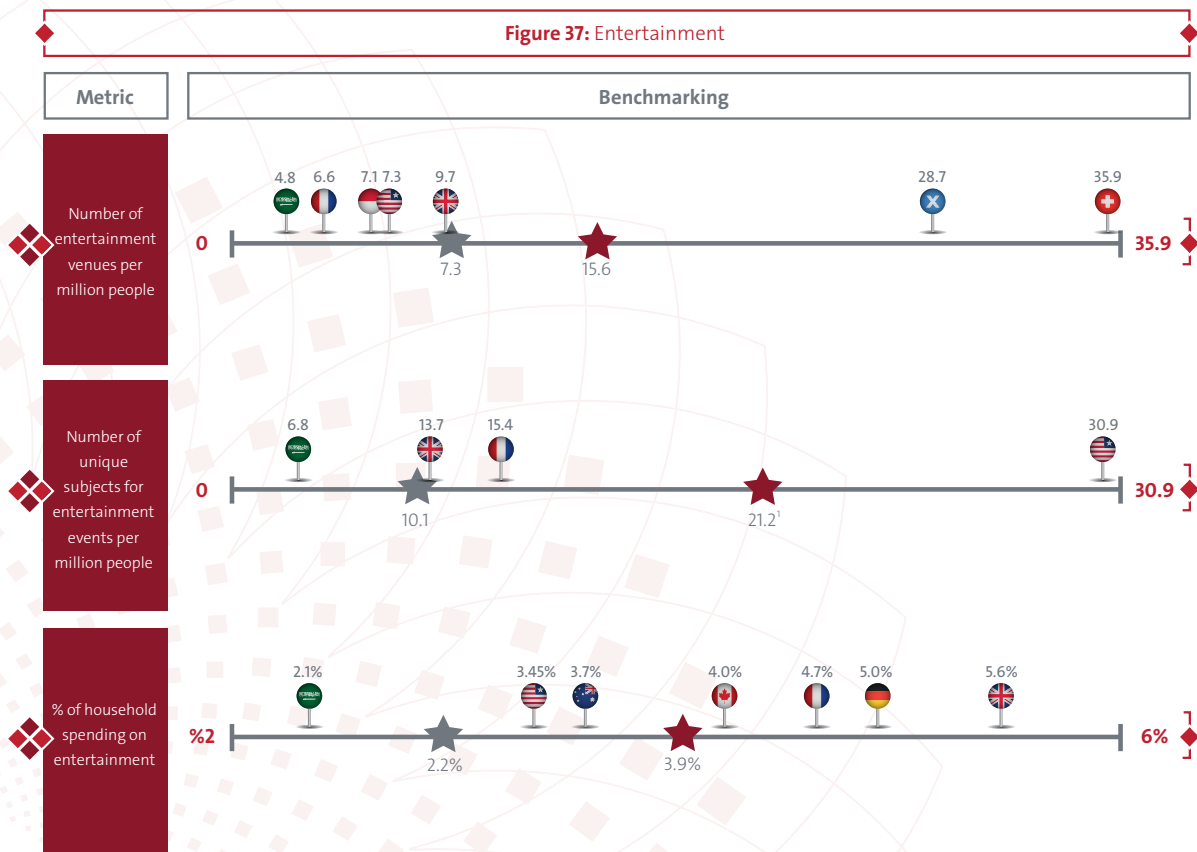
### 3.B.3. Entertainment

#### Current performance

Entertainment opportunities that are currently available do not reflect the rising aspirations of Saudi citizens and residents. Due to the structural gap of entertainment offering and infrastructure in KSA, a large number of Saudis are seeking entertainment options abroad and more specifically in neighboring countries such as Bahrain or the UAE. The main gaps of the KSA entertainment sector are mainly reflected in the absence of a comprehensive entertainment infrastructure (i.e., number of entertainment venues), the lack of a developed and diverse entertainment offering (i.e., number of events) and the low citizen propensity to consume entertainment related activities (i.e. share of household spending on entertainment).

#### Benchmarking

Saudi entertainment is currently widely underdeveloped compared to international benchmarks. For example, there are currently only ~7 events per million inhabitants in KSA. In addition, KSA only has ~5 entertainment venues per million inhabitants, which is half the number in the UK. The expenditure on entertainment is also low, with households only spending 1.7% on their income in entertainment the compared to 5% in France.



## Initiatives in progress

To reach its ambitious targets and start addressing these major challenges, the government has initiated a series of initial steps towards increasing entertainment options for Saudi citizens and residents over the past two years. One of the most important initiatives is the creation of the General Entertainment Authority (GEA) and the development of the entertainment sector strategy. As a result, an agreement was recently reached between the Six Flags Entertainment Corporation and the General Entertainment Authority (GEA) to build entertainment facilities across the Kingdom, including a half-a-billion-dollar theme park. GEA has also developed a set of new initiatives within the past year. GCAM is currently working on drafting the regulation and building the infrastructure required for opening cinemas.

Several musical concerts were recently hosted in the country, in addition to world-class international events that attracted Saudi families. For instance, General Authority for Entertainment invited the “Blue Man Group” to perform in Jeddah and Riyadh in September 2017. Moreover, many festivals were organized in Riyadh and other Saudi cities in 2017 and 2018. The first musical concert in KSA’s history, by Lebanese singer Heba Tawaji, was held in Riyadh in December 2017. Within few days all the tickets were sold out.

The greatest achievement in this regard was reopening of cinemas in KSA as part of initiative 7.2.5. On December 11, 2017, the Saudi Minister of Culture and Information stated that public cinemas will be free to open by 2018.

### 3.B.4. Recreation

#### Current performance

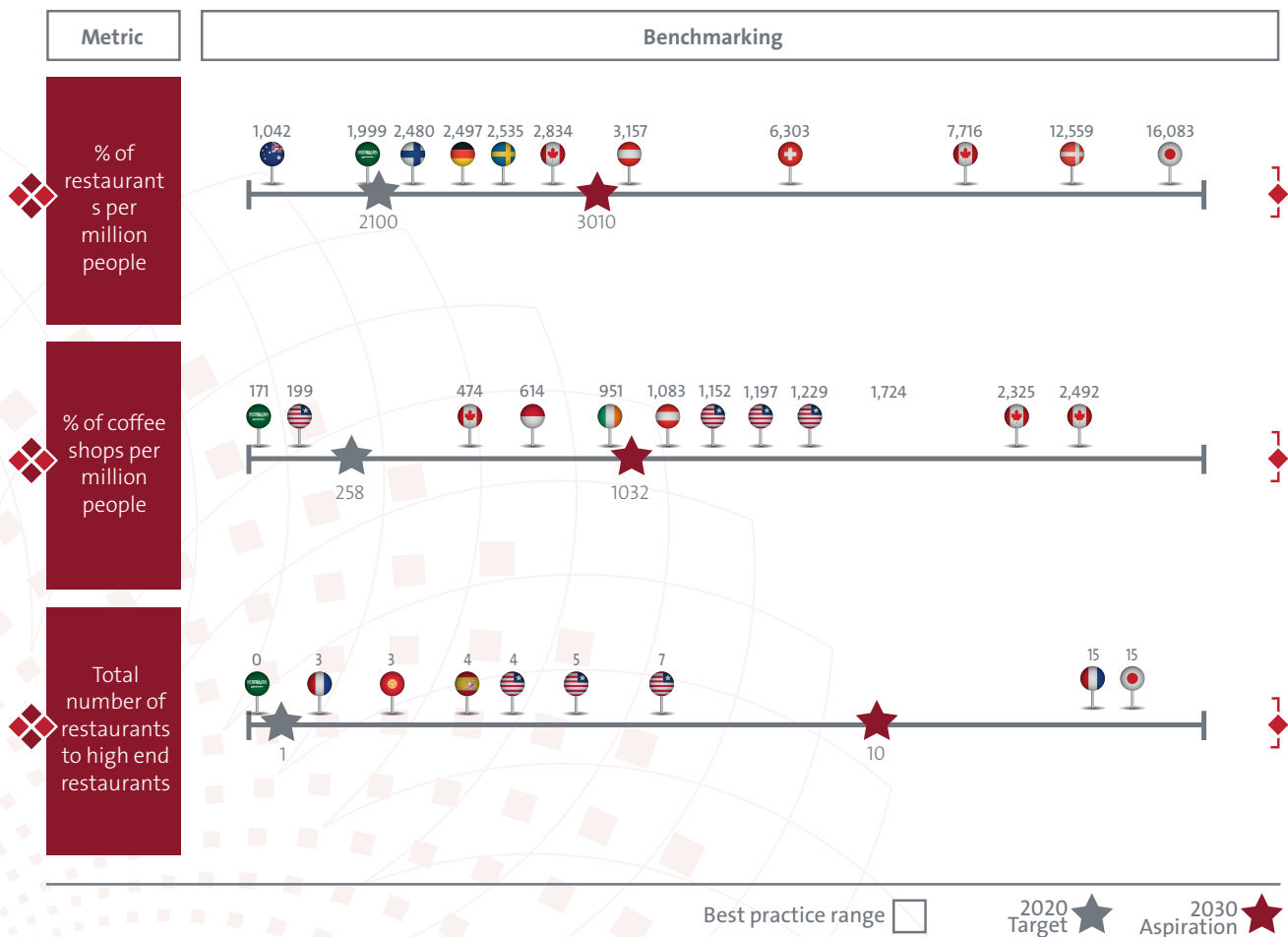
The food and beverage offering is relatively diversified and has been growing over the past years, especially in the low/medium segments. However, when it comes to fine dining or premium segments, there are only very few internationally recognized dining experiences available in KSA (i.e., number of restaurants owned by globally renowned chefs). For example, the Trip Advisor list of the “top 10” restaurants in Jeddah features mainly restaurants in the fast food or low-end segments. While there are many recreational options in the KSA, the largest malls in Riyadh and Jeddah are smaller and provide less leisure options compared to other regional malls (i.e., sq.

meters of retail space per capita). Shopping and dining are the most popular activities for Saudi citizens. Nevertheless, this is more a consequence of the lack of offerings and alternative recreational options than a realistic reflection of the range of activities preferred by Saudi citizens and residents.

#### Benchmarking

Saudi Arabia does not currently offer a comprehensive food and beverage experience. There are no restaurants with globally recognized chefs vs. 15 in Paris, for example. The food and beverage sector is limited, however the current expenditure is at the same level as leading benchmarks (5.57% of consumer expenditure). The program is working on maintaining this level of expenditure while increasing the range of recreational options.

Figure 38: Recreation



### Initiatives in progress

There are currently no initiatives aimed at increasing the number and the quality of the recreational activities. The Quality of Life Program 2020 will support in developing initiatives to improve this sector.

### 3.B.5. Social engagement

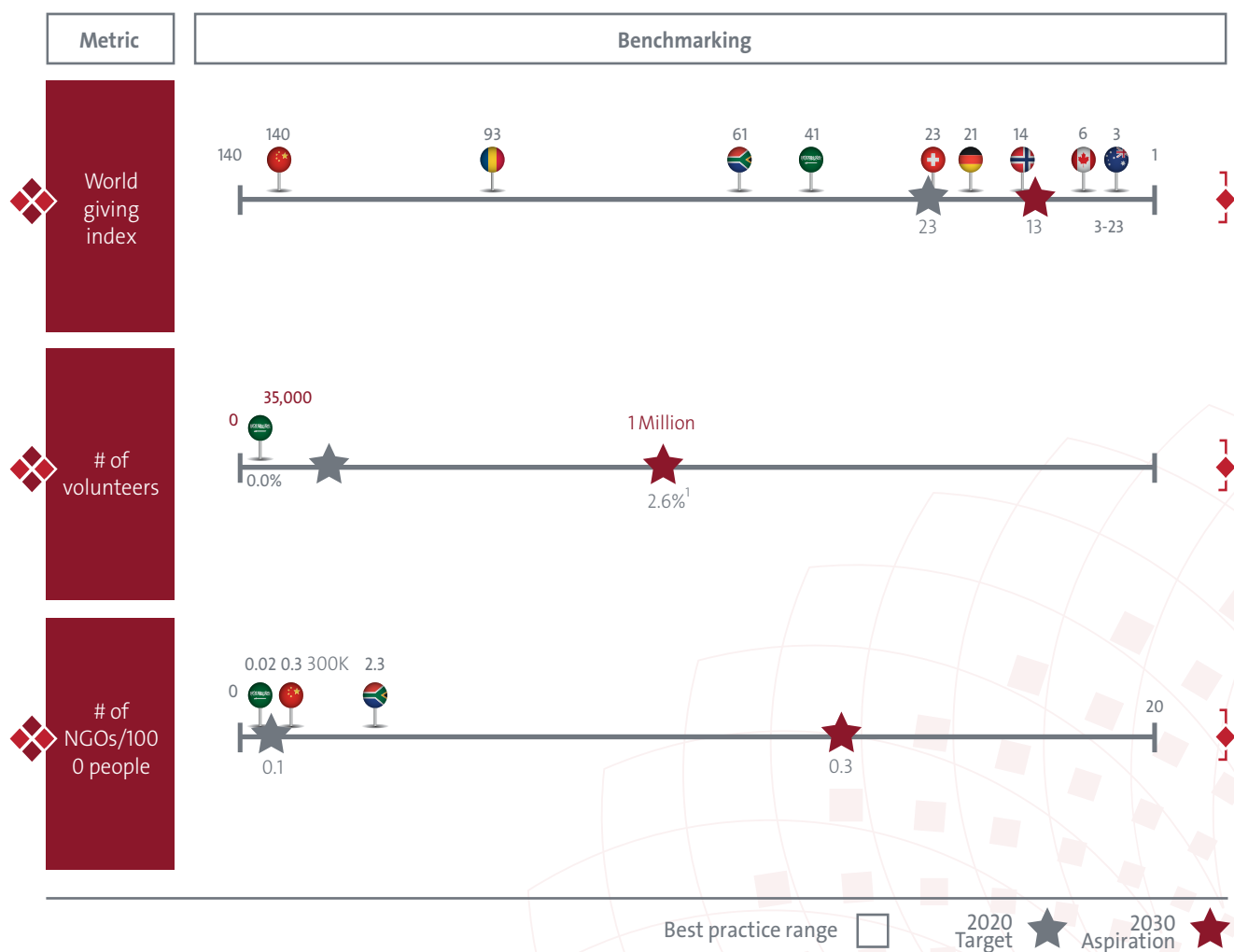
#### Current performance

Saudi Arabia currently offers volunteering opportunities. During Hajj and Umrah, thousands of volunteers support the pilgrims throughout their journey. However, beyond religious volunteering, there is limited engagement from Saudi population in other types of volunteering (i.e., support for poor families, etc.).

#### Benchmarking

There are only 0.01 NGOs per 1,000 inhabitants, which is extremely low compared to leading countries such as Australia (24.8 NGOs per 1000 inhabitants) and even similar countries.

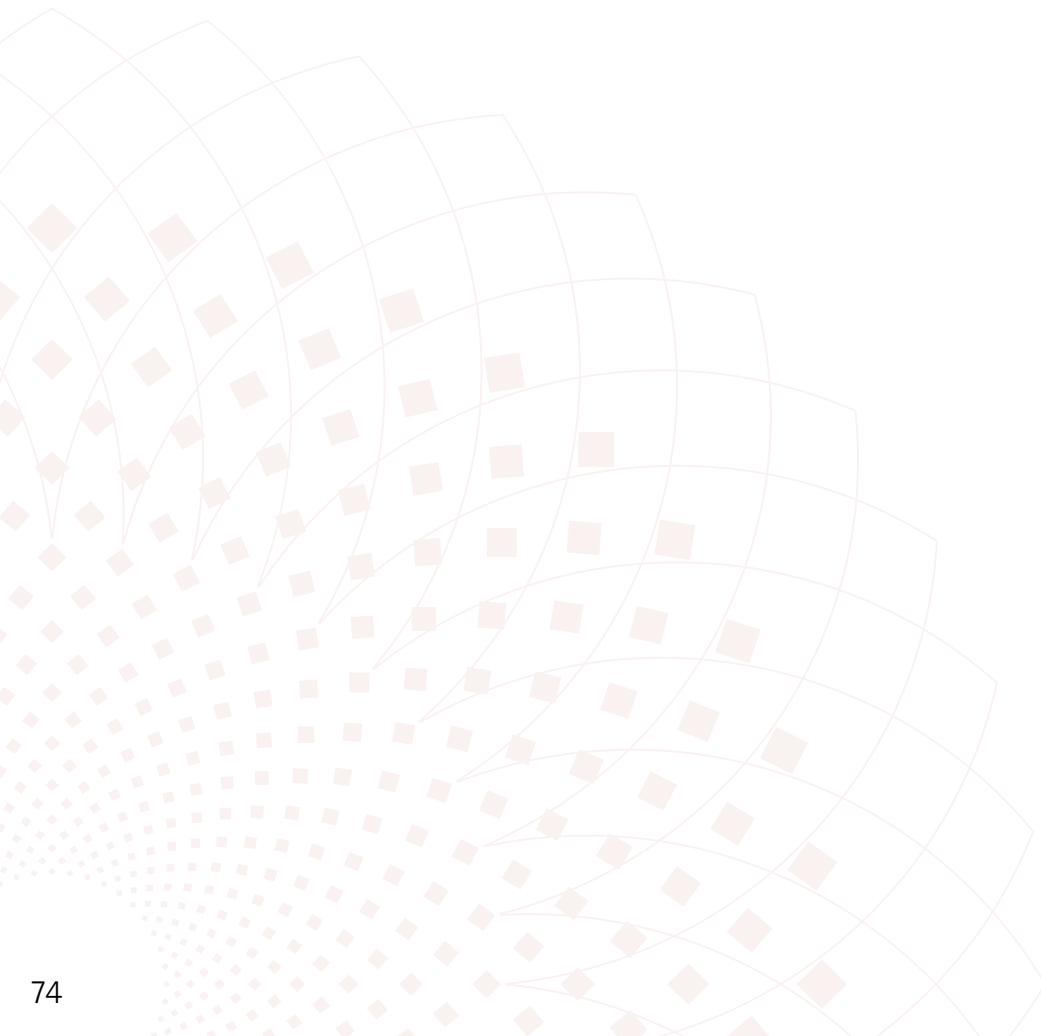
Figure 39: Social engagement



### Initiatives in progress

A number of key initiatives have been initiated over the past years, mainly under the umbrella of MLSD. More specifically, MLSD has developed plans to deploy 300,000 volunteers by 2020 in the non-profit sector. The ministry is also working on unifying volunteering regulations and instructions. Finally, MLSD will also develop the “Haroon Program”, which combines professional volunteers and experts from specialized organizations to carry out projects with the aim of meeting the specific needs of volunteering.

# QoL VRP 2020 STRATEGY



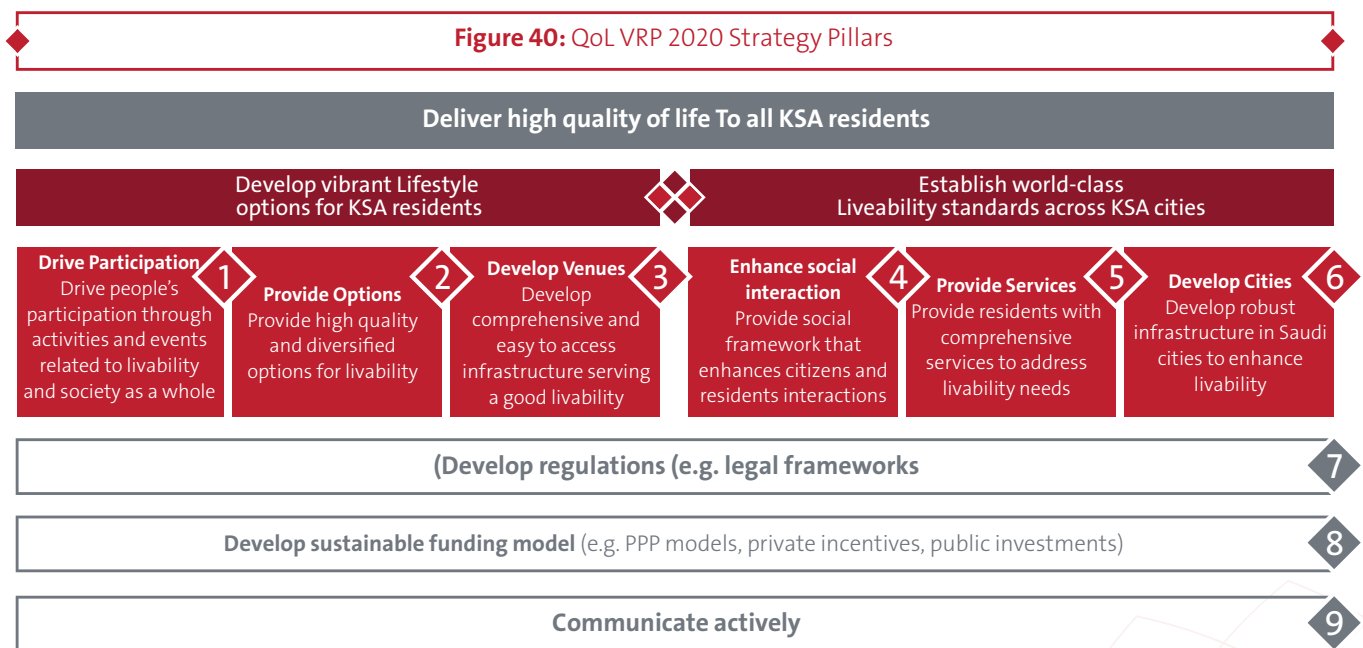
## 4 QoL VRP 2020 STRATEGY

### 4. Strategic Pillars

The VRP strategy, which represent the macro approach to reaching the VRP targets, is designed around nine strategic pillars. Three are dedicated to establishing world-class livability standards, three are dedicated to developing vibrant lifestyle options, and three are cross-cutting enablers required to support both areas.

Both “Livability” and “Lifestyle” contain infrastructure, services, and behaviors components.

### The Quality of Life VRP 2020 Strategy is based on 9 pillars



The 9 pillars of the VRP strategy can be further detailed as follows:

#### Three vertical pillars supporting the livability dimension of the strategy:

1. Develop cities – Develop a robust infrastructure in Saudi cities to enhance livability
2. Provide livability services – Provide residents with comprehensive services to address livability needs
3. Enhance social interaction – Provide a social framework that enables citizens and residents engagement

#### Three vertical pillars of the VRP supporting the lifestyle dimensions:

1. Develop infrastructure – Develop a comprehensive and accessible lifestyle infrastructure
2. Deliver offerings – Deliver high-quality diverse lifestyle offerings
3. Build engagement and safeguard public engagement with lifestyle activities and society at large

### Three horizontal enabling pillars:

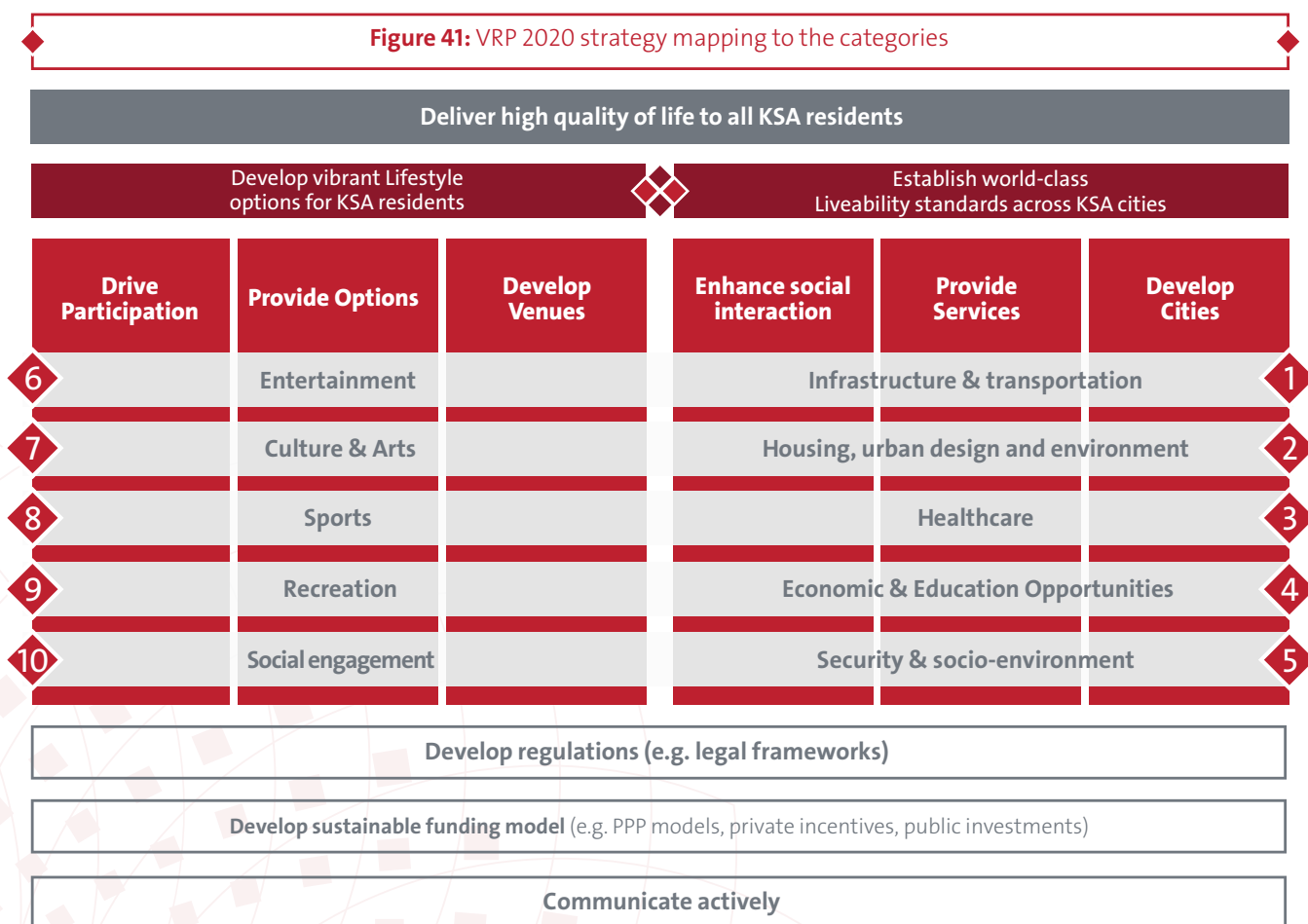
1. Develop regulations– Define the required regulatory framework to enable Quality of Life to cut across all categories
2. Develop sustainable funding models – Build funding mechanisms including public-private partnership (PPP) models, private incentives, public investments to facilitate involvement of private sector
3. Communicate actively – Communicate with all stakeholders (e.g., citizens, private sector, etc.) to showcase the progress of the Program in all dimensions

The six vertical pillars, 3 for livability and 3 for lifestyle, cover the 10 categories defined to achieve Quality of Life 2020 targets.

Additionally, the strategy is supported by sector-based strategies in Entertainment, Culture and Sports.

The 6 vertical pillars cover the 10 categories within livability and lifestyle

**Figure 41: VRP 2020 strategy mapping to the categories**





#### 4.A.1. Develop Saudi cities to enhance livability

Citizen-centric cities – i.e. cities with safe pedestrian pathways and streets, reliable and robust public transportation, and walkable, distinguished neighborhoods – occupy the top ranks on livability indices. This kind of urban design has positive spillover effects for residents, encouraging outdoor engagement and activity, and by extension, an active lifestyle. Specific lifestyle venues, such as cinemas and stadiums, will be covered in section 4.A.4.

Enhanced urban design can be achieved in the following ways:

- White land can be re-used to create parks and green spaces for families to enjoy and conduct outdoor activities. New buildings can be planned in clusters, with clear access to lifestyle facilities. These initiatives are currently being developed and driven by MoMRA, with the objective of enhancing the human aspects of Saudi cities.
- Appropriate urban planning guidelines should be implemented to ensure the availability of high-quality, affordable housing, embedded within efficient, green, and environmentally-friendly urban landscaping. This will contribute to, among others, an increase in the individual number of steps per day to more than 4000 and guarantee the WHO-recommended minimum of 9 sq. m. of green space per urban inhabitant.
- A robust public transportation system should also be developed, with the objective of providing a safe, convenient, fast, and environmentally-friendly alternative that reduces commute time, promotes non-car transport to work and school, and embeds a more active routine into the daily lives of KSA citizens and residents. The Ministry of Transportation is spear-heading this dimension with the development of the Riyadh metro and could potentially drive further developments for bus transportation. Expected impacts include a rise in the annual use of mass-transport from 0 to 115 journeys per person per year, above the top emerging markets.
- As the public transit lines are built, concentrating developments along these thoroughfares ensures that new retail and hubs for dining out will be accessible, in addition to increased community engagement, active lifestyle, and an increased sense of security.
- The enhancement of municipal services will ensure thorough maintenance and sustainability of cities, including better waste and rubble collection, efficient electricity and water supply, and better signage management. This, in addition to housing reforms, is not included in the Quality of Life Program 2020 but are covered by other parallel programs such as the NTP and the Housing VRP.

## 4.A.2. Provide residents with comprehensive services to address livability needs

Beyond the physical urban layout and the hard infrastructure in which people live their lives, what drives the performance of major cities in terms of livability rankings is the availability and quality of 'services' accessible to citizens and residents, catering to their basic needs. These services are increasingly recognized globally as basic rights. Some of them comprise opportunities to access housing, learn, work and make a living, maintain good physical health and benefit from a secure environment. In top-ranked cities, these opportunities exist and are easily physically accessible and financially affordable. They are also provided in the right quantity and at the right quality to all segments of the population that require them.

As outlined above, Saudi cities score low on global rankings, with no city in the EIU global top 100. Part of this is due to multiple shortfalls on service availability, accessibility and quality.

To reverse this, various programs (e.g. NTP 2020) and entities (e.g. MoMRA, MoE, MoH) will work towards providing global best-in-class services to citizens and residents in KSA. The Quality of Life Program 2020 will coordinate its initiatives with these entities and programs when interdependencies exist and will monitor their progress:

1. High-performing education services for all, including People with Disabilities, will equip the Kingdom's youth to excel in the labor market. These services will use a curriculum that includes new topics such as sports, and arts and culture. Which will be delivered through cutting-edge pedagogical teaching methodologies.
2. New economic and social services – e.g., one-stop-shops, e-government digitalized portals, access to government-backed mortgages – will proactively and efficiently address entrepreneurs' and businesses' needs, which will simplify everyday administration for citizens and expatriates in the KSA
3. Medical services will offer effective and affordable care, comprehensive prevention measures and high-quality care for the elderly to ensure high health levels. Among the targeted outcomes is a life expectancy extended from 76 to 80 years

### 4.A.3. Provide social framework that enables change in behavior in citizens

A 'good lifestyle' is the sum total of a set of positive choices made by people, largely driven by ingrained habits and behaviors. For KSA to establish world-class lifestyle and livability standards, it must encourage its citizens to voluntarily lead healthier and more active lives all the time, not just when they are taking part in formal entertainment, culture, recreation, and sports activities. This includes encouraging citizens and residents to use public transport or to walk instead of driving, visit primary care, pursue and complete higher education, and to display inclusivity and tolerance towards one another.

Research has shown that citizens are more likely to change their behaviors when four components are simultaneously present: (1) role models (2) conviction, (3) if they have the skills and capabilities to enact the change and (4) regulations.

The Program ensures fostering a social framework that builds healthy habits among its citizens and residents and help drive change in the following areas:

1. Leverage role-modelling to embody and promote desired behaviors of being active.
2. Foster understanding and conviction to further inspire a voluntary desire within residents and citizens to promote change. This can be done through effective awareness campaigns, intervention in school curriculums, and/or organizing workshops.
3. Leverage technologies to automate procedures and reminder mechanisms, as was the case in New Orleans, where reminder texts were sent to the local population to increase primary care check-ups, thereby successfully increasing enrollment rates by 2%. This method has great potential, given the high telecom and social media penetration in KSA: 65% of the population owns a smartphone and the proportion of social media users on Facebook is expected to rise from 87% to 95% in 2021.

Other small interventions include changing regulations to nudge people to make healthier and more active choices.

#### 4.A.4. Provide residents with comprehensive and accessible infrastructure to support their lifestyle requirements

The Program's ambition is to develop lifestyle infrastructure that can compete with global best practices. Targets include, for example, doubling the number of existing recreational and cultural infrastructure. However, at the current stage, the development of KSA's lifestyle infrastructure for Saudi citizens is in a preliminary phase—creating the need for Saudi citizens to seek entertainment and recreational opportunities abroad. In addition, opportunity exists to increase the quality and quantity of infrastructure across KSA's regions.

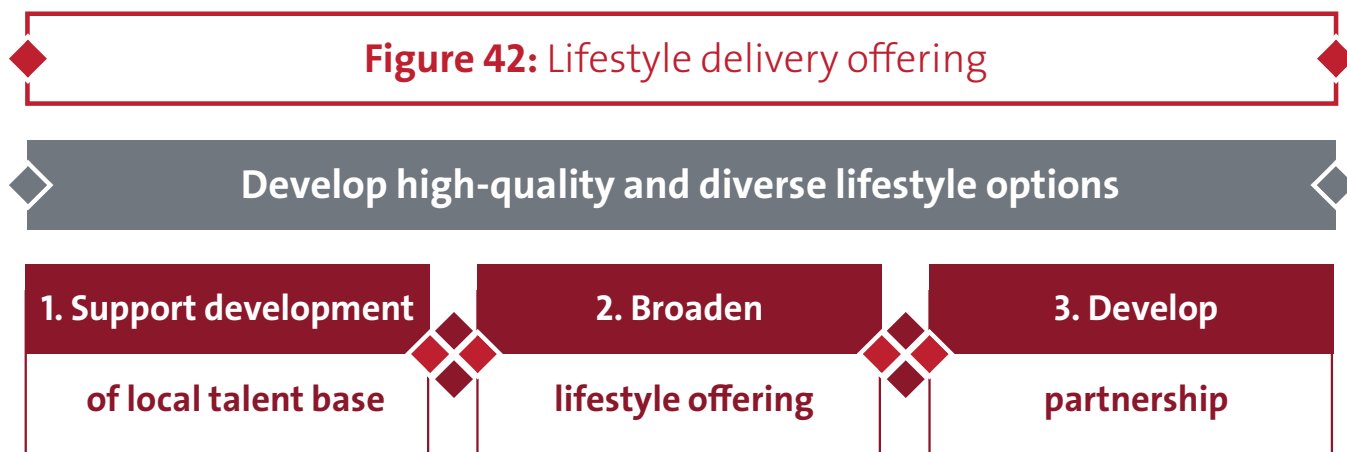
To facilitate the access of lifestyle options for the Saudi citizens, Program strategy aims at upgrading existing infrastructure as well as developing new infrastructure. The following types are examples of lifestyle infrastructure that should be prioritized as they strongly support specific citizen requirements:

1. Stadiums generally welcome a multitude of outdoor sports encounters, concerts, or other types of events. Stadiums are by nature a space of societal cohesion as they gather a significant number of socially and culturally diverse communities in one location.
2. Museums have a strong lifestyle significance as they play an important cultural role, manage Saudi Arabia's cultural heritage and exhibit it to a wide audience.
3. Entertainment and sports facilities are venues where people congregate in large numbers to attend events. Examples of these types of facilities include professional sports stadiums and arenas, movie theaters, etc. As they service large crowds of people, they must be easy to access from parking lots, drop-off areas, public transit, and pedestrian pathways without disrupting the surrounding flow of pedestrian and vehicular traffic.
4. Natural reserves hold strategic importance for wildlife, flora, fauna or features of geological or other special interests, and are reserved, protected and managed for conservation.
5. Amusement parks features various attractions, such as rides and games, as well as other events for entertainment purposes.

Quality of Life Program 2020 seeks to ensure that infrastructure is easily accessible across the Kingdom and not only in big cities. In addition, it seeks to ensure that it is accessible by public transportation and designed to welcome People with Disabilities. This implies heavy capital expenditures (CAPEX), which requires a clear prioritization of the projects based on key project outcomes (e.g., social impact, economic factors and delivery timelines).

#### 4.A.5. Deliver offerings

The Program aspires to provide a set of rich and diverse offerings comparable to the most developed countries. It has set up very ambitious targets such as hosting over 800 live shows and 200 sport competitions. To establish a world-class lifestyle offering, the KSA needs to prioritize the following 3 areas:



##### Support talent required to build the base for offerings

Quality of Life Program 2020 should aim to encourage the development of a lifestyle talent base (e.g., artists, sportsmen, etc.) that will initiate and sustain all types of lifestyle activities. This can be stimulated by investing in Saudi Arabia's existing talents, who can produce high quality work. More specifically, the Program needs to support the talent base by developing targeted programs, financial support and dedicated facilities.

##### Broaden lifestyle offering beyond traditional audiences

The first step towards increasing lifestyle offerings is to identify the unmet needs of the Saudi population. The offering needs to go beyond current lifestyle activities which mainly cater to families but not to other demographic groups (e.g., single males, teenagers, etc.). For example, the entertainment offering in malls currently almost exclusively targets children. This is especially relevant for a country in which the majority of the population is below the age of 30. Equally, activities and service offerings need to cover a wide range of pricing options to ensure the inclusion of all social groups.

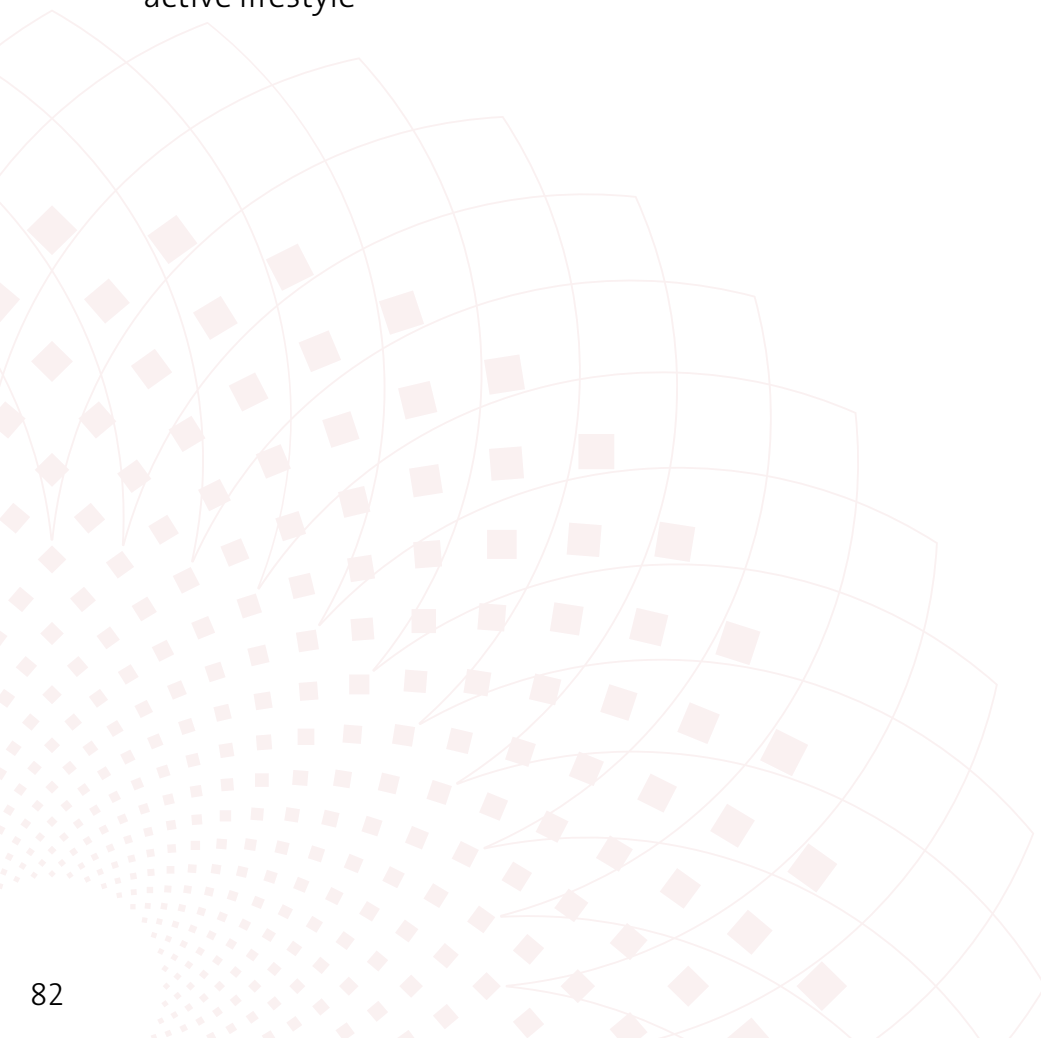
##### Develop high quality offerings in partnership with international renowned organizations

In addition, the Program is seeking partnerships with international organizations to further develop offerings and align them with international standards. Currently, local entertainment vendors need more experience and know-how to provide high quality offerings. To fill this capability gap, the Program needs to initiate partnerships with renowned organizations.

#### 4.A.6 Build engagement

The Quality of Life Program 2020 aims to encourage citizens to participate in more lifestyle activities. The ambitions set for lifestyle are high and include some quintessential targets, such as doubling household expenditure on arts and culture. For KSA to establish world-class lifestyle standards, the Program will encourage its citizens to voluntarily take part in more active and diverse lifestyle options. This implies going beyond the traditional options of shopping malls, dining and chalets to start engaging in visiting museums, attending art exhibitions, visiting natural reserves, etc.

- Raise awareness about lifestyle activities: The program will better inform and educate citizens about the range of lifestyle activities available.
- Leverage role models: Saudi officials could encourage citizens by themselves attending cultural or sports events. This would also have the additional benefit of reducing the social stigma associated to certain activities
- Promote the development of lifestyle communities: A way to increase participation in lifestyle activities is to promote community development, as communities foster interactions and exchanges between people. Community engagement tools include networking events, live performances, workshops, etc.
- Engage Saudis at a young age: The appetite for lifestyle activities should be nurtured at childhood. For instance, encouraging the practice of sports or artistic activities at school stimulate cognitive development, and reinforce behavior patterns underlying a more active lifestyle





#### 4.A.7 Develop regulations

The regulatory environment is a major challenge for many areas affecting overall quality of life. Broadly, there are two issues: (1) regulatory barriers and (2) weak regulatory incentives. The result of these issues is that the public is reluctant to engage in new offerings and the private sector shies away from investment. Updating the regulatory framework is a fundamental first step in achieving overall aspirations.

There are 5 categories of regulations that need to change to permit participation across a range of lifestyle components:

- Individual protection laws are necessary to open up the venues around the Kingdom to everyone, from both genders, who wants to participate in arts, culture, entertainment, sporting and other activities, and ensure that these activities are acceptable and appropriate
- Authorizations for lifestyle related businesses are required to signal to the market that investing in galleries and theme parks is a “good investment”. This will also allow universities to introduce new career paths to help build the entire ecosystem around these activities and events.
- Permit access and usage of government facilities to enable the private sector to rent and activate existing spaces, with the potential to quickly bring revenues to the state while minimizing the need for further capital expenditure and providing a platform for a diverse scene of clubs, performance and exhibitions and all associated ancillary services to thrive
- Update of urban development standards to encourage citizen-centric building. This will need to include guidelines on minimum green space in developments; parking restrictions to improve walkability; accessible and well-placed stairs to build in physical fitness to daily life. Building codes must also support accessibility for People with Disabilities and elderly citizens, keeping all population segments active
- Transparent and simple licensing processes to make it easy for businesses to enter the lifestyle market and create new offerings – e.g. new gyms, restaurants, galleries, theaters, etc.

## 4.A.8 Develop sustainable funding models (e.g. PPP models, private incentives, public investments)

Vision 2030 aspires to create an economy that reduces dependency on the public sector and on natural resource revenues, looking to create sustainable growth and development. Lifestyle industries have proven to be major drivers of economic growth around the world. For example, it is estimated that culture and arts contribute over \$700 billion to the US economy. In the UK, the Premier League and Clubs adds over \$3 billion to the economy alone. There are very exciting opportunities across these sectors in KSA; a variety of financing models will need to be developed to catalyze investment from the private sector—CAPEX and operational expenditures (OPEX).

Under this pillar, the main objective of the Program is to minimize public sector expenditure and maximize private sector participation in the development of the strategy. The Quality of Life Program 2020 has considered four levers to achieve these targets:

- Optimize public sector participation in critical areas – Ensuring that public sector participation is restricted to the areas where CAPEX levels and financial returns do not favor private sector contributions or where some public lead investments can be used to showcase the potential of the sector
- Provide all necessary (non-financial) enablers to reduce investment risk – Ensuring that all non-financial barriers that restrict private sector participation are removed. Such barriers include regulatory risks, legal frameworks, etc.
- Provide financial incentives to offset profitability gaps in the sectors – Providing financial incentives to trigger private sector participation by offsetting some of the financial hurdles
- Actively manage private sector participation – Ensure proactive management of private sector participation opportunities by actively identifying and linking investors and investment opportunities across all sectors.

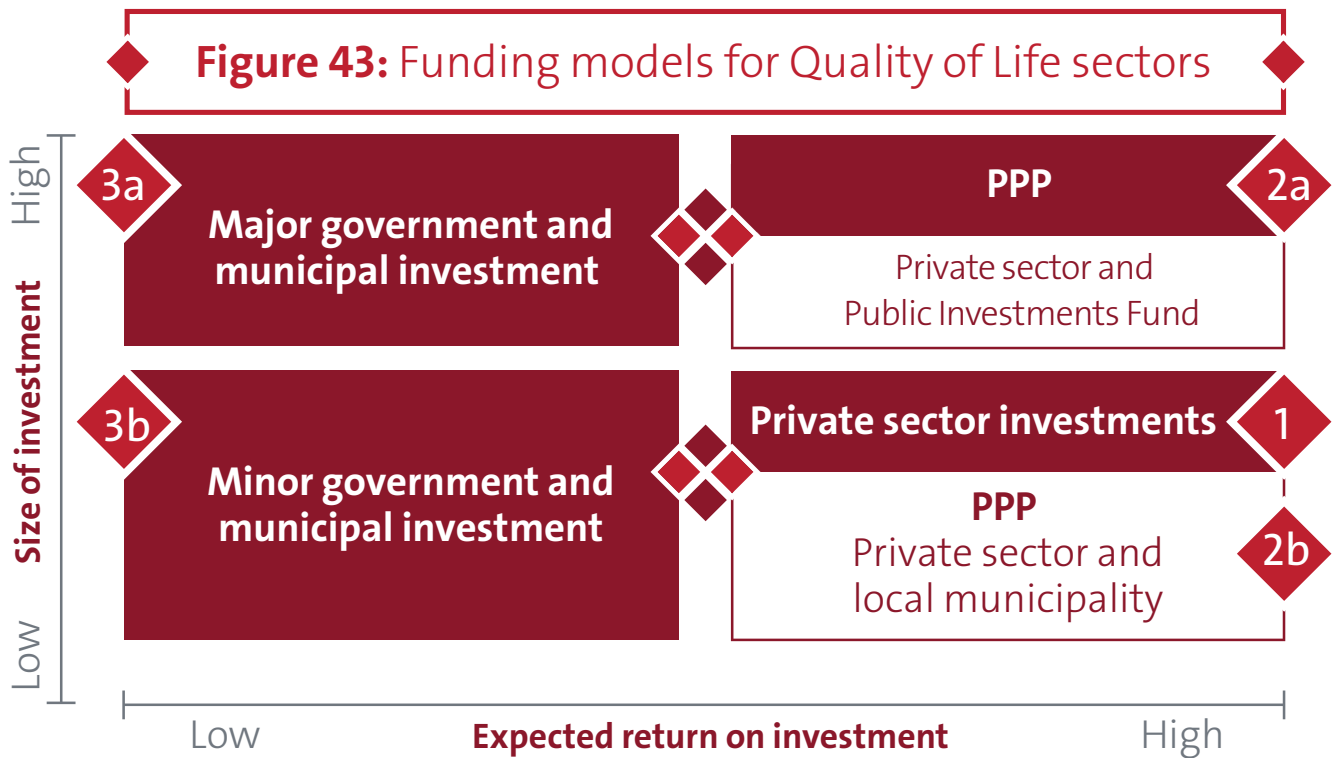
The four levers are fundamental to the delivery of the Program and the four elements above are included across all elements of the delivery plan, from the initiative portfolio to the governance section.

### **Optimize public sector participation in critical areas**

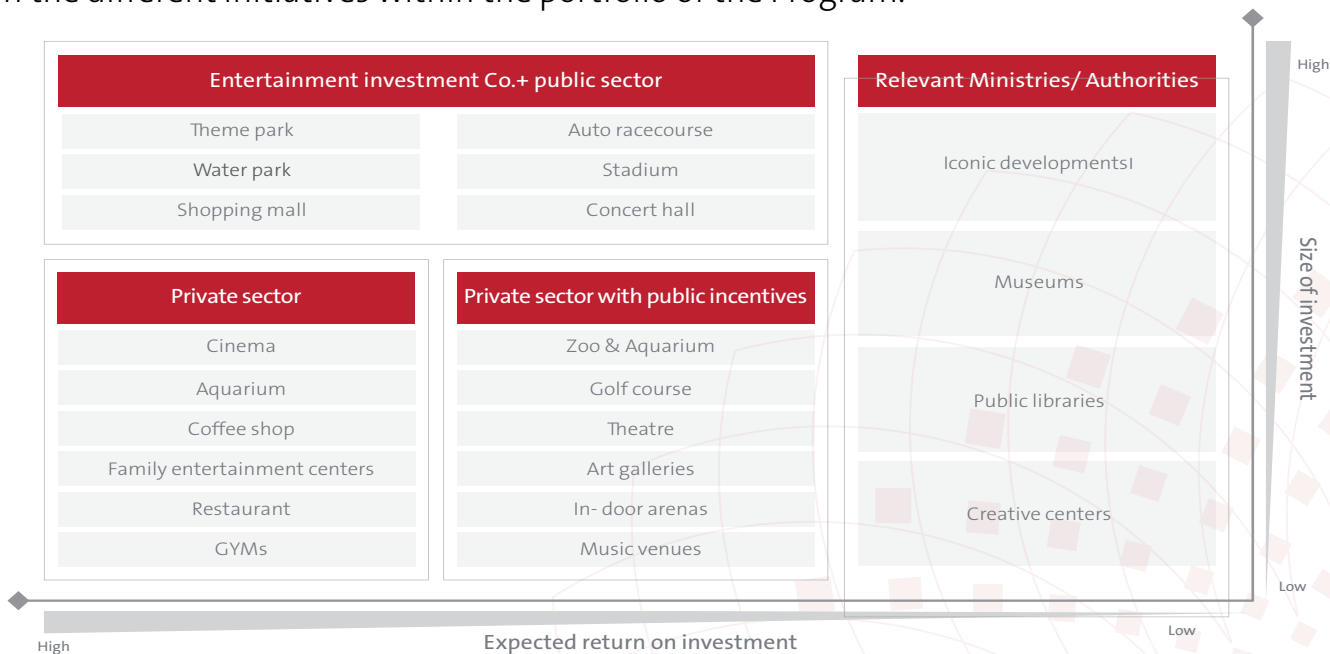
The Program has defined as part of its strategy the optimal funding model (e.g. role of private vs. public) for the key developments within all the sectors. The optimal funding mechanisms depend on two parameters: (a) size of investment (b) expected return on investment. In summary, businesses with higher returns and low investment (e.g. cinemas) are those where the private sector is expected to play a leading role. On the other hand, businesses with large investments and low financial returns are expected to be led by public sector funding.



## Funding models for Quality of Life sectors



The Program has classified all the sub-sectors to define what the right mix between private and public investments is. This classification has been used to determine the different budgets for the Program, as well as the expected private sector investments. This distribution is embedded in the different initiatives within the portfolio of the Program.



Beside this macro classification, the Program will ensure that, even in areas where the public sector is the largest source of funding, the private sector plays a role (e.g. the private sector can be the operator of a publicly-funded venue).

### Funding option (1): private sector investments

The Program aims to encourage investments from the private sector especially from small-medium scale investments, which are expected to have high returns from the beginning. These will likely be in sectors where the demand is already present and significant additional infrastructure is not required. In these cases – such as cinemas and additional restaurant and dining venues – entrepreneurs will be able to make traditional business models work, as we have seen internationally.

The Program will support setting up government-funded incubators for the lifestyle sector to encourage entrepreneurship. Currently, the General Entertainment Authority, General Culture Authority, and the Ministry of Education all have plans to build and establish accelerators and innovation centers to fuel local content.

### Funding option (2): PPPs

For larger-scale projects of medium or uncertain returns, PPPs are likely the best mechanism to lower the risks for private investors while minimizing the resources invested by government stakeholders. This mechanism is used widely around the world for cultural and sporting landmarks, in addition to wider livability categories such as healthcare and power/water systems. In this case, at least two types of projects can fall under this category. City-level projects are where the municipality can facilitate investment through a range of tools, including access to land and services or actual financing. This can be used in the case of stadiums, theatres and other infrastructure builds. The second type of PPP will largely be for larger-scale projects where co-investment is required. Public funding, such as PIF, can be used to co-finance, alongside large local and international investors.

### Funding option (3): National and municipal (Amanat) funding

To build the lifestyle and livability infrastructure and programming that the KSA needs, there will also be financing required for low or no-return activities. For example, arts classes or small ‘pocket parks’ in neighborhoods are critical to achieving our outcomes but will be government-led. Even larger scale investments such as new exhibition halls for art and culture could be financed in this way.

#### Provide financial incentives to offset profitability gaps in the sectors

Apart from defining the primary sourcing mechanism of the strategy, the Program will leverage financial incentives to offset potential profitability gaps or reduce the investment barriers. In this sense, the Program has established three different funds for the Sports, Entertainment and Culture sectors amounting to SAR ~3bn.

The Program has included three specific initiatives (with their associated budgets) to set up the above funds (see section 5.A – Initiative portfolio) additionally, the management structure of the funds above has been included as one of the key elements in the program governance section (see section 4.D – Program Governance).

## Provide all necessary (non-financial) enablers to reduce investment risk

The Program will provide the following:

- Build Engagement, which seeks to facilitate sector development through promotion and marketing
- Develop Regulation, whereby a solid regulatory framework will be put in place

Up to 45 initiatives are included in the initiative portfolio to cover the regulation and the engagement concepts (see section 5.A – Initiative Portfolio)

### Actively manage private sector participation

The involvement of the private sector in the given categories is not automatic and often needs to be facilitated and promoted. In all categories where private sector investment is expected, there need to be mechanisms put in place to ensure that the stakeholders of the private sector are presented with the individual opportunities, as well as informed and convinced about the underlying investment opportunities.

To this effect, the first step consists of developing regional feasibility studies (or blueprints) that highlight the major investment opportunities broken down by geographical location and category. These studies will be essential to engage with investors and highlight the investment opportunities for them.

The Quality of Life Program 2020 aims to deal with investors through two separate mechanisms: (1) every entity (e.g. GEA and GCA) will have initiatives focusing on identifying and engaging with potential target investors, by preparing marketing materials, events and one-on-one meetings and (2) the VRP, assisted by SAGIA, will carry out activities similar to those of entities that follow a more comprehensive approach in order to meet the funding requirements of all categories (e.g. through the involvement of investment funds). These initiatives will collectively ensure communication with private sector players to buy into the feasibility and profitability of the investment opportunities.

The Quality of Life Program 2020 will realize investment opportunities by establishing an Investment Committee within the Program office. The role of the Investment Committee is to oversee the development and execution of all investment opportunities. The composition of the committee will be a mix of “permanent attendance” representatives, from the VRP, the VRP Office and SAGIA, as well as other representatives (e.g., GCA, GEA, GSA, GCAM...), invited only when the meetings’ agenda is relevant to their role within the committee.

The approach for the realization of the investments will be driven by two main streams: “sector activation” and “structuring of investment opportunities.”

Through “sector activation,” the Investment Committee will conduct investment promotion and lead generation activities (e.g., sectors value propositions, investors identification and prioritization, roadshows, 1:1s meetings with investors...).

Meanwhile, “Structuring of investment opportunities” will consist of four main activities: identification of investments related to quality of life across Saudi; assessment, bundling and packaging of investments; development of deep-dives and market testing of opportunities.

The structuring of investment opportunities will follow five key guiding principles: minimize government spending, maximize attractiveness of investment opportunities for the private sector, maximize social and economic impact, prioritize mature investments, and maximize

private sector competition to ensure high quality and sustainability. The Program and SAGIA will collaborate with relevant stakeholders to realize investments in line with the VRP objectives and to maximize the benefits for the country.

## 4.B Strategic Considerations

The Quality of Life Program 2020 has adopted six guiding principles to support the overarching strategy for the VRP.

Topic	Description	Decision made and implications
Holistic approach to quality of life	Lifestyle does not drive overall quality of life alone if foundational infrastructure and services to citizens are not in place	<p>Quality of Life Program 2020's initiative portfolio covers both livability and lifestyle to varying degrees:</p> <p>Monitoring and support for relevant initiatives carried by other VPRs and/or entities</p> <p>Ownership of any other initiative pertaining to any dimension of livability or lifestyle not covered by other VRP or entities – with inclusion of further relevant entities in the Program (e.g. MoHousing, Mol)</p>
Private sector involvement	Essential components of quality of life (e.g. infrastructure, services or offering) can be provided by either the state – often when their profitability is low or they are considered as part of the government's role – or by the private sector – often when high innovation is required and they are profitable	<p>The bulk of infrastructure spending is expected to come from the private sector, with several initiatives designed by entities meant to facilitate private investment</p> <p>Government infrastructure spending plans to focus on areas with low profitability (e.g. libraries), on the refurbishment and activation of existing assets (e.g. existing stadiums), and on a few iconic investments (e.g. opera house, elite sport training centers)</p> <p>Government operational spending planned to focus on kick-starting creative economies (e.g. financing new school programs, providing grants, setting up incubation programs)</p>
Socio-demographic and geographic diversity	<p>Livability and lifestyle aspiration vary among citizens and place of residence</p> <p>Solving for the average does not solve for individuals</p>	<p>Avoidance of a “one-size-fits-all” approach and focus on choice (e.g. creation of a wide range of offering across sectors)</p> <p>Focus on diverse population by ensuring that initiatives improve the daily quality of life across age groups, economic levels, genders and nationalities</p>
Future as starting point	The Quality of Life Program 2020 and its entities will be working on incremental change from today but setting a goal of completely redefining lifestyle in the Kingdom and building for those needs	Targets and KPIs defined outside-in based on international best practices and aspiration countries rather than based on current situation and past KSA trajectory only
Aspirations without constraints	The transformational nature of the Quality of Life Program 2020 required high aspirations across all domains considered holistically	Unconstrained approach towards identifying initiatives, with no topics considered irrelevant if they had a direct impact on the quality of life
National pride	National pride is a paramount driver of the fulfillment and engagement of residents and citizens in their community, city and country	Focus on enhancement of national pride by developing a diverse and exciting set of lifestyle activities that make citizens excited and proud to live in the Kingdom

## 4.C Trade-offs and Interdependencies with other VRPs

Several VRPs within Vision 2030 are taking measures to make Saudi Arabia a place which provides a high quality of life for citizens and residents. A comprehensive exercise was conducted to map quality of life attributes which are either dependent on or conflicted with the strategic objectives of other VRPs. These trades-offs and interdependencies with other VRP initiatives can be resolved by stretching aspiration targets, expanding scope, and ensuring close co-ordination (including monitoring mechanisms) between the Quality of Life Program 2020 and the respective VRP.

Relevant Programs	Tradeoffs/interdependencies	Strategic Decision
NTP 2020	<p>NTP entities have multiple programs with attributes which improve quality of life</p> <p>Overlaps with NTP initiatives include:</p> <ul style="list-style-type: none"> <li>Enhancing the livability of the cities by improving urban design, reducing pollution and rehabilitating natural landscapes</li> <li>Improving quality of public services provided in Saudi cities (utilities, public transport, e-government etc.)</li> <li>Enhancing traffic safety to make roads in Saudi Arabia safer</li> <li>Developing the digital economy to provide newer opportunities for the citizens to engage in commerce</li> <li>Improving access and value provided by the health care system, ensure strengthened prevention against health threats, and improved effectiveness of welfare system</li> <li>Taking measures to ensure equal opportunities in the labor market</li> </ul>	<p>Scope and aspiration of certain NTP initiatives should be aligned with the strategy of the QoL Program 2020. To do this, close coordination through monthly/quarterly meetings is required between VRP and NTP on initiatives which address the quality of life of Saudi citizens.</p> <p>Some examples of where aspiration and scope of NTP initiatives should match those of QoL VRP include:</p> <ul style="list-style-type: none"> <li>Urban design should include focus on walkability, among other initiatives that enhance livability</li> <li>Digital economy should include building smart cities and ensuring availability of cutting edge communication technologies to all the citizens</li> <li>In healthcare, the scope should include developing world-renowned hospitals in the Kingdom.</li> </ul>
National Character Enrichment Program	<ul style="list-style-type: none"> <li>Take initiatives to improve accessibility and quality of education available in the country</li> <li>Instill national values and strengthen sense of national belonging and volunteering ethic amongst the population</li> <li>Foster values of equity, transparency, moderation and tolerance</li> </ul>	<p>Monitoring mechanisms should be put in place to ensure national values stay intact as the variety and availability of entertainment channels increase</p>
National Industrial Development and Logistics Program	<ul style="list-style-type: none"> <li>Enhance livability in the country by improving local, regional and international connectivity</li> <li>Showcase long-term sustainability of the country by investing in renewables</li> <li>Localize promising industries</li> </ul>	<p>Aspiration should target a significant level of penetration in electronic and alternate fuel vehicles</p>
Housing Program	<ul style="list-style-type: none"> <li>Ensure availability, quality and affordability of houses</li> <li>Enable suitable home ownership among Saudi families</li> </ul>	<p>Scope should include adequate housing supply which targets foreign professionals</p>
Fiscal Balance Program	<ul style="list-style-type: none"> <li>Incentivize private investment in the livability and lifestyle sectors</li> <li>Reduce taxes on consumption of lifestyle goods to encourage more participation</li> </ul>	<p>Monitoring mechanism should be put in place to track the potential impact an increase in taxation will have on consumption levels in the entertainment sector</p>
Privatization Program	<ul style="list-style-type: none"> <li>Ensure clear PPP framework for with private sector entities who invest in Lifestyle projects</li> </ul>	<p>Close monitoring is required to ensure that the terms of the PPP framework are adhered to during the lifecycle of a private sector investment</p>
Strategic Partnership Program	<ul style="list-style-type: none"> <li>Ensure clear frameworks to attract and partner with foreign investors in lifestyle projects (e.g. AMC)</li> </ul>	<p>Close monitoring is required to ensure that the terms of strategic partnerships with foreign investors are adhered to during lifecycle of an investment</p>

Public Investment Fund	Lifestyle focused mega projects	Close co-ordination is required between VRP and PIF on lifestyle focused projects, e.g. via VRP representation in PIF founding board committees of relevant real estate opportunities
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To ensure alignment with other VRPs and other delivery entities, the Quality of Life Program 2020 has taken concrete measures to develop additional processes to make initial contact. The VRP engaged with all the entities entirely or partially involved in the Quality of Life Program 2020 and achieved alignment in all key aspects. Stakeholders in this process can be divided into three main groups: entities involved in the livability aspect, entities involved in the lifestyle aspect and supporting entities.

The Quality of Life VRP 2020 and stakeholders agreed on the following:

- Program metrics
- KPI targets
- Follow-up on and/or ownership for the initiative
- Initiative budgets
- Alignment at entity/VRP level

The following table provides a detailed description of the alignment achieved between the Quality of Life Program 2020 and the different stakeholders.

Entity	Entity
Livability	
MoE	Align on Quality of Life 2020 metrics and targets (i.e. the scores in the International Student Assessment Program and the number of world-class local universities)
MLSD	Align on Quality of Life 2020 metrics and targets (i.e. global competitiveness of talents, unemployment rate and female unemployment rate)
MoHo	Align KPIs and targets with the ambitions of Vision 2030
MoMRA	Align on Quality of Life 2020 metrics and targets (i.e. % of house ownership, the existing houses, the residential share (thousand houses) relative to the population (this indicator is proprietary to the Quality of Life Program 2020).
MoT	Align on Quality of Life 2020 metrics and targets
Ministry of Energy, Industry and Mineral Resources	Align on Quality of Life 2020 metrics and targets (i.e. Percentage of renewable energy to total energy used)
Saudi Energy Efficiency Center (National Industrial Development and Logistics Program)	Align on Quality of Life 2020 metrics and targets (i.e. Penetration of electric cars)
General Authority of Civil Aviation	Align on Quality of Life 2020 metrics and targets (i.e. direct international flights (by city or frequency)
MCIT under Transformation Program	Align on Quality of Life 2020 metrics and targets (i.e. Network Readiness Index, e-Government Survey Index)
MEP	Align on Quality of Life 2020 metrics and targets (i.e. corruption perception index)



Ministry of Health	<ul style="list-style-type: none"> <li>- Align on Quality of Life 2020 metrics and targets (i.e. life expectancy, obesity rate, diabetes prevalence, hospital beds for 1,000 people, out-of-pocket health expenditure, number of road traffic deaths per 100,000 population)</li> <li>- Approve of the Quality of Life VRP 2020 to support follow-up on 37 initiatives</li> </ul>
MoI	<ul style="list-style-type: none"> <li>- Alignment on Quality of Life VRP 2020 to take responsibility for 3 KPIs for 7 crime-related initiatives</li> <li>- Align on expected outcomes and budgets for the initiative</li> </ul>
Lifestyle	
General Sports Authority (GSA)	Align on Quality of Life VRP 2020 to take responsibility for KPIs, initiatives and budgets-
GCA	
GEA	
General Commission for Audiovisual Media	
Ministry of Culture and Information	
Saudi Commission for Tourism and National Heritage (SCTH)	Align on KPIs and align on the support in tracking delivery of initiatives (not owned by the VRP)
MoE	Align on KPIs, initiatives and budgets
MoHo	<ul style="list-style-type: none"> <li>- Alignment on owning one housing initiative within the Quality of Life Program 2020</li> <li>- Align on expected outcomes and budgets for the initiative</li> </ul>
Saudi Arabian General Investment Authority	<ul style="list-style-type: none"> <li>- Align on next steps for each entity (GSA, GCA, Ministry of Culture and Information and GEA)</li> <li>- Align on initiatives to be prioritized for potential foreign investment</li> <li>- Align on the strategy of engagement with foreign investors</li> </ul>
Supporting Entities	
Relevant Entity	Align on the total numbers of direct jobs created by Quality of Life VRP 2020
Non-Oil Revenues	Align on total non-oil revenues created by Quality of Life VRP 2020
LCPSD Unit	Align on impact on the contribution to local content
MEP	Align on the balance of payments, consumption and inflation figures

## 4.D Program Governance

The governance of the Quality of Life VRP 2020 is a critical element to ensure success given the complexity of the Program in terms of scope, the needs for coordination with other VRPs and the nature of the initiative portfolio.

As part of its governance, the Program has defined the following four elements:

- The mandate of the VRP to ensure delivery of the VRP targets
- The stakeholder landscape for this Program
- The key processes required to run the VRP Program and the role of each stakeholder
- The organization required in the VRP

### 4.D.1 VRP Program mandate

The mandate of the Quality of Life VRP 2020 Office can be split into three components:

1) Setting aspirations for the Program:

- Identify metrics required to measure Quality of Life across all categories and dimensions
- Define ambition level for the 2020 and 2030 against the identified metrics
- Align on ambition level with responsible entities and identify ambition gaps

2) Deliver against set aspirations

- Determine the strategy to deliver the aspirations
- Review, influence and validate with responsible entities the plan to deliver aspirations
- Plan implementation continuously and coordinate across entities
- Provide with expert support in planning and implementation and allocate resources

3) Track implementation efforts and monitor outcome progress

- Review progress of initiatives, identify potential risks and flag gaps in initiative delivery and suggest corrective actions
- Monitor the output by measuring the performance against Program metrics, identify output delivery gap and suggest corrective actions



However, the above mandate applies differently to the dimensions owned by the Quality of Life VRP and to the dimensions owned by other VRPs. While the ambition setting and the performance monitoring applies to both groups of dimensions (with limited differences) the level of involvement in the implementation is different. In the case of fully-owned dimensions, the VRP will have an active role in influencing the implementation (budget control, initiative approval, resource allocation, etc.). However, in the other dimensions (owned by other VRPs), the Quality of Life VRP role will be limited to influencing the design of their delivery plans, understanding the progress of identifying potential risks or issues for the overall delivery, providing guidance and expertise to the different entities and ensuring coordination across all entities.

Under this mandate, we foresee that the Quality of Life VRP will be involved heavily with the other VRPs at two different stages. During the creation of the delivery plan, it can push the aspirations of other VRPs through the inclusion of the Quality of Life angle. This could comprise of forcing the inclusion of certain metrics (not previously considered) or pushing specific targets to support the delivery of the overall Program objectives (3 cities in the top 100 of EIU index). Also, during the delivery plan creation, by influencing the design of the delivery plan, i.e. ensuring that initiatives portfolio is comprehensive, covers the key elements of Quality of Life, and delivers against the targets

During the implementation phase, the Quality of Life VRP will shape the implementation planning of initiatives falling under different VRPs through continuous engagement. The Quality of Life VRP will seek to ensure that the aspirations defined in the delivery plan are effectively pursued.

Quality of Life VRP will support the delivery plan creation and implementation planning of other VRPs in a three-pronged approach:

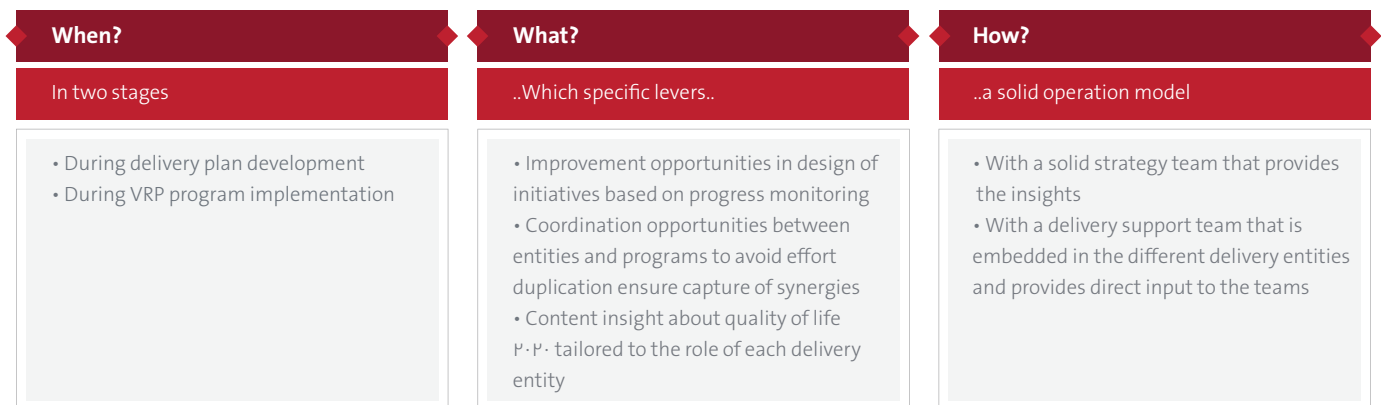
- By providing subject matter expertise across topics with a Quality of Life angle
- By ensuring the coordination between the different initiatives of the different Programs, to avoid duplication of efforts and alignment towards a unified outcome
- By deriving insights both from analyzing global trends in quality of life and monitoring the outcomes of initiatives improving Quality of Life

To provide the mentioned support, extensive resources will be deployed by the Quality of Life

VRP. Subject matter experts will be engaged across all the topics covered under quality of life. In addition, the Program will deploy dedicated personnel to coordinate with the key entities responsible for delivering on its initiatives as well as region-specific teams to oversee and monitor ongoing initiatives across the different regions.

The following sections explain in detail the governance that will be put in place to ensure that the Program delivers its targets considering its mandate.

**Figure 45: Value adding mechanisms**



#### 4.D.2 Stakeholder maps

To deliver against the Program’s comprehensive aspirations, a wide array of stakeholders will have to be mobilized and engaged. The main stakeholders involved in Program development, approval and delivery can be generally allocated to four main groups: Strategic oversight, Quality of Life VRP 2020 and related entities, Other VRPs and related entities, and Supporting entities.

**1. Strategic oversight:** This group includes the committees and supporting structures that are responsible for the oversight of all VRPs. Their main role with regards to Quality of Life VRP 2020 is to review and approve the scope and aspiration levels and to monitor the progress of the Program against the agreed upon targets. Within this group, there are two main stakeholders:

- Strategic Management Committee (SMC)
- Strategic Management Office (SMO)

**2. - Quality of Life Program 2020 structure:** The main design and delivery engine for Quality of Life Program 2020, the group includes the Quality of Life VRP itself as well as the entities that make up the committee of the VRP. This group can be broken down in two groups:

- Quality of Life VRP Office
- Quality of Life Delivery Entities:
- General Entertainment Authority
- General Cultural Authority

- General Sports Authority
- DAEM
- GCAM
- Ministry of Economy and Planning
- Ministry of Commerce and Investment
- Ministry of Municipalities and Rural Affairs
- Ministry of Environment Water and Agriculture
- Ministry of Education
- Ministry of Communication and Information Technology
- Ministry of Housing
- Ministry of Health
- Ministry of Interior

3. – Other VRPs and Entities: To deliver on its broad mandate, Quality of Life VRP 2020 will have to set aspirations that affect multiple other VRPs and their related entities, coordinate the execution of the related initiatives and monitor their progress and outcomes. As a consequence, two main stakeholder groups are considered of the stakeholder landscape:

Other VRP Offices:

- NTP 2020
- National Character Enrichment Program
- Housing VRP

Other ministries and authorities with mandate and aspirations that contribute to Quality of Life exclusively through other VRPs, including:

- Ministry of Labor and Social Development
- Ministry of Transport
- Ministry of Energy, Industry and Mineral Resources

Supporting entities: Entities supporting the development of the business cases for the VRPs, the projections of macroeconomic impact and the monitoring of progress versus aspirations. Additional stakeholders that are related to the Program are:

- Aada – National Center for Performance Management
- MLSD’s Deputyship for Saudis Employment
- Non-Oil Revenues Unit
- MoF
- MEP

**Figure 46: Stakeholder overview**

Stakeholder	Description	Stakeholder	Description
<b>1-Strategic oversight</b>		<b>3-Non- QoL structure</b>	
SMC	<ul style="list-style-type: none"> <li>• maintains oversight of Vision 2030 realization</li> </ul>	Other VRPs	Other Vision Realization Programs whose mandate and aspiration contribute to improving Quality of Life: <ul style="list-style-type: none"> <li>• NTP 2020</li> <li>• National character</li> <li>• Housing VRP</li> <li>• Others 1</li> </ul>
SMO	<ul style="list-style-type: none"> <li>• Strategic Management Office supports SMC &amp; VRPs with guidance and quality assurance</li> </ul>	Non- QoL VRP entities	Other ministries and authorities with mandate and aspirations that contribute to QoL 2020 through other VRPs: <ul style="list-style-type: none"> <li>• MLSD</li> <li>• MOT</li> <li>• MEIM</li> </ul>
<b>2-Quality of life structure</b>		<b>4-Supporting entities</b>	
QoL VRP 2020	<ul style="list-style-type: none"> <li>• VRP office oversees the design and implementation of QOL VRP strategy</li> </ul>		<ul style="list-style-type: none"> <li>• Entities supporting the definition of business cases</li> <li>• Adaa – National Center for Performance Management</li> <li>• MLSD’s Deputyship for Saudis Employment</li> <li>• Non-Oil Revenues Unit</li> <li>• MEP</li> <li>• MoF</li> </ul>
QoL 2020 Entities	<ul style="list-style-type: none"> <li>• QOL 2020 Committee members support delivery of aspirations</li> <li>• General Entertainment Authority</li> <li>• General Cultural Authority</li> <li>• General Sports Authority</li> <li>• DAEM</li> <li>• Other QoL VRP committee members (MEP, MCI, MoMRA, MoEWA, MOE, MCIT, MOHO, MOH, MOI)</li> </ul>		

<sup>1</sup> Additional vision 2030 programs can be determined once primary programs receive approval

### 4.D.3 Key processes

To comply with the mandate stated above, the Program has identified 5 key macro-processes that will constitute the bulk of activities in the coming years.

The five macro processes for the VRP Program are:

The Ambition Setting Process: Process to set up the Quality of Life VRP ambitions for the period (e.g. set commitments for 2020)

Two Implementation Processes:

- Implementation Planning Process: Process to create and constantly update the consolidated macro delivery plan for the Quality of Life VRP Program
- Execution Process: Process to execute the tasks included in the delivery

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- Implementation Planning Process: Process to create and constantly update the consolidated macro delivery plan for the Quality of Life VRP Program
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## Two Performance Monitoring Processes:

- Implementation Tracking Process: Process to oversee implementation of macro delivery plan and to identify issues and gaps and propose corrective actions
- Performance Monitoring Process: Process to measure the outcome of the Program against the predefined metrics and targets

Through the phase of reviewing achieved progress and monitoring outputs, the VRP's responsibility is not only limited to measuring outputs in terms of the desired number, but most importantly ensuring the high quality of these outputs and their compliance with global standards.

The Program Office will conduct a measuring process through two main mechanisms:

- The first mechanism will be within the planning and initiative design phase, where the Program will use creative workshops to develop ideas and make use of new projects in global best cities to develop initiatives.
- Creative workshops are an event that focuses on a specific output and region to be chosen. In this event, idea leaders, experts and consultants in different fields meet supported by decision makers. There will be a team specialized for continuously arranging and planning the event.
- The second mechanism includes submitting reports quarterly to the strategic committee to review the strategic program outputs and progress at the level of all initiatives. It shall be ensured that the program will report outputs on two phases: output design phase and the second phase will be implemented after executing the initiative. Report models will compose of a list of standards to check outputs quality. Such standards are approved by the strategic committee in the first phase. In addition, opportunities suggested by the strategic committee will be evaluated and approved even if they are in line with the standards. The Program does not consider any output completed if it does not achieve the set standard in terms of quality.



The global quality of the program outputs will be ensured on two levels



Ensuring global quality



**In advance, creative ideas will be devised through creative labs**



**Throughout the implementation phase, progress and impact reporting will be based on predefined global standards**

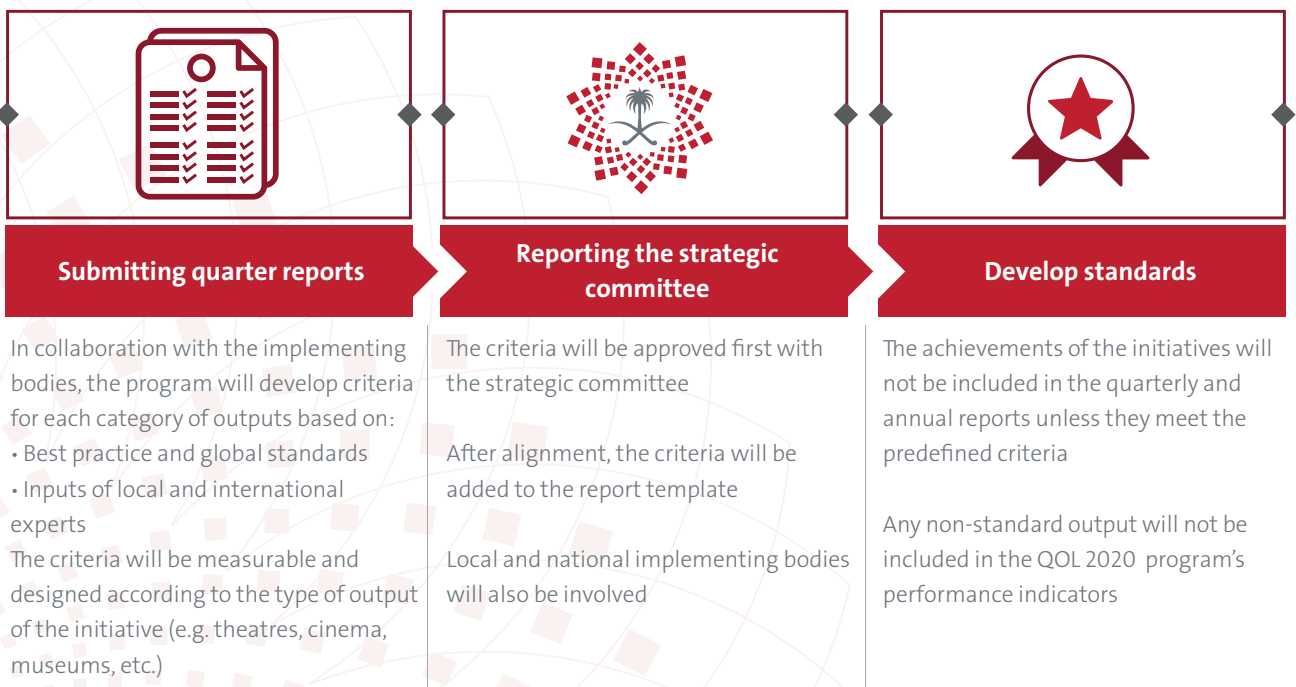
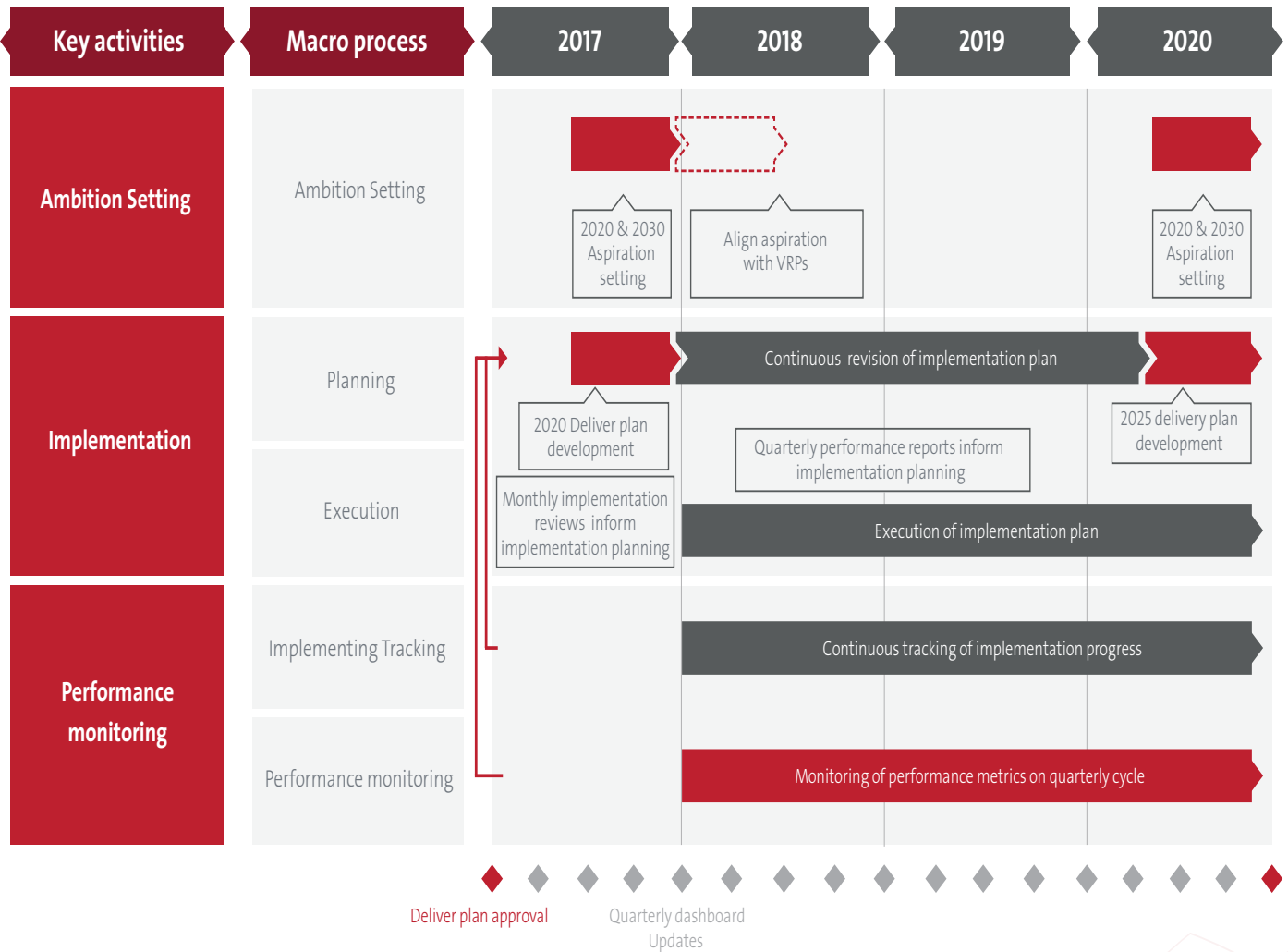


Figure 47: Macro-process overview

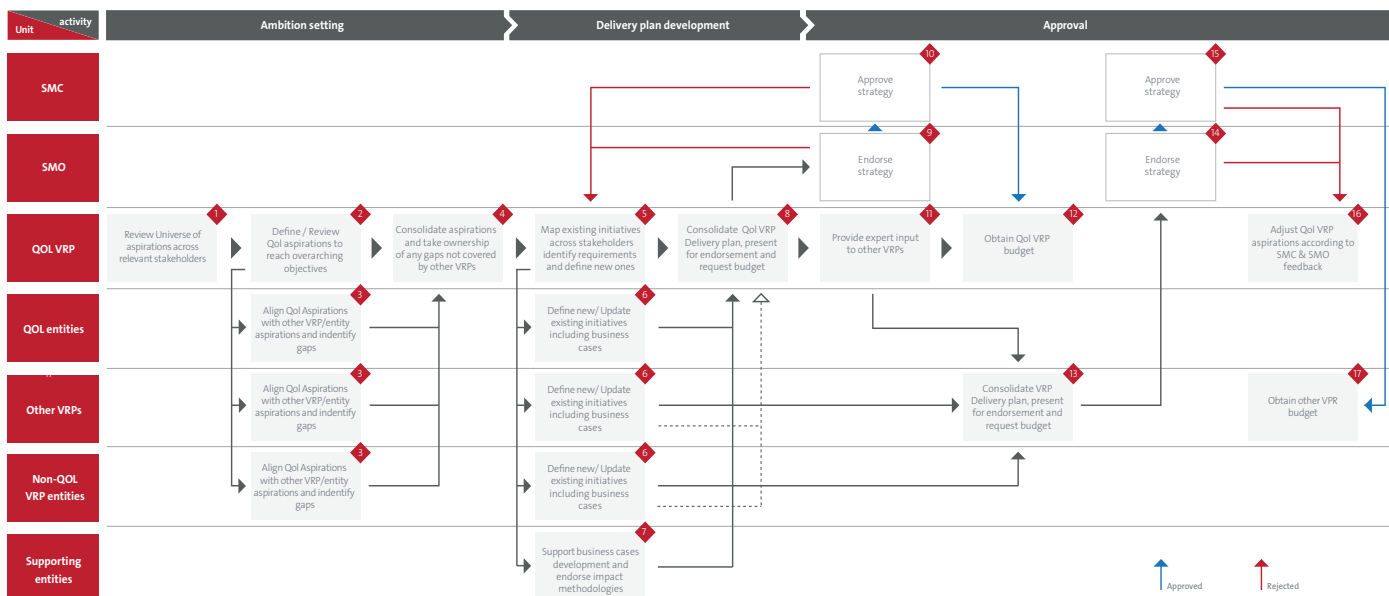




The high-level process map and the roles and responsibilities of each stakeholder have been defined below:

## Ambition setting and delivery plan development process

Figure 48: Process map - Ambition setting and Delivery plan development

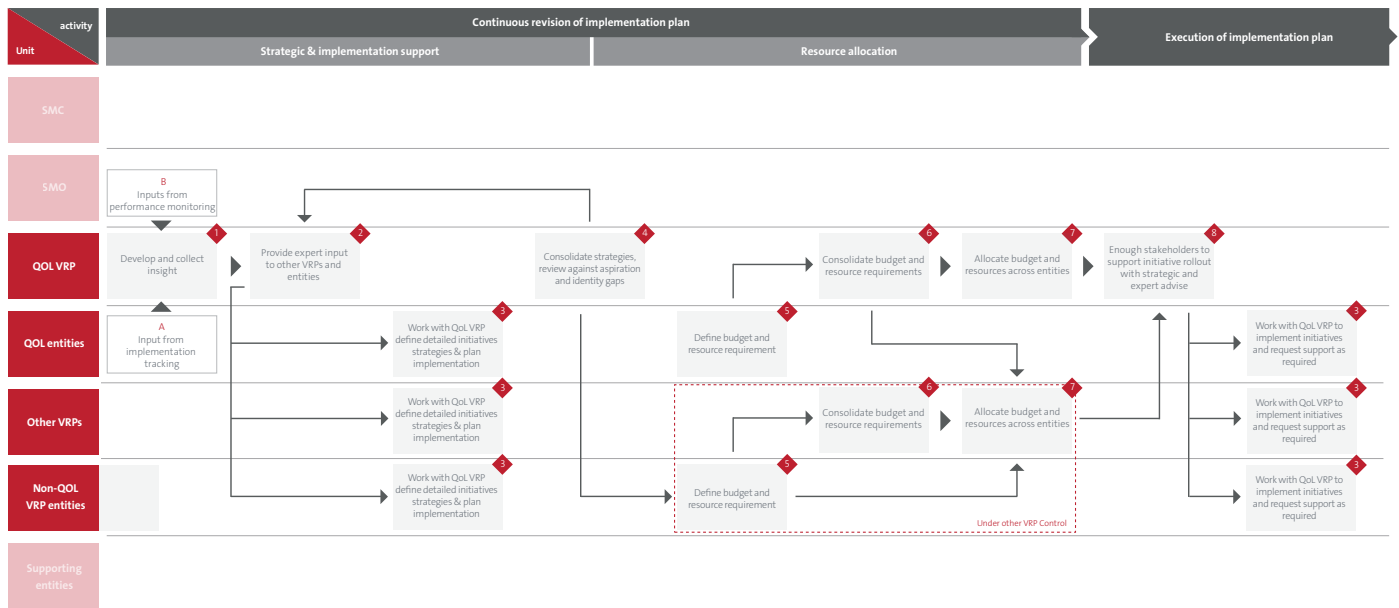


The ambition levels of VRPs that already obtained the approval of the Strategic Management Committee (e.g. Housing VRP), have been taken into consideration when setting targets for the Quality of Life VRP. In the case of VRPs that have not yet been finalized, it is crucial to consider escalation mechanisms in the case of ambition misalignments.

If a VRP submits a delivery plan with lower levels of ambition compared to the Quality of Life 2020 delivery plan, the Quality of Life VRP 2020 will assess the magnitude of the misalignment, the rationale for the change and the implication for the overall Quality of Life VRP 2020 targets. It will then proceed to coordinate with the Strategic Management Office, the Strategic Management Committee, and the other VRP in question and prepare an action plan to address the issue. The Strategic Management Committee will provide direction on the resolution of the ambition level setting, to which both the Quality of Life VRP and the other VRP in question should adjust their ambitions and any required initiatives as necessary.

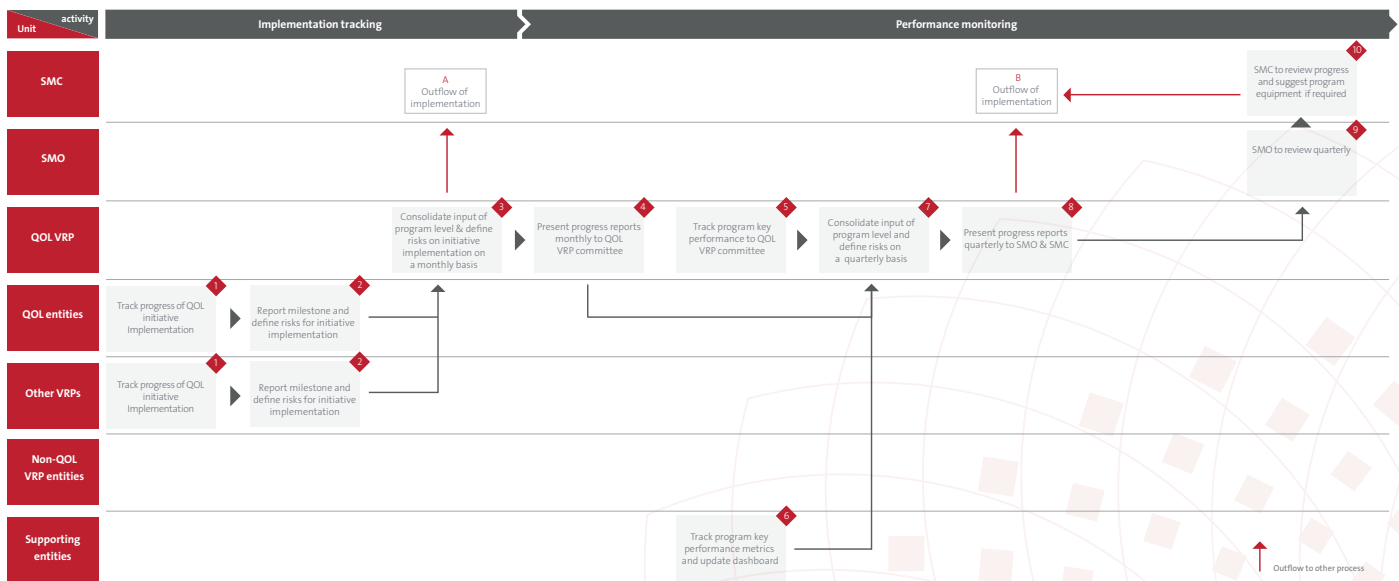
# Implementation, Implementation tracking and performance monitoring

Figure 49: Process map – Implementation



# Implementation tracking and performance monitoring

Figure 50: Process map - Implementation tracking and Performance monitoring



Before the initiation of the Implementation, Implementation tracking and performance monitoring processes the Quality of Life VRP 2020 will assess the level of working relationship required with each of the different VRP Programs based on the: joint ambitions and targets, level of interdependencies and shared initiatives. The Program will then proceed to define custom governance and alignment mechanisms with each VRP in order to ensure the effective coordination, reporting and conflict resolution is in place.

#### 4.D.4 Escalation Process:

The escalation process often takes place during the weekly meetings between the VRP office and the delivery entities to discuss progress on key obstacles and issues. Many of these issues may be simple and can be solved by the team itself; however, some issues constitute a risk to the progress of initiatives, and in such cases, the escalation process should be defined.

For example, if the initiative owner is not able to deliver one of the initiative milestones, they should consider the root cause of issue at hand. The VRP office may propose solutions or provide the required support to avoid impact on KPIs. Other cases may require the escalation of the issue for consideration by a senior officer in the organizational structure.

Below are other examples of issues that may require escalation:

- Conflict between more than one delivery entity over the responsibility for delivering initiatives or mandating one delivery entity and not the other.
- The need for legislative procedures to deliver initiatives, e.g. a royal decree to define the mandate/functions of entities
- Disbursement orders, contracting processes, the Tenders and Procurement Law and all aspects related to the financial management of initiatives
- Initiative eligibility criteria for budget disbursement and the subsequent actions to be taken by the permanent team.
- Escalation standards and process are illustrated below. However, escalation to the next level should only take place one week after the issue is raised.

Figure 51: Escalation process



# INITIATIVES and TIMELINE



## 5 Initiatives and Timeline

The Program's aspirations and strategic commitments have been translated into a portfolio of initiatives which address quality of life. These initiatives constitute a base on which the aspirations of KSA Vision 2030 shall be achieved.

Current initiatives that have relevance to the Program commitments have been reviewed and linked to the strategic pillars.

Initiatives were designed according to an analytical study of the Program's requirements, a review of global best practices, and according to what suits the KSA the most. These initiatives are detailed below.

### 5.A Initiatives Portfolio

This section aims to provide an overview of the initiative portfolio to deliver against the targets for 2020.

Following the ownership distinctions introduced in previous chapters, this section differentiates between two types of initiatives.

1. The initiatives covering KPIs owned by the Program.
2. The initiatives covering KPIs not owned by the Quality of Life VRP 2020.

For the initiatives covering KPIs owned by the Program, this section provides detailed descriptions for each initiative, leading entity, and the VRP KPI, impact, and whether an initiative can be privatized. Additionally, some of these initiatives have been identified as game changers or quick-wins:

1. Game changers are initiatives presenting the highest potential for economic or social impact (see Game changer section for more details)
2. Quick wins are initiatives with a low budget requirement and an impact expected to realize in a short period of time (typically 6-12 months)

On the other hand, for the KPIs not owned by the Program, a set of initiatives has been selected with the purpose of showcasing the plans of the different entities to deliver against the agreed targets. This list of initiatives is organized by dimension, KPI, and mapped against entity and strategic pillars. Going forward, the corresponding entities will provide the necessary details within their respective VRP delivery plans and/or strategy.

The initiatives have been mapped against the 10 categories of livability and lifestyle (or flagged as overarching) as well as the 9 strategic components (the 6 pillars and 3 horizontals). The initiatives that impact more than one strategic component have been mapped to the component that is expected to be impacted most.

At the moment of submission, the Program had a portfolio of approximately of 220 initiatives of which ~119 were within livability, 101 within lifestyle. The next figure provides with an overview of the number of initiatives by pillar and category.

Figure 52: Initiative number overview

220 Deliver high quality of life to all KSA residents							
82 Develop vibrant lifestyle options for KSA residents				112 Establish world class liveability standards across KSA cities			
	Drive participation	Deliver offering	Develop venues	Enhance social engagement	Provide services	Develop cities	
Sports	22	3	5	4	17	20	Infrastructure & Transportation
Heritage & culture	8	9	6	-	3	2	Housing, Urban Design & Environment
Entertainment	4	6	2	5	20	6	Healthcare
Recreation	1	1	1	6	17	1	Economic & education opportunities

101 out of 220 initiatives are related to KPIs directly owned by the Quality of Life Program 2020. The following figure provides an overview of the number of these initiatives by pillar and category.

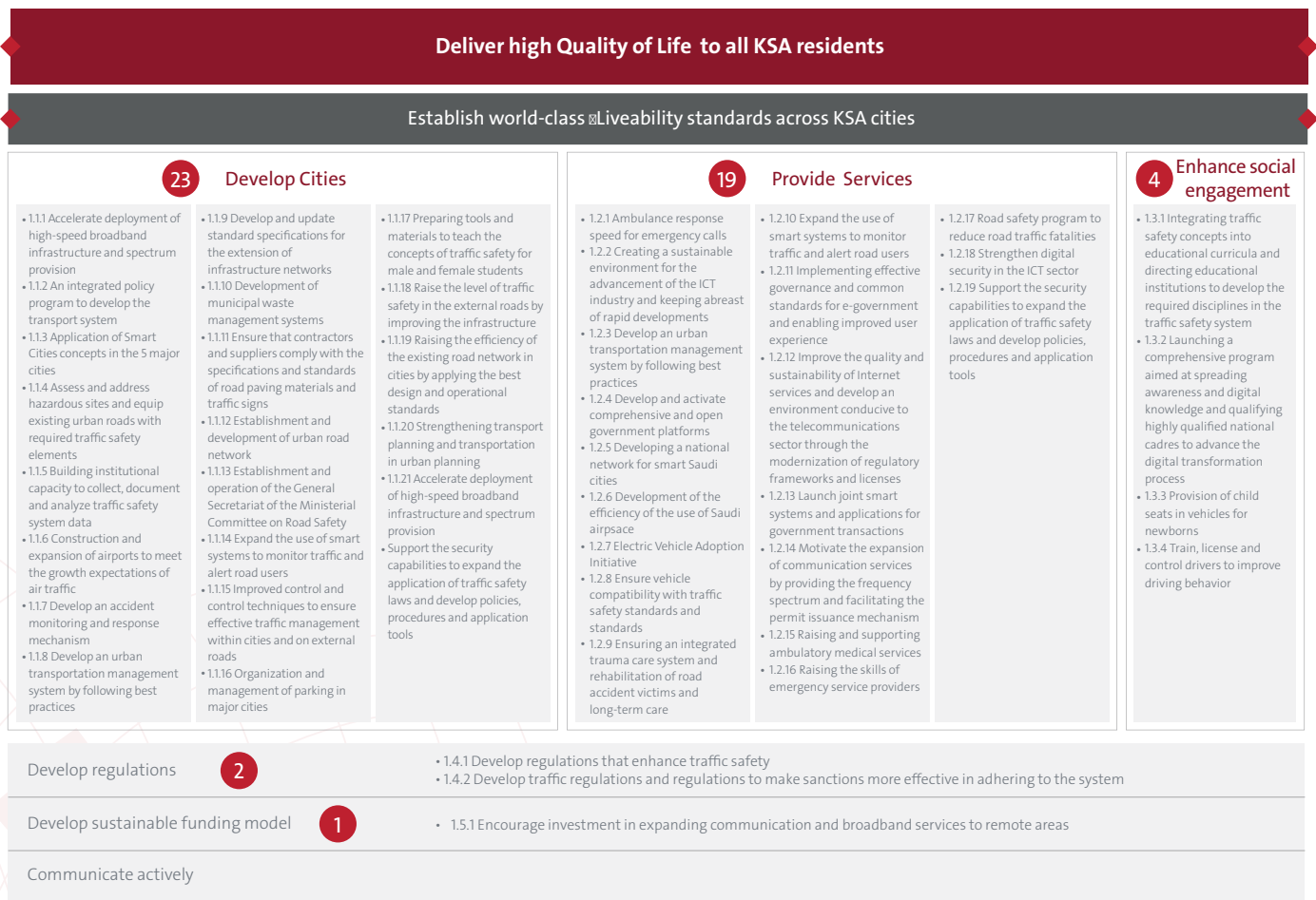
Figure 53: Overview of the number of initiatives directly owned by Quality of Life Program 2020

101 Deliver high quality of life to all KSA residents							
73 Develop vibrant lifestyle options for KSA residents				7 Establish world class liveability standards across KSA cities			
	Drive participation	Deliver offering	Develop venues	Enhance social engagement	Provide services	Develop cities	
Sports	22	3	5	-	-	-	Infrastructure & Transportation
Heritage & culture	8	9	6	-	-	-	Housing, Urban Design & Environment
Entertainment	4	6	2	-	-	-	Healthcare
Recreation	1	1	1	-	-	-	Economic & education opportunities
Social Engagement	4	-	1	-	7	-	Security & socio-Environment
Develop regulations				8			
Develop a sustainable funding model				8			
Communicate affectively				5			

## 5.B Infrastructure and Transportation

As indicated in sections 1 and 2, the KPIs within the Transportation and Infrastructure category, despite contributing to Quality of Life final objectives, remain owned by other VRPs (mostly NTP 2020). The following initiatives, which have been collected from various entities, shall be included in the initiative portfolio of the respective VRPs but have been included in this delivery plan to be able to provide an overview of the activities required to meet Quality of Life targets. The list of initiatives is organized by dimension within the category (e.g. Connectivity) and by KPI (e.g. Network Readiness Index). Additionally, a visual overview with the mapping of initiatives against strategic pillars is included in the following figure.

Figure 54: Infrastructure and Transportation





Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Connectivity	Devices connected to internet / person	Develop Cities	<ul style="list-style-type: none"> <li>Accelerate deployment of high-speed broadband infrastructure and spectrum provision</li> </ul>	<ul style="list-style-type: none"> <li>MCIT</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>Develop a national network for smart Saudi cities</li> <li>Motivate the expansion of communication services by providing the frequency spectrum and facilitating the permit issuance mechanism</li> </ul>	<ul style="list-style-type: none"> <li>MoMRA</li> <li>MCIT</li> </ul>
		Develop sustainable funding models	<ul style="list-style-type: none"> <li>Encourage investment in expanding communication and broadband services to remote areas</li> </ul>	<ul style="list-style-type: none"> <li>MCIT</li> </ul>
Connectivity	Network Readiness Index	Develop Cities	<ul style="list-style-type: none"> <li>Accelerate deployment of high-speed broadband infrastructure and spectrum provision</li> </ul>	<ul style="list-style-type: none"> <li>MCIT</li> </ul>
		Enhance Social Engagement	<ul style="list-style-type: none"> <li>Launch a comprehensive program aimed at spreading awareness and digital knowledge and qualifying highly qualified national cadres to advance the digital transformation process</li> </ul>	<ul style="list-style-type: none"> <li>MCIT</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>Create a sustainable environment for the advancement of the ICT industry and keeping abreast of rapid developments</li> <li>Develop and activate comprehensive and open government platforms</li> <li>Implement effective governance and common standards for e-government and enabling improved user experience</li> <li>Improve the quality and sustainability of Internet services and develop an environment conducive to the telecommunications sector through the modernization of regulatory frameworks and licenses</li> </ul>	<ul style="list-style-type: none"> <li>MCIT</li> <li>MCIT</li> <li>MCIT</li> <li>MCIT</li> </ul>
			<ul style="list-style-type: none"> <li>Launch joint smart systems and applications for government transactions</li> <li>Motivate the expansion of communication services by providing the frequency spectrum and facilitating the permit issuance mechanism</li> <li>Strengthen digital security in the ICT sector</li> </ul>	<ul style="list-style-type: none"> <li>MCIT</li> <li>MCIT</li> <li>MCIT</li> </ul>
			Develop sustainable funding models	<ul style="list-style-type: none"> <li>Encourage investment in expanding communication and broadband services to remote areas</li> </ul>
Develop Cities	<ul style="list-style-type: none"> <li>An integrated policy program to develop the transport system</li> <li>Develop an urban transportation management system by following best practices</li> <li>Strengthening transport planning and transportation in urban planning</li> </ul>		<ul style="list-style-type: none"> <li>MoMRA</li> <li>MoMRA</li> <li>MoMRA</li> </ul>	
Public/ Shared transport	Annual journeys in public transport per capita	Develop Cities	<ul style="list-style-type: none"> <li>An integrated policy program to develop the transport system</li> <li>Develop an urban transportation management system by following best practices</li> <li>Strengthening transport planning and transportation in urban planning</li> </ul>	<ul style="list-style-type: none"> <li>MoMRA</li> <li>MoMRA</li> <li>MoMRA</li> </ul>
Public/ Shared transport	Electric car sales as percentage of total transport	Provide services	<ul style="list-style-type: none"> <li>Electric Vehicle Adoption Initiative</li> </ul>	<ul style="list-style-type: none"> <li>MEIM</li> </ul>
Sustainable utilities	% of recycled waste from total waste produced	Develop Cities	<ul style="list-style-type: none"> <li>Development of municipal waste management systems</li> </ul>	<ul style="list-style-type: none"> <li>MoMRA</li> </ul>
Transportation and Infrastructure	Direct international flights	Develop Cities	<ul style="list-style-type: none"> <li>Construction and expansion of airports to meet the growth expectations of air traffic</li> </ul>	<ul style="list-style-type: none"> <li>GACA</li> </ul>
		Provide Services	<ul style="list-style-type: none"> <li>Development of the efficiency of the use of Saudi airspace</li> </ul>	<ul style="list-style-type: none"> <li>GACA</li> </ul>

Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Transportation and Infrastructure	Hours/year that the average commuter spends in traffic	Develop Cities	<ul style="list-style-type: none"> <li>Application of Smart Cities concepts in the 5 major cities</li> <li>Develop and update standard specifications for the extension of infrastructure networks</li> <li>Organization and management of parking in major cities</li> <li>Increasing the efficiency of the existing road network in cities by applying the best design and operational standards</li> <li>Strengthening transport planning and transportation in urban planning</li> </ul>	<ul style="list-style-type: none"> <li>MoMRA</li> <li>MoMRA</li> <li>MoMRA</li> <li>MoMRA</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>Develop an urban transportation management system by following best practices</li> <li>Expand the use of smart systems to monitor traffic and alert road users</li> </ul>	<ul style="list-style-type: none"> <li>MoMRA</li> <li>MoH</li> </ul>
Transportation and Infrastructure	Road traffic deaths per 100 000 population	Enhance Social Engagement	<ul style="list-style-type: none"> <li>Integrating traffic safety concepts into educational curricula and directing educational institutions to develop the required disciplines in the traffic safety system</li> <li>Provision of child seats in vehicles for newborns</li> <li>Train, license and control drivers to improve driving behavior</li> </ul>	<ul style="list-style-type: none"> <li>MoH</li> <li>MoH</li> <li>MoH</li> </ul>
		Develop Cities	<ul style="list-style-type: none"> <li>Assess and address hazardous sites and equip existing urban roads with required traffic safety elements</li> <li>Building institutional capacity to collect, document and analyze traffic safety system data</li> <li>Develop an accident monitoring and response mechanism</li> <li>Ensure that contractors and suppliers comply with the specifications and standards of road paving materials and traffic signs</li> <li>Establishment and development of an urban road network</li> <li>Establishment and operation of the General Secretariat of the Ministerial Committee on Road Safety</li> <li>Expand the use of smart systems to monitor traffic and alert road users</li> <li>Improved control and control techniques to ensure effective traffic management within cities and on external roads</li> <li>Preparing tools and materials to teach the concepts of traffic safety for male and female students</li> <li>Increase the level of traffic safety in the external roads by improving the infrastructure</li> <li>Support the security capabilities to expand the application of traffic safety laws and develop policies, procedures and application tools</li> </ul>	<ul style="list-style-type: none"> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoMRA</li> <li>MoH</li> <li>MoH</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>Ambulance response speed for emergency calls</li> <li>Ensure vehicle compatibility with traffic safety standards and standards</li> <li>Ensuring an integrated trauma care system and rehabilitation of road accident victims and long-term care</li> <li>Raising and supporting ambulatory medical services</li> <li>Raising the skills of emergency service providers</li> <li>Road safety Program to reduce road traffic fatalities</li> </ul>	<ul style="list-style-type: none"> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoH</li> <li>MoMRA</li> </ul>
		Develop Regulations	<ul style="list-style-type: none"> <li>Develop traffic regulations and regulations to make sanctions more effective in adhering to the system</li> </ul>	<ul style="list-style-type: none"> <li>MoH</li> </ul>

## 5.C Housing, Urban Design and Environment

As indicated in the chapters 1 and 2, the KPIs within the Housing, Urban Design and Environment category, despite contributing to the quality of life final objectives, remain owned by other VRPs (mostly Housing and NTP 2020). The following initiatives, which have been collected from various entities, shall be included in the initiative portfolio of the respective VRPs but have been included in this delivery plan to be able to provide with an overview of the activities required to meet Quality of Life targets. The list of initiatives is organized by dimension within the category (e.g. Urban Design) and by KPI (e.g. Green space per square meter per capita). Additionally, a visual overview with the mapping of initiatives against strategic pillars is including in the following figure.

Figure 55: Housing, Urban Design and Environment

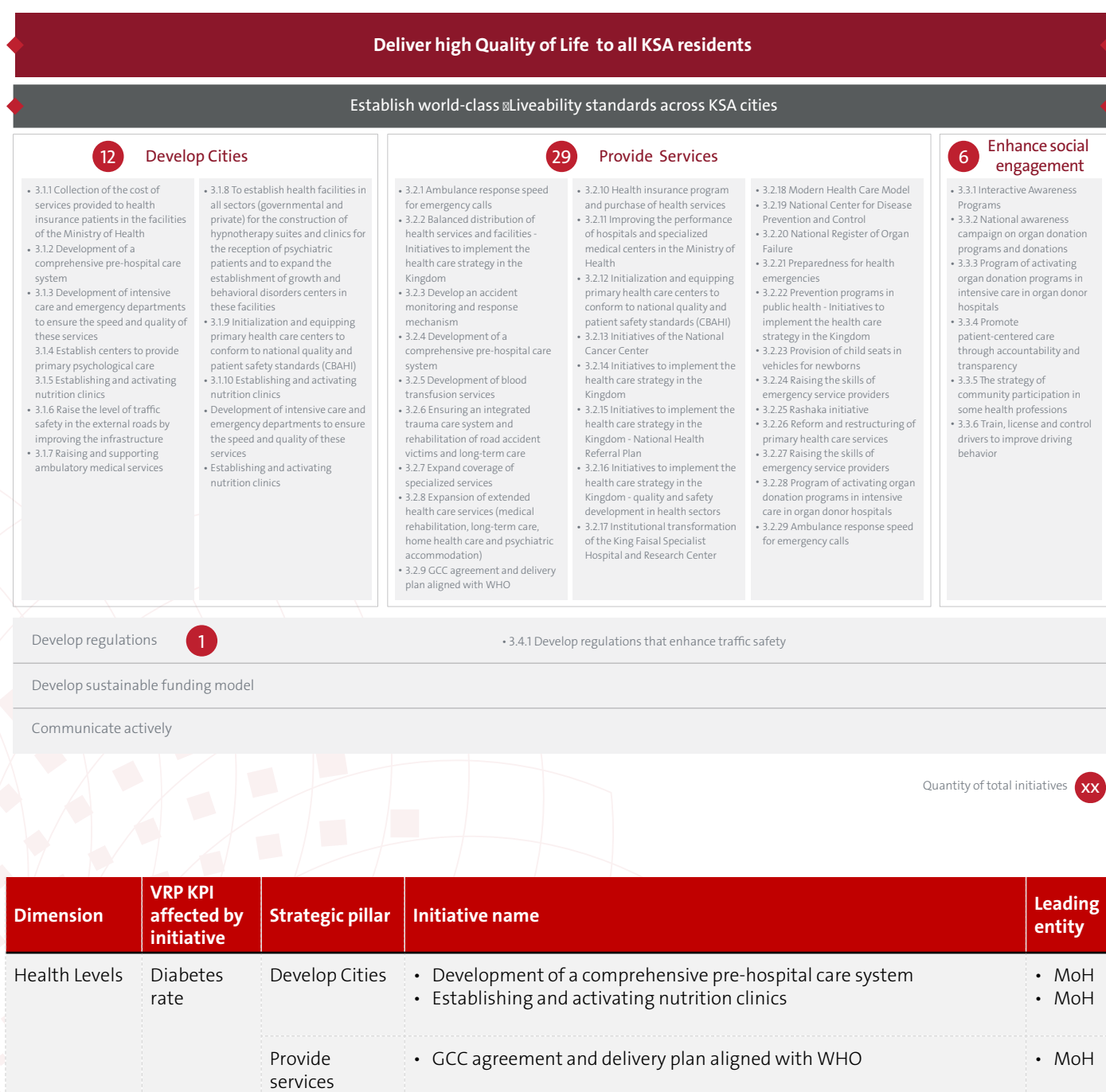


Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Housing	Percentage of population that is a homeowner	Develop Cities	• Create a cooperative housing program to build affordable housing	• MoHo
		Provide services	• Cooperation of the Ministry of Housing and the Ministry of Finance to facilitate housing loans for government employees • Mortgage Guarantees	• MoHo • MoHo
		Develop sustainable funding models	• Developing partnerships with private sector developers on government land (Ministry of Housing land)	• MoHo
Housing	Percentage Housing stock (thousands of houses) to the percentage of population	Develop Cities	• Create a cooperative housing program to build affordable housing • Developing partnerships with private sector developers on government land (Ministry of Housing land)	• MoHo • MoHo
		Develop sustainable funding models	• Developing partnerships with private sector developers on government land (Ministry of Housing land)	• MoHo
Quality of Environment	Carbon dioxide emissions from fuel combustion are estimated at about \$ 1 million of gross domestic product (GDP) for 2014	Provide services	• Establish a central unit to monitor air quality and emissions from the source	• MoEWA
Urban Design	Green space sq. m./ capita	Develop Cities	• Implement urban and environmental rehabilitation projects to improve the urban landscape of light industry areas in the 17 cities	• MoMRA

## 5.D Healthcare

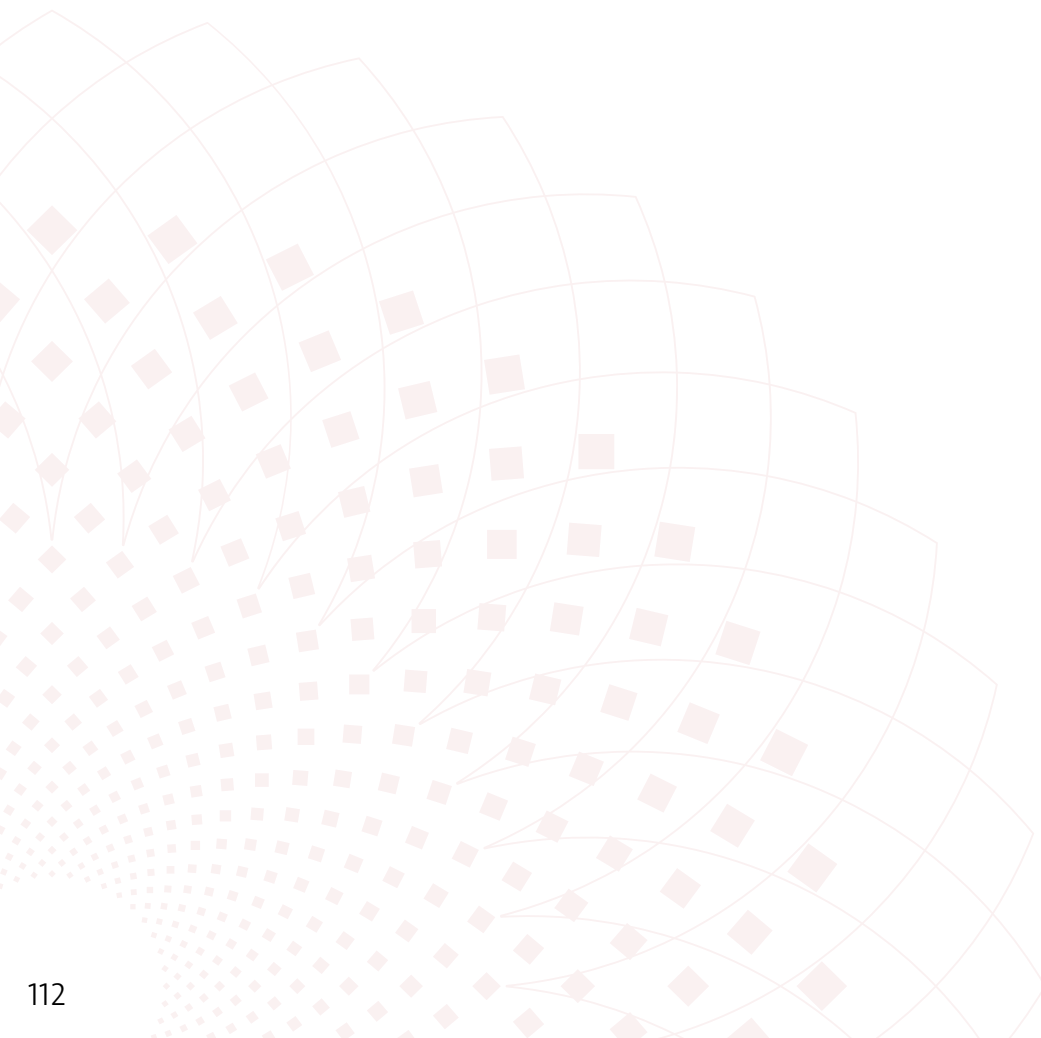
As indicated in the chapters 1 and 2, the KPIs within the Healthcare category, despite contributing to the Quality of Life final objectives, remain owned by other VRPs (mostly NTP 2020). The following initiatives, which have been collected from various entities, shall be included in the initiative portfolio of the respective VRPs but have been included in this delivery plan to be able to provide an overview of the activities required to meet Quality of Life targets. The list of initiatives is organized by dimension within the category (e.g. Health Levels) and by KPI (e.g. Obesity rate). Additionally, a visual overview with the mapping of initiatives against pillars is including in the following figure.

Figure 56: Healthcare





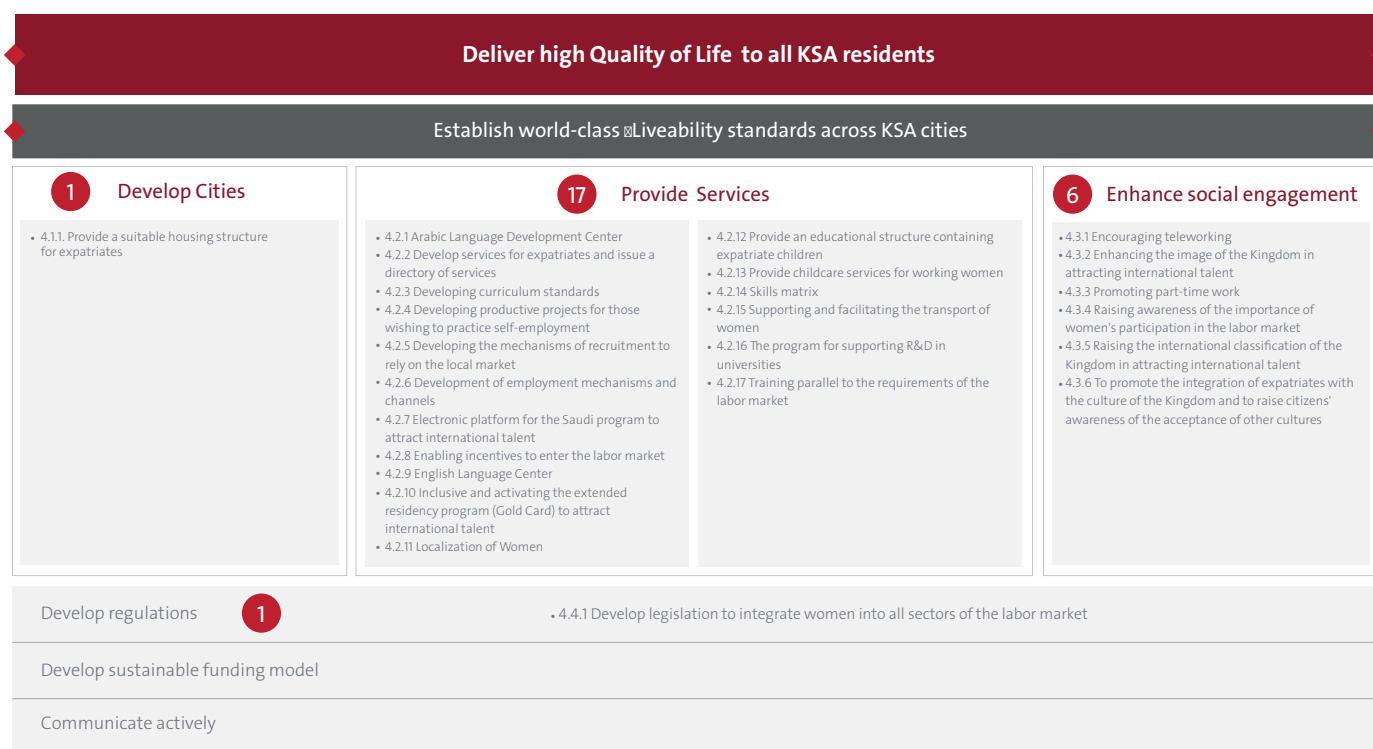
Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Medical care	Out-of-pocket health expenditure	Develop Cities	<ul style="list-style-type: none"> <li>• Collect the cost of services provided to health insurance patients at Ministry of Health facilities</li> <li>• Establish centers to provide primary psychological care</li> <li>• Establish and activate nutrition clinics</li> <li>• Establish health facilities in all sectors (governmental and private) for the construction of hypnotherapy suites and clinics for the reception of psychiatric patients and to expand the establishment of growth and behavioral disorders centers in these facilities</li> </ul>	<ul style="list-style-type: none"> <li>• MoH</li> <li>• MoH</li> <li>• MoH</li> <li>• MoH</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>• Balanced distribution of health services and facilities - Initiatives to implement the health care strategy in the Kingdom</li> <li>• Expansion of extended health care services (medical rehabilitation, long-term care, home health care and psychiatric accommodation)</li> <li>• Health insurance Program and purchase of health services</li> </ul>	<ul style="list-style-type: none"> <li>• MoH</li> <li>• MoH</li> <li>• MoH</li> </ul>



## 5.E Education and Economic Opportunities

As indicated in the chapters 1 and 2, the KPIs within the Education and Economic Opportunities category, despite contributing to the Quality of Life final objectives, remain owned by other VRPs. The following initiatives, which have been collected from various entities, shall be included in the initiative portfolio of the respective VRPs but have been included in this delivery plan to be able to provide an overview of the activities required to meet Quality of Life targets. The list of initiatives is organized by dimension within the category (e.g. Employment Opportunities) and by KPI (e.g. Unemployment rate). Additionally, a visual overview with the mapping of initiatives against strategic pillars is including in the following figure.

Figure 57: Education and Economic Opportunities

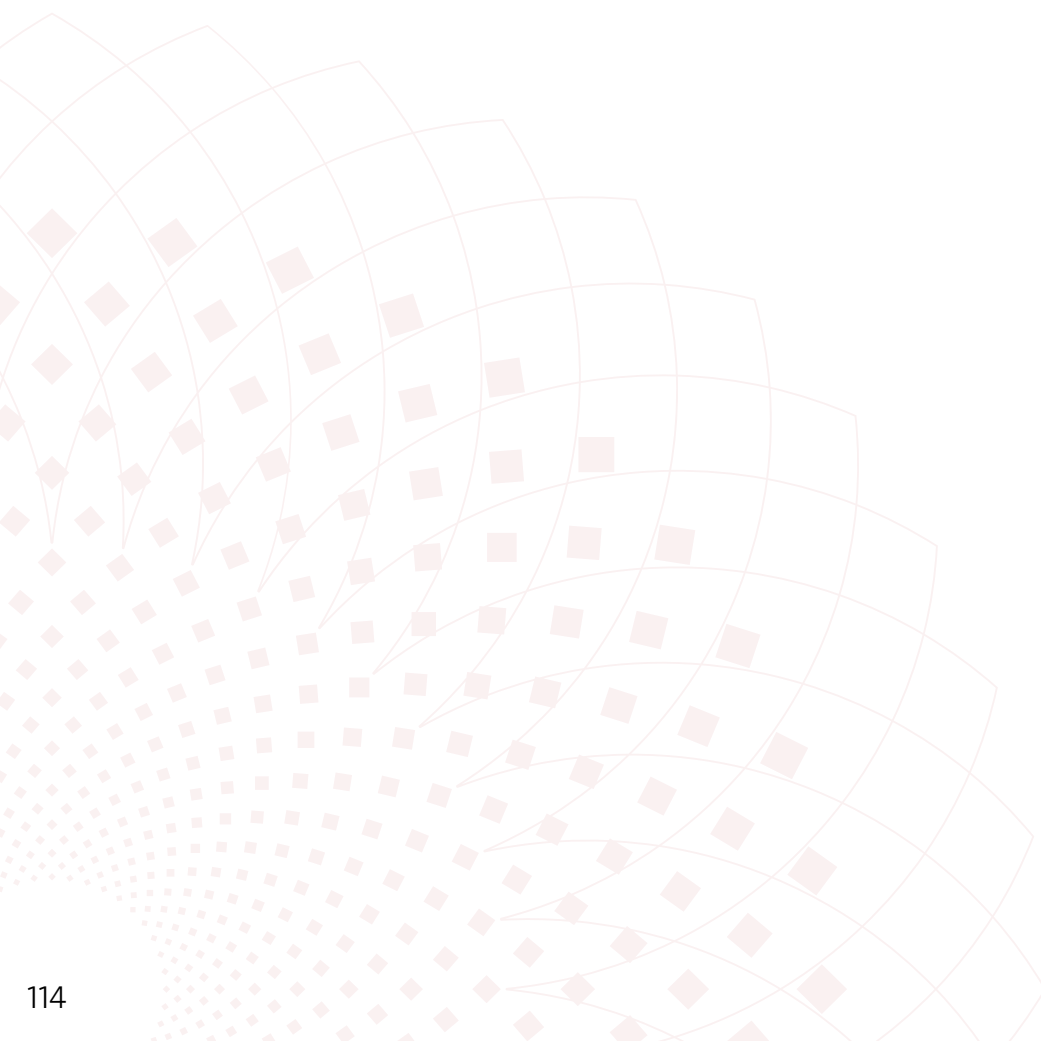


Quantity of total initiatives **XX**

Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Education Opportunities	Number of local universities that are ranked globally	Provide services	• The Program for supporting research and development (R&D) in universities	• MoE
Education Opportunities	PISA score	Provide services	• Arabic Language Development Center • Developing curriculum standards • English Language Center • Skills matrix	• MoE • MoE • MoE • MoE
Employment Opportunities	Female employment rate	Reinforce social interaction	• Raising awareness of the importance of women's participation in the labor market	• MLSD
		Provide services	• Localization of Women • Provide childcare services for working women • Supporting and facilitating the transport of women	• MLSD • MLSD • MLSD
		Develop Regulations	• Develop legislation to integrate women into all sectors of the labor market	• MLSD



Employment Opportunities	Global Talent Competitiveness Index	Reinforce social interaction	<ul style="list-style-type: none"> <li>• Enhancing the image of the Kingdom in attracting international talent</li> <li>• Raising the international classification of the Kingdom in attracting international talent</li> <li>• Promoting the integration of expatriates within the culture of the Kingdom and raising citizens' awareness of the acceptance of other cultures</li> </ul>	<ul style="list-style-type: none"> <li>• MLSD</li> <li>• MLSD</li> <li>• MLSD</li> </ul>
		Develop Cities	<ul style="list-style-type: none"> <li>• Provide a suitable housing structure for expatriates</li> </ul>	<ul style="list-style-type: none"> <li>• MLSD</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>• Develop services for expatriates and issue a directory of services</li> <li>• Develop electronic platform for the Saudi Program to attract international talent</li> <li>• Activate the extended residency Program (Gold Card) to attract international talent</li> <li>• Provide an educational structure containing expatriate children</li> </ul>	<ul style="list-style-type: none"> <li>• MLSD</li> <li>• MLSD</li> <li>• MLSD</li> <li>• MLSD</li> </ul>
Employment Opportunities	Saudi unemployment rate	Reinforce social interaction	<ul style="list-style-type: none"> <li>• Encouraging teleworking</li> <li>• Promoting part-time work</li> </ul>	<ul style="list-style-type: none"> <li>• MLSD</li> <li>• MLSD</li> </ul>
		Provide services	<ul style="list-style-type: none"> <li>• Developing productive projects for those wishing to practice self-employment</li> <li>• Developing the mechanisms of recruitment to rely on the local market</li> <li>• Development of employment mechanisms and channels</li> <li>• Enabling incentives to enter the labor market</li> <li>• Training parallel to the requirements of the labor market</li> </ul>	<ul style="list-style-type: none"> <li>• MLSD</li> <li>• MLSD</li> <li>• MLSD</li> <li>• MLSD</li> <li>• MLSD</li> </ul>



## 5.F Security and Socio-environment

As indicated in the sections 1 and 2, the KPIs within the Security and Social Environment category fall under two types. The ones related to Crime are fully owned by the Quality of Life VRP, while the rest are owned by other VRPs. For the KPIs owned by other VRPs, the following initiatives, which have been collected from various entities, shall be included in the initiative portfolio of the respective VRPs but have been included in this delivery plan to be able to provide an overview of the activities required to meet Quality of Life targets. The list of initiatives is organized by dimension within the category (e.g. Crime) and by KPI (e.g. Homicide Rate). Additionally, a visual overview with the mapping of initiatives against strategic pillars is including in the following figure.

Figure 58: Security and Socio-Environment



Strategic pillar	Initiative name	Dimension	Leading entity	Type	VRP KPI related to the initiative
Provide services	<ul style="list-style-type: none"> <li>Career Recycling Project</li> <li>Governance of the system of control, auditing and combating corruption</li> <li>Services and procedures project (study of more than 100 services and procedures in government agencies exposed to corruption)</li> </ul>	• Government services	• MEP		• Corruption Perception Index
Provide services	<ul style="list-style-type: none"> <li>Develop and activate comprehensive and open government platforms</li> <li>Implement effective governance and common standards for e-government and enabling improved user experience</li> <li>Launch joint smart systems and applications for government transactions</li> <li>Launching the government cloud and upgrading government integration</li> </ul>	• Government services	• MCIT		• e-Government Survey Index

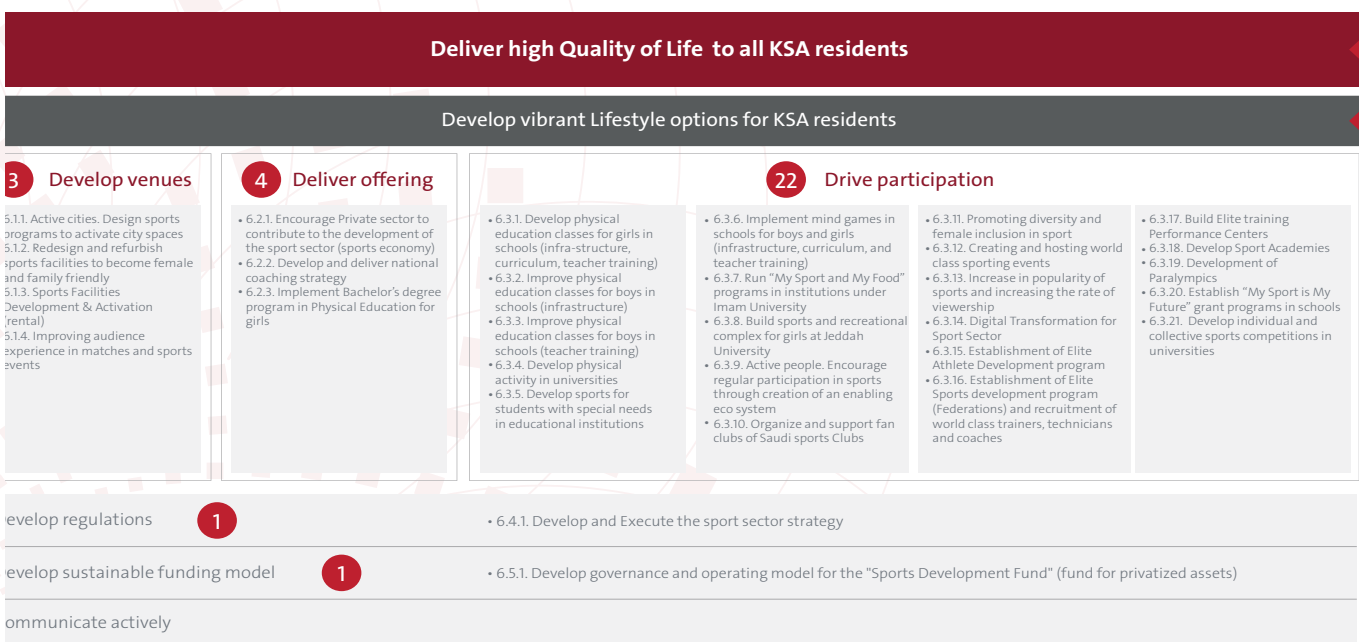
Strategic pillar	Initiative name	Dimension	Leading entity	Type	VRP KPI related to the initiative
Provide Services	<ul style="list-style-type: none"> <li>Develop standard police centers and build infrastructure</li> <li>Develop security preparations</li> <li>Develop systems and programs at police centers</li> <li>An initiative for rehabilitating and training prison inmates</li> <li>An initiative for transparency and support decision making in combating crime</li> <li>An initiative for developing security men abilities level</li> <li>An initiative for a unified 911 operations center</li> </ul>	• Crime	• Mol	• Priority	• Intentional homicides by 100,000 population
Provide Services	<ul style="list-style-type: none"> <li>Develop standard police centers and build infrastructure</li> <li>Develop security preparations</li> <li>Develop systems and programs at police centers</li> <li>An initiative for rehabilitating and training prison inmates</li> <li>An initiative for transparency and support decision making in combating crime</li> <li>An initiative for developing security men abilities level</li> <li>An initiative for a unified 911 operations center</li> </ul>	• Crime	• Mol	• Priority	• Level of violent crime
Provide Services	<ul style="list-style-type: none"> <li>Develop standard police centers and build infrastructure</li> <li>Develop security preparations</li> <li>Develop systems and programs at police centers</li> <li>An initiative for rehabilitating and training prison inmates</li> <li>An initiative for transparency and support decision making in combat-ing crime</li> <li>An initiative for developing security men abilities level</li> <li>An initiative for a unified 911 operations center</li> </ul>	• Crime	• Mol	• Priority	• Perceived criminality

## 5.G Sports

As indicated in the sections 1 and 2, the KPIs within the Sports category are fully owned by the Quality of Life Program 2020. The following table includes the list of initiatives within Sports, as well as a short description and the responsible entity. Additionally, a visual overview with the mapping of initiatives against strategic pillars is included in the following figure.

Quantity of total initiatives **XX**

Figure 59: Sports



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop Venues	6.1.1 Active regions	<p>Provide a range of accessible places for exercise in order to encourage mass participation among citizens and residents. The 2020 target is to utilize 100 GSA facilities, develop Health and Wellness Programs in 150 companies, launch MP Programs in 80% of universities, and hold an annual National Sports day.</p> <ul style="list-style-type: none"> <li>Utilize existing GSA facilities for mass participation</li> <li>Work with national stakeholders, e.g. MoMRA, to provide a range of accessible places as sporting venues</li> <li>Deliver a program of physical activities and competitions for students in schools</li> <li>Activate workplaces by offering mass participation programs in the work place</li> <li>Hold an annual National Sports Day</li> </ul>	<ul style="list-style-type: none"> <li>30,000 schools and universities activated through regular sports programs and competitions</li> <li>Activation of more than 500 community clubs around the Kingdom with MoE</li> <li>300+ events delivered yearly, to activate regular participation – organized in GSA's 100+ facilities</li> </ul> <p>Accessible public and private facilities for the citizen within 34 hours to practice physical activities</p>	Yes	Game Changer	GSA	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>
Develop Venues	6.1.2 Redesign and refurbish sports facilities to become female and family friendly	<p>Redesign and refurbish the main sporting facilities in KSA to enable families/women to access any type of sporting event. The 2020 target is to redesign 23 sports facilities.</p> <ul style="list-style-type: none"> <li>Redesign 23 current facilities to be suitable to host families/women, e.g. developing separate entrances and toilets and developing dedicated parking lots</li> </ul>	<ul style="list-style-type: none"> <li>23 sports facilities that are accessible for families/women during events</li> </ul> <p>Increase the number of attendees</p>	No	Quick Win	GSA	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>
Develop Venues	6.1.3 Sports Facilities Development and Activation (rental)	<p>Improve existing sporting facilities to meet best practice standards. The 2020 target is to develop and activate sports facilities.</p> <ul style="list-style-type: none"> <li>Audit, assess and classify all sports facilities in KSA</li> <li>Develop commercial and investment strategies to increase their sources of income (e.g. private sector participation)</li> <li>Develop operational models for these facilities and mechanisms to improve enhancement</li> </ul>	<ul style="list-style-type: none"> <li>Increased venue utilization rate from 8% to 55% by 2020</li> <li>GSA sports facilities fully assessed and ready to use by the public</li> <li>Ready facilities to host sports and non-sport events</li> <li>Increased revenue of GSA through commercialization and investment strategies</li> </ul> <p>The activation of these facilities is a key enabler for multiple lifestyle VRP initiatives</p>	Yes	Priority	GSA	<ul style="list-style-type: none"> <li>Number of sports venues</li> <li>% of GDP spend on sports</li> <li>% participation in sports</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop Venues	6.1.4 Improving audience experience in matches and sports events	Enhance audience experience during sporting events to increase the popularity of sports in general, increase attendance in sporting events, and ultimately to encourage grassroots participation. <ul style="list-style-type: none"> <li>Set up and implementing entertainment options for all types of audience at venues, e.g. fan zones, food trucks</li> </ul>	<ul style="list-style-type: none"> <li>Sports venues that offer multiple entertainment options during sports events</li> <li>Improve the satisfaction of the attendees</li> <li>Increase the number of attendees</li> </ul>	No	Quick Win	GSA	<ul style="list-style-type: none"> <li>% of GDP spend on sports</li> </ul>
Deliver Offerings	6.2.1 Encourage the private sector to contribute to the development of the sport sector	Encourage private sector involvement in building the sports economy. Expected private sector contribution is expected to exceed 1B SAR. <ul style="list-style-type: none"> <li>Incubate start-ups with seed funding</li> <li>Educate entrepreneurs via training programs</li> <li>License privately owned gyms, and ensure consistent inspection standards for gyms</li> </ul>	<ul style="list-style-type: none"> <li>Development of a world-class vibrant sports economy in the Kingdom</li> <li>Improved levels of sports participation</li> <li>Improved overall health of population</li> <li>Increased private investment in sports</li> <li>Increased number of sports start-ups / SMEs</li> <li>Local content development (opportunities to localize operations and supply chains)</li> <li>Local R&amp;D and Manufacturing (Made in Saudi)</li> <li>Establishing the sports economy as a new contributor to Saudi employment</li> <li>This will result from developing a sports economy strategy and by implementing a number of initiatives and programs defined in the strategy</li> </ul>	Yes	-	GSA	<ul style="list-style-type: none"> <li>Number of sports venues</li> <li>Sports as a % of GDP</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Deliver Offerings	6.2.2 Develop and deliver national coaching strategy	Develop and deliver national coaching strategy in collaboration with selected KSA Federations, International Federations and private sector vendor's strategy to increase the quality and number of gym instructors, mass participation and professional coaches. The 2020 target is to have 4,500 certified coaches and 7 federations with standard complaint licensing programs. <ul style="list-style-type: none"> <li>Define/revise and activate Federation coaching development strategy</li> <li>Define/revise competency and regulatory framework to derive curriculum and course portfolio for national coaches</li> <li>Deliver courses for coaches in blended approach (online and offline, leveraging private sector)</li> </ul>	<ul style="list-style-type: none"> <li>Increase of KSA active population rate driven by increased availability of coaches</li> <li>Healthier lifestyle of KSA population</li> <li>Reduced obesity in kids</li> <li>Increased inclusion of females in sport activities (focus on female coaches)</li> </ul>	Yes		GSA	<ul style="list-style-type: none"> <li>% of people participating in sports</li> <li># of sportsmen in summer Olympics</li> </ul>
Deliver Offerings	6.2.3 Bachelor's degree program in Physical Education for girls	<ul style="list-style-type: none"> <li>Introduce a bachelor's program in physical education at the Faculty of Education and Literature for girls in the University of Tabuk in addition to four major universities. This bachelor's program will allow girls to qualify as graduates in physical education and allow them to work at fitness centers, sports instructions and to compete in various sports. The target by 2020 is to enroll 180 female students, 60 annually.</li> <li>Define curricular and academic problems of bachelor's program in University of Tabuk and four other major universities</li> <li>Construct and equip facilities, e.g. gyms, in respective universities</li> </ul>	<ul style="list-style-type: none"> <li>Develop and activate an academic program that grants a bachelor's degree in physical education in Tabuk University, in addition to 4 major universities for female students</li> <li>Qualifying female graduates in the field of physical education to meet the region and the Kingdom's need.</li> <li>Qualifying female graduates to work in physical fitness centers</li> <li>Qualifying female competitors to compete on several sports regionally and globally.</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>
Drive Participation	6.3.1 Enhance girls' sports participation at the school level	<ul style="list-style-type: none"> <li>Design and implement physical education (PE) programs and activities for females in the public education system. Train a curriculum with classes in the study plan shall be taught by specialized teachers, while continuing the practice of physical activities as a part of extracurricular activities during the school day. The 2020 target is to have 325,000 children following sports classes, have 7,500 qualified teachers, and 1,500 schools equipped with well-maintained gyms</li> <li>Provide suitable buildings for practicing physical activities and equipped spaces in schools</li> <li>Train and qualify female teachers to train female students on these activities</li> </ul>	<ul style="list-style-type: none"> <li>Establish and prepare 500 sports halls in girls' schools annually.</li> <li>Train and qualify female teachers on job to teach physical education subject and provide training on physical activities in addition to their part-time work in order to employ specialized teachers.</li> <li>Qualify and employ female teachers to teach physical education subject.</li> </ul>	Yes	Game changer	MoE	<ul style="list-style-type: none"> <li>% population participating in sports</li> <li>Number of non-professional sports venues</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.2 Sports-active school (infrastructure)	<ul style="list-style-type: none"> <li>Improve the school environment for practicing competitive, specialized and recreational sports activities for male students. The 2020 target is to establish 150 gyms, 50 gyms annually.</li> <li>Rehabilitate and establish sports complexes in schools, supervised by the Education Offices of the directorates of education in KSA</li> </ul>	<ul style="list-style-type: none"> <li>Building a sports complex for each education office</li> <li>Rehabilitating current sports complexes</li> <li>Increasing number of pitches and sports halls in schools</li> </ul>	Yes	-	MoE	<ul style="list-style-type: none"> <li>Number of non-professional sports venues</li> </ul>
Drive Participation	6.3.3 Develop physical education classes for boys in schools (teacher training)	<p>Train physical education teachers with new knowledge, skills and concepts in physical education and school sport sciences. Target is to increase the number of teachers qualified to train specialist sports</p> <ul style="list-style-type: none"> <li>Provide training courses, rehabilitation programs and scholarship programs</li> </ul>	<ul style="list-style-type: none"> <li>Professional development of all physical education and sports activity teachers and supervisors.</li> <li>Enabling a percentage of teachers to train different sports.</li> <li>Providing a number of teachers of advanced experiences</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>
Drive Participation	6.3.4 Physical activity in universities	<ul style="list-style-type: none"> <li>Develop physical activity in universities by hiring specialized staff to manage physical health activities in universities. The 2020 target includes building 15 in-university training centers (5 annually), building 3 external training centers (1 annually), and 300 technical centers.</li> <li>Construct sports facilities in universities</li> <li>Promote the culture of physical activity among university employees</li> <li>Develop metrics to evaluate physical activity</li> <li>Establish a center focusing on initiative-related studies and research</li> <li>Design programs for physical activities in universities</li> </ul>	<ul style="list-style-type: none"> <li>Increasing participations of university students in physical activities</li> <li>Increasing the number of cadres specialized in managing physical activities in universities.</li> <li>Awareness programs concerned with raising community awareness with the importance of exercising</li> <li>Develop studies and researches to monitor, develop, evaluate and exercise physical activity.</li> </ul>	Yes	-	MoE	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.5 Sports of students with special needs in educational institutions	<ul style="list-style-type: none"> <li>• Provide a stimulating sporting environment for students with special needs to exercise all sports. The 2020 target is to build 10 disability-friendly facilities, 240 male disability sport specialists, and 180 female disability sport specialists. Other 2020 targets include 9,000 male participants and 4,200 female participants.</li> <li>• Provide stadiums, gyms, and technical and administrative staff specializing in sports for people with special needs</li> <li>• Develop world-class support services that help universities attract distinguished athletes with mobility disability or visual or auditory impairment</li> </ul>	<ul style="list-style-type: none"> <li>• Developing sports infrastructure through establishing sports facilities suitable for special needs sports.</li> <li>• Establishing sports centers and departments for special needs persons.</li> <li>• Providing training courses and workshops to develop the skills of workers in special needs sports field.</li> <li>• Developing standards to match the global standards to provide necessary facilities for distinguished athletes with special needs</li> </ul>	Yes	-	MoE	<ul style="list-style-type: none"> <li>• % of population participating in sports</li> </ul>
Drive Participation	6.3.6 Mind Games initiative (infrastructure, curriculum, and teacher training)	<ul style="list-style-type: none"> <li>• Develop a program in schools based on a specific ecosystem of games and exercises in which the effort is more mental than physical. The 2020 target to build 7 facilities.</li> <li>• Establish centers specialized in mental sports</li> <li>• Develop accredited trainers in mental sports</li> <li>• Develop a curriculum based on a specific ecosystem of games and exercises in which the effort prepares all parts of the brain</li> </ul>	<ul style="list-style-type: none"> <li>• Develop intelligence, and provide the individual with cognitive and sensory skills necessary for different ages and levels</li> <li>• Enhance sensory skills such as hearing, seeing, balance and motor coordination</li> <li>• Address academic problems in reading, writing, mathematics, memory, concentration and follow-up</li> <li>• Treatment of behavioral and motor disorders in the learning disabilities category</li> <li>• Prevention of Alzheimer's</li> <li>• Improve social skills and self-esteem</li> <li>• Support the wheel of sustainable development</li> </ul>	Yes	-	MoE	<ul style="list-style-type: none"> <li>• Number of entertainment infrastructure</li> <li>• Number of out-of-home entertainment events</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.7 "My health comes first" program	Implement a range of interactive physical activities to raise nutritional awareness in the 68 intermediate and secondary scientific institutes in KSA. The target by 2022 is to have 14 sport courts (including basketball, volleyball, table tennis, gymnasium) and 39 soccer fields. <ul style="list-style-type: none"> <li>Develop awareness programs within institutions which includes media programs</li> <li>Develop sports programs and partnerships with sports or health clubs</li> <li>Develop a network of sports professionals and volunteers to create a sustainable sport sector</li> </ul>	<ul style="list-style-type: none"> <li>Preparing institutes with integrated sports clubs.</li> <li>Holding social partnerships with associations and companies that financially benefit the institute.</li> <li>Encouraging students to exercise sports in a sound manner.</li> <li>Reducing obesity rates among students.</li> <li>Reducing smoking rates among students.</li> <li>Educating students about the importance of proper food in the health of the body</li> <li>Increasing student participation percentage in local and international sports competitions.</li> </ul>		-	MoE	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>
Drive Participation	6.3.8 Sports and recreational complex for girls at Jeddah University	Build a sports and recreational complex for girls in Jeddah University in order to provide various types of sports and recreational activities for students of Jeddah University and women in the surrounding area. The 202 target is to have 750 females participating in the complex. <ul style="list-style-type: none"> <li>Complex includes two multipurpose gyms for various types of sports, a fitness and wellness center, an aquatic center, and a rehabilitation and physiotherapy center</li> </ul>	<ul style="list-style-type: none"> <li>(2) multipurpose playgrounds</li> <li>Fitness center</li> <li>Water recreational center</li> <li>Rehabilitation and Physiotherapy Center</li> <li>25% of university girls engage in physical and recreational activity at least once a week in the first year of operation</li> <li>1000 women from outside the university engage in physical and recreational activity in the first year of operation</li> </ul>	Yes	-	MoE	<ul style="list-style-type: none"> <li>Number of non-professional sports venues</li> </ul>
Drive Participation	6.3.9 Active people:	Attract, educate and encourage people to be regular participants in sports. Target includes increasing CSGs from 200 to 1,500 by 2020 and 15,000 by 2030, increasing number of members and volunteers associated with CSGs to 30% of population by 2030, increasing physical activity levels from 13% to 40% of national population by 2030, and upskilling workforce in CSGs and federations to meet sport's needs. <ul style="list-style-type: none"> <li>Enable and create community sports groups</li> <li>Support federations to increase grassroots participation</li> </ul>	<ul style="list-style-type: none"> <li>An increase in the number of Community Sports Groups (15,000 in 2030) and the number of members and volunteers (30% of population by 2030)</li> <li>An increase in # of participants due to the enablement of all sports workforce</li> </ul>	Yes	Priority	GSA	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.10 Connect fans of Saudi sports clubs	The initiative aims at enhancing the image of Saudi Arabia through the use of sports diplomacy through: <ul style="list-style-type: none"> <li>- Increasing the number and size of the links of fans of Saudi sports clubs.</li> <li>- Increasing the number of Saudi sports viewers in countries such as the Gulf Cooperation Council and the Arab countries.</li> <li>- Enabling local football clubs to support fans' links by providing the necessary support and funding.</li> <li>- Supporting local football clubs to build relationships with fan associations in Arab countries.</li> </ul>	<ul style="list-style-type: none"> <li>- Enhance the image of Saudi Arabia through sport</li> <li>- Official recognition of the links of fans in the Saudi national teams</li> <li>Increased number of countries with links 4 to 9.</li> <li>- Increase the number of overseas fans links from 9 to 28.</li> <li>* Additional channels of revenue by increasing the number of viewers in the region</li> <li>- Television Broadcasting Rights</li> <li>- Sales of goods in sports clubs</li> <li>- Attend games remotely</li> </ul>		-	GSA	<ul style="list-style-type: none"> <li>• % of GDP spend on sports</li> </ul>
Drive Participation	6.3.11 Promoting diversity and female inclusion in sport	Develop systems, structures, and processes for engaging and working with key individuals, organizations, and government entities to remove the systemic obstacles preventing women and other underserved groups from realizing full participation in sports and sports related activities in KSA. The 2020 target is to have 21 new, operational clinics for women, ~40 females participating in international sports, and ~1.2M females participating in grassroots sports. <ul style="list-style-type: none"> <li>• Develop diversity and inclusion strategy</li> <li>• Develop female health and wellness clinics</li> <li>• Ensure female access to sports stadiums</li> <li>• Develop program to engage and support elite female athletes</li> <li>• Develop program to engage and support female athletes at grassroots level</li> </ul>	<ul style="list-style-type: none"> <li>• Increased # new clinics operational, # females served annually [e.g. 10 clinics 2018]</li> <li>• Increased # females participating in international competitions [e.g. 5 in 2019]</li> <li>• Increased # of females participating in grassroots sports</li> <li>• Increased % professional sporting events accessible to women (e.g. 15% 2018)</li> </ul>	Yes	Quick Win	GSA	<ul style="list-style-type: none"> <li>• % of population participating in sports</li> </ul>
Drive Participation	6.3.12 Creating and hosting world class sporting events	<ul style="list-style-type: none"> <li>• Generate encouragement, sustainable commercial opportunities, awareness and participation in a wide range of sports. The 2020 target is to have 880M global viewers, and total of 18 sporting events.</li> <li>• Bring in globally respected sporting brands, championships and events to the Kingdom</li> <li>• Develop fund for each sub-initiative</li> <li>• Define framework for PPP involvement whenever possible</li> </ul>	<ul style="list-style-type: none"> <li>- hosting 5-10 world class events in the kingdom every year</li> <li>- Increase viewership of sport events locally</li> <li>- Strengthen the kingdom's reputation internationally</li> </ul>	Yes	Game changer	GSA	<ul style="list-style-type: none"> <li>• % of GDP spend on sports</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.13 Increase in popularity of sports and increasing the rate of viewership	Increase popularity and viewership of sports locally and regionally. <ul style="list-style-type: none"> <li>Assess current satisfaction levels</li> <li>Develop a marketing strategy for specific segments</li> <li>Provide media content support for GSA campaigns and initiatives. Initial focus will be on football in addition to 3-5 selected sports for the first year and will be reviewed to add more sports in following years</li> </ul>	<ul style="list-style-type: none"> <li>Current audience and target statistics</li> <li>Audience Satisfaction Index</li> <li>Comprehensive Communication Strategy and Plan for GSA and increased reach for initiatives</li> <li>Enhanced Media plan for every campaign and activation for all initiatives</li> <li>Full Media Planning and execution for all GSA Campaigns and Activities</li> <li>Increase in awareness of GSA and its objectives</li> <li>Post event reports and analysis for every campaign to continuously optimize media and reach</li> </ul>	No	-	GSA	<ul style="list-style-type: none"> <li>% of population participating in sports</li> <li>% of GDP spend on sports</li> </ul>
Drive Participation	6.3.14 Digital Transformation for Sports Sector	Introduce digitization and connectivity into the sports landscape to drive sports participation, performance and economy. The 2020 target is to have a total of 20 GSA e-services (cumulative). <ul style="list-style-type: none"> <li>Develop an umbrella digital architecture within GSA as well as the sporting ecosystem. This will allow end consumers to access various sporting services, such as venue booking, via digital means</li> </ul>	<ul style="list-style-type: none"> <li>Increased mass participation by driving changes in behavior through digital tools and interventions</li> <li>Improved citizen experience and offering by joining up all parts of the sports ecosystem through digital means</li> <li>World class digital ecosystem that stimulates creation of multiple connected apps, sites and facilities</li> </ul>	Yes	-	GSA	<ul style="list-style-type: none"> <li>% of population participating in sports</li> </ul>
Drive Participation	6.3.15 Establishment of Elite Athlete Development Program	Develop elite athletes in KSA through a professional and integrated program for elite athletes. The 2020 target is to have 1,000 elite sports. <ul style="list-style-type: none"> <li>Develop a scouting Program that covers all age groups (schools, universities and practitioners) in partnership with different government entities (MoD, MoE, etc),</li> <li>Develop the required services for elite athletes in sporting institutions</li> </ul>	<ul style="list-style-type: none"> <li>Increased quality and long-term quantity of athletes</li> <li>Appropriate performance environment</li> <li>Increased number of athletes qualifying for regional and international games / competitions (e.g. Asian Games, Summer Olympics, X-games and others)</li> <li>Increased Saudi role models, national pride and inspiration for mass participation</li> </ul>	No	-	GSA	<ul style="list-style-type: none"> <li># of sportsmen in summer Olympics</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.16 Establish new sports federations and build capabilities of elite sports	<p>Establish elite sports development program (Federations) in order to scout and identify talented athletes and improve KSA standing in elite sports. This initiative aims to improve the federations' technical and administrative capabilities to run elite programs as well as expand the current landscape of sports federations to include other sports. The 2020 target is to develop 3-6 federations in the first year.</p> <ul style="list-style-type: none"> <li>• Conduct full assessment and design of Federations, including shortlisting of federations</li> <li>• Develop identified federations</li> <li>• Recruit world-class coaches and talent</li> <li>• Identify athletes and national teams with potential for success</li> <li>• Deliver training and preparation programs for identified teams</li> </ul>	<ul style="list-style-type: none"> <li>• Increased number of elite athletes in KSA</li> <li>• Increased number of high-performance coaches in KSA (international and local)</li> <li>• Increased number of athletes qualifying for regional and international games / competitions</li> <li>• Increased Saudi role models, national pride and inspiration for mass participation</li> </ul>	Yes	-	GSA	<ul style="list-style-type: none"> <li>• # of sportsmen in summer Olympics</li> <li>• % of population participating in sports</li> </ul>
Drive Participation	6.3.17 Build Elite Training Performance Centers	<p>Build training sports centers for various elite sports.</p> <ul style="list-style-type: none"> <li>• Develop major training centers to be specialized according to national sporting priorities</li> <li>• Develop major training centers to be located in major cities such as Riyadh and Jeddah</li> <li>• Develop smaller training centers to be located according to a needs-based assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Build currently non-existent elite training centers across the KSA, creating the core enabler to elite athlete ambitions</li> <li>• Improved performance, including number of athletes qualifying for regional and international games / competitions (e.g. Asian Games, Summer Olympics, X-games)</li> <li>• Increased Saudi role models, national pride and inspiration for mass participation</li> </ul>	No	-	GSA	<ul style="list-style-type: none"> <li>• # of sportsmen in summer Olympics</li> </ul>
Drive Participation	6.3.18 Develop Sport Academies	<p>Develop sport academies to ensure a consistent pipeline of talent. The target is to establish 4 soccer academies.</p> <ul style="list-style-type: none"> <li>• Develop scouting programs and special sport related trainings in partnership with international academies. Initial focus will be on football academies</li> </ul>	<ul style="list-style-type: none"> <li>• Support and development of the Saudi Football (i.e. increase the ranking of national teams and clubs on short term (youth, Olympic...) and the long term (first team))</li> <li>• Increase the performance and participation of the Saudi players</li> </ul>	Yes	Priority	GSA	<ul style="list-style-type: none"> <li>• # of sportsmen in summer Olympics</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.19 Development of Paralympics (for persons with special needs) to compete in the Paralympic Games	Promote the Paralympics in KSA in order to make sure people with disabilities are fully engaged in sporting activities in KSA. The 2020 target is to have 6 athletes participating in the Paralympic games. <ul style="list-style-type: none"> <li>Develop a strategic transformation plan to adapt clubs and facilities to cater for elite athletes with disabilities, with a view to competing in the Paralympic Games in Tokyo and Paris</li> </ul>	<ul style="list-style-type: none"> <li>Achieving medals in the Paralympic games – Paris 2024</li> <li>Female participation in Tokyo 2020</li> <li>Excellence in the Paralympic sports</li> <li>Empower people with disability in the sports sector, merge them into society, and improve their lifestyle</li> </ul>	Yes		GSA	<ul style="list-style-type: none"> <li># of population participating in sports</li> <li># of sports venues</li> </ul>
Drive Participation	6.3.20 “My Sport is My Future” Program	Develop competitive and specialized sports programs for school students. The 2020 target includes 25% student participation rate in extra-curricular, 4% participation in local, regional, and international competition, and total of 18 grants, and 3% decrease in obesity. <ul style="list-style-type: none"> <li>Develop sports tournaments, sports festivals</li> <li>Develop local and international specialized training programs for talented students</li> </ul>				MoE	<ul style="list-style-type: none"> <li>% of people participating in sports</li> </ul>
Drive Participation	6.3.21 Develop individual and collective sports competitions in universities	Increase participation of university students in university tournaments across all regions in KSA. The 2020 target is to have 8,000 male participants, 2,000 female participants, 30 male university federations, and 30 female university federations. <ul style="list-style-type: none"> <li>Hire managerial and professional staff specializing in university sports activities;</li> <li>Develop regulations governing university sporting activities</li> <li>Develop university sports programs emphasizing the importance of participation in sport competitions</li> </ul>			Quick win	MoE	<ul style="list-style-type: none"> <li>% of people participating in sports</li> </ul>



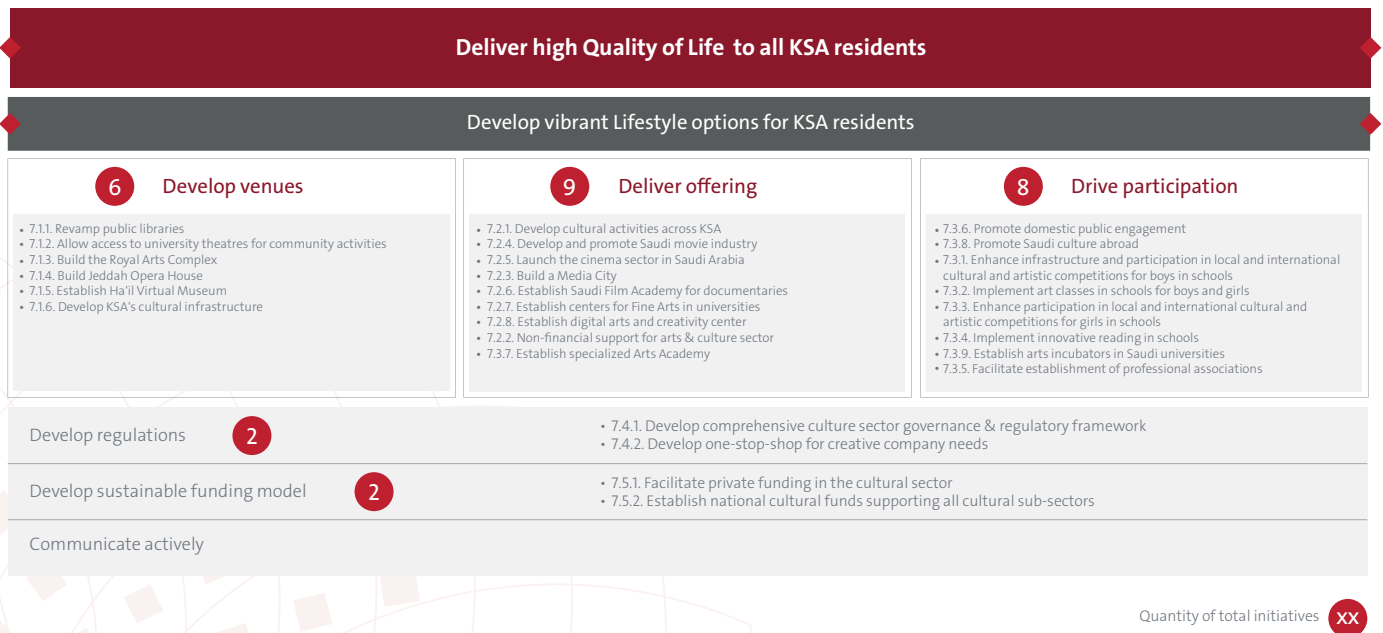
Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	6.3.22 National Mindset and Behavioral Shift Campaigns	Shift people's perceptions of physical activity, where there is deep-rooted socio-cultural resistance by communicating and driving acceptance of its benefits. This will influence people's behavioral patterns and create the new behavior of a more physically active sporty population. The target is increase the % of population who are physically active for more than 30 mins per week and decrease the % of population who are not interested in physical activity below the current 67%. Organize campaigns and public messages around the benefits of physical activity Understand current mindsets and measure baseline to assess current situation	<ul style="list-style-type: none"> <li>• Increase the % of the population who are physically active (30+ mins per week)</li> <li>• Decrease the % of the population who are not interested in physical activity (67%)</li> <li>• Increase the reach of campaigns and messages around physical activity</li> <li>• Broaden the participation base to support elite performance development</li> <li>• Increase the contribution of the sports economy to GDP</li> <li>• Increase the positive perception of KSA in international perception indices influenced by sport</li> </ul>	No		GSA	% of people participating in sports
Develop regulation	6.3.22 National Mind-set and Behavioral Shift Campaigns 6.4.1 Develop and Execute the sport sector strategy	Develop and execute the KSA sport sector strategy to increase mass participation and improve elite performance <ul style="list-style-type: none"> <li>• Develop creating strategic initiatives which align with national sporting priorities</li> <li>• Develop a sustainable financial model</li> <li>• Develop and implement a strategic roadmap</li> <li>• Develop a governance model which addresses all entities in the sporting ecosystem</li> </ul>	<ul style="list-style-type: none"> <li>• The strategy will reshape and restructure the entire sports sector to be more effective and efficient, bringing all ecosystem players to a common ground and direction</li> <li>• KPIs and goals will be clear for all key sports and organizations.</li> <li>• The governance will drive the desired performance.</li> <li>• This is a key enabler to the overall sport related goals of the Quality of Life VRP</li> </ul>	No		GSA	<ul style="list-style-type: none"> <li>• # of sports venues</li> <li>• % of GDP spend on sports % of population participating in sports</li> <li>• # of sportsmen in summer Olympics</li> </ul>
Develop sustainable funding model	6.5.1 Develop governance and operating model for the "Sports Development Fund"	Develop the governance and operating model of a "Sports Development Fund" to push forward the ambitions of the sport sector strategy <ul style="list-style-type: none"> <li>• Develop the mandate for the Sports Development Fund</li> <li>• Develop governance model of the fund</li> <li>• Develop an investment strategy which fulfils the priorities of the sport sector strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Efficiently manage and invest income from privatization</li> <li>• Promote growth in the sports economy</li> <li>• Incentivize and support startup companies and clubs</li> </ul>	No		GSA	<ul style="list-style-type: none"> <li>• Number of sports infrastructure</li> <li>• Sports as % of GDP</li> <li>• % of population participating in sports</li> </ul>



## 5.1 Heritage, Culture and Arts

Services of culture, heritage and arts initiatives refer to the following cultural activities: Opera, theatre, painting, sculpture, history, film production and books. Places where such cultural services will be offered are: Opera houses, theatres, museums, art galleries and libraries. As indicated in sections 1 and 2, the KPIs within the Heritage Culture and Arts category fall under two types. The ones related to Culture and Arts are fully owned by the Quality of Life VRP while the initiatives related to tourism are owned by NTP under the supervision of the Saudi Commission for Tourism and National Heritage For the KPIs owned by other VRPs, the following initiatives, which have been collected from the responsible entity, shall be included in the initiative portfolio of the respective VRPs but have been included in this delivery plan to be able to provide an overview of the activities required to meet Quality of Life targets. Two separate tables are provided for each group of initiatives. Additionally, a visual overview with the mapping of initiatives against strategic pillars is including in the following figure. The Program classifies this as a strong overlap. This is because one of the GEA's initiatives "Drawing a plan for outdoor entertainment" is based on SCTH initiatives, which are specialized towards developing touristic venues in terms of establishing museums and heritage sites, as one of the entertainment options is touristic tours.

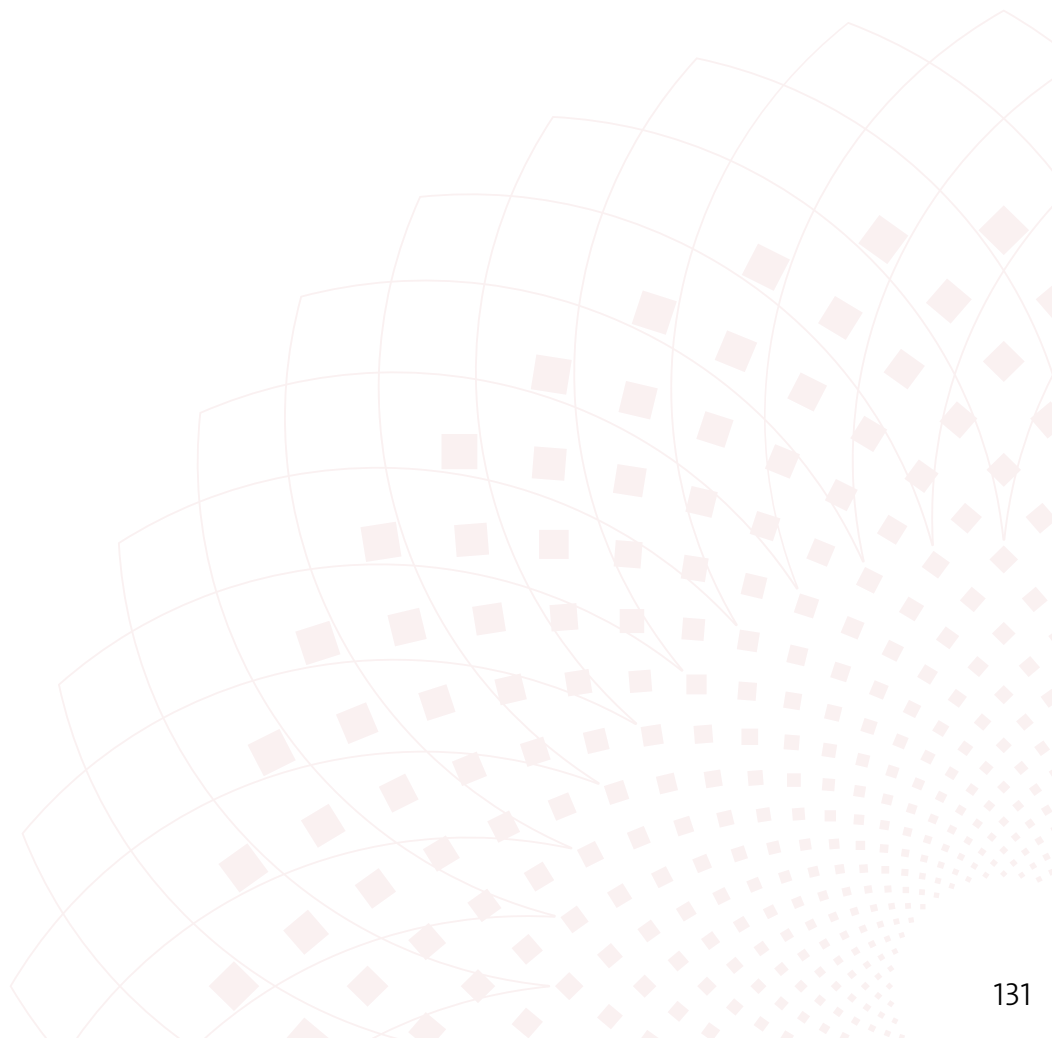
Figure 60: Heritage, Culture and Arts



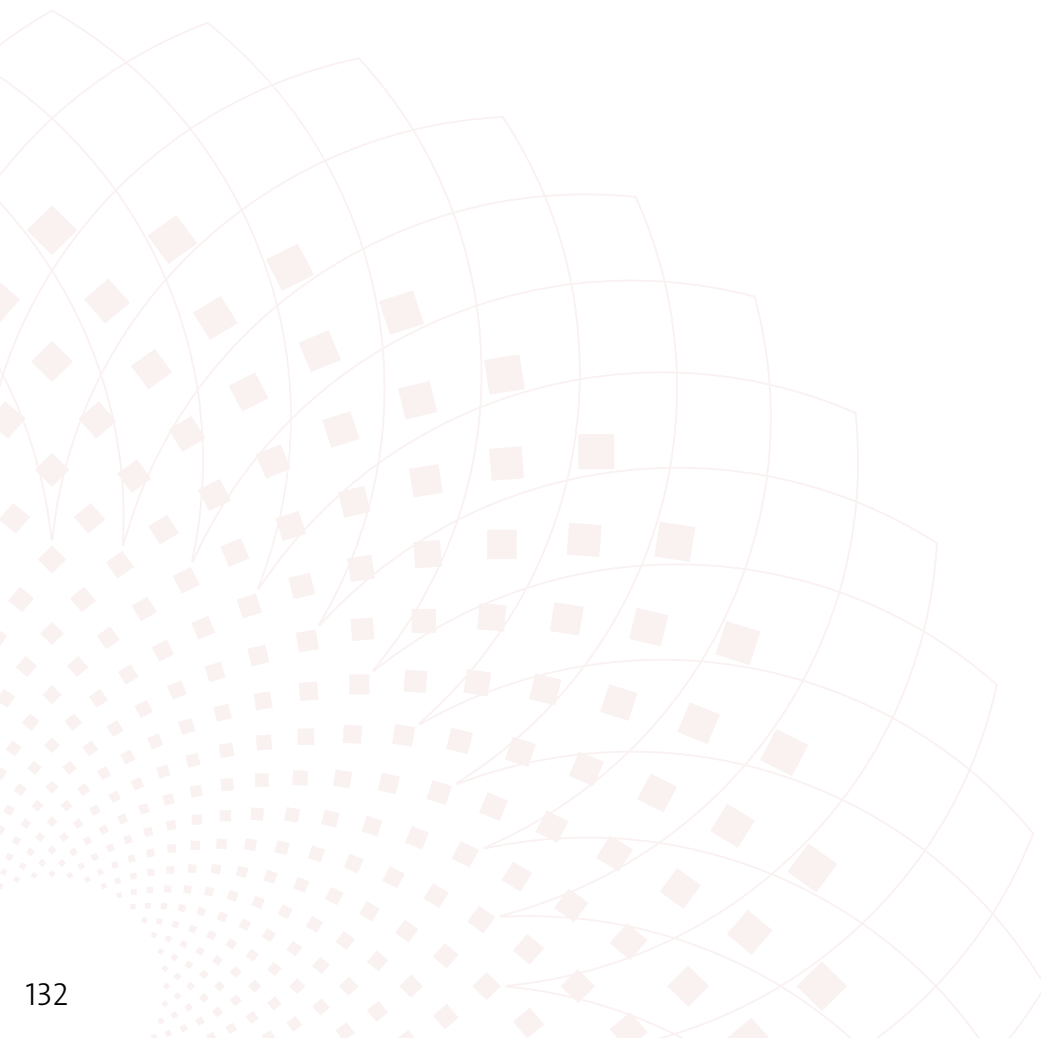
Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Develop Venues	7.1.1 Revamp public libraries	Rehabilitate and modernize the 84 public libraries owned and operated by MoCI by 2022 in order to increase the utilization of libraries. The 2020 target is the revamping of 42 libraries leading <ul style="list-style-type: none"> <li>• Refurbish and upgrade infrastructure and services</li> <li>• Provide additional training to employees</li> <li>• Develop special calendar and organize library events</li> <li>• Digitalize content (books, magazines, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Increased attendance of public libraries in KSA</li> <li>• Updated public library operating model – efficient and in line with international best practices</li> </ul> Access to modern IT infrastructure (PCs, tablets, etc.) as well as digital content e.g. publicly unavailable databases or eBooks	No		MoE (with GCA)	• Number of cultural infrastructure
Develop Venues	7.1.2 Allowing the use of university theatre in conducting community activities	Upgrade existing university halls and theaters to increase public participation and build local talent. This will be done by upgrading the infrastructure of existing halls and hold the following types of events under the supervision of King Abdulaziz University: <ul style="list-style-type: none"> <li>• Conduct trainings, e.g. theatrical representation, theatrical motion and voice performance</li> <li>• Host international and local cultural festivals and events</li> </ul>	<ul style="list-style-type: none"> <li>• Developing the skills of staging.</li> <li>• Developing the basic skills of theatre direction and production.</li> <li>• Developing creative thinking skills through teamwork during training.</li> <li>• Developing theatre production management skills to provide greater employment opportunities for trainees.</li> </ul>	Yes	Quick wins	GCA	• Number of culture and artistic activities
Develop Venues	7.1.3 Build the Royal Art Complex	Create a city cluster in Riyadh, centered around a government-owned and built building including an opera house and 3 multipurpose halls to raise the artistic and cultural awareness in Saudi Arabia, increasing household spending on culture and arts. 2021 target is to have ~450,000 tickets sold to different cultural offerings in the given year	<ul style="list-style-type: none"> <li>• Defined operational strategy of Arts Complex</li> <li>• Increased cultural and recreational activities among Saudi citizens from different age groups</li> <li>• Increased contribution of KSA to the international and local culture scene</li> </ul>	Yes	Game changer	MOCI	<ul style="list-style-type: none"> <li>• Number of cultural infrastructure</li> <li>• Percentage of consumer expenditure on cultural offering</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Develop Venues	7.1.4 Build an Iconic Arts and Culture Island in Jeddah	The objective is to develop an iconic Island for Arts and Culture in Jeddah, contributing to the enhancement of the international perception of Saudi Arabia. Not only would the construction be a first-of-a-kind for Saudi Arabia, but the landmark's iconicity would also jumpstart international recognition linked to Saudi Arabian architecture. The vast complex will encompass several spaces: concert hall (~1,200 seats), Theatre (~600 seats), Recital hall (~400 seats), Multi-purpose hall (~2,000 seats), a botanic garden and a museum. The complex will be built on two separate man-made islands and will be connected with a bridge that will serve as the botanic garden.	<ul style="list-style-type: none"> <li>• Increased awareness of Saudi culture internationally through visitors</li> <li>• Increased cultural diversity and global understanding of Saudi citizens</li> <li>• Additional iconic site in KSA</li> <li>• Positive influence on perception of KSA on a global level</li> </ul>	Yes	Game changer	MoE	<ul style="list-style-type: none"> <li>• Number of cultural infrastructure</li> <li>• Percentage of consumer expenditure on cultural offering</li> </ul>
Develop Venues	7.1.5 Establish Ha'il Virtual Museum	Establish a site in Ha'il that is equipped with the latest, modern soft technologies. This aims to introduce tourists and Saudis to major archaeological sites of the area and learn about the area's history and culture. The 2020 target is to have gross total of 50,000 attendees, 200 trainees. The museum will aim to do this in the following ways: <ul style="list-style-type: none"> <li>• Education guides</li> <li>• Competitions</li> <li>• Activation events</li> <li>• Hosting international and local cultural festivals and events</li> </ul>	<ul style="list-style-type: none"> <li>• Launch and enhance the virtual museum's components</li> <li>• Support the participation of 10 beneficiaries from the museum by participating in regional competitions</li> <li>• Establishing an informative week for archaeological sites and tourist areas in Hail, Hail region as a tourist attraction</li> <li>• Simple education guides on the virtual museum</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>• Number of culture and artistic infrastructure</li> </ul>
Develop Venues	7.1.6 Open cultural sites (including theaters, art galleries and libraries) across KSA	Develop cultural infrastructure across all regions of KSA to be in line with global benchmarks. The 2020 targets are to construct, refurbish, rent and/or enable development of 16 theatres, 4 cultural cinemas, 140 art galleries, 13 public libraries and 1 music venue to reach 200k yearly visits <ul style="list-style-type: none"> <li>• Assess 2030 targets and identify potential gaps in existing cultural infrastructure availability and accessibility</li> <li>• Develop short, medium, and long-term development plans to reach 2030 targets</li> <li>• Create cultural infrastructure blueprint for all culture sub-sectors</li> <li>• Offer financing to construct the necessary infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>• 2018 – (Public) 2 theatres, 1 cultural cinema, 2 public libraries (Private) 26 art galleries</li> <li>• Cultural infrastructure facilitating the hosting of cultural offering at adequate venues, providing access to cultural offerings</li> <li>Support in increasing the KSA's contribution to culture and arts</li> </ul>	Yes	Game changer	GCA	<ul style="list-style-type: none"> <li>• Number of cultural infrastructure</li> <li>• Percentage of consumer expenditure on heritage and cultural offering</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Deliver Offerings	7.2.1 Develop cultural activities across KSA	<ul style="list-style-type: none"> <li>Develop detailed strategy for cultural activities across all regions of KSA to be in line with global benchmarks, and adapted to local context to enhance the lifestyle activities available to citizens and residents. The 2020 targets are to offer 16 exhibitions, 647 plays, 6 festivals and 109 different shows. Assess the target cultural activities needed to meet 2030 cultural aspirations and identify gaps</li> <li>Coordinate with local providers to implement a set of 778 short-term cultural activities while domestic capabilities are being built</li> <li>Organize and deliver long-term offerings once the cultural infrastructures are operational</li> </ul>	<ul style="list-style-type: none"> <li>2018 – (Public) 8 exhibitions and 55 different shows and 110 plays</li> <li>Enabled Saudi citizens to experience world-class cultural activities</li> <li>Contributed to local production of arts and culture</li> <li>Increased KSA presence in regional and international cultural scene</li> </ul>	Yes		GCA	<ul style="list-style-type: none"> <li>Number of cultural activities</li> <li>Percentage of consumer expenditure on artistic offering</li> </ul>



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Deliver Offerings	7.2.2 Provide non-financial support for entities involved in arts and culture in the private sector	<p>Set up incubators, residencies and provide professional services to individuals and organizations operating in the cultural sector to stimulate the creation of a sustainable ecosystem. The 2020 targets are to set up 6 incubators and 6 residencies, each graduating 20 individuals per year</p> <ul style="list-style-type: none"> <li>• Set up and operate, incubators and residencies that offer services ranging from legal, consulting, marketing and co-working space for creative industry players</li> <li>• Ensure the provision of Programs to safeguard artists facing social persecution</li> <li>• Identify and implement other non-financial support for local talent and entities (incl. networking, KSA talent agencies. etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Artists and cultural organizations avail subsidizes for professional services</li> <li>• Saudi citizens can experience world-class cultural activities</li> <li>• Promote production of local content in arts and culture</li> </ul>	No		GCA	-Number of culture and artistic activities - number of local films produced



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Deliver Offerings	7.2.3 Build a media city	<p>Build a fully integrated and a multiservice media ecosystem (Digital video/Film, Animation, Video Game, App, Social Media, digital Radio, VR, AR, and MR) to support and enable content and talent creation which will lead to the increase in cultural offering. The 2020 target is to actively interact ~4,000 people in the Media city through different ways (grants, provision of office space, participation in events, etc.)</p> <ul style="list-style-type: none"> <li>• Include facilities for content and talent incubation services, studios, training and education, fully equipped for all kinds of media content.</li> <li>• Carry out the project in two stages. Stage 1 will be focused on local talent and content development through opening 3 media clusters. Stage 2 will be at KAFD, and will introduce a full media zone that will target international publishers</li> </ul>	<ul style="list-style-type: none"> <li>• 3 local media hubs in different cities for local production purposes in 2018</li> <li>• 1 large media hub for the purpose of attractive international companies in 2020</li> <li>• 4,000 people interacting with the Media Cities in 2020</li> <li>• Increased media market and related industries</li> <li>• Localized media industry and related markets</li> <li>• Increased contribution of startup/small talent and companies to the media industry</li> </ul> <p>Appearance of global investors to the local media ecosystem</p>	Yes	Quick wins	GCAM	<ul style="list-style-type: none"> <li>• Percentage of consumer expenditure on artistic offering</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Deliver Offerings	7.2.4 Develop and promote Saudi movie industry	<ul style="list-style-type: none"> <li>Support the development of the film industry to grow domestic production levels to match comparable G-20 countries and attract international players to produce movies in Saudi. The 2020 target is to locally produce 13 movies on a yearly basis</li> <li>Design and instate the regulatory framework governing the movie production in Saudi Arabia</li> <li>Setup key functions within GCA to oversee development of film sector</li> <li>Brand KSA to become a preferred location for major global film producers (e.g., major Hollywood studios) to fully or partially produce their movies in the region</li> <li>Identify, sponsor, and support local talents through educational Programs and film festivals and competitions</li> </ul>	<ul style="list-style-type: none"> <li>Developed film infrastructure (studio and backlots)</li> <li>Jobs creation through KSA movie sector</li> <li>Development of a sustainable movie ecosystem</li> <li>Increase in the KSA's contribution to international and local culture</li> </ul> International movies fully/partially produced in KSA	Yes	Priority	GCA	<ul style="list-style-type: none"> <li>Number of local movies produced</li> </ul>
Deliver Offerings	7.2.5 Launch the cinema sector in Saudi Arabia	Develop, support and implement the strategy to Launch the film sector in the KSA to provide 100% of the Saudi population with a game-changing entertainment option. The 2020 target is to set up 45 cinemas and achieve 3.8M yearly visits throughout the country <ul style="list-style-type: none"> <li>Design and implement the regulatory framework and licensing office that oversee the cinema sector</li> <li>Build cinemas to showcase the national film industry by screening movies produced by local producers</li> <li>Engage the private sector for the construction of the cinema infrastructure</li> <li>Promote cinema offerings amongst Saudi citizens and residents to ensure cultural awareness of the newly introduced entertainment options</li> </ul>	<ul style="list-style-type: none"> <li>Introduction of a new form of entertainment in Saudi Arabia</li> <li>Increased household spending in out-of-home entertainment</li> <li>Creation of a competitive environment for regional and international operators</li> <li>Positive social impact and growth of the KSA's soft power through film production</li> </ul>	Yes	Game changer	GCAM	<ul style="list-style-type: none"> <li>Number of cultural infrastructure</li> <li>Number of out-of-home entertainment infrastructure</li> </ul>



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Deliver Offerings	7.2.6 Saudi Film Academy for documentaries	<p>Establish a Saudi Film Academy which provides a training and certification Program for documentary film making, under the supervision of King Abdulaziz University. The academy will focus on documentary-making to effectively promote Saudi knowledge and values. The 2020 target is to have 100 graduates, 35 local professors, and design 1 graduate degree.</p> <ul style="list-style-type: none"> <li>• Develop a certified diploma in filmmaking and for filmmaking trainers</li> <li>• Develop digital arts design lab for the Saudi Film Academy</li> <li>• Create film competitions for students with participants from abroad</li> </ul>	<ul style="list-style-type: none"> <li>• Developing skills in writing and editing texts, from narrative to character-building and dialogue-making.</li> <li>• Develop basic skills for directing from text review, pre-production, production and editing.</li> <li>• Develop analytical skills through individual projects and work with actors during training.</li> <li>• Develop film and television production management skills to provide greater employment opportunities for trainees.</li> <li>• Qualifying the trainee for the practice of cinematography through training to act as director of photography, camera operator, assistant and others to understand the precise nature of each task.</li> <li>• Recognition of sound production and sound recording, purification and processing mechanisms.</li> </ul>	Yes		MoE	<ul style="list-style-type: none"> <li>• Number of local movies produced</li> </ul>
Deliver Offerings	7.2.7 Fine Arts	<p>Build centers in universities specializing in theatrical, artistic and musical performances, and the organization of motion arts galleries that exhibit many works of university students. This aims to showcase the outstanding performances and fine art talents of students from 15 universities across the whole Kingdom. The 2020 target is to have 55 events, 10% enrollment from current universities, and 2% students classified as being talented</p> <ul style="list-style-type: none"> <li>• Conduct necessary consultation and benchmarking to design the specification and structure for the centers of Fine arts in universities</li> <li>• Build and equip these centers with the necessary equipment and personnel</li> </ul>	<ul style="list-style-type: none"> <li>• Provide fine arts and outstanding performance for students.</li> <li>• Establish art theaters and train students on modern art styles.</li> <li>• Prepare specialized courses in the art industry and artistic content management for students</li> <li>• Meet the needs of the country of the designs and drawings with touches of modern and creative art of international competition in light of the National Renaissance vision 2030.</li> <li>• Discover and adopt creative talents in the fine arts through competitions, courses and exhibitions in the arts.</li> <li>• Providing direct arts services and consultations to the State and community departments.</li> <li>• Contribute to creating a general environment for artistic culture in line with social values</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>• Number of culture and artistic infrastructure</li> <li>• Number of cultural activities</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Deliver Offerings	7.2.8 Digital arts and creativity center	Build a digital media arts and creativity center in order to train and promote digital art skills through establishing a digital arts design lab, holding student competitions, and organizing promotional events. The 2020 target is 1,500 participants, 25 events at schools and universities, and ~10 exhibitions <ul style="list-style-type: none"> <li>Identify requirements for a digital arts design lab and creativity center</li> <li>Build and equip the design lab and initiate competitions and events</li> <li>Organize seminars, trainings and hold competitions</li> <li>Set up professional digital art galleries</li> </ul>	<ul style="list-style-type: none"> <li>Training courses for student beneficiaries in particular, and community segments in general in the field of digital art (3000 trainees)</li> <li>Support the participation of 10 beneficiaries of the Center in creative competitions</li> <li>Art exhibitions specializing in digital art</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>Number of local movies produced</li> </ul>
Drive Participation	7.3.1 Enable arts and culture among K12 students	Increase male student participation in cultural and artistic competitions in order to instill artistic habits in the students at an early age and impart cultural knowledge and concepts. The 2020 target is to increase local participation by 15%, organize 24 cultural events per education level, train 2400 trainees and win 8 medals in each competitive category <ul style="list-style-type: none"> <li>Identify local, regional and international competitions and awards where Saudi citizens can participate</li> <li>Develop training curriculum for art educators and supervisors</li> <li>Organize trainings for art educators and supervisors</li> <li>Hold exhibitions, cultural competitions and cultural festivals</li> <li>Encourage participation in local and international competitions</li> </ul>	<ul style="list-style-type: none"> <li>Preparing school infrastructure for arts practice</li> <li>Preparing the infrastructure of schools to practice cultural fields.</li> <li>Qualifying and training of art workers from general education teachers</li> <li>Qualifying and training of cultural workers from public education teachers</li> <li>Establish and develop specialized centers in public education schools</li> <li>Performing local and national competitions in the field of arts and crafts and calligraphy</li> <li>Implementation of local and national competitions in different fields of culture.</li> <li>Creating a variety of theaters in public education schools.</li> <li>Participation in artistic competitions at the Gulf, regional and international levels.</li> <li>Participation in Gulf, regional and international cultural competitions.</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>Number of cultural infrastructure</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Drive Participation	7.3.2 Develop art classes in schools for boys and girls to include various arts	Develop and implement art classes for boys and girls across all schools in KSA in order to provide access to facilities where they can practice and identify and nurture talent. Initiative aims at developing an artistically and professionally educated generation of Saudi citizens <ul style="list-style-type: none"> <li>• Develop art and culture curriculum</li> <li>• Develop art laboratories and infrastructure to facilitate teaching and training</li> <li>• Provide training to culture and arts teachers</li> <li>• Organize exhibitions to promote art work of students</li> </ul>	<ul style="list-style-type: none"> <li>• Change in community awareness about the role and importance of arts in spreading the culture and introduce it to all aspects of life as one of the languages of communication between peoples and their civilization, for a conscious generation of artistic and professional intellectuals in the industrial design processes of digital art which is convinced with transforming the outlook of arts into a culture rather than a craft.</li> <li>• Contributing to diversifying the sources of the Kingdom's economic income through marketing for the production of arts and exhibition outputs through online stores.</li> <li>• Make qualitative and quantitative changes in the field of highlighting the popular arts and employing them through the Kingdom's strategic location and its impact on the Islamic and Arab world.</li> <li>• Dissemination of the culture of intellectual property rights for artistic and intellectual production</li> </ul>	No	Game changer	MoE	<ul style="list-style-type: none"> <li>• Number of cultural activities</li> </ul>
Drive Participation	7.3.3 Enhance participation in local and international cultural competitions	Increase female student participation in cultural and artistic competitions in order to seed artistic habits in the students at an early age and impart cultural knowledge and concepts. Initiative aims to enable an ecosystem which makes participation in cultural and artistic competitions easier for the students <ul style="list-style-type: none"> <li>• Identify local, regional and international competitions and awards where Saudi citizens can participate</li> <li>• Establish specialized centers (Saudi Student Center for Culture and Arts Education) where students can learn necessary skills</li> <li>• Develop training curriculum for art educators and supervisors and organize trainings for art educators and supervisors</li> <li>• Coordinate with stakeholders to organize exhibitions, cultural competitions and cultural festivals</li> </ul>	<ul style="list-style-type: none"> <li>• A generation that is qualified for international competitions and is aware of competing in cultural and artistic processes such as industrial design, digital art and other motor performance</li> <li>• Make qualitative and quantitative changes in the arts and culture competitions through the Kingdom's strategic location and its impact on the Muslim and Arab world.</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>• Number of cultural activities</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Drive Participation	7.3.4 Reading is the reflection of intellect and culture	<p>Design, develop and implement innovative reading courses in schools in order to promote reading hobbies among Saudi students of both genders. The effort aims to transform Saudi Arabia into a knowledge producing country rather than a knowledge consuming country. The 2020 target is to establish 6 reading academies across the Kingdom</p> <ul style="list-style-type: none"> <li>Develop and implement mandatory programs in schools to address issues of poor reading and abstention</li> <li>Create fixed and mobile libraries and online stores for sale and borrowing of books</li> <li>Partner with institutes, local organizations, global universities to organize events that foster literary arts</li> </ul>	<ul style="list-style-type: none"> <li>Building a strategy to raise the international level of the Kingdom in arts and culture.</li> <li>Mandatory programs in schools to address the phenomena of reading weakness and lack of reading.</li> <li>Specific programs within and outside schools to enable readability in the production and use of knowledge in life.</li> <li>Establish ten academies that qualify for cultural and artistic professionalism.</li> <li>Qualified cadres to represent the Kingdom in regional and international artistic and cultural events and forums.</li> <li>Establish fixed and mobile small libraries and online bookstores to sell and borrow books.</li> <li>Build partnerships with specialized institutes and private universities that sponsor culture, literary and media arts to sharpen the skills of learners with artistic and cultural orientations.</li> <li>Launch quality competitions focusing on reading investment in the production of knowledge, highlighting and sponsoring artistic and cultural abilities and talents</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>Number of cultural activities</li> </ul>
Drive Participation	7.3.5 Establish cultural associations	<p>Enable the establishment of artist associations that offer support services, networking opportunities and connect artists with other entities to promote the creation of cultural content. The 2020 target is to set up 4 professional associations that will support 2,000 individuals, on an annual basis, through workshops and events</p> <ul style="list-style-type: none"> <li>Establish 4 professional associations across each cultural pillar</li> <li>Develop an online platform to access a list of associations across KSA</li> <li>Promote the existence of cultural associations through media campaigns</li> <li>Augment national associations with local art guilds/federations</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment and retention of artists in the artists association</li> <li>Annual events and services provided for members</li> <li>Setting up a support and development mechanism in place for artists</li> <li>Increased awareness among artists regarding developments in their respective fields</li> </ul> <p>Successful enrollment and retention of artists in the association</p>	Yes		GCA	<ul style="list-style-type: none"> <li>Number of cultural activities</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Drive Participation	7.3.6 Launch initiatives for local public participation	<p>Launch domestic public engagement and marketing initiatives to attract Saudi Arabia's population towards cultural offering and activities while increasing the social acceptance of culture and arts and incrementing cultural consumption, across demographics.</p> <ul style="list-style-type: none"> <li>• Design and rollout communication and marketing strategies to promote popularity of artists in the Kingdom</li> <li>• Develop and implement a platform to highlight the availability and the benefits of cultural infrastructures and activities/events</li> <li>• Establish awards to reward artists across the various cultural pillars</li> <li>• Monitor public sentiment through sample population surveys and focus groups</li> </ul>	<ul style="list-style-type: none"> <li>• Campaigns, initiatives and events aimed at increasing public engagement targeting different demographics (e.g., investors, youth, adults); to be defined during initiative implementation; potential adoption of key role models as cultural ambassadors</li> <li>• Increased awareness and engagement in Saudi culture domestically</li> <li>Increased social acceptance of arts and culture among all demographics</li> </ul>	No		GCA	<ul style="list-style-type: none"> <li>• Percentage of consumer expenditure on cultural offering</li> </ul>
Deliver Offerings	7.3.7 Establish specialized Arts Academy	<p>Establish a specialized, top-tier academic institute with a focus on performing arts, visual arts, and film awarding Bachelor and Master degrees in order to increase the Saudi content in culture and arts. The 2020 target is to have 1000 students enrolled over 1 campus</p> <ul style="list-style-type: none"> <li>• Construct 2 campuses and enroll 8,000 students</li> <li>• Train and provide exclusive services (e.g. access to working space, facilities, materials) to maximize the students' and artists' creativity and strengthen local and international talents</li> </ul>	<ul style="list-style-type: none"> <li>• Increased number of professionally-trained artists, actresses and directors in KSA</li> <li>• Increased international collaboration in arts and culture</li> <li>Improved arts and culture positioning of KSA globally</li> </ul>	No		GCA	<ul style="list-style-type: none"> <li>• number of local films</li> <li>• Number of published books</li> <li>• Number of offered cultural activities</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Drive Participation	7.3.8 Promote Saudi culture abroad	<p>Promote Saudi culture amongst international audiences through extensive events, forums and exhibitions to create awareness as well as to support local artists to participate in international events. The 2020 targets are to organize 2 traveling exhibits till 2020, launch 5 awareness campaigns, host 2 cultural forums support over 1,000 artists to participate in international cultural events.</p> <ul style="list-style-type: none"> <li>Assess the perception of Saudi culture in international countries and define international promotion strategy</li> <li>Launch initiatives and media campaigns to increase awareness about Saudi culture</li> <li>Host international cultural forums in Saudi Arabia</li> <li>Support artists and organizations in their efforts to participate in international events</li> </ul>	<ul style="list-style-type: none"> <li>International cultural forums to provide immersive experience to foreigners</li> <li>Traveling arts exhibitions to present Saudi culture in prominent cities globally</li> <li>Grants for individuals for presenting work internationally</li> <li>Increased presence of Saudi individuals/organizations to int'l events (i.e. Art Basel)</li> <li>Increased perception of Saudi culture abroad and international interest in KSA</li> </ul> <p>Increasing the KSA's contribution to international and local art scene</p>	No		GCA	<ul style="list-style-type: none"> <li>Number of cultural activities</li> <li>Participation in major international festivals</li> </ul>
Drive Participation	7.3.9 Establish arts incubators	<p>Establish arts incubators in Saudi universities to invest in businesses and enterprises working towards promoting arts and culture in the Kingdom. In addition to investment, initiative also aims at nurturing and refining artistic talent available in the Kingdom. The 2020 target is to graduate 65 students and establish a total of 2 incubators</p> <ul style="list-style-type: none"> <li>Conduct citizens' survey to gauge their interest in arts</li> <li>Develop appropriate programs and strategies for incorporation of arts in educational institutions</li> <li>Build art incubators within universities</li> <li>Carry out awareness campaigns to promote incubators and support arts</li> </ul>	<ul style="list-style-type: none"> <li>Prepare a survey on the trends of citizens of plastic arts of all kinds.</li> <li>Establish a center for plastic arts.</li> <li>Provide business incubators for plastic arts.</li> <li>Develop appropriate programs and strategies for the inclusion of plastic arts in educational institutions.</li> <li>Raise the awareness of the importance of plastic arts in its various forms among different community categories.</li> <li>Implement a number of awareness campaigns to support and consolidate the concept of plastic art.</li> <li>Provide support, management and marketing consulting for small projects in the field of plastic arts.</li> </ul>	No		MoE	<ul style="list-style-type: none"> <li>Number of cultural infrastructure</li> <li>Number of local movies produced</li> </ul>



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Develop regulation	7.4.1 Develop culture sector governance and regulatory framework	Draft and implement a comprehensive governance and regulatory framework for the cultural sector to enable the sector's growth and success <ul style="list-style-type: none"> <li>• Develop basic governing law for the culture sector, clarifying and outlining the role of various regulators</li> <li>• Set-up sectorial council on culture policy and regulation, with representation from various entities: government, private, and non-profit</li> <li>• Develop legal framework to protect creative professionals against defamation and social persecution</li> <li>• Develop Saudi IP protection regulatory framework and enforcement mechanism</li> <li>• Develop laws and regulations for art exhibitions licensing</li> </ul>	<ul style="list-style-type: none"> <li>• Basic governing law for the culture sector passed through Council of Ministers</li> <li>• MoUs signed between entities, highlighting different entity's roles and responsibilities</li> <li>• Set-up of sectorial council</li> <li>• Clarification of roles of various culture sector regulators</li> <li>• Simplified laws governing culture sector</li> </ul> Decreased complexity of government processes relating to culture sector	No	Quick wins	GCA	<ul style="list-style-type: none"> <li>• Number of cultural activities</li> <li>• Percentage of consumer expenditure on artistic offering</li> </ul>
Develop regulation	7.4.2 Develop a one-stop-shop for creative business needs	Develop a one-stop-shop for all creative business interactions with the government (including registration, event licensing, production permit, labor registration and content importing) to allow for a smooth business establishment process <ul style="list-style-type: none"> <li>• Re-design and enforce the registration and licensing process</li> <li>• Build and recruit personnel for physical one-stop shop (or merge with MCI-led one-stop shop)</li> <li>• Develop web portal to facilitate the establishment and management of creative businesses</li> </ul>	<ul style="list-style-type: none"> <li>• Re-designed government processes for creative businesses and individuals</li> <li>• Physical one-stop shop and web portal for single point of contact for all government needs</li> <li>• Decreased complexity, and clarification in all government processes relating to creative businesses</li> </ul> Increased incentive to set up cultural offering due to removed barriers to entry	No	Quick wins	GCA	<ul style="list-style-type: none"> <li>• Number of cultural infrastructure</li> <li>• Number of cultural activities</li> <li>• Percentage of consumer expenditure on artistic offering</li> </ul>



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	GCA	VRP KPI affected by initiative
Develop sustainable funding model	7.5.1 Facilitate private funding in the cultural sector	Organize promotion events and campaigns to facilitate investment, sponsorship and donation of funds from the private organizations and high net worth individuals (HNWI) to support the cultural sector in KSA. The 2020 targets are to annually undertake 4 targeted media campaigns, 2 mass media campaigns and 4 networking/promotion <ul style="list-style-type: none"> <li>Develop strategy to reach out to private sector investors, sponsors and donors</li> <li>Promote general public awareness about supporting the cultural sector in KSA</li> <li>Conduct targeted campaigns towards identified corporations and HNWIs</li> <li>Organize promotion and networking events</li> </ul>	<ul style="list-style-type: none"> <li>Additional private funding will enable the increased offering of cultural activities in KSA</li> <li>Financial support for the cultural ecosystem's economic necessities</li> </ul> Private sector and HNWI will become an integral part of the funding process for KSA's cultural sector	Yes		GCA	<ul style="list-style-type: none"> <li>Number of cultural infrastructure</li> <li>Number of cultural activities</li> <li>Percentage of consumer expenditure on artistic offering</li> </ul>
Develop sustainable funding model	7.5.2 Establish national cultural funds supporting all cultural sub-sectors	Support cultural sector growth by establishing 5 government backed national funds (one in each cultural sub-sector: films, performing arts, visual arts and literature) that facilitate the engagement of individual or organizations in cultural activities and enhance financial attractiveness of the sector. The 2020 targets are to provide 278.5 million riyals grant in film sub-sector, 197.1 million riyal grant in performing arts sub-sector, 72.7 million riyals grant in literature sub-sector, and 62.5 million riyal grant in visual arts sub-sector in addition to 29.5 million riyals cultural fund <ul style="list-style-type: none"> <li>Assess the demand for funding across cultural ecosystem and subsectors</li> <li>Initiate funds and determine each fund's strategy – periodically update to tailor the support to most</li> <li>Review applications for funding and determine capital allocations</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of 5 funds (4 for each of the sub-sectors and 1 general fund to support cross sub-sector initiatives) – estimated at ~SAR 3.2 in the first 5 years</li> <li>Establishment of grants for artists and organization within each sub-sector</li> <li>Additional funding to encourage the creation, production and distribution of culture</li> <li>Increased local production of arts and culture</li> </ul> Support of amateur and professional artistic talents	No	Priority	GCA	<ul style="list-style-type: none"> <li>Number of cultural infrastructure</li> <li>Number of cultural activities</li> <li>Percentage of consumer expenditure on artistic offering</li> </ul>

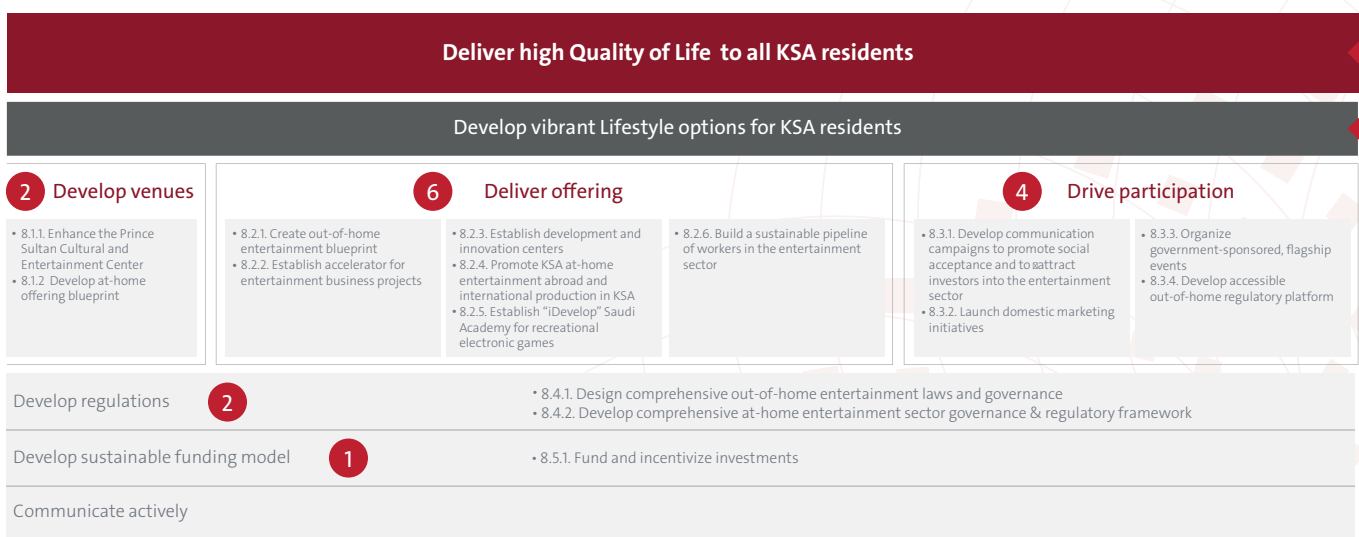
Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Heritage	Number of heritage infrastructure	Develop venues	1. Construct and rehabilitate 18 public museums	• SCTH
		Develop venues	2. License 200 private museums	• SCTH
		Develop venues	3. Register 3 UNESCO sites in the World Heritage List	• SCTH
		Develop venues	4. Rehabilitate and operate 17 creative centers	• SCTH
		Develop venues	5. Rehabilitate 80 archaeological sites	• SCTH
		Develop venues	6. Develop and rehabilitate 14 villages and heritage towns	• SCTH
Heritage	Number of heritage events	Develop offerings	7. Offer 40 yearly heritage events	• SCTH
		Develop offerings	8. Register 1 UNESCO intangible cultural heritage element	• SCTH

## 5.J Entertainment

Entertainment initiative services include the following activities: Media (TV, newspapers, magazines and radio), series, games, videos, events, festivals, concerts and performances. Places where activities will be offered outside home are: Movie theaters, public parks, zoos, family entertainment centers, concert halls, event halls, game centers, etc.

As indicated in chapters 1 and 2, the KPIs within the Entertainment category are fully owned by the Quality of Life Program 2020. The following table includes the list of initiatives within this category with a short description and the responsible entity.. Additionally, a visual overview with the mapping of initiatives against strategic pillars is included in the following figure.

Figure 61: Entertainment



Quantity of total initiatives XX

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop Venues	8.1.1 Enhance the Prince Sultan Cultural and Entertainment Center	<p>Activate the Prince Sultan Cultural and Entertainment Center to develop a facility which discovers, nurtures and markets people with cultural and artistic skills. This initiative also aims at increasing arts and cultural contributions made by Saudi Arabia by diversifying and increasing cultural forums and organizing cultural events. The 2020 target is to develop 150 talented artists, organize 9 activities and events, and build 9 key attractions for the population</p> <ul style="list-style-type: none"> <li>Identify, design and develop the required infrastructure in the Prince Sultan Cultural and Entertainment Center</li> <li>Run the talent discovery, sponsorship and marketing Programs</li> <li>Attract and organize local, regional and global cultural entertainment</li> </ul>	<ul style="list-style-type: none"> <li>Integrated cultural entertainment center</li> <li>Discover, sponsor and market talent programs</li> <li>Cultural and entertainment Programs suitable for the community</li> </ul>			MoE	<ul style="list-style-type: none"> <li>Number of cultural and artistic activities</li> <li>Number of out-of-home entertainment events</li> <li>Percentage of overall household expenditure on culture and arts</li> <li>Percentage of overall household expenditure on out-of-home entertainment</li> <li>Number of local movies produced</li> <li>Number of published books</li> </ul>
Deliver Offerings	8.1.2 Develop at-home entertainment in the Kingdom	<p>Create offering blueprint for all at-home entertainment categories in KSA, including digital (video games, series, etc.), analogue (board games, toys, books, etc.), and media (TV, radio, magazines, etc.) in cooperation with all relevant entities in order to reach 2.9% of household spending on at-home entertainment options. The 2020 target is to offer similar at-home entertainment options to all citizens of KSA</p> <ul style="list-style-type: none"> <li>Develop a rollout plan for entertainment offering with priority categories targeted for early launch.</li> <li>Identify and attract major international titles (films, series, board games, books, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Developed market study of each entertainment category</li> <li>13 regional detailed blueprints for the development of all at-home entertainment categories</li> <li>Focused roadmap for special needs of at home entertainment</li> <li>Set up joint task force, responsible for the management of the implementation of the roadmap</li> <li>Increased share of top titles available within 3 months of global publishing</li> <li>Increased accessibility of entertainment options (analogue, digital and media)</li> </ul> <p>Number of accessible media reaching over 400 by 2020</p>	Yes	Priority	GCAM	<ul style="list-style-type: none"> <li>Number of accessible media</li> <li>Percentage of top titles available within 3 months of global publishing</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop Venues	8.2.1 Build strategy of development and implementation of entertainment options and infrastructure in entertainment sector	Create offering and infrastructure blueprint for the development of all out-of-home entertainment categories (Theme parks, water parks, family entertainment centers, zoos, live music events, LAN gaming centers, eSports tournaments, etc...) in order to increase household spending on out-of-home entertainment. The 2020 target is to unlock an additional~1M visits to entertainment facilities <ul style="list-style-type: none"> <li>Develop out-of-home entertainment requirements per region</li> <li>Finance selected initial entertainment venues</li> <li>Track completion of infrastructure developments by the private sector</li> </ul>	<ul style="list-style-type: none"> <li>Regional offering and infrastructure blueprints for the development of all categories</li> <li>Implementation roadmap for each entertainment sub category and infrastructure type</li> <li>204 entertainment venues developed by 2020 (171 – 2018; 187 – 2019)</li> <li>358 live events offered in 2020 (263 – 2018; 310 – 2019)</li> </ul> <p>Increased out-of-home entertainment spend to reach 0.5% by 2020</p>	Yes	Priority	GEA	<ul style="list-style-type: none"> <li>Number of venues</li> <li>Number of events</li> <li>Household spend on out-of-home entertainment</li> </ul>
Develop Offering	8.2.2 Establish accelerator for entertainment business projects	<ul style="list-style-type: none"> <li>This initiative is about building and establishing an accelerator for young participants. It will invest in their abilities and direct them to open entertainment projects suited to the requirements and needs of the KSA's growing population. It also aims to transform and guide participants of the initiative's programs and provide material assistance and technical advice to start their entertainment projects under the supervision of specialists in this field. This will allow participants and beneficiaries to be self-employed. Furthermore, the accompanying entertainment projects will provide future jobs for university students and graduates under the supervision of the University of Ha'il and will be applied to six other universities</li> <li>Define structure and operating model for the accelerator</li> <li>Run marketing and awareness campaigns to promote accelerator and attract proposals</li> <li>Identify and support implementation of at least 2 entertainment projects each year</li> <li>Finance selected initial entertainment venues</li> </ul>	<ul style="list-style-type: none"> <li>Training courses to qualify participants to open their entertainment projects (70 beneficiaries by 2020)</li> <li>Opening two entertainment projects annually in the region</li> </ul>		Priority	MoE	<ul style="list-style-type: none"> <li>Number of local content produced</li> </ul>

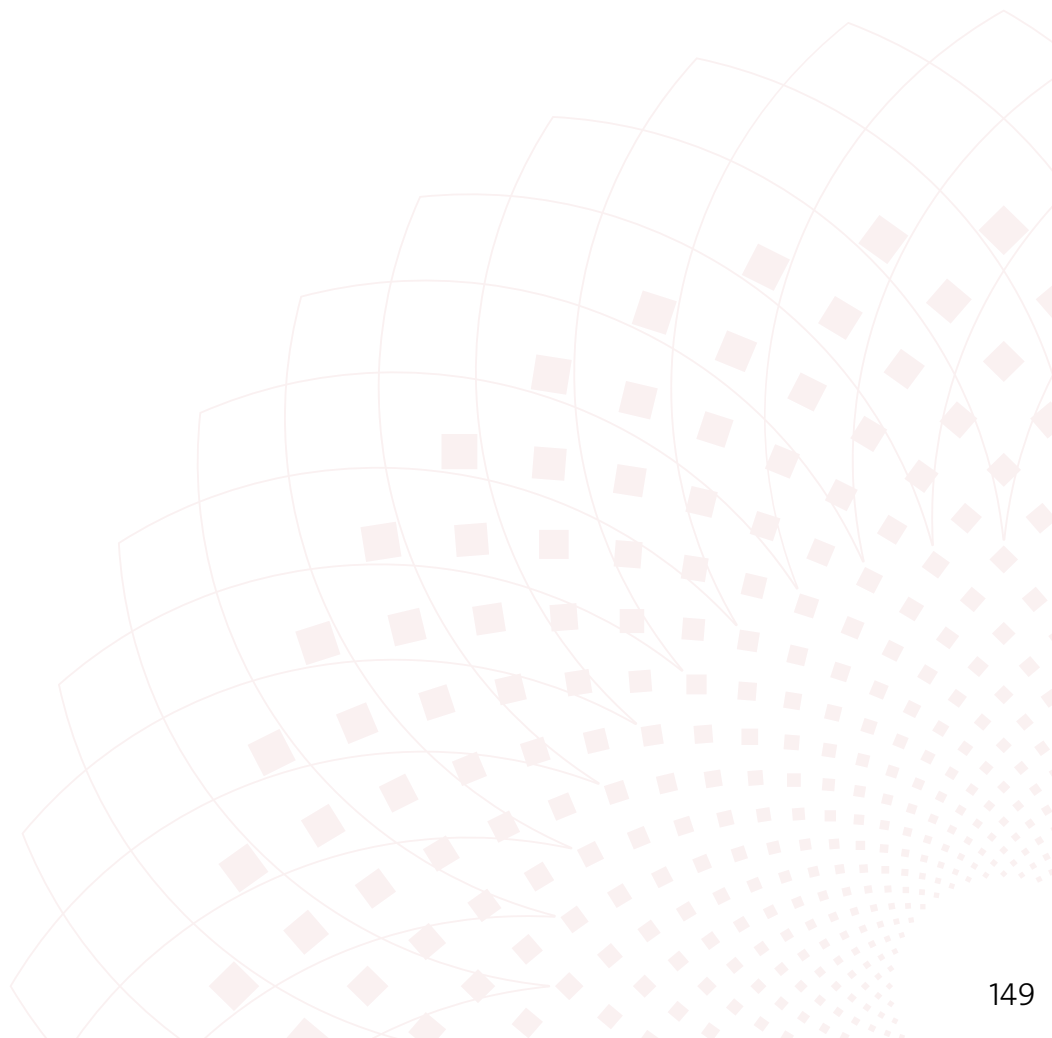
Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Deliver Offerings	8.2.3 Establish development and innovation centers in entertainment sector	Establish several development and innovation centers, providing free space and lectures for entrepreneurs and students aimed at increasing the locally created content share of the 1% household spending on out-of-home entertainment and award the best local artists. The 2020 target is to have 12,240 participants and students in the given year interacting with the development centers <ul style="list-style-type: none"> <li>• Support a local culture of innovation in the entertainment sector by free space and infrastructure</li> <li>• Highlight the importance of creativity through presentation of international experts</li> <li>• Provide visibility to exceptional local artists, entrepreneurs, and companies by creation of award</li> </ul>	<ul style="list-style-type: none"> <li>• Innovation center strategy</li> <li>• KSA entertainment innovation award design and structure</li> <li>• 3 established innovation centers by 2020 (Jeddah, Dammam, Riyadh)</li> <li>• Reach 100 full time participants per semester in each development center by 2020</li> <li>• Have 11,640 students take part in courses and lectures in 2020</li> <li>• Increased local content</li> <li>• Introduction of culture of innovation</li> </ul>	No		GEA	<ul style="list-style-type: none"> <li>• Percentage of total family spending on entertainment.</li> </ul>
Deliver Offerings	8.2.4 Promote KSA at-home entertainment abroad and international production in KSA	Support the development of Saudi at-home entertainment industry to allow Saudi producers to deliver high-quality products, competing with global content on an international platform <ul style="list-style-type: none"> <li>• Promote top content abroad through campaigns focusing on Arabic speaking countries.</li> <li>• Create opportunities for international production in KSA by shooting series, developing video games etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased KSA contribution to international and local at-home entertainment offerings</li> <li>• 75M SAR in 2020 spent on advertising of Saudi content and production opportunities abroad</li> <li>• KSA established as a preferred destination for producing international titles</li> <li>• Increased number of local content advertised abroad</li> <li>• Increased number of international content developed in KSA</li> <li>• Increased in the Saudi talent working in the at-home entertainment industry</li> <li>• Increased in content consumption</li> </ul>	Yes		GCAM	<ul style="list-style-type: none"> <li>• Number of accessible media</li> <li>• Percentage of top titles available within 3 months of global publishing</li> <li>• Household spend on out-of-home entertainment</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Deliver Offerings	8.2.5 Saudi Academy for Electronic Game Development	Build and establish an academy in order to create interest and train citizens to be able to design and program recreational e-games. Initiative will be implemented in 4 major universities under the supervision of King Abdulla University and will also involve building state-of-the-art game design studios and production and marketing of e-games. The 2020 target includes graduating 20 participants from the academy <ul style="list-style-type: none"> <li>Design and develop infrastructure for the academy</li> <li>Attract teachers and managerial staff for the academy</li> <li>Train staff in the design and programming of games</li> <li>Induct students for academy</li> <li>Design, produce and market e-games keeping in view local, regional and global interests</li> </ul>	<ul style="list-style-type: none"> <li>Selling electronic games and entertainment graphics that are compatible with Saudi values and culture.</li> <li>Designing electronic games and graphic films for a safe entertainment and the community, especially for children and young people, and presenting them to local and international markets keeping in line with international standards.</li> <li>Training and qualifying national cadres to obtain a certificate in the design and programming of electronic games and graphic films</li> </ul>			MoE	<ul style="list-style-type: none"> <li>Percentage of Household total spend on entertainment</li> </ul>
Deliver Offerings	8.2.6 Build and develop human capital for the entertainment sector	Develop and localize the human capital in the out of home entertainment sector to ensure the Saudi talent and job creation. The 2020 target is having sent 750 people (teachers and employees in the sector) on exchange programs <ul style="list-style-type: none"> <li>Prepare job categorization in the out-of-home entertainment sector</li> <li>Engage universities and schools to develop curriculum and training programs</li> <li>Develop incentive programs for the employment of Saudis</li> </ul>	<ul style="list-style-type: none"> <li>List of core entertainment occupations and professional classifications</li> <li>Signed MOU with key stakeholders for developing curriculums, programs and incubators</li> <li>Career education programs for entertainment sector developed</li> <li>Variety of human capital development programs developed</li> <li>Over 3,000 people trained on exchange programs by 2030</li> <li>Registration of entertainment occupations into MLSA ASOC</li> <li>Employers Incentives Scheme developed, aimed at increasing Saudis hiring</li> <li>Increased Saudization rates</li> <li>Increased employment in the entertainment sector</li> </ul>	No	Priority	GEA	

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Deliver Offerings	8.3.1 Develop communication campaigns to promote entertainment offerings at home and abroad, enhance social acceptance and attract investors into the entertainment sector	Promote new entertainment offerings and investment opportunities locally and internationally to develop the entertainment sector and increase household spending on out-of-home entertainment to 1.0% to match best in class international countries. The 2020 target is to reach the entire population of KSA with communication campaigns in order to achieve the ~1M visits to entertainment facilities and events <ul style="list-style-type: none"> <li>• Highlight social benefits of out-of-home entertainment to ensure acceptance</li> <li>• Develop communication material for international investors to increase their involvement</li> <li>• Develop communication material for local and international consumers to highlight entertainment options</li> </ul>	<ul style="list-style-type: none"> <li>• Comm. strategy to the different stakeholders (including messages, content, timing, etc...)</li> <li>• Comm. campaigns and events to raise social acceptance</li> <li>• Comm. campaigns for attracting investors</li> <li>• Comm. campaigns promoting entertainment offerings locally and internationally</li> <li>• Public sentiment monitoring</li> <li>• Increased Saudi household spending on local entertainment</li> <li>• Increased number of foreign visitors</li> <li>• Creation of positive image of the Kingdom internationally</li> <li>• Increased private sector's awareness of investment opportunities</li> <li>• Increased public awareness around entertainment offering</li> </ul> <p>Increased social acceptance and participation</p>	Yes	Quick wins	GEA	<ul style="list-style-type: none"> <li>• Household spend on out-of-home entertainment</li> </ul>
Drive Participation	8.3.2 Launch local public participation and marketing initiatives to increase and encourage local entertainment consumption	Increase domestic public engagement through large scale events in the 3 biggest cities as well as country wide marketing initiatives to increase at-home entertainment consumption and participation across demographics to reach 2.9% of household expenditure on at-home entertainment by reaching the entire population of KSA <ul style="list-style-type: none"> <li>• Increase social acceptance of different at-home entertainment options.</li> <li>• Develop communication platform and launch marketing campaigns for four months/year.</li> <li>• Organize one large scale event per year in main cities Riyadh, Jeddah and Dammam</li> </ul>	<ul style="list-style-type: none"> <li>• Large media campaigns every year reaching a wide audience</li> <li>• Large-scale events every year in major cities engaging different stakeholders (education, capital, technology, consumer, talents). Events should include championships, school activities, etc....</li> <li>• Increased awareness and engagement in Saudi and international at-home entertainment across the country</li> <li>• Increased social acceptance of at-home entertainment options among all demographics</li> </ul> <p>Increased consumption of at home entertainment</p>	No		GCAM	<ul style="list-style-type: none"> <li>• Household spend on entertainment</li> </ul>



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	8.3.3 Organize government	Partner with private sector to organize ~50 annual anchor events all around KSA to kick start the sector and showcase its changes aiming to increase household spending on out-of-home entertainment activities and providing entertainment options to the entire population of KSA. The 2020 target is ~6M attendance on the 3 biggest flagship events (National day, Eid Al Adha, Eid Al Fitr) <ul style="list-style-type: none"> <li>Define event calendar per region</li> <li>Develop strategic communication campaigns linked to all types of events</li> <li>Organize and hold flagship events</li> </ul>	<ul style="list-style-type: none"> <li>Calendar of national events and festivals</li> <li>Strategic communication campaigns promoting government-sponsored entertainment offerings locally and internationally</li> <li>Large scale and flagship events with attendance of ~3M on national day, ~1.5M on Eid Al Adha and ~1.5M on Eid Al Fitr in 2020</li> <li>Retained Saudi household spending during these occasions</li> <li>Decreased number of travelers from KSA to other destinations for entertainment during these occasions</li> <li>Increased social cohesion</li> </ul> Projection of a positive image of the Kingdom internationally	No		GEA	<ul style="list-style-type: none"> <li>Number of events</li> <li>Household spend on entertainment</li> </ul>



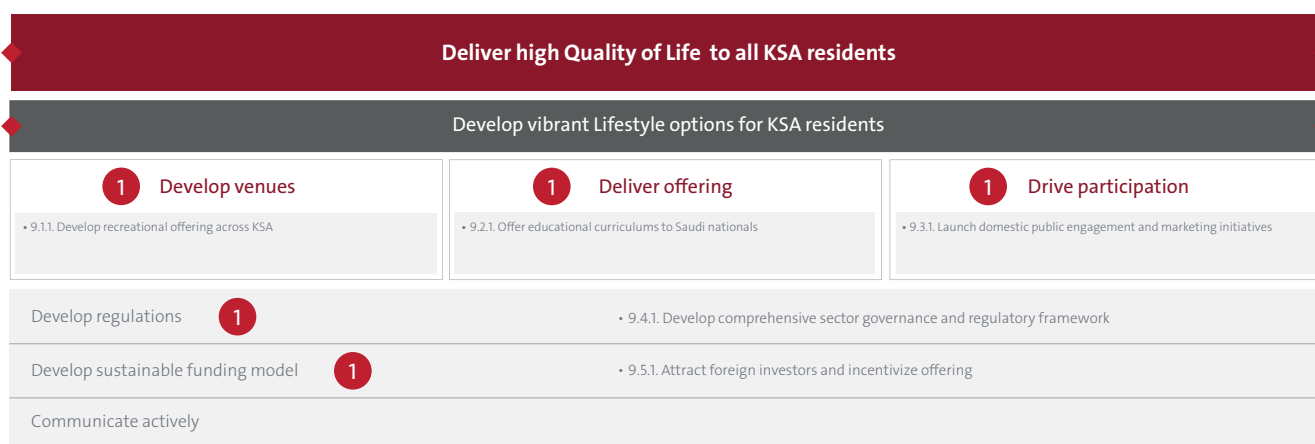
Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Drive Participation	8.3.4 Develop accessible regulatory platform	Develop clear and publicly accessible IT platform that summarizes regulatory framework and guidelines in order to facilitate operation of businesses, adherence to the regulations as well as the increase in household spending on entertainment through facilitated ticket purchase. The 2020 target is to have over 3M visits to the website in the given year <ul style="list-style-type: none"> <li>Collect regulations and make them accessible for public viewing</li> <li>Develop and publish website with all regulations, database of events and possibility of ticket sales</li> </ul>	<ul style="list-style-type: none"> <li>Clear, simple, and innovative regulatory framework guidelines</li> <li>User-friendly accessible dynamic platform filled with entertainment sector regulatory framework information</li> <li>User-friendly accessible dynamic platform for entertainment vendors and customers</li> <li>Increased out-of-home entertainment spend</li> </ul> <p>Increased number of out-of-home entertainment events</p>	No		GEA	<ul style="list-style-type: none"> <li>Number of venues</li> <li>Number of events</li> <li>Household spend on at-home entertainment</li> </ul>
Develop regulations	8.4.1 Design comprehensive out-of-home entertainment laws and governance	Establish law, comprehensive regulatory framework and sector governance structure in order to enable the sector's growth and success aimed at increasing the entertainment offerings <ul style="list-style-type: none"> <li>Draft and enact comprehensive regulatory framework detailing permitted entertainment options</li> <li>Define detail organization chart and appoint regulatory body</li> </ul>	<ul style="list-style-type: none"> <li>Defined regulatory and governance framework for the out-of-home entertainment sector</li> <li>Defined quality standards and inspection guidelines to ensure high-quality service and venue offering</li> <li>Effective and simple licensing process for out-of-home entertainment activities</li> <li>Increased social adherence and understanding of entertainment sector regulatory framework through easy, simple, accessible, clear, and dynamic platform</li> <li>High quality service and venue offering due to the adherence to the regulation</li> </ul> <p>Increased number of entities in the out-of-home entertainment sector due to the easy licensing process</p>	No	Priority	GEA	<ul style="list-style-type: none"> <li>Number of venues</li> <li>Number of events</li> <li>Household spend on at-home entertainment</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop regulation	8.4.2 Develop comprehensive at-home entertainment sector governance and regulatory framework	Specify and simplify the roles and responsibilities of each government entity and develop and update a comprehensive set of regulations for at-home entertainment, in order to enable sector's growth and success ensuring that 100% of leading global titles are available at the time of global publishing in KSA and enabling the population to spend 2.9% of household expenditure on at-home entertainment offering <ul style="list-style-type: none"> <li>Define permitted entertainment options.</li> <li>Develop governance framework clarifying role of various regulators.</li> <li>Include private sector in decision-making by organizing workshops across major cities, and establish sectorial council.</li> <li>Identify restrictive legislation, gaps in licensing and submit amendments</li> </ul>	<ul style="list-style-type: none"> <li>Define permitted entertainment options</li> <li>Develop governance framework clarifying role of various regulators</li> <li>Involve the private sector in decision-making by organizing workshops across major cities, and establish sectorial council</li> </ul> Identify restrictive legislation, gaps in licensing and submit amendments	No	Priority	GCAM	<ul style="list-style-type: none"> <li>Number of accessible media</li> <li>Percentage of top titles available within 3 months of global publishing</li> <li>Household spend on at-home entertainment</li> </ul>
Develop sustainable funding model	8.5.1 Support and drive investment in the entertainment sector	Establish an entertainment fund aimed at encouraging the private sector to invest in commercially less attractive regions and developing an ecosystem of new SME companies in order to boost local content creation. The 2020 target is to hand out ~440M SAR of funds to ~600 SMEs <ul style="list-style-type: none"> <li>Create incentives for private companies to invest in commercially not attractive regions</li> <li>Define SME sponsorship strategy and Program and select SMEs to provide funds to</li> </ul>	<ul style="list-style-type: none"> <li>Set-up of a fund with annual ~440M SAR funds to allocate</li> <li>~450 events in commercially not attractive areas in 2020</li> <li>Comprehensive incentives scheme developed for each entertainment category targeting investments in less attractive regions</li> <li>Assessment of SME landscape (challenges and opportunities)</li> <li>Comprehensive incentives and support Program aimed towards entrepreneur and local SMEs</li> <li>Developed funding requirements and criteria and investment plans</li> <li>Increased out-of-home entertainment activities in areas where it was previously non-existent</li> <li>Increased out-of-home entertainment spending in rural areas</li> </ul> Overall increased life quality in areas which have been commercially unattractive	No	Priority	GEA	<ul style="list-style-type: none"> <li>Number of venues</li> <li>Number of events</li> <li>Household spend on out-of-home entertainment</li> </ul>

## 5.K Recreation

As indicated in chapters 1 and 2, the KPIs within the Recreation category are fully owned by the Quality of Life Program 2020. The following table include the list of initiatives within this category with a short description and the responsible entity. Additionally, a visual overview with the mapping of initiatives against strategic pillars is included in the following figure.

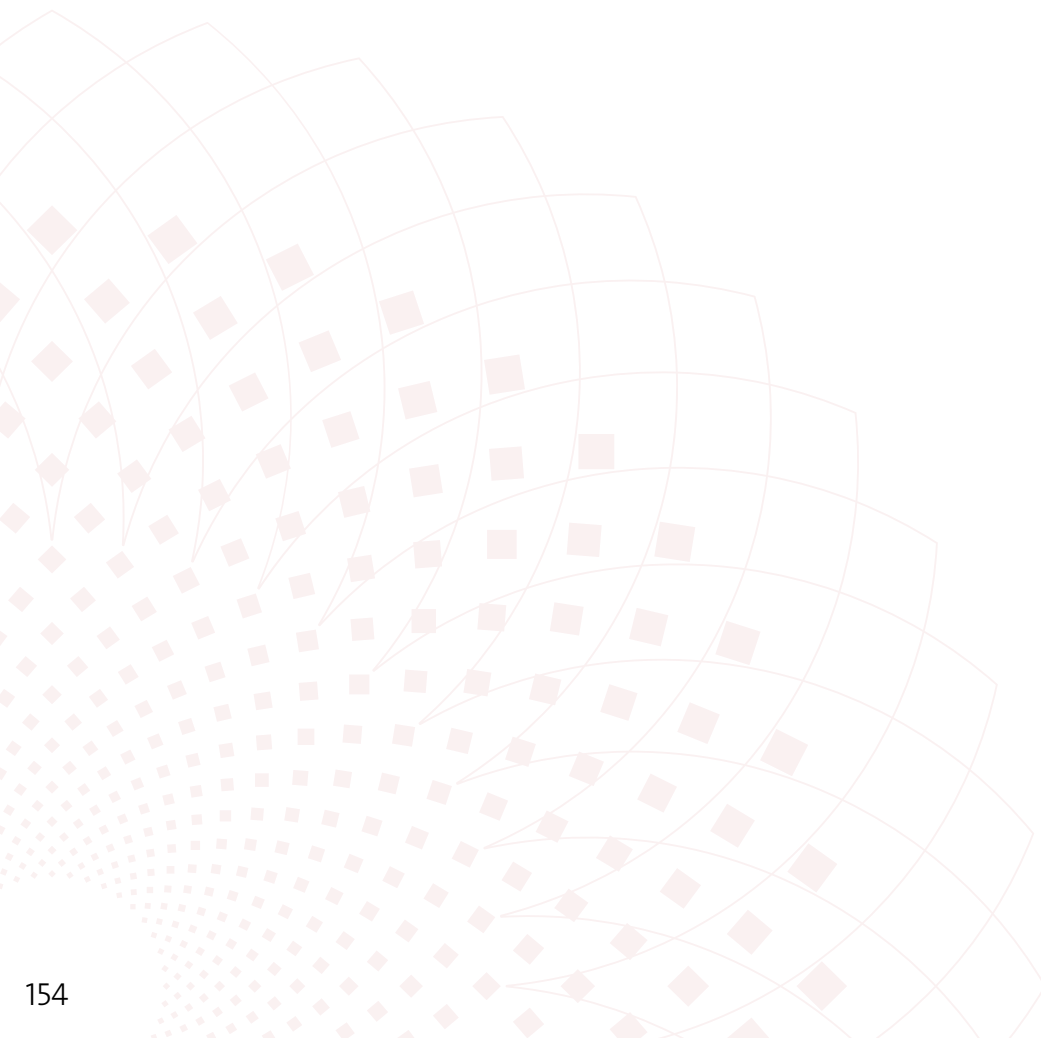
Figure 62: Recreation



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop Venues	9.1.1 Develop recreational offering across KSA	Develop the infrastructure blueprint for the recreational sub-sector to enable the provision of additional food and beverage outlets, extra retail space as well as constructing iconic developments across major cities in Saudi Arabia to enhance the variety of the recreational offering. The 2020 targets are to build 1,322 new restaurants, 1,127 new coffee shops and increment retail space with additional 390k sq. meters of shopping centers in order for the offering to reach 100% of KSA's growing population <ul style="list-style-type: none"> <li>• Incentivize private sector to develop recreational infrastructure across KSA</li> <li>• Identify globally renowned chefs (i.e. chefs awarded 1+ Michelin-star).</li> <li>• Enable top-quality retailers to enter the Saudi market.</li> <li>• Develop three "iconic developments" in Riyadh, Jeddah and Dammam to positively influence the perception of KSA globally</li> </ul>	<ul style="list-style-type: none"> <li>• Iconic developments to positively influence the global perception of Saudi Arabia</li> <li>Increased percentage of global brand representation</li> </ul>	Yes		QoL until responsible entity is assigned	<ul style="list-style-type: none"> <li>• Sq. meters of shopping mall retail space per capita</li> <li>• Number of iconic developments</li> <li>• Number of RandB stores</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop offering	9.2.1 Offer educational curriculums to Saudi nationals	Nurture local Saudi talent to generate entrepreneurial opportunities in the sector and to develop local recreational workforce by subsidizing relevant educational Programs. The 2020 target is to offer 20 national and 30 international scholarships for Saudi youth <ul style="list-style-type: none"> <li>Develop educational curriculums to attract new Saudi generations towards the recreational sector and sponsor international exchange Programs.</li> <li>Foster national champions through international Programs to learn about best-practice techniques to be implemented by Saudi Arabia</li> </ul>	<ul style="list-style-type: none"> <li>Improve local perception of recreational sector and attract Saudi talent</li> <li>Increased number of Saudi students enrolled in recreation curriculums</li> <li>Increased number of Saudi chefs</li> </ul>	No	Priority	QoL until responsible entity is assigned	<ul style="list-style-type: none"> <li>Number of restaurants</li> <li>Number of coffee bars</li> </ul>
Drive Participation	9.3.1 Launch local public participation and marketing initiatives to increase and encourage recreational consumption	Launch domestic public engagement and marketing initiatives to maintain current expenditure levels in the recreational sector. The 2020 target is to reach and maintain the current levels of 5.57% consumer expenditure in food and beverage services and engage with 100% of the Saudi population <ul style="list-style-type: none"> <li>Develop communication strategy highlighting availability and benefits of recreational offering.</li> <li>Develop marketing strategy to promote popularity of recreational options in the Kingdom.</li> <li>Launch large scale events in Riyadh, Jeddah and Dammam every year</li> </ul>	<ul style="list-style-type: none"> <li>Improved local perception of recreational sector and attract Saudi talent</li> <li>Increased number of Saudi students enrolled in recreation curricula</li> <li>Increased number of Saudi chefs</li> <li>Increased awareness and engagement in Saudi domestic recreational offering</li> </ul>	Yes		QoL until responsible entity is assigned	<ul style="list-style-type: none"> <li>Percentage of consumer expenditure spent on food and beverage services</li> </ul>
Develop regulation	9.4.1 Develop comprehensive recreational sector governance and regulatory framework	Updated and instate a regulatory framework that enables the development and success of the recreational sector <ul style="list-style-type: none"> <li>Ensure that the governance and regulatory frameworks are up to date and identify potential gaps or areas for amendments.</li> <li>Update legal provisions to support and protect entrepreneurs interested in entering the recreation industry.</li> <li>Include private sector in decision-making by organizing workshops across major cities</li> </ul>	<ul style="list-style-type: none"> <li>Simplified laws governing the recreation sector</li> <li>Decreased complexity of government processes relating to entertainment sector</li> <li>Improved ease of opening new recreational activities</li> </ul>	No	Priority	QoL until responsible entity is assigned	<ul style="list-style-type: none"> <li>Number of restaurants</li> <li>Number of coffee bars</li> <li>Sq. meters of shopping mall retail space per capita</li> <li>Percentage of consumer expenditure spent on food and beverage services</li> </ul>

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Type	Leading entity	VRP KPI affected by initiative
Develop sustainable funding model	9.5.1 Attract foreign investors and present motivational recreational shows	<p>Attract investors from outside the KSA to direct FDIs into recreational activities in the country and incentivize the quality of the recreational offerings by attracting fine dining chefs and top retail brands. The 2020 targets are to attract 10 chefs and 30 top-retail brands</p> <ul style="list-style-type: none"> <li>• Create business cases to showcase investment opportunities' ROIs</li> <li>• Enforce investment opportunities through events and media campaigns in target countries.</li> <li>• Identify and attract globally renowned chefs (i.e. chefs awarded 1+ Michelin-star) through financing of start-up costs both in iconic and non-iconic cities</li> <li>• Support top-quality retailers to enter the Saudi market by covering initial rent for three years, for ~10 retailers each year</li> </ul>		No	Priority	Quality of Life VRP until responsible entity is assigned	<ul style="list-style-type: none"> <li>• Number of premium restaurant</li> <li>• Percentage of global brand representation</li> <li>• Number of iconic locations per iconic city</li> </ul>



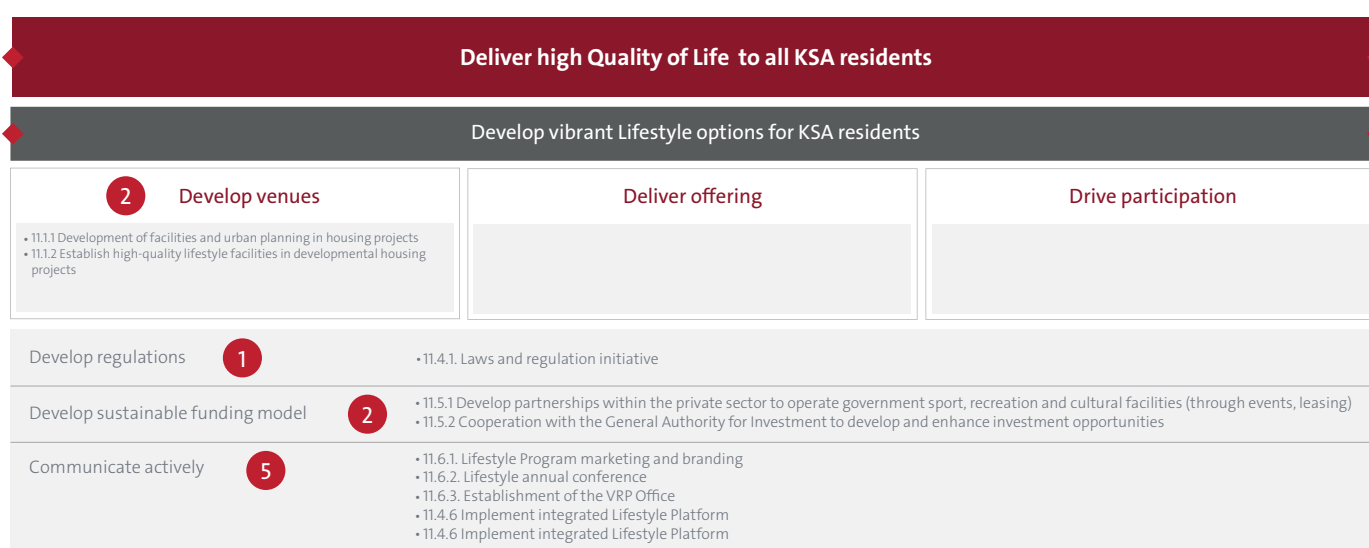
## 5.L Overarching initiatives

The volatile nature of sectors that fall under the “lifestyle” concept requires an overarching umbrella for some initiatives and for VRP to play a neutral role in implementing such initiatives, especially the ones related to quality of life, while also promoting and enabling regulations and legislation for all other initiatives, and develop a global index to measure Quality of Life in KSA.

The Program is a central entity that coordinates between different bodies to ensure compatibility and achieve desired aspirations.

The VRP also serves as a focal point to facilitate coordination among the various entities in order to ensure alignment and achieve the desired aspirations

Figure 63: Overarching Initiatives



Quantity of total initiatives **XX**

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Game changer	Leading entity	VRP KPI affected by initiative
Develop a sustainable funding model	11.5.1 Develop partnerships within the private sector to operate government sport, recreation and cultural facilities (through events, leasing)	Work towards establishing partnerships with the private sector to operate and maintain governmental facilities efficiently and effectively <ul style="list-style-type: none"> <li>• Develop a database of government facilities across all entities and lifestyle sectors</li> <li>• Agree with entities on operation and maintenance standards</li> <li>• Establish partnerships with private sector to operate and maintain sport, recreation and cultural facilities</li> </ul>	2020 targets are 10 schools, 3 sport infrastructures and 2 cultural infrastructures activated per region with a utilization rate of 80% to 90% depending on the region	Yes		QoL VRP 2020	



Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Game changer	Leading entity	VRP KPI affected by initiative
Communicate effectively	11.6.4 Develop Integrated Lifestyle Platform	Design and launch one-stop-shop website or app for citizens and residents to find entertainment, sports and arts and culture opportunities. 2020 target is to have had a total of 1.1M application downloads. The website will feature: <ul style="list-style-type: none"> <li>• Citizen's profiles and preferences, easing matching opportunities and personal preferences;</li> <li>• Calendar of one-time events in arts, sports and arts and culture areas; accurate information on existing hobby clubs, museums, theaters, movies theaters</li> <li>• Club and event registration, publication and approvals portal</li> <li>• Summary of rules and regulations for individuals (protections laws, approved entertainment) and institutions (club rules, summary of registration process)</li> <li>• Tickets sales or registration portal</li> </ul>	2020 target are 1m download, with an average stay of 8min per user at each visit and a 100%-of-the-time availability of the platform	Yes	Priority	QoL VRP 2020	<ul style="list-style-type: none"> <li>• Number of cultural and artistic activities</li> <li>• Number of out-of-home entertainment events</li> <li>• % of population participating in sports</li> </ul>
Develop laws and regulations	10.4.1 Laws and regulations initiative	vLobby to pass social and business-related laws and regulations. This will lead to an increase in citizen participation in lifestyle activities, increased utilization rate of government facilities and improved confidence of investors/entrepreneurs in lifestyle sectors. 3 areas have been identified which require immediate regulatory changes: <ul style="list-style-type: none"> <li>• Participation of women in sports in public places and allow entrance to sports venues and stadiums</li> <li>• Allow access to government owned facilities and pre-approve a large set of facilities to speed up booking and enhance ease of use</li> <li>• Encourage both gender's equal participation in sports activities</li> </ul>	2020 targets are: <ul style="list-style-type: none"> <li>- 10~15 key laws changed per year</li> <li>- 100% awareness and positive opinion on change</li> </ul>	No	Priority	QoL VRP 2020	<ul style="list-style-type: none"> <li>• % of people participating in sports</li> <li>• % of consumer spend on cultural performances</li> </ul>

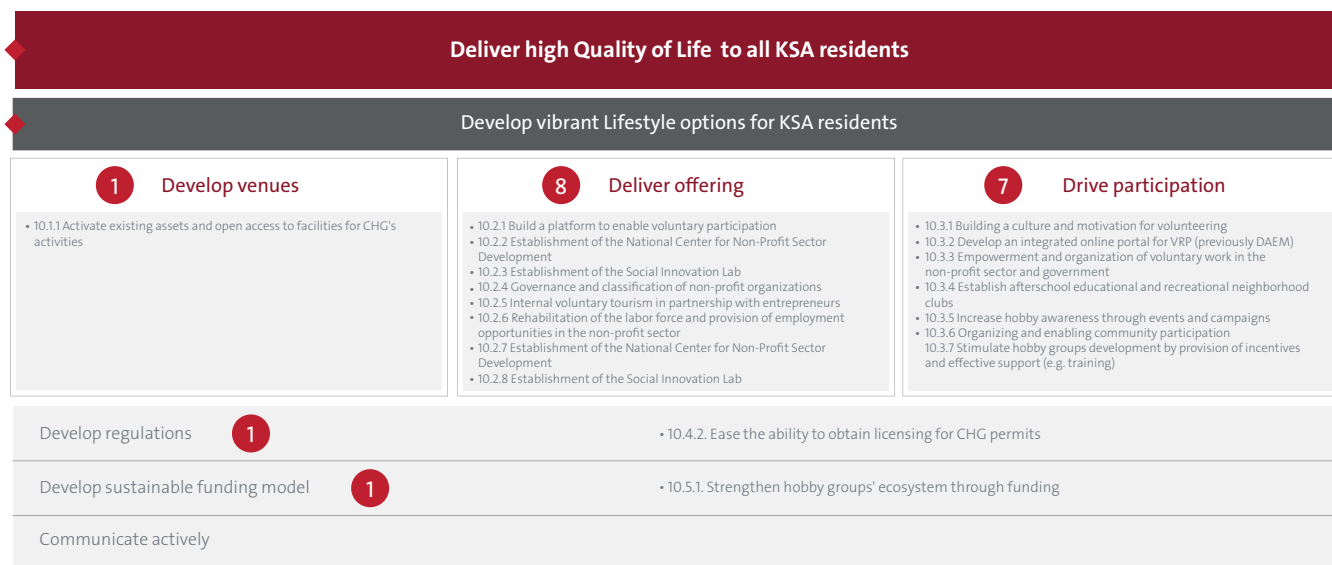
Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Game changer	Leading entity	VRP KPI affected by initiative
Communicate actively	11.6.1 Lifestyle Program marketing and branding	Market the Quality of Life Program and its objectives and aspirations for quality of life in KSA on an ongoing basis <ul style="list-style-type: none"> <li>• Create a unified brand for the Quality of Life Program to be used by all entities for their own sector awareness campaigns (e.g. GEA's entertainment perception and investors campaigns, GSA mass-participation awareness campaigns, MoE's sports and healthy lifestyle awareness campaigns)</li> </ul>	2020 targets: <ul style="list-style-type: none"> <li>- roll out of 3 nationwide campaigns annually</li> <li>- reach 20m Saudis and residents (followers) on Quality of Life social media platforms)</li> </ul>	No	Quick wins	QoL VRP 2020	<ul style="list-style-type: none"> <li>• Number of entertainment activities</li> <li>• Number of cultural activities</li> </ul>
Communicate actively	11.6.2 Lifestyle annual conference	Host an annual 1-2 day conference to celebrate the VRP's greatest successes, discuss key learnings, and communicate path forward, in addition to new ideas (e.g. Future Studios)	2020 target: <ul style="list-style-type: none"> <li>-Organize 1 annual conference</li> <li>- implement 50-75% of ideas presented in past conferences</li> </ul>	Yes	-	QoL VRP 2020	<ul style="list-style-type: none"> <li>• Number of entertainment activities</li> <li>• Number of cultural activities</li> </ul>
Communicate actively	11.6.3 Establishment of the VRP Office	Establish and launch the VRP office to monitor progress towards achieving Quality of Life VRP aspirations and providing necessary support to the executive bodies involved in the Program's delivery plan <ul style="list-style-type: none"> <li>• Establish 5 offices, with head office in Riyadh</li> <li>• Establish clear internal governance and processes to implement VRP initiatives</li> <li>• Hire required FTEs</li> </ul>	The 2020 target is 150 employees spread across KSA, up from 120 in 2018 and 140 in 2019	No	Priority	QoL VRP 2020	
Communicate actively	11.6.4 Creating the World's First Fulfilment index to drive lifestyle policy	The combination of the science of individuality, the personalization of social institutions, and the changing nature of the global economy provides a once-in-a-generation opportunity to transform how Saudis learn, work, and live, and reshape how each Saudi citizen defines success individually and collectively. Led by Harvard research scientist, Todd Rose, the Lifestyle VRP will align local initiatives to support the "science of the individual," work with local agencies to communicate these change initiatives to the public and deliver a Fulfillment Index at Davos 2018 as a gift to the world.	The 2020 target includes the index available for at least 2 years (2019 and 2020) and the global publication of results (e.g. presentation at Davos WEF forum in 2019)	Yes	Quick wins	QoL VRP 2020	

Strategic pillar	Initiative name	Initiative description	Impact	Possibility for privatization	Game changer	Leading entity	VRP KPI affected by initiative
Develop venues	1.1.11 Establish high-quality life-style facilities in developmental housing projects	Many government facilities are not fully exploited. The initiative aims to facilitate private sector participation in the operation and maintenance of government facilities. Optimizing the efficiency of operation and maintenance of government facilities through the private sector participation will attract more tenants and users of these facilities.	<ul style="list-style-type: none"> <li>• Increase the citizens' standard of living and well-being in residential communities.</li> <li>• Achieve integration of the different entities' roles and increase local content.</li> <li>• Create new jobs within residential communities.</li> </ul> Increase the attractiveness of residential developments, especially in places outside the city centers.	Yes	Game changer	MoHo	<ul style="list-style-type: none"> <li>- Number of recreational venues</li> <li>- Percentage of people participating in sports activities</li> </ul>
Develop a sustainable funding model	11.5.1 Cooperate with SAGIA to develop and promote investment opportunities	<p>The initiative aims to attract foreign investment opportunities in Quality of Life VRP initiatives via cooperation with SAGIA, through a journey that begins by evaluating and supporting the marketing of a set of initiatives among investors, then implementing procedures relating to investment proposals, and finally supporting through the post-award phase (after care).</p> <p>The Program will be assigned a special team from SAGIA to inaugurate the phases of the investment journey. In addition, an investment committee will be formed to oversee the development and implementation of all investment opportunities.</p>	<ul style="list-style-type: none"> <li>• Reduce government spending</li> <li>• Maximize the attractiveness of investment opportunities for the private sector</li> <li>• Maximize the social and economic impact</li> <li>• Prioritize advanced investments</li> <li>• Maximize competition in the private sector to ensure quality and sustainability.</li> </ul>	Yes	Game changer	QoL VRP 2020	<ul style="list-style-type: none"> <li>- Number of recreational venues</li> <li>- The available number of cultural infrastructures</li> <li>- Percentage of consumer spending on cultural offerings</li> </ul>

## 5.M Social Engagement

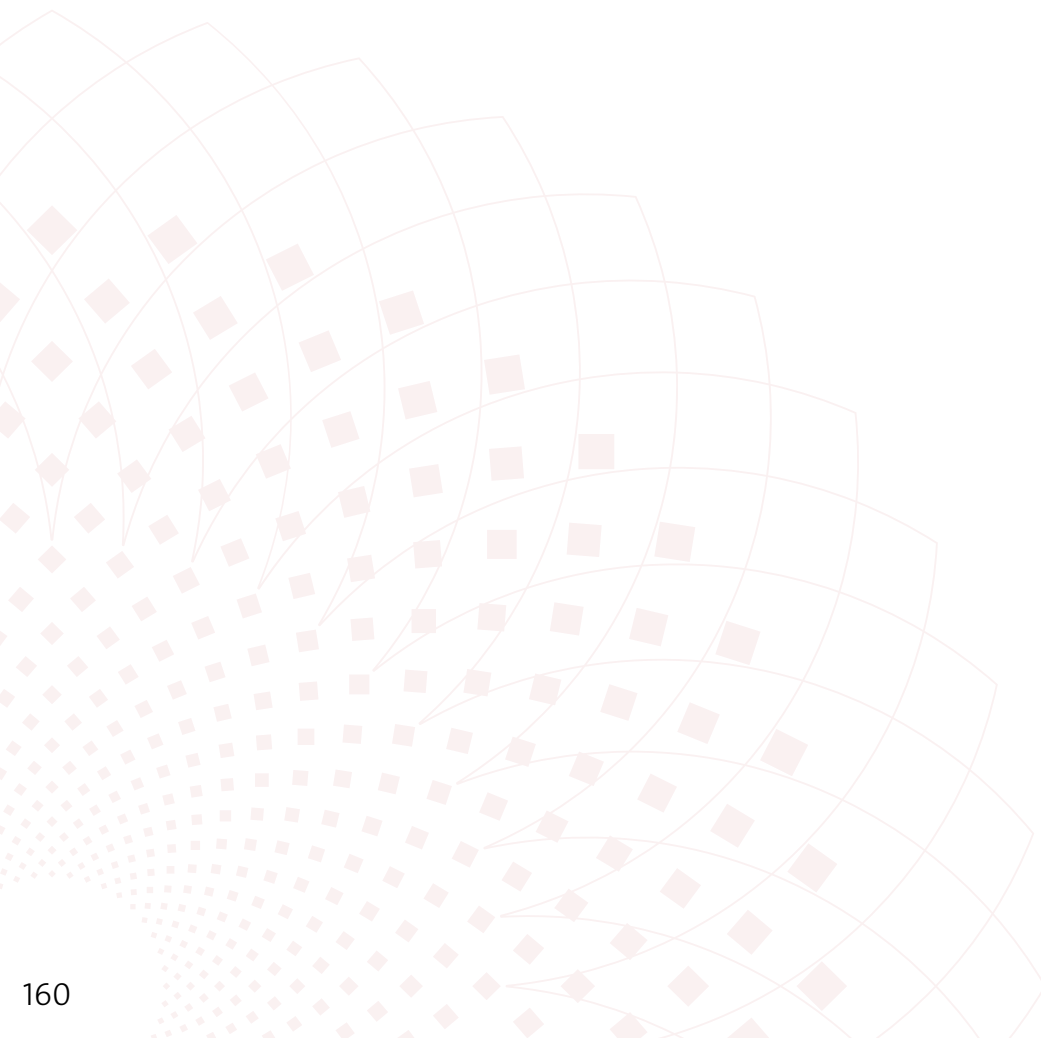
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Figure 64: Social Engagement



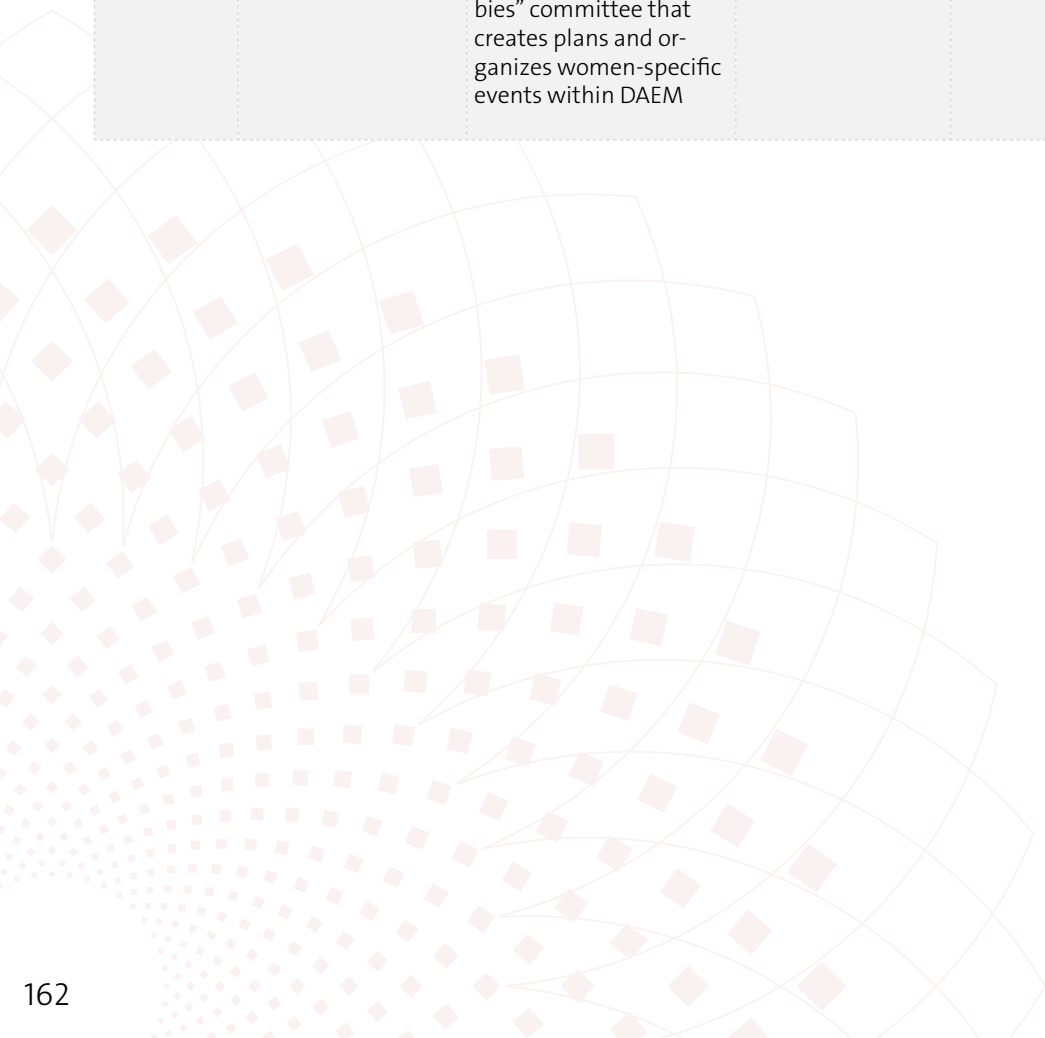
Quantity of total initiatives **XX**

Develop Venues	10.1.1 Activate existing assets and open access to facilities for CHG's activities	<p>Develop partnerships with schools, universities, government entities (i.e. GSA, MoM-RA) and private sector to activate public and private spaces, schools, events halls and such venues to provide access to Community Hobby Groups so they can use the facilities to host events. The 2020 targets include activating 100 venues, achieving ~60% utilization and building 103 facilities</p> <ul style="list-style-type: none"> <li>• Identify and reach agreements with public and private sector</li> <li>• Retrofit and prepare venues to be used by hobby groups</li> <li>• Implement a streamlined booking system to reserve spaces for CHGs</li> <li>• Run marketing campaigns to raise awareness about availability of venues</li> </ul>	<p>The 2020 targets are:</p> <ul style="list-style-type: none"> <li>- 100 venues activated and used 58% of days</li> <li>- 65% satisfaction rate among user clubs</li> </ul>	Yes		DAEM	<ul style="list-style-type: none"> <li>• Number of cultural and artistic activities</li> <li>• Number of out-of-home entertainment activities</li> </ul>
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Drive Participation	10.3.2 Digitalize and automate operations and develop and connect DAEM portal	<p>Develop an integrated online portal for CHGs to register and retrieve important information. The 2020 target is to have a total number of 450 clubs listed on portal directory, 100 venues listed on the portal directory, and a total of 75,000 application downloads</p> <ul style="list-style-type: none"> <li>• Consolidate a database of all active CHGs in KSA and integrate into DAEM portal</li> <li>• Create an integrated mobile application for DAEM) that shares most features of the portal</li> </ul>	<p>The 2020 targets are:</p> <ul style="list-style-type: none"> <li>- 450 clubs and 100 venues listed on portal directory</li> <li>- 270,000 monthly visitors on the portal</li> </ul>	Yes	Quick wins	DAEM	<ul style="list-style-type: none"> <li>• % of population participating in sports</li> <li>• Number of out-of-home entertainment events</li> <li>• Number of cultural and artistic activities</li> </ul>
Drive Participation	10.3.4 Educational and recreational neighborhood clubs	<ul style="list-style-type: none"> <li>• Establish afterschool education and recreational neighborhood clubs to allow citizens to practice their hobbies, develop safe social relations, shift to a healthier life style and deepen their engagement with society. The initiative will increase entertainment and educational neighborhood clubs to 2000 from the current number of 520, and equip each of them with facilities and well-trained staff. These clubs will have a potential reach of 2,000,000 beneficiaries</li> <li>• Identify schools where neighborhood clubs will be established</li> <li>• Equip schools with sports and recreational tools</li> <li>• Identify and train staff and facilitators</li> <li>• Open clubs for participation</li> </ul>	<p>Open 2,000 neighborhood entertainment and educational clubs. Qualify specialized human resources. Increase the participation of students and members of society in sports activities. Increase the number of health-enhancing sports and physical Programs. Increase the number of entertainment Programs. Increase the number of cultural and social activities. Increase the percentage of students and community members involved in cultural and social activities. Execute Programs for amateur students. Hold cultural and art competitions. Qualify students for participation in regional events. Enrolls students in regional activities.</p>	Yes	Quick wins	MoE	<ul style="list-style-type: none"> <li>• % participation in sports</li> <li>• % of people participating in community and neighborhood clubs</li> </ul>

Drive Participation	10.3.5 Increase hobby awareness through events and campaigns	<p>Develop and communicate the value and importance of hobbies (sport, recreation, culture and art) through a wide public educational campaign. The 2020 target is to have had a total of ~10 events, ~24M residents reached through online campaigns, and 210,000 attendees to events.</p> <ul style="list-style-type: none"> <li>• Establish an annual multidisciplinary national competition (arts, sports, gaming, etc.) for amateurs in which they will be representing their cities or communities</li> <li>• Identify and build partnerships with local organizations and celebrities representing various sectors of KSA (academic, cultural, sports, etc.) to leverage their marketing channels and outreach efforts</li> <li>• Periodically conduct surveys on hobbies to assess demand patterns and deepen understanding of demand</li> <li>• Institutionalize an “Active women in hobbies” committee that creates plans and organizes women-specific events within DAEM</li> </ul>	<p>The 2020 targets are:</p> <ul style="list-style-type: none"> <li>- 4 annual events, attracting a total of 80,000 attendees</li> <li>- 12m Saudis and residents reached yearly by Daem’s communication campaigns</li> </ul>	No	-	DAEM	<ul style="list-style-type: none"> <li>• % population participating in sports</li> <li>• Number of cultural and entertainment activities</li> <li>• % of people participating in community and neighborhood clubs</li> </ul>
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Drive Participation	10.3.7 Stimulate hobby groups development by provision of incentives and effective support (e.g. training)	Develop hobby groups by establishing incubators in cities to support hobby groups. The 2020 target is to have 36 incubated clubs in the mentorship program. <ul style="list-style-type: none"> <li>• Develop tiered certificates and special entitlements for clubs to increase exposure and attract sponsors</li> <li>• Create an online toolkit accessible through the VRP (previously DAEM) portal</li> <li>• Develop a volunteer attraction program to ensure CHGs receive adequate support from CHGs</li> <li>• Provide a club-establishment toolkit for individuals interested in creating a hobby group and offering a dedicated helpline</li> <li>• Create recurrent workshops themed by hobby to advise on operations and club management</li> <li>• Launch the DAEM Ambassador Program providing mentor support for CHG</li> </ul>	The 2020 targets are: <ul style="list-style-type: none"> <li>- 36 clubs incubated</li> <li>- with 60% having downloaded online course</li> <li>- and 7.5% of all other clubs having completed one online course</li> </ul>	Yes	-	DAEM	<ul style="list-style-type: none"> <li>• % of population participating in sports</li> <li>• Number of out-of-home entertainment events</li> <li>• Number of cultural and artistic activities</li> </ul>
Develop regulation	10.4.1 Ease the ability to obtain licensing for CHG permits	Reduce the time to register CHGs and CHG events to 20 days. The 2020 target is to reduce the licensing duration to 10 days and have a total of 450 clubs registered. <ul style="list-style-type: none"> <li>• Simplify forms for CHGs to use to fast-track their registration processing time, and leverage stakeholders' expertise for the drafting of event license permits</li> </ul>	The 2020 target: <ul style="list-style-type: none"> <li>- The possible obtaining of permit digitally and in less than 10 days; 450 new hobby clubs officially registered</li> </ul>	No	-	DAEM	<ul style="list-style-type: none"> <li>• Number of out-of-home entertainment</li> <li>• Number of cultural and artistic activities</li> </ul>

Develop sustainable funding model	10.5.1 Strengthen hobby groups' ecosystem through funding	Strengthen the ecosystem of hobby groups through various funding measures. The 2020 target is to have a total of 750 supported hobby clubs, 60% of which remain active for more than a year and to support a cumulative total of ~55 hobby group gatherings. <ul style="list-style-type: none"> <li>• Develop institutional development grants to CHGs across high priority interest categories in hot zones</li> <li>• Design funds including desired objectives, business model, financing model, size, funding duration, operating model and processes</li> <li>• Establish private funding mechanisms via CSR</li> </ul>	The 2020 targets is the support of 750 hobby clubs, with 60% remaining active more than a year after support	Yes	Quick wins	DAEM	<ul style="list-style-type: none"> <li>• # of cultural activities offered</li> <li>• # of out-of-home entertainment events</li> <li>• % of population participating in sports</li> </ul>
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Dimension	VRP KPI affected by initiative	Strategic pillar	Initiative name	Leading entity
Community Engagement	5- Number of NGOs per 1,000 inhabitants	Develop Offering	<ul style="list-style-type: none"> <li>• 10.2.1 Build a platform to enable voluntary participation</li> <li>• 10.2.2 Establishment of the National Center for Non-Profit Sector Development</li> <li>• 10.2.3 Establishment of the Social Innovation Lab</li> <li>• 10.2.5 Internal voluntary tourism in partnership with entrepreneurs</li> </ul>	• MLSD
		Drive Participation	<ul style="list-style-type: none"> <li>• 10.3.1 Building a culture and motivation for volunteering</li> <li>• 10.3.3 Empowerment and organization of voluntary work in the non-profit sector and government</li> <li>• 10.3.6 Organizing and enabling community participation</li> </ul>	• MLSD
Third sector	• Number of NGOs per 1000 inhabitants	Develop Offering	<ul style="list-style-type: none"> <li>• 10.2.2 Establishment of the National Center for Non-Profit Sector Development</li> <li>• 10.2.3 Establishment of the Social Innovation Lab</li> <li>• 10.2.4 Governance and classification of non-profit organizations</li> <li>• 10.2.6 Rehabilitation of the labor force and provision of employment opportunities in the non-profit sector</li> </ul>	• MLSD

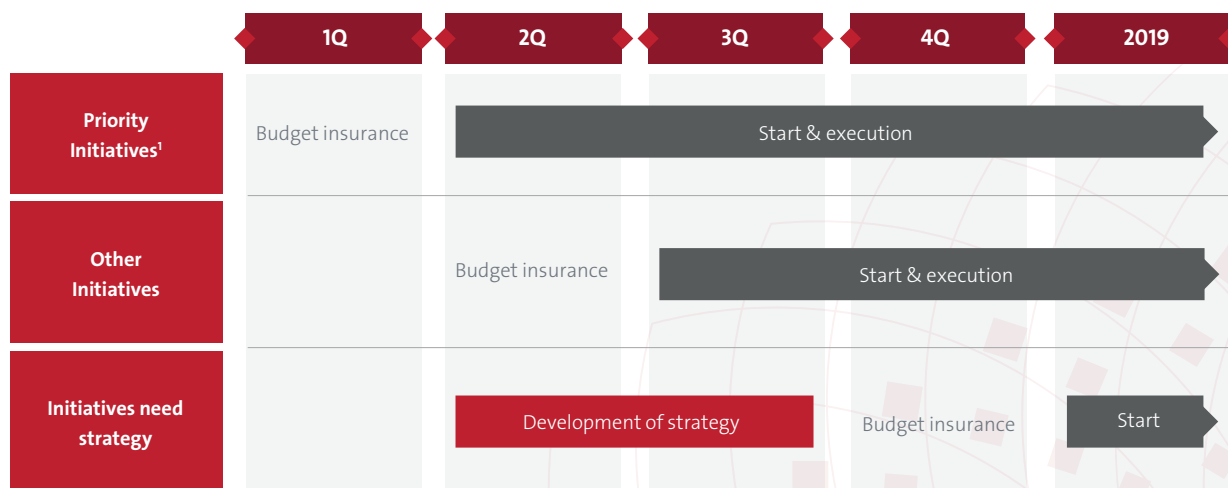
## 5.N Delivery Timeline

After completing the design of the initiatives, we analyzed interdependencies between initiatives to understand the effect on initiative sequencing and timelines. Based on this analysis, we have developed a timeline for each of the initiatives covering the period from 2018 to 2020. As directed by the SMO, Quality of Life initiatives have been categorized into 4 types (game changers, quick-wins, enablers and other initiatives). This categorization has influenced the design of the high-level roadmap timeline, ensuring an appropriate focus on priority initiatives. Apart from the current initiatives (such as the opening of cinemas and the hosting of sports events), priority has been given to the implementation of quick-wins and priority initiatives. These initiatives will progress at a faster pace in early 2018. In the second half of 2018, priority will be also given to the other initiatives. The game changers will also gradually enter the implementation phase depending on their level of readiness. More precise timelines were designed for each initiative (see section below).

As for initiatives requiring advisory studies, such as the majority of Ministry of Interior initiatives, they will be submitted to the Permanent Working Group for the disbursement of the required budget for studies, which will take place in the second quarter of 2018. Initiatives will start in the fourth quarter of 2018. It should be noted that the timeline of Ministry of Interior's initiatives is not precise at the current moment, wherein the consulting company develops plans for all initiatives.

In terms of recreational initiatives, the Program will work towards developing a strategy and then identify the owner of strategy implementation. Therefore, recreational initiatives will be implemented in the first quarter of 2019.

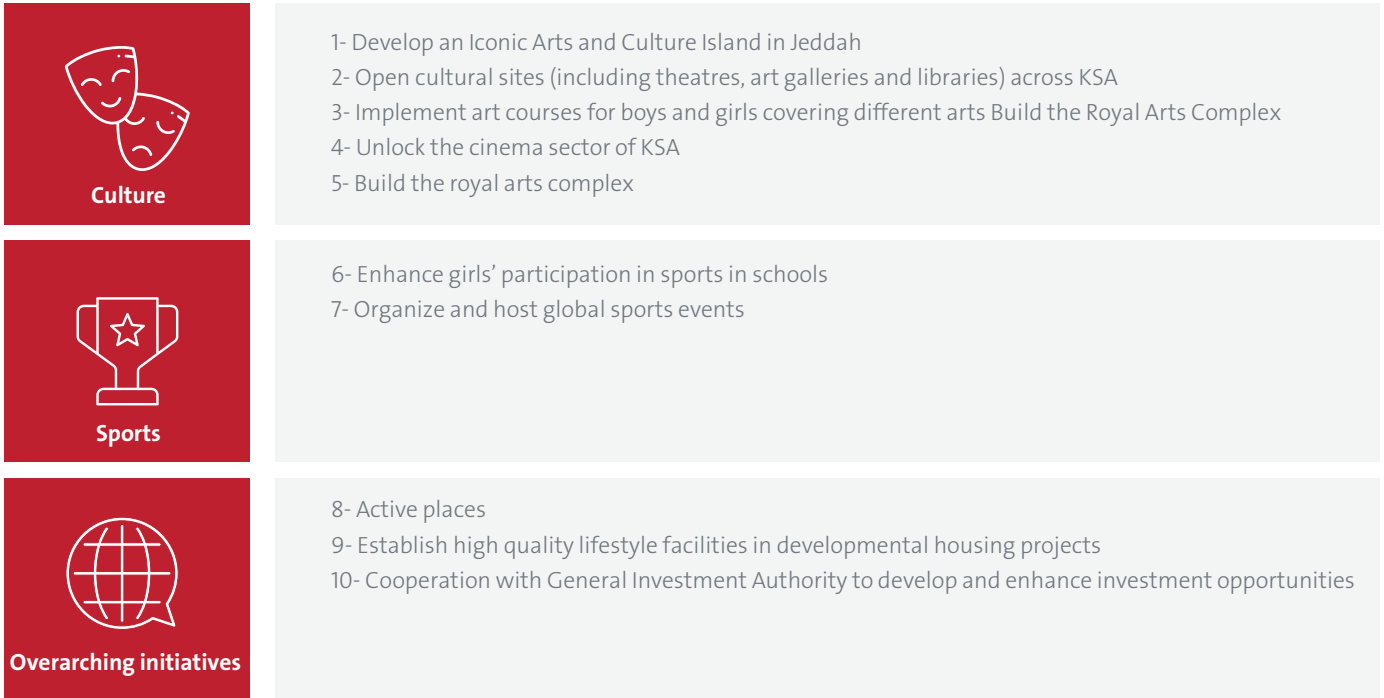
Figure 65: High-level initiative roadmap



1. Game changers, priority initiatives and quick wins 2. recreation and at home entertainment and new initiatives

**Figure 66: Game changers**

10 Game changers have been identified to transform the quality of life



**Figure 67: Quick wins**

13 Game changers were identified to accelerate the launch of the program



1-The initiatives of the entertainment Authority are classified as priority initiatives as they will activate the sector by developing a plan for implementation of options and designing systems and a governance framework for the sector

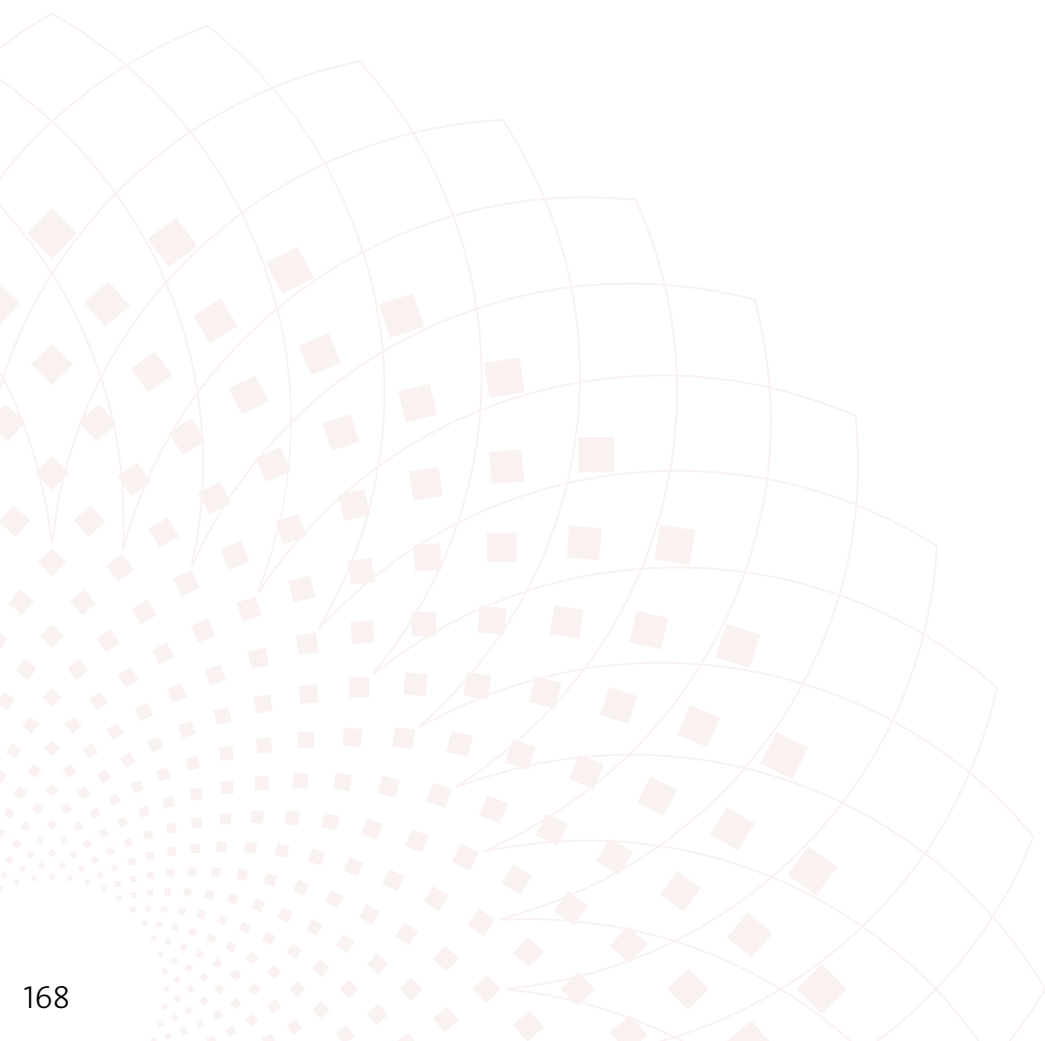
**Figure 68: 27 priority initiatives**

27 priority initiatives were identified to facilitate overall program delivery

 <p><b>Entertainment</b></p>	<ul style="list-style-type: none"> <li>• Build a sustainable pipeline of workers in the entertainment sector</li> <li>• Develop at home entertainment blueprint</li> <li>• Develop comprehensive at home entertainment sector governance and regulatory framework</li> <li>• Accelerator for the entertainment works</li> <li>• Design comprehensive out-of-home entertainment laws &amp; governance</li> <li>• Give access to all entertainment options (including theme parks and live concert)</li> <li>• Fund and incentive investment</li> </ul>	 <p><b>Overarching initiatives</b></p>	<ul style="list-style-type: none"> <li>• Establishment of VRP office</li> <li>• Laws and regulations initiative</li> <li>• Develop model police stations and build the infrastructure</li> <li>• Develop security installations</li> <li>• Develop systems and programs in police stations</li> <li>• “MAAN” initiatives for prisoner rehabilitation and training</li> <li>• Initiatives to promote transparency and support decision making in combating crime</li> <li>• Initiative for the central operations center 911</li> <li>• Implement integrated lifestyle platform, (calendar of events, information on facilities, licensing, general rules, and regulations, ticket sales)</li> </ul>
 <p><b>Recreation</b></p>	<ul style="list-style-type: none"> <li>• Attract foreign investors and incentivize offering process</li> <li>• Develop comprehensive sector governance and regulatory framework</li> <li>• Offer educational curricula To Saudi nationals</li> </ul>	 <p><b>Sports</b></p>	<ul style="list-style-type: none"> <li>• Develop sports academies</li> <li>• Develop &amp; active sports facilities</li> <li>• Active society</li> </ul>
 <p><b>Culture</b></p>	<ul style="list-style-type: none"> <li>• Promote and develop cinema sector in KSA</li> <li>• Develop comprehensive culture sector governance and regulatory framework</li> <li>• Establish national cultural funds supporting all cultural sub-sector</li> </ul>	 <p><b>Community participation</b></p>	<ul style="list-style-type: none"> <li>• Facilitate the ability to obtain permits for hobby groups</li> </ul>



# Game Changers



## 6 Game changers

### 6.A Selecting Game changers

A number of initiatives have been defined as game changers based on 4 criteria. All relevant entities will seek to implement all the initiatives; however, game changers will receive special attention and support from the leadership of the Program to ensure their successful and timely completion.

The selection of game changers is based on 4 criteria:

- Direct relationship and impact on Program and entity KPIs and objectives
- Magnitude of the expected impact on citizen experience
- Reputation of KSA as lifestyle hub
- Magnitude of expected economic and social impact

In general, the identified game changers cover all VRP objectives.

The selected game changers are:

#### 1. Cooperation with SAGIA to develop and enhance investment opportunities

This initiative aims to attract foreign investment opportunities in Quality of Life VRP 2020 initiatives via cooperation with SAGIA, through a journey that begins by evaluating and supporting the marketing of a set of initiatives among investors, then implementing procedures relating to investment proposals, and finally supporting through the post-award phase (after care).

The Program will be assigned a special team from SAGIA to inaugurate the phases of the investment journey. In addition, an investment committee will be formed to oversee the development and implementation of all investment opportunities.

The approach to attract investment will be followed across two main work streams: “Activating and promoting the targeted sector” and “structuring investment opportunities.”

Through the “activation and promotion of the targeted sector,” the Investment Committee will carry out activities to promote investments and generate potential investment opportunities. “Structuring investment opportunities” will include four main activities: Identify investments related to Quality of Life VRP 2020 across KSA; assess and prepare investment packages; prepare detailed analyses and test opportunities in the market.

#### 2. Develop an Iconic Arts and Culture Island in Jeddah

The objective is to develop an iconic Island for Arts and Culture in Jeddah, contributing to the enhancement of the international perception of Saudi Arabia. Not only would the construction be a first-of-a-kind for Saudi Arabia, but the landmark’s iconicity would also jump-start international recognition linked to Saudi Arabian architecture. The vast complex will encompass several spaces: concert hall (~1,200 seats), Theatre (~600 seats), Recital hall (~400 seats), Multi-purpose hall (~2,000 seats), a botanic garden and a museum. The complex will be built on two separate man-made islands and will be connected with a bridge that will serve as the botanic garden.

#### 3. Open cultural sites (including theatres, art galleries and libraries) across KSA

The objective is to develop cultural infrastructure across all regions of KSA to be in line with global benchmarks. Existing cultural infrastructure requires further improvements to enable cultural offerings. The scope includes the construction and/or refurbishment of 50 theatres, 1



concert hall, 4 cultural cinemas, and 13 public libraries by 2020. Ultimately, this initiative will develop 1,487 venues, that will in turn offer more than 46k cultural activities such as exhibitions, concerts, and performances. In total, these additional venues and activities would enable the offering of cultural activities to reach approximately 200k+ yearly visits by 2020. Enabling cultural offerings will generate both economic and social impact, because it will increase the cultural interest stemming from the Saudi population. This in turn will lead to additional heritage and cultural spending, therefore moving from 0.11% to 0.12% of yearly consumer expenditure. Due to the nature of the venues being built and the activities being conducted, the initiative's social impact is more expansive than simply offering additional lifestyle opportunities. This initiative will de facto nurture the Saudi population's cultural interest, which currently possesses very limited opportunities to be satiated. Furthermore, the initiative will allow the Saudi population to foster artists that may aspire to pursue a career in the country or go beyond borders and propagate Saudi culture abroad.

#### 4. Unlock the cinema sector of KSA

The aim is to develop, support and implement the strategy to launch the film sector in the KSA. Cinemas are the go-to venue when looking for entertainment opportunities. Yet, there are currently no cinemas present across the country. Re-introducing them would act as a catalyst for the overall development of the entertainment sector. The scope is to create a sound environment that will attract national and international players to invest in the construction of 45 cinemas across the 13 regions of Saudi Arabia by 2020. Rendering cinemas available once again, is expected to foster over 3.6M yearly visits by 2020. By re-introducing cinemas, this initiative will play a paramount role in increasing the out-of-home entertainment spending from 0.4% to 0.5% by 2020. Additionally, this initiative will contribute to the development of the local movie industry, which in turn will positively affect the international perception of the country by enabling it to export locally-produced content to Arab and non-Arab countries, as well as participate in international festivals and conventions.

#### 5. Implement art courses for male and female students covering different arts

This initiative aims to provide art classes for male and female students in all schools across the KSA. This will have a long-term impact in terms of raising a generation with a cultivated taste for cultural arts and various artistic skills—a generation that savors and participates in cultural activities in KSA in the upcoming years.

This initiative will also develop a number of qualified teachers who actively participate in educational exhibitions, conferences and international and local events to sharpen their art teaching skills. More broadly, this initiative will help introduce Saudi art and folklore to the international cultural scene.

The initiative also aims to transform schools into learning communities that focus on active and collaborative learning and teamwork through the development of art and culture curricula and the provision of appropriate facilities to host the various categories of culture and arts including digital, visual and cultural arts.

## 6. Build the Royal Art Complex

This initiative aims to build cities in Riyadh centered around a government-owned building that houses the Opera House and 3 multipurpose halls. The goal is to raise awareness about arts and culture in the KSA, particularly in Riyadh, and subsequently increase household spending on arts and culture. The initiative targets the completion of the complex by 2020 to start selling 450,000 tickets annually for various cultural performances as early as 2021. The successful implementation of this initiative will help to increase the number of cultural and recreational activities among Saudi citizens of different age groups and strengthen the Kingdom's presence in the international and local cultural scenes.

## 7. Organize and host global sports events

This initiative aims to transform the KSA into a hub for sports events in the GCC and the Middle East by organizing and/or hosting numerous events worldwide in various sports and in different regions.

A key element of the initiative is to build partnerships to host international events, some of which have already been signed: The International Chess Championship, the Race of Champions, the Mohammed Ali Boxing Cup, the Unmanned Aerial Association, and the Takeshi Castle. The initiative will enable, fund and support national federations to establish, organize and host sports events, including popular activities to accompany events and promote sports participation.

## 8. Enhance girls' participation in sports in schools

The objective of the initiative is to design and implement physical education (PE) programs for females in the public education system. Currently, only 350 K12 female schools are equipped with well-maintained gyms, reaching approximately only 60,000 girls. The initiative aims to build well equipped gyms in 1500 schools, reaching approximately 350,000 girls; qualify and recruit 7,500 PE teachers; and develop and roll out PE curricula for girls at all education levels. This initiative will require close cooperation with Tatweer Company for Educational Services (T4du) in building the necessary infrastructure and developing PE curricula. Through developing PE classes for girls in schools, this initiative will help achieve the broader goal of increasing female participation in weekly physical activity from 28% to 42%.

## 9. Establish high-quality lifestyle facilities in developmental housing projects

The objective of this initiative is to develop public facilities and establish sustainable community centers with green spaces, sports areas, outdoor spaces and community centers housing assembly halls to host the residents' sports, recreational, cultural and artistic activities. Family members can also use the facilities for social activities such as holidays, national day celebra

tions, etc. This will reinforce family and community ties among the community members in the neighborhood.

These centers will be operated and managed by the private sector according to the specifications set by MoHo. This is to ensure the quality of the services provided to individuals, as well as to benefit from the private sector experience in using such sites for social activities, whether recreational, cultural, artistic, athletic, and otherwise.

## 10. Active Places

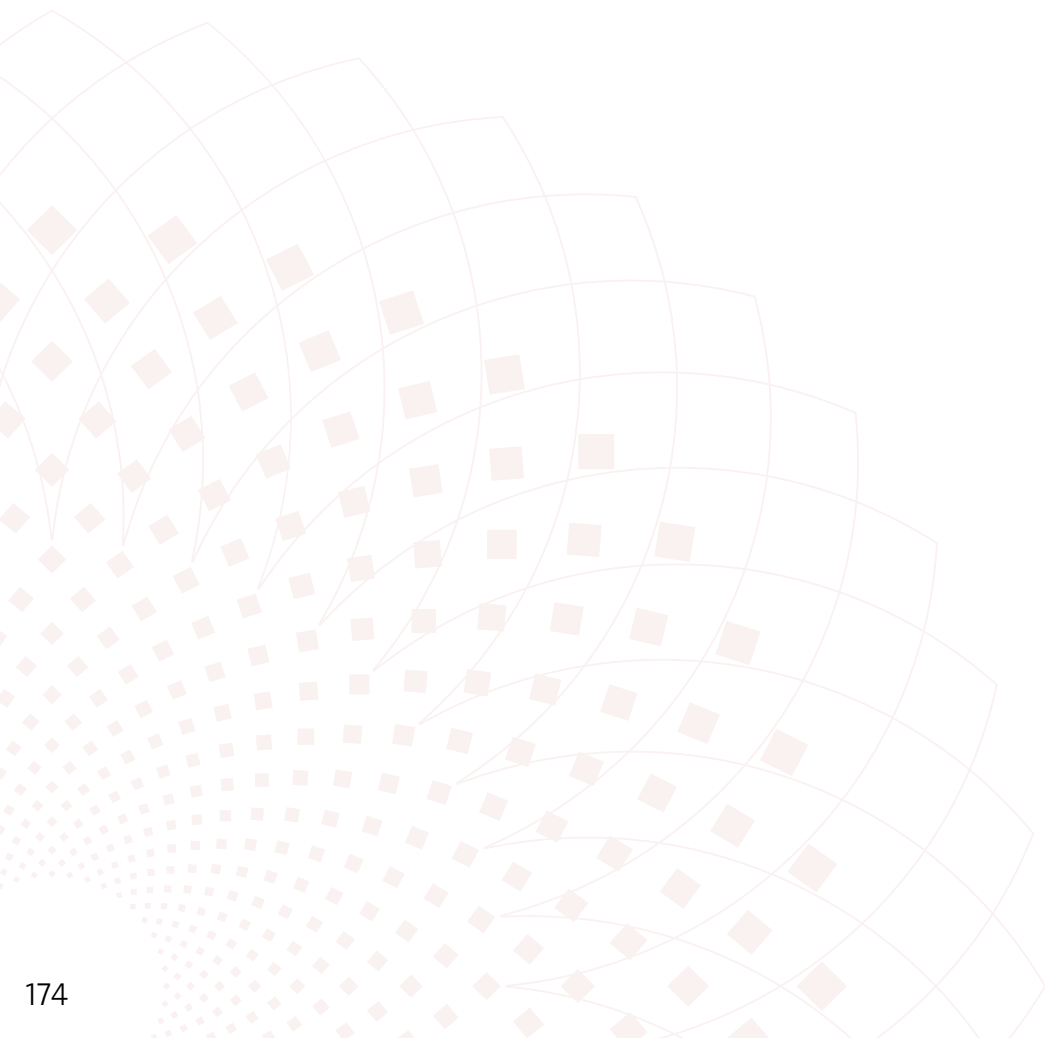
The objective of this initiative is to provide venues for all residents to access and participate in sports and physical activities. Saudi Arabia currently has less than 10% venues per million people than Germany. The initiative’s scope includes all public spaces, with specific plans developed related to schools, universities, urban environments such as parks and plazas, existing sports locations that are not open to the public, and places of employment. In the next few years, the initiative targets to reach 30,000 schools and universities, at least 150 companies, at least 150 sports complexes, and urban areas in each of the Saudi regions. In addition to identifying and opening up public spaces, the program will arrange more than 300 events to encourage people to participate in physical activity, inspired by benchmarks such as Malaysia National Sports Day. This initiative will help transform the areas throughout the Kingdom into “active venues” to achieve the broader goal of increasing the country’s weekly sports participation from 13% to 18% by 2020

Initiatives identified as game changers can meet several or all of these criteria.

Pillars	Owner	Initiative name	Reason for selection	Expected impact
Drive Participation	MoE	6-3-2 Enhance girls’ participation in sports in schools	Milestone change in regulation requires the necessary infrastructure and support to drive social impact	2,500 qualified instructors by 2020 (baseline 2017: 46)
Develop Venues	GCA	7-1-4 Build an Arts and Culture Island in Jeddah	Iconic landmark that will drive arts and culture performances, and improve the Kingdom’s reputation globally	Saudi culture and heritage shared on a global level  Project viewed as an iconic cultural destination for both regional and international visitors
Develop Venues	GCA	6-1-7 Open cultural sites (including theatres, art galleries and libraries) across the Kingdom	Crucial to developing the arts and culture sector and offerings in the Kingdom	Development of 16 theatres, 4 cinemas, 140 art galleries (baseline 2017 for all: 0)
Deliver Offerings	GCAM	7.2.5 Unlock the cinema sector in Saudi Arabia	Iconic social and artistic move for the country; high existing consumption demand	Diversify entertainment offerings

Pillars	Owner	Initiative name	Reason for selection	Expected impact
Develop venues	MoHo	2.1.11 Establish high-quality lifestyle facilities in developmental housing projects	Use such sites to activate social activities whether recreational, cultural, artistic or sports	Raise the citizens' standard of living and well-being in residential communities. - Achieve integration of the different entities' roles and increase local content. - Create new jobs within residential communities. Increase the attractiveness of residential developments, especially in places outside city centers.
Develop venues	MOCI	7.1.3 Build the Royal Art Complex	Iconic landmark that will drive arts and culture performances, and improve the Kingdom's contribution to the international and local cultural scene	<ul style="list-style-type: none"> <li>Royal Arts Complex to be fully built by the end of 2020</li> <li>Around 450,000 tickets to be sold in 2021 <ul style="list-style-type: none"> <li>Increase cultural and recreational activities among Saudi citizens of different age groups</li> </ul> </li> </ul>
Drive participation	MoE	6.3.1 Implement art courses for male and female students covering different arts	Lead change in the perception of arts and culture by the younger generations; this will drive higher participation in cultural activities and push Saudi art into the international cultural scene	<ul style="list-style-type: none"> <li>An artistically and professionally educated generation in all forms of art</li> <li>Qualified teachers who actively participate in educational exhibitions, conferences and international and local events to sharpen their art teaching skills.</li> </ul>
Drive participation	GSA	6.3.12 Organize and host global sports events	Strengthen the reputation of KSA	Host 5 to 10 major international sports events annually in KSA
Develop venues	GSA	6-1-1 Active Places:	Transforming cities into active and healthy places to live is a key dimension to improving the quality of life	80% of universities launch mass-participation programs Increase citizens' and residents' participation in sports activities Increase access and variety of sports available in the KSA
Develop a sustainable funding model	QoL VRP 2020	2-5-11 Cooperate with SAGIA to promote and develop investment opportunities	Because of their significant economic impact on ensuring sustainability and quality of projects	<ul style="list-style-type: none"> <li>More than 50 opportunities to attract investment</li> <li>Reduce government spending</li> <li>Maximize the attractiveness of investment opportunities for the private sector</li> <li>Maximize social and economic impact</li> <li>Prioritize advanced investments</li> </ul> Maximize competition in the private sector to ensure quality and sustainability

# Enablers



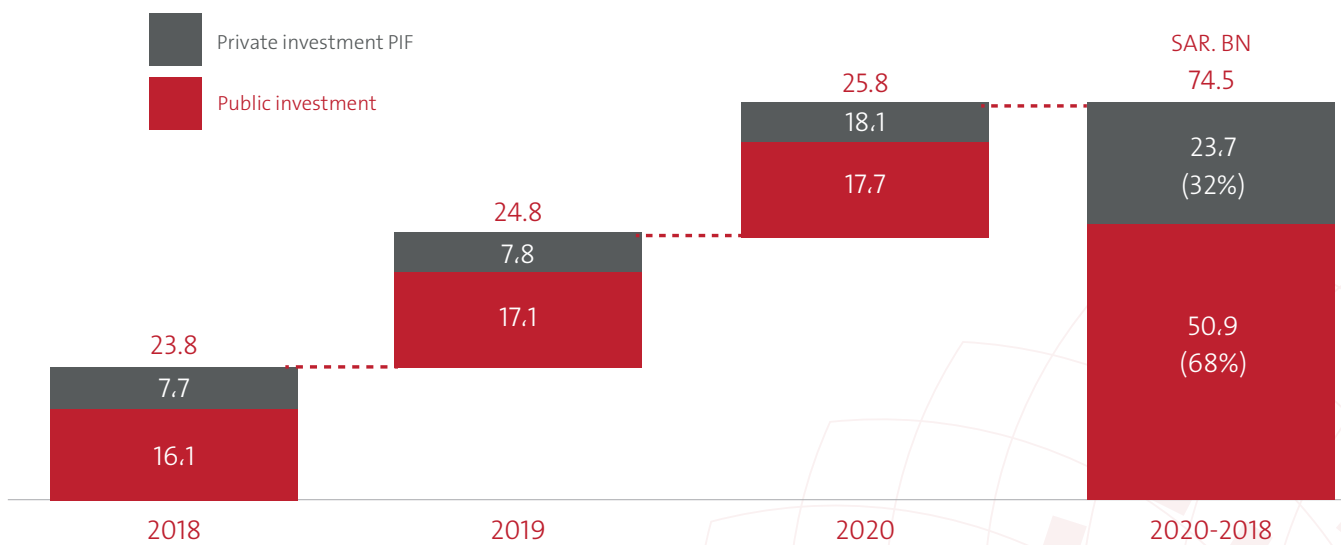
## 7 Enablers

### 7.A Portfolio Budget Analysis

This section details out the overall funding needs of the Program and the breakdown of the government budget requested by Program entities. This only includes budget that is related to the areas of direct Program ownership, such as entertainment, sports, and culture. For other areas that are part of the Program, but are also owned by other Programs (e.g. health, safety and security), we have excluded the required budgets here to avoid double counting with other Programs.

Delivering the Program's initiatives to enhance quality of life will require both capital expenditure and operational expenditure with funding coming from the public sector, local private sector, and global investors. Initially, the Program will require public sector investments to help spur growth. Over time, the Program strategy is to transfer an increasing share of investment and spending to private investors. The overall breakdown of funding requirements is summarized in the chart below.

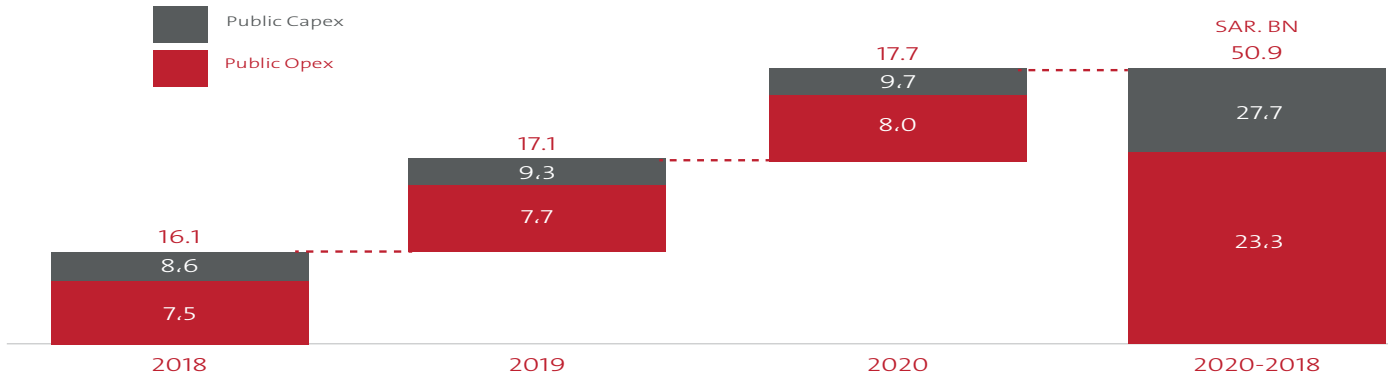
**Figure 69: Funding breakdown by type and source**



NOTE: Totals may not match due to rounded numbers

Note: The Public Investment Fund has announced a SAR 10 billion entertainment fund to be invested in the sector

**Figure 70: Funding breakdown by type and source**



NOTE: Totals may not match due to rounded numbers  
 Note: The Public Investment Fund has announced a SAR 10 billion entertainment fund to be invested in the sector

Capital expenditure constitutes investments needed to develop the necessary lasting infrastructure to enable the livability and lifestyle offerings, e.g. construction of theme parks, equipment for school gyms, and refurbishment of libraries. This will be covered by 3 sources of funds:

1. The government’s direct investment through the financing of Quality of Life VRP 2020’s initiatives
2. The government’s investment through other vehicles, e.g. PIF’s entertainment funds
3. Private investment, e.g. from investors or theme park operators

Operational expenditure, on the other hand, enables the broader sector, e.g. marketing newly developed lifestyle offerings, providing grants to students studying certain fields related to lifestyle. This will be covered by 2 sources of funds:

- Government direct expenditure through the financing of QoL VRP 2020’s initiatives
- Potentially, other private sources of funding, e.g. private company CSR as is common in other countries (not yet assessed)

It is difficult to determine the contribution of the Public Investment Fund to the total private investment at present. This is due to the method of calculation, which was based on the difference between public investment (bottom-up initiatives) and the total investment needed (top-bottom). The Program believes that the Public Investment Fund is a significant source of investment and thus, a chair of the Investment Committee has been assigned to the Fund’s representative. The value of Fund’s contribution can be thus determined after the activation of the Investment Committee.

**Figure 71: Funding sources**



■ Included in VRPs portfolio budget  
■ Included in VRPs portfolio budget, but included in macro-economic impact assessment  
 Not estimated for now



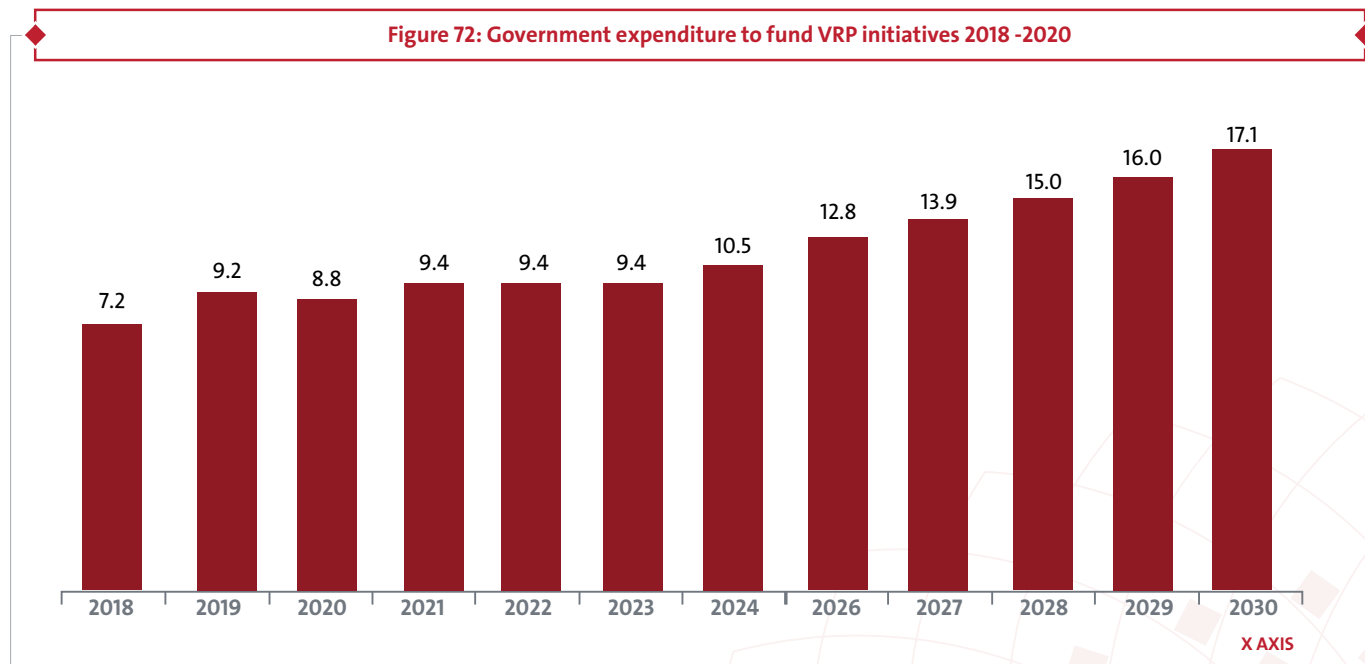
Capital expenditure (lines 1, 2. and 3. above) accounts for the majority of the amount required to develop the sectors. The share of this amount covered by the public sector is expected to gradually decrease over time, while the share of CAPEX covered by the private sector is expected to increase, as summarized in the graph below.

### Expected evolution of capital expenditure funding sources

The government’s OPEX will increase over time, due to inflation and the need to manage government services in a fast-growing sector. While the total OPEX are expected to double by 2030, we should consider that the sectors addressed by this Program grow by 6 times their volume today, which represents more efficient government expenditures per one dollar of the GDP in 2030.

The delivery plan includes expected operational expenditures for 2020 and beyond. This amount has been assessed as necessary to enable it to fully manage initiatives, but can be revised in the future in the event of redefining priorities or redefining the scope. This commitment is not an obligation, but will be necessary to complete initiatives taking into account current scope and objectives.

Figure 72: Government expenditure to fund VRP initiatives 2018 -2020

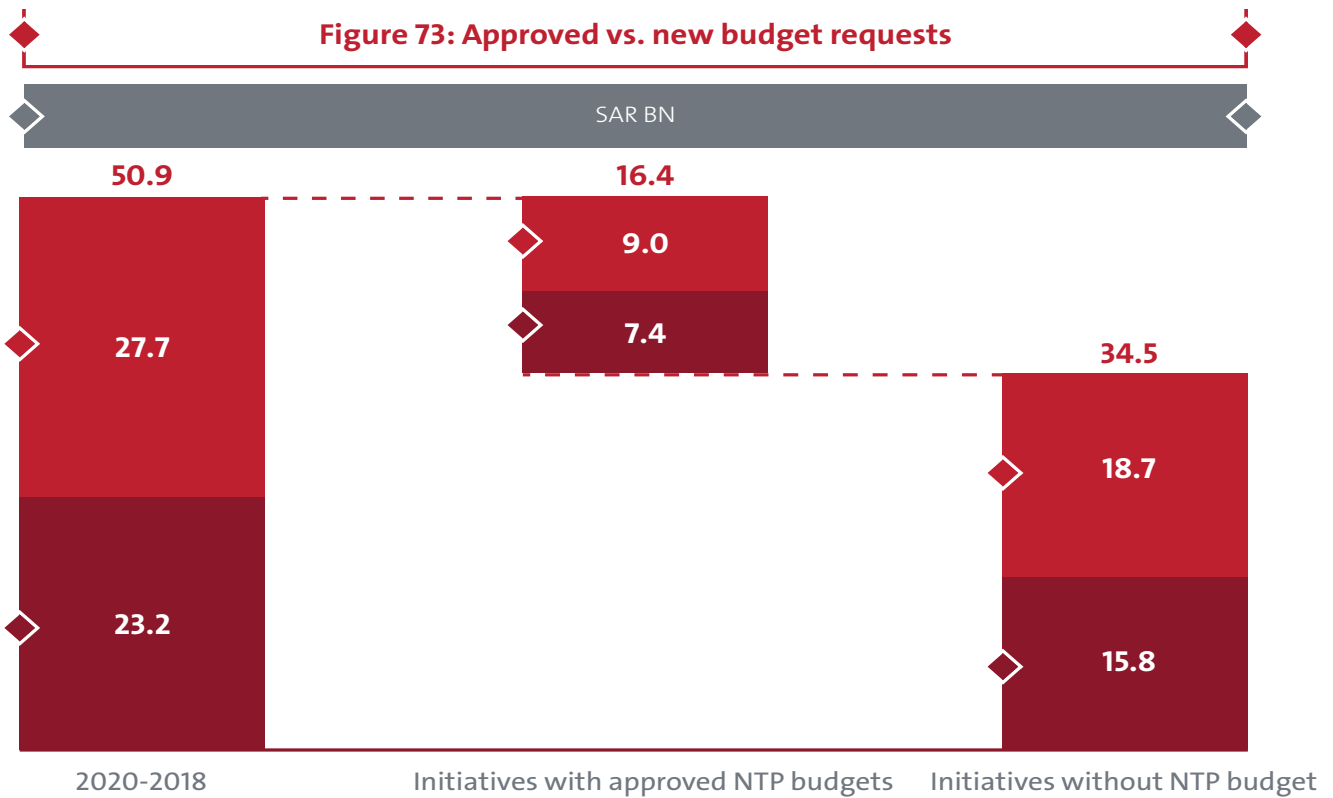


The budget submitted by the Quality of Life Program 2020 comprises requests from entities to the Ministry of Finance to fund government direct capital expenditures (line 1. above) and government direct operational expenditure (line 4. above). It excludes funding through other government vehicles, such as PIF’s Entertainment Fund and from private investors and potential private contributions to operational expenses.

The relatively higher share of capital expenditure between 2018 and 2022 is explained by the need to develop core infrastructure in nascent sectors. In time, the private sector will take over more of the investment burden, but at first the government needs to play a stronger role to catalyze broader private investment.

Out of the overall funding requirement, approximately two thirds will come from government budgets. About a third of that amount requested has already been approved as part of previous government efforts. It is natural that the share of initiatives with previously approved budgets is lower than in some other programs because many of the entities and initiatives in the Quality of Life Program 2020 have only been established in the last couple of years.

**Figure 73: Approved vs. new budget requests**



NOTE: Totals may not match due to rounded numbers

Note: The Public Investment Fund has announced a SAR 10 billion entertainment fund to be invested in the sector

CAPEX ■ OPEX ■

### Incentivize private sector participation

Four factors were identified to incentivize private sector investments. The implementation of these four factors is essential to facilitate roll out and reduce the burden on private sector investments.

The four factors identified to incentivize the private sector investments are:

- Provide early public sector investments in key areas
- Offer financial incentives to make up for foregone profits.
- Provide non-financial enablers to limit investment risks
- Manage private sector participation

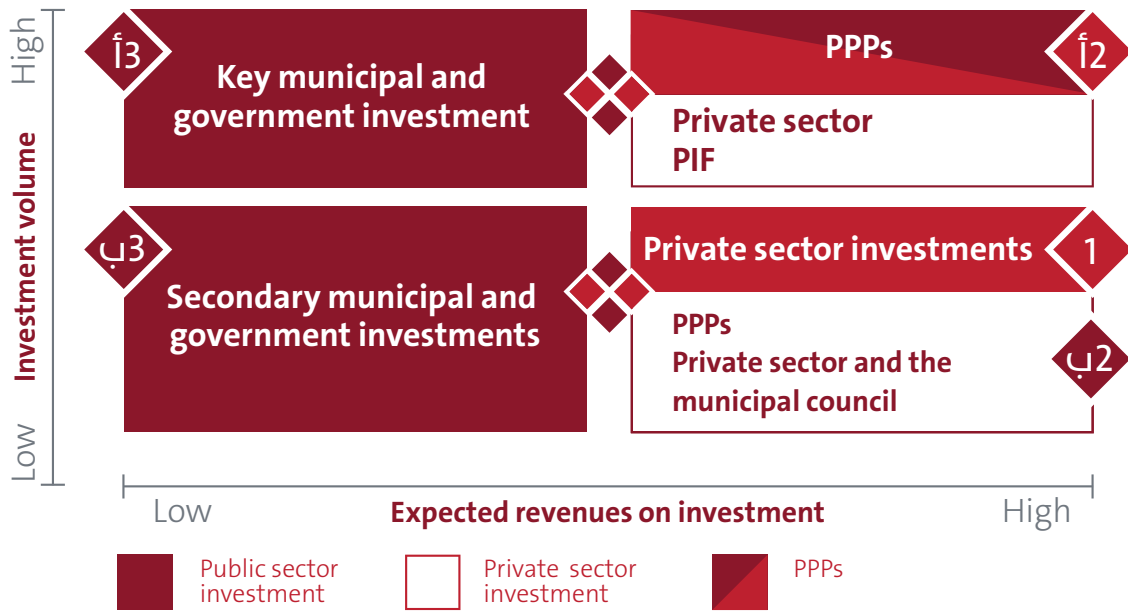
#### 1. Provide early public sector investments in the key areas

The program will ensure that private sector participation is limited to areas where the private sector does not contribute to the expected CAPEX and financial returns (e.g. zoos and aquariums, golf courses, theaters, music venues, art galleries and indoor spaces). Public sector investments may also be used to showcase the sector's potential (e.g. development projects, the Opera House, museums, water parks, camel/horse racetracks, mixed-use sports facilities, public libraries and creative centers).

It is expected for the private sector investments to contribute significantly to medium-size projects with high expected returns (e.g. cinemas, cafés, family entertainment centers, restaurants, and gyms).

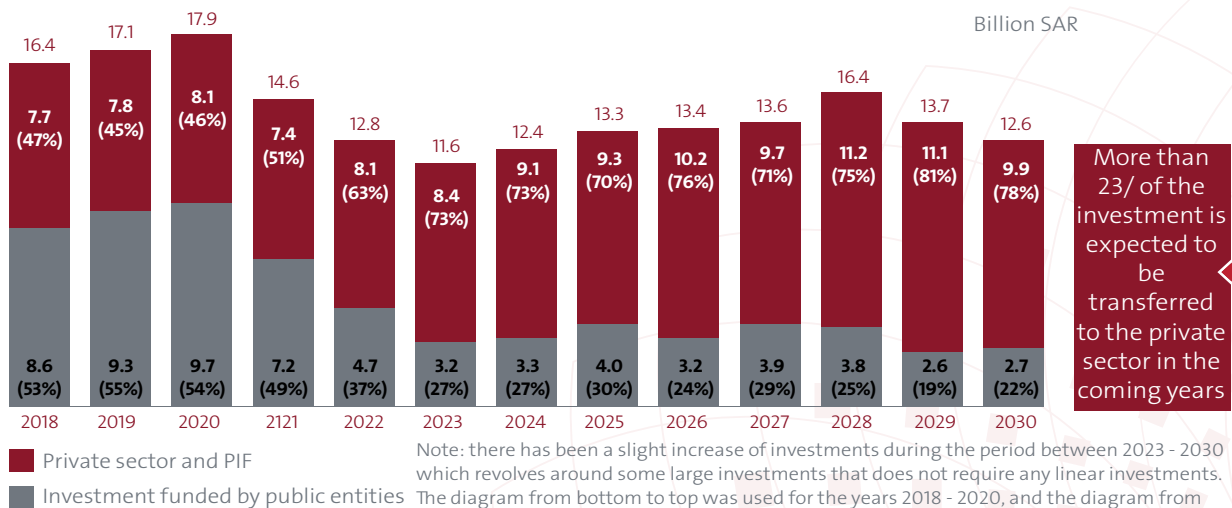
PPP's will be essential in large projects even with an increased estimated return (e.g. race tracks, stadiums, concert halls, theme parks, aquariums, malls, etc.)

**Figure 74: Fund for the private sector to be used for suitable fields**



The public sector's role will be more important in the early years, where the opportunity attractiveness need to be showcased. By 2029, the share of public sector investments will decrease gradually to less than 20%.

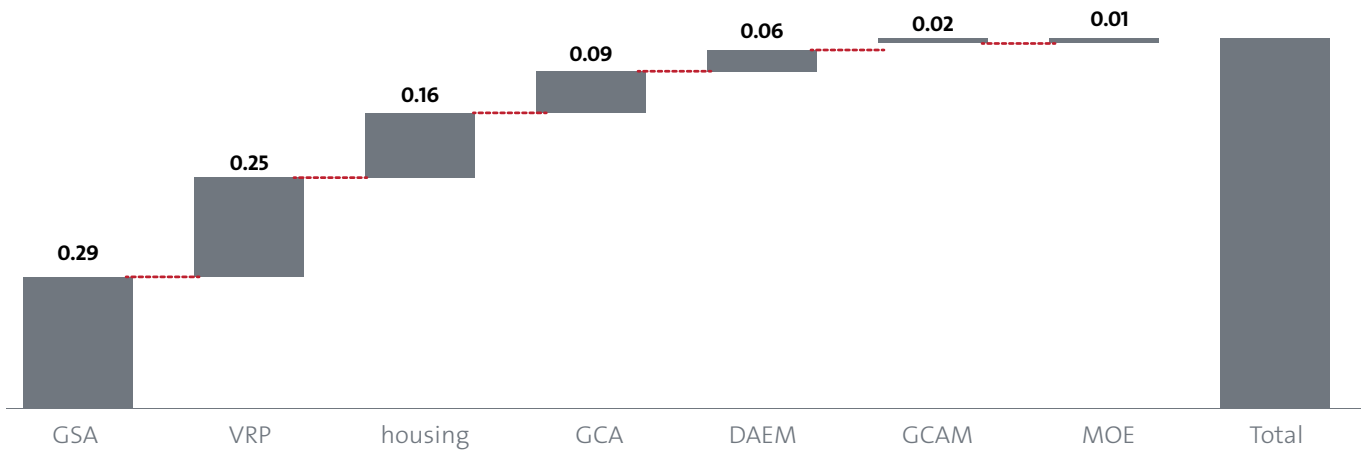
**Figure 75: Share of public and private investments**



Note: there has been a slight increase of investments during the period between 2023 - 2030 which revolves around some large investments that does not require any linear investments. The diagram from bottom to top was used for the years 2018 - 2020, and the diagram from top to bottom was used for the years 2021 - 2030. Main assumptions: Inflation was put into perspective when the 2018 - 2020 budget was determined.

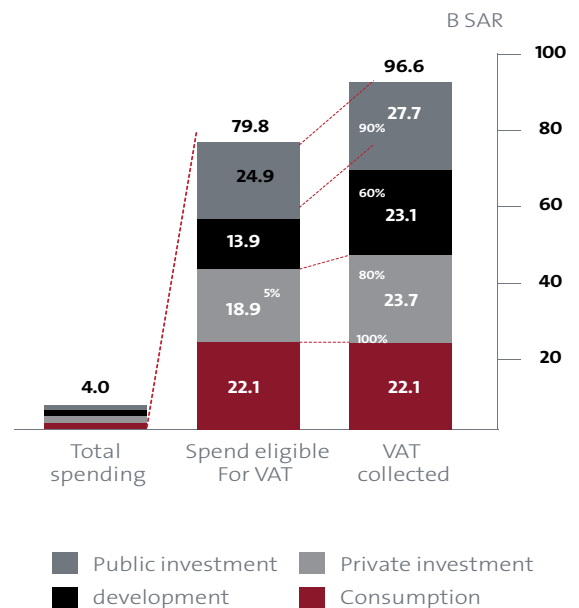
This investment will generate income for the government sectors in the following years.

**Figure 76: Non-oil government revenues. 2018-2020- (SAR bn)**



**Figure 77: VAT revenues are estimated at around SAR 4 billion for 2018 -2020**

Type of spend	eligible for VAT %	Rational
Consumption	100%	All subject to VAT
Public investment	90%	Mostly developed through contractors (i.e. subject to VAT)
Private investment	80%	Higher percentage of in-house paid salaries
Developed	60%	Includes more salaries



2. Offer financial incentives to make up for foregone profits.

The Program will work towards offsetting some financial barriers by providing financial incentives for the private sector participation. Three funds will play an important role in implementing these incentives.

Each fund will have specific objectives according to its type:

Sports Fund

- Equity investments to incubate sports-themed businesses.
- Grants to start and develop sports companies and clubs
- Favorable loans to sports companies and clubs
- Promotion of sports events

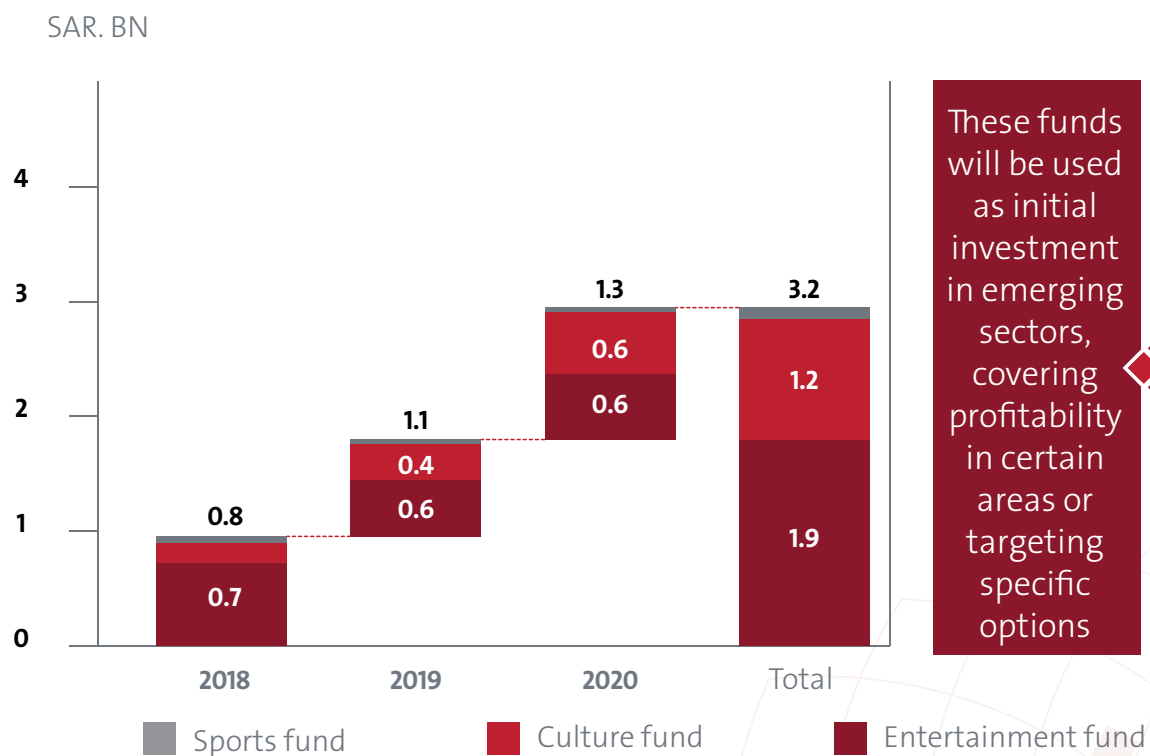
## Cultural Fund

- Grants offered to artists and institutions within each sub-sector
- Funds to encourage cultural innovation, production and dissemination
- Support amateur and professional artistic talent

## Entertainment Fund

- Funds to encourage investments in regions with lower commercial attractiveness
- Funds to develop an SME ecosystem to promote content localization
- The elimination of non-financial barriers will be essential to promote private sector investments

◆ **Figure 78: The Program launched three funds for financial incentives valued at SAR 3 billion.** ◆



### 3. Provide non-financial enablers to limit investment risks

The VRP ensures the elimination of non-financial barriers that limit private sector participation.

These barriers include regulatory risks, the legal framework, and social acceptance.

**Figure 79: The elimination of non-financial barriers will be essential to promote private sector investments**



#### 4. Manage private sector participation

The VRP will ensure a process that actively and systemically identifies and maps investors to investment opportunities. Some of the main tools include: funds to incentivize private sector investments, a committee on investments at the VRP 2020 Office, and direct cooperation with SAGIA.

SAGIA has previously helped incentivize private sector participation. A team from SAGIA was specifically assigned to support the Quality of Life VRP 2020. The team works regularly from the VRP site and supports two parallel work streams. First: Structuring investment opportunities, including the selection, prioritization, analysis, detailing and collection thereof, testing their feasibility with investors and publishing them in the investment atlas. Second: Activating the sector, including the development of the sector's value proposition, engaging with the stakeholder, and providing support with the selection of investors.

# Appendix





## 8.A. Quality of Life aspirations for major Saudi cities

### Riyadh

Modern metropolis with distinctive cultural heritage

#### Overview

##### Riyadh

5,86 M Inhabitants



##### Particularly famous for:

- Financial District
- Developed infrastructures
- Major football clubs
- Wadi Hanifah natural park
- Horse Centers at Dirab

Riyadh is both a modern metropolis with urban construction styles and a historical and cultural city with distinctive heritage and cultural sites

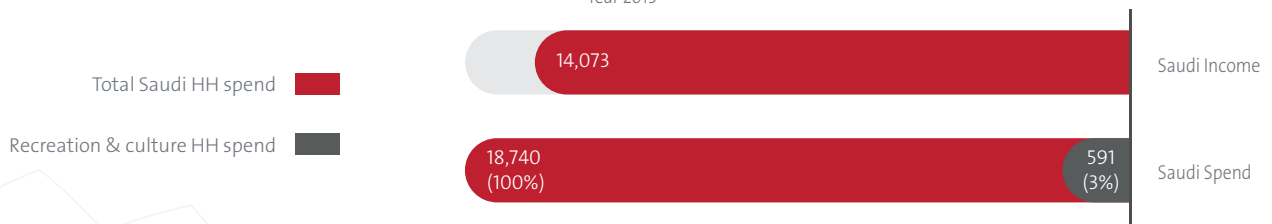
##### Riyadh

8 M Inhabitants

- Plain
- Mountain
- Sea
- Oases
- Sand
- Rock
- Region
- Capital

#### HH Income & Spend<sup>1</sup>

Year 2013



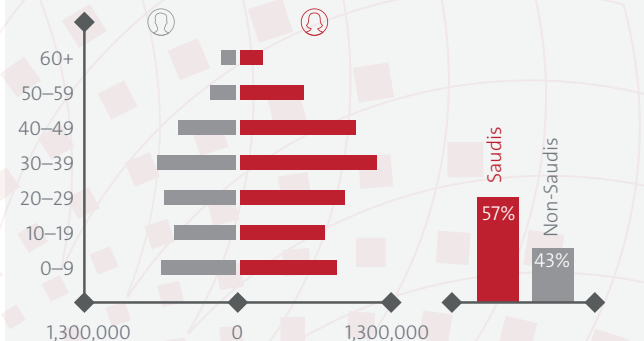
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

1. Average monthly household income and spend (SAR/month)

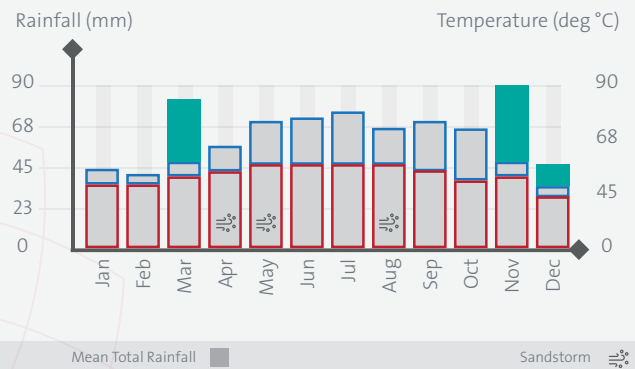
Source: GaStat, Desktop research, Team analysis

#### Population

Year 2016



#### Climate



## Key infrastructure highlights of Al-Riyadh region

Non-Exhaustive



### Stadiums

- Prince Faisal bin Fahd Stadium
- King Saud University Stadium
- King Fahd International Stadium



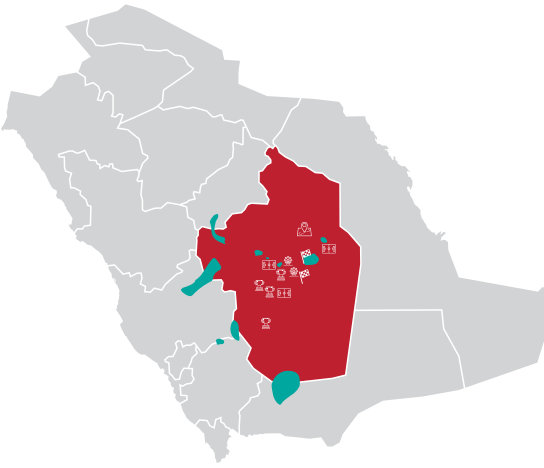
### Sports club

- Dirab Golf and Country Club
- Saudi Aviation Club
- Al-Aghar Equestrian Club



### Nature Reserve

Taif National Park



### Theme parks

- Star City
- Al Hokair Land



### Racing track

- King Abdul Aziz Racecourse
- Reem International Circuit
- Dirab Motorsports Park



### UNESCO World Heritage Site

Turaif District



### Museums

Total number: 30

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Riyadh: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>7</b> <b>Theme Parks</b> 2 large 0 medium 5 small	<b>30</b> <b>Cinema</b> (#of cinemas)	<b>56</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>14</b> <b>Guided Tours</b> (#of landmarks)	<b>9</b> <b>eSports</b> (# of tournaments /year)	<b>45</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>1</b> <b>Water Parks</b> (#of water parks)	<b>26</b> <b>Theatres</b> (#of theatres)	<b>195</b> <b>Exhibitions</b> (# of titles/year)	<b>9</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>36</b> <b>Recreational Sports</b> (# of non-prof. events/year)
<b>66</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>96</b> <b>Live Events</b> (#of titles/year)		<b>64</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>9</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

of which iconic

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

Calendar events: 372

Shows/  
Performance Arts  
**96 Events**

Culture and Arts  
**195 Events**

Sports  
**81 Events**

Target offering where ent. categories do not match infrastructure



9

**Extr. & Adv. Sports**

(# of sport types)

**9 Extr. & adv. sports<sup>1</sup> suitable for city geography:**

- Xpogo
- Parkour
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Bungee jumping
- Skydiving
- Wingsuit flying



14

**Guided Tours**

(# of landmarks)

**14 Top landmarks for guided tours:**

- Kingdom Centre Tower
- Masmak Citadel
- Al Faisaliyah Center
- Al Rajhi Grand Mosque
- Old Dir'aayah
- King Khalid Grand Mosque
- Imam Turki Bin Abdullah Grand Mosque
- Wadi Namar
- Othman Ibn Affan Mosque
- Heet Cave
- Princess Latifa Bint Sultan Bin Abdulaziz Mosque
- World Sights Park
- Underground Gallery
- King Fahad Cultural Centre



36

**Recreational Sports**

(# of non-prof. events/year)



43

**Competitive Sports**

(# of major prof. sports events/yr)



9

**eSports**

(# of tournaments /year)

1. Sports selected from list of 41 sports on activecities.com  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

# Jeddah

City with plenty of marine spots

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



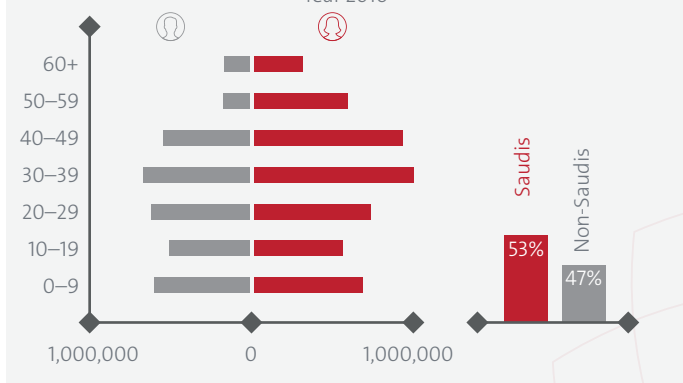
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

1. Average monthly household income and spend (SAR/month)

Source: GaStat, Desktop research, Team analysis

## Population

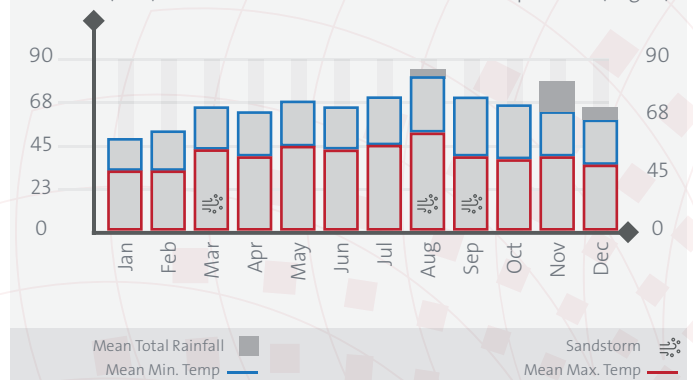
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)



## Key infrastructure highlights Makkah Al Mokarramah region

Non-Exhaustive



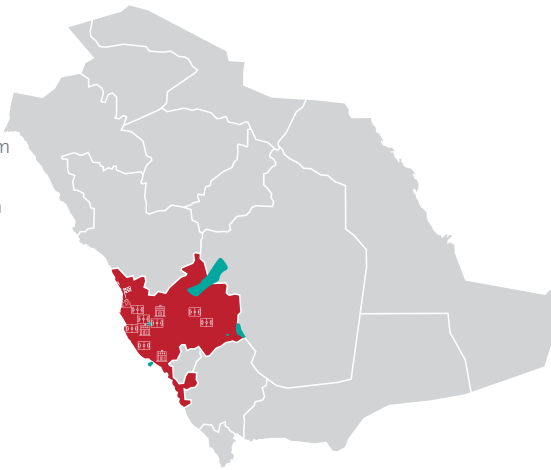
### Stadiums

- Prince Sultan bin Fahd Stadium
- Prince Abdullah bin Jalwy Stadium
- Prince Sultan bin Fahd Stadium
- Prince Abdullah Al Faisal Stadium
- King Abdullah Sports City
- King Abdulaziz Stadium
- King Fahd Stadium



### Archeological sights

- Sulaiman Palace
- Saqqaf Palace
- Shubra Palace



### Racing track

Jeddah Raceway



### UNESCO World Heritage Site

Historic Old Jeddah



### Nature Reserve

Taif National Park



### Museums

Total number: 23

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Jeddah: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>5</b> <b>Theme Parks</b> 2 large 0 medium 5 small	<b>32</b> <b>Cinema</b> (#of cinemas)	<b>48</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>17</b> <b>Guided Tours</b> (# of landmarks)	<b>6</b> <b>eSports</b> (# of tournaments /year)	<b>21</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>2</b> <b>Water Parks</b> (#of water parks)	<b>28</b> <b>Theatres</b> (#of theatres)	<b>132</b> <b>Exhibitions</b> (# of titles/year)	<b>10</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>24</b> <b>Recreational Sports</b> (# of non-prof. events/year)
<b>35</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>54</b> <b>Live Events</b> (#of titles/year)		<b>42</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>11</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

of which iconic

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 241

Shows/  
Performance Arts  
**54 Events**

Culture and Arts  
**132 Events**

Sports  
**55 Events**

### Target offering where ent. categories do not match infrastructure



**11**

**Extr. & Adv. Sports**

(# of sport types)

**11 Extr. & adv. sports<sup>1</sup> suitable for city geography:**

- Scuba diving
- Water skiing
- Parasailing
- Xpogo
- Parkour
- Vert ramp
- BMX
- Skateboarding
- Skydiving
- Wingsuit flying
- Bungee jumping



**17**

**Guided Tours**

(# of landmarks)

**17 Top landmarks for guided tours:**

- Grand Mosque
- Safa to Marwa
- Black Stone
- Kaaba
- Jabal-al-noor (Mountain of Light)
- Abraj Al-Bait Towers
- Masjid Taneem
- Mount Arafat
- Bilal Masjid
- UmrahLimo
- Sulaiman Palace,
- Saqqaf Palace,
- Shubra Palace
- Balad
- Floating Mosque
- Taif National Park
- Jeddah Fountain



**24**

**Recreational Sports**

(# of non-prof. events/year)



**21**

**Competitive Sports**

(# of major prof. sports events/yr)



**6**

**eSports**

(# of tournaments /year)

1. Sports selected from list of 41 sports on [activecities.com](https://www.activecities.com)

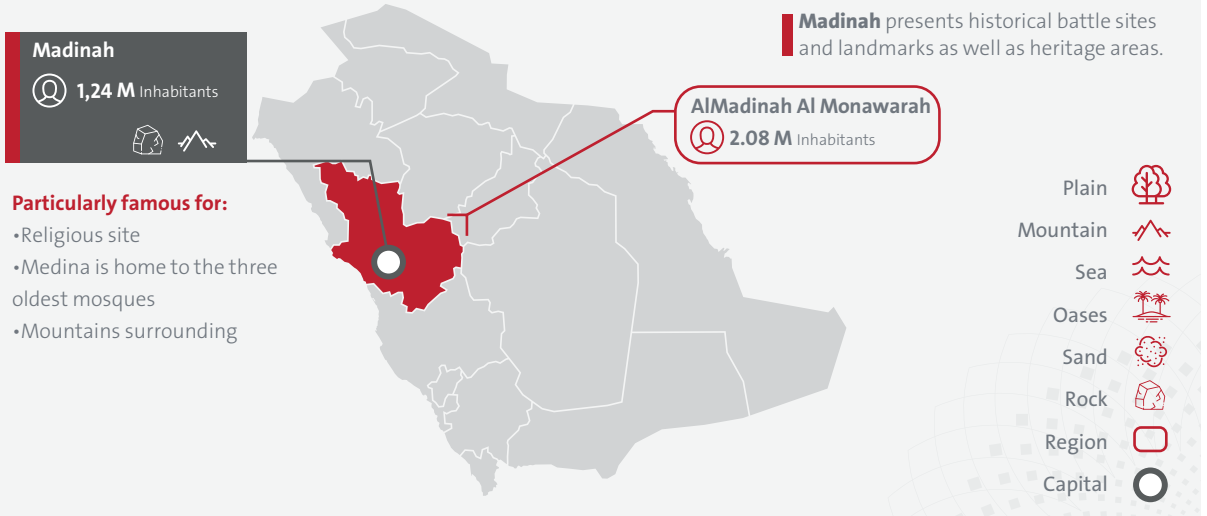
Note: Lists of landmarks and sports types are non-exhaustive

Source: Desktop research, Team analysis

# Madinah

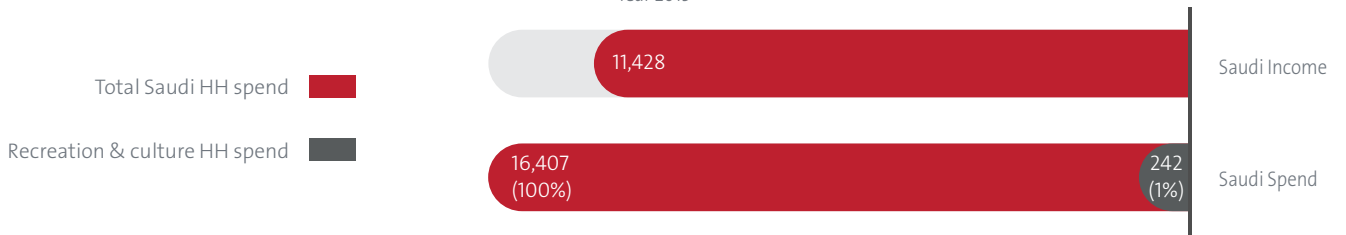
City with famous landmarks

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



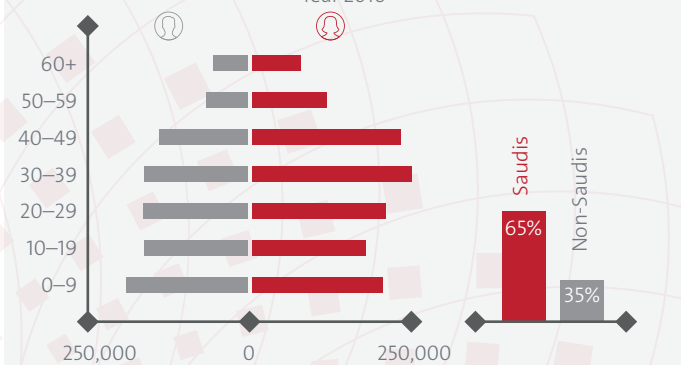
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

<sup>1</sup> Average monthly household income and spend (SAR/month)

Source: GaStat, Desktop research, Team analysis

## Population

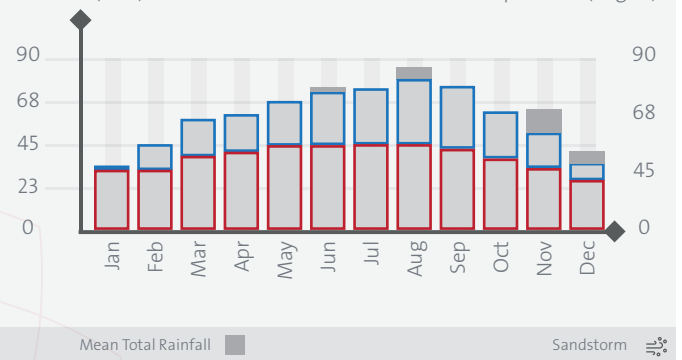
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)





## Key infrastructure highlights Al Madinah Al Monawarah region

Non-Exhaustive



### Stadiums

Prince Mohammed bin Abdul Aziz Sports City



### UNESCO World Heritage Site

Mada'in Saleh



### Museums

Total number: 2

## Madinah: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 0 large 1 medium 0 small	<b>19</b> <b>Cinema</b> (#of cinemas)	<b>11</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>13</b> <b>Guided Tours</b> (# of landmarks)	<b>2</b> <b>eSports</b> (# of tournaments /year)	<b>11</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>1</b> <b>Water Parks</b> (#of water parks)	<b>7</b> <b>Theatres</b> (#of theatres)	<b>53</b> <b>Exhibitions</b> (# of titles/year)	<b>9</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)	<b>14</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)	<b>9</b> <b>Recreational Sports</b> (# of non-prof. events/year)	<b>14</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)
<b>15</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>23</b> <b>Live Events</b> (#of titles/year)					

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades


Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 96

  
Shows/  
Performance Arts  
**23 Events**

  
Culture and Arts  
**53 Events**

  
Sports  
**20 Events**

### Target offering where ent. categories do not match infrastructure



**14**

#### Extr. & Adv. Sports

(# of sport types)

#### 14 Extr. & adv. sports<sup>1</sup> suitable for city geography:

- Mountain boarding
- Xpogo
- Parkour
- Rappelling
- Hang gliding
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Mountain biking
- Highlining
- Bungee jumping
- Skydiving
- Wingsuit flying



**13**

#### Guided Tours

(# of landmarks)

#### 13 Top landmarks for guided tours:

- Masjid an-Nabi
- Quba Mosque
- Masjid al-Qiblatain
- Jannatul Baqi
- Grave Of Hamzah
- The Seven Mosques
- Madain Saleh Tombs
- Mosque of Badr
- King Fahd Glorious Quran Printing Complex
- Masjid Al Ghamamah
- Masjid Jumah
- Abu Bakar Masjed
- Mada'in Saleh



**9**

#### Recreational Sports

(# of non-prof. events/year)



**11**

#### Competitive Sports

(# of major prof. sports events/yr)



**2**

#### eSports

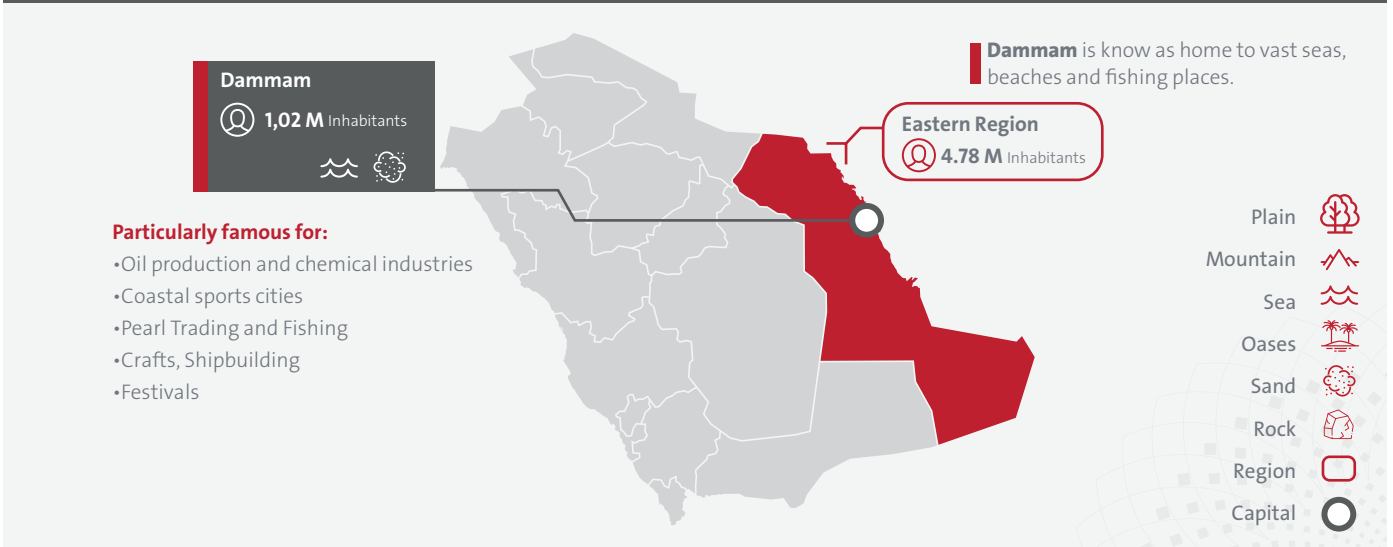
(# of tournaments /year)

1. Sports selected from list of 41 sports on [activecities.com](https://www.activecities.com)  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

# Dammam

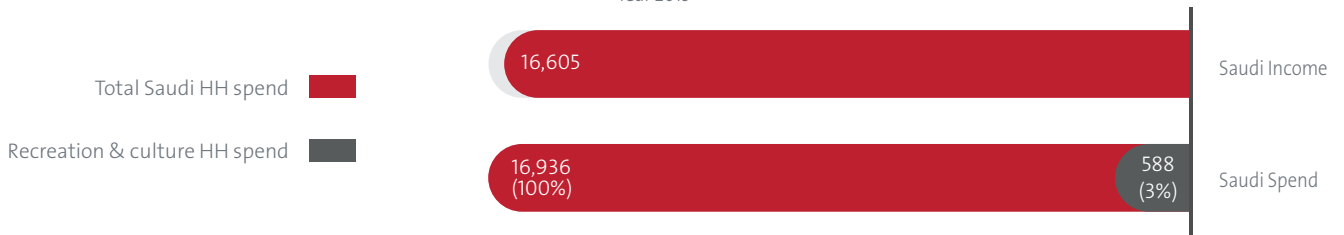
City of vast seas and beaches

## Overview



## HH Income & Spend<sup>1</sup>

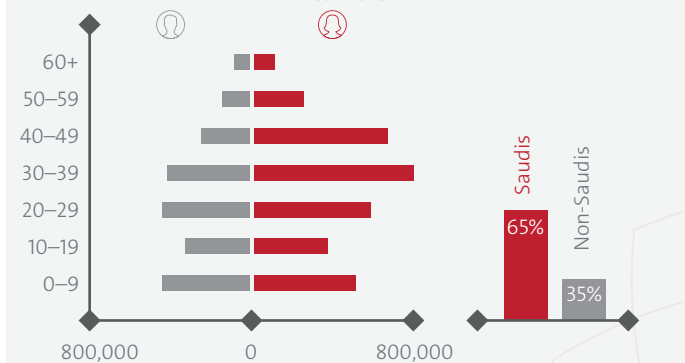
Year 2013



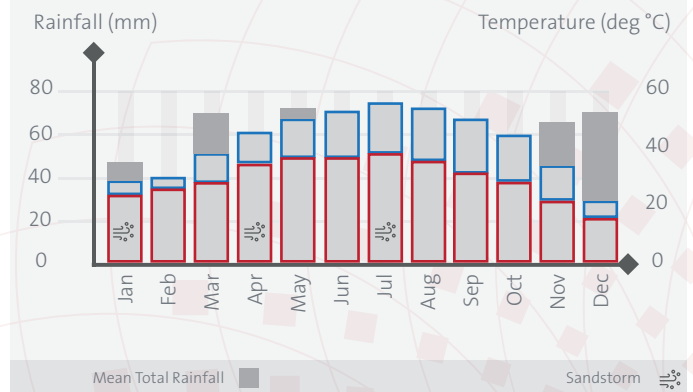
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive  
 1. Average monthly household income and spend (SAR/month)  
 Source: GaStat, Desktop research, Team analysis

## Population

Year 2016



## Climate



## Key infrastructure highlights of Eastern Region

Non-Exhaustive



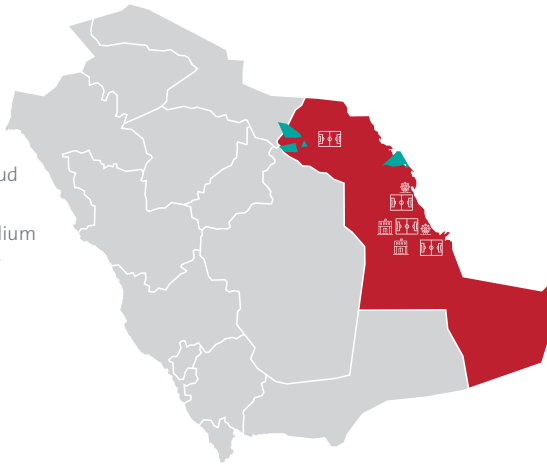
### Stadiums

- Department of Education Stadium
- Prince Nayef bin Abdul Aziz Al Saud Stadium
- Prince Mohammad bin Fahd Stadium
- Prince Saud bin Jalwy Sports City



### Archeological sights

- Ibrahim Palace
- Tarout Castle & Old Town



### Theme parks

- Cobra Amusement Park
- Castle Park Theme Park



### Racing track

- GP Karting



### Museums

Total number: 14

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Dammam: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>3</b> <b>Theme Parks</b> 0 large 1 medium 2 small	<b>28</b> <b>Cinema</b> (#of cinemas)	<b>42</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>4</b> <b>Guided Tours</b> (# of landmarks)	<b>4</b> <b>eSports</b> (# of tournaments /year)	<b>17</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>1</b> <b>Water Parks</b> (#of water parks)	<b>21</b> <b>Theatres</b> (#of theatres)	<b>20</b> <b>Exhibitions</b> (# of titles/year)	<b>6</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>14</b> <b>Recreational Sports</b> (# of non-prof. events/ year)
<b>26</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>27</b> <b>Live Events</b> (#of titles/year)		<b>11</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>11</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

Additional offering elements

Calendar events: 78

Shows/  
Performance Arts  
**27 Events**

Culture and Arts  
**20 Events**

Sports  
**31 Events**

Target offering where ent. categories do not match infrastructure



11

Extr. & Adv. Sports

(# of sport types)

11 Extr. & adv. sports<sup>1</sup> suitable for city geography:

- Scuba diving
- Water skiing
- Parasailing
- Xpogo
- Parkour
- Vert ramp
- BMX
- Skateboarding
- Skydiving
- Wingsuit flying
- Bungee jumping



4

Guided Tours

(# of landmarks)

4 Top landmarks for guided tours:

- Tarout Castle & Old Town
- Ibrahim Palace
- The Heritage Village
- Dammam Museum of Archaeology & Ethnography



14

Recreational Sports

(# of non-prof. events/year)



17

Competitive Sports

(# of major prof. sports events/yr)



4

eSports

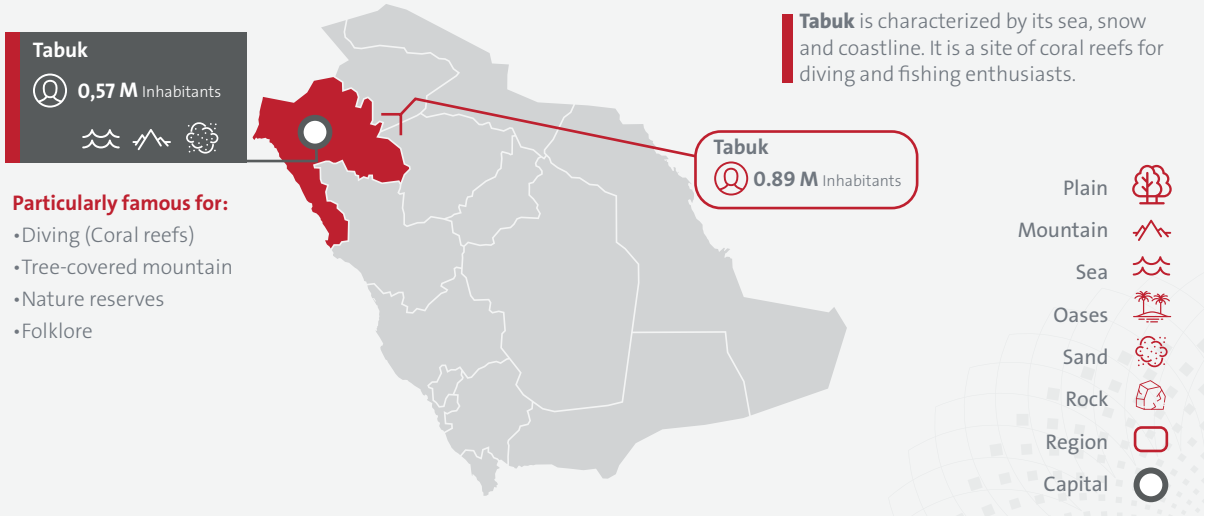
(# of tournaments/year)

1. Sports selected from list of 41 sports on activecities.com  
 Note: Lists of landmarks and sports types are non-exhaustive  
 Source: Desktop research, Team analysis

# Tabuk

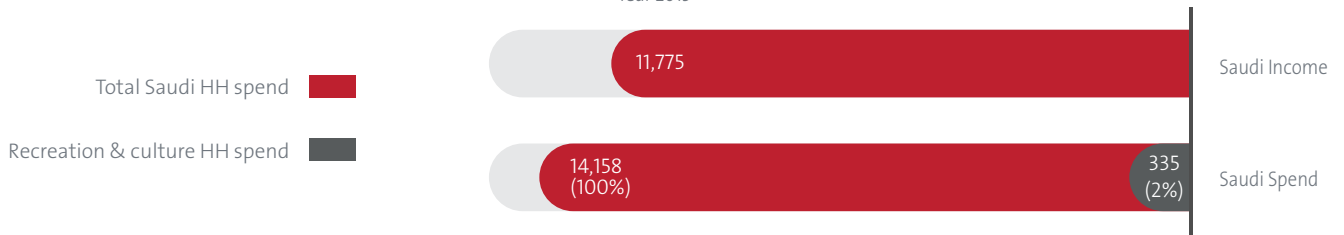
City of seas and coral reefs

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



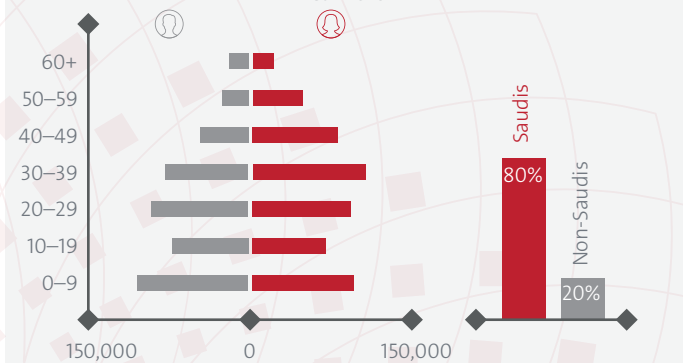
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

1. Average monthly household income and spend (SAR/month)

Source: GaStat, Desktop research, Team analysis

## Population

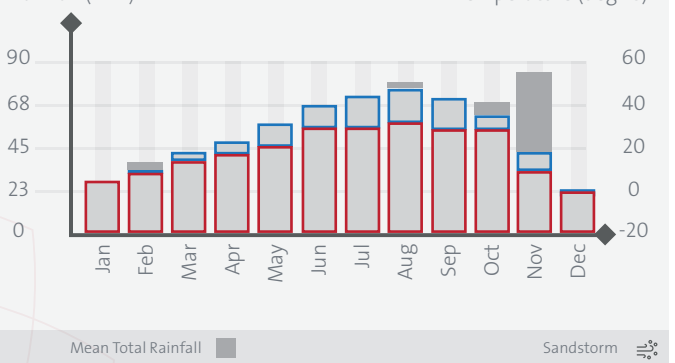
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)



## Key infrastructure highlights Tabuk region

Non-Exhaustive



Museums

Total number:5

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Tabuk: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 0 large 1 medium 0 small	<b>9</b> <b>Cinema</b> (#of cinemas)	<b>6</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>8</b> <b>Guided Tours</b> (# of landmarks)	<b>2</b> <b>eSports</b> (# of tournaments /year)	<b>11</b> <b>Competitive Sports</b> (# of major prof. sports events/ yr)
<b>0</b> <b>Water Parks</b> (#of water parks)	<b>2</b> <b>Theatres</b> (#of theatres)	<b>17</b> <b>Exhibitions</b> (# of titles/year)	<b>3</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>9</b> <b>Recreational Sports</b> (# of non-prof. events/ year)
<b>7</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>14</b> <b>Live Events</b> (#of titles/year)		<b>6</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>15</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis




## Additional offering elements

### Calendar events: 50

  
Shows/  
Performance Arts  
**14 Events**

  
Culture and Arts  
**17 Events**

  
Sports  
**20 Events**

### Target offering where ent. categories do not match infrastructure



**15**

#### Extr. & Adv. Sports

(# of sport types)

#### 15 Extr. & adv. sports<sup>1</sup> suitable for city geography:

- Scuba diving
- Water skiing
- Parasailing
- Xpogo
- Parkour
- Vert ramp
- BMX
- Skateboarding
- Skydiving
- Wingsuit flying
- Bungee jumping
- Mountain boarding
- Rappelling
- Mountain biking
- Highlining



**8**

#### Guided Tours

(# of landmarks)

#### 8 Top landmarks for guided tours:

- Taima
- Tabuk Castle
- Albedaa
- Alwajh
- Desah
- Hejaz Railway Station
- Prophet's Mosque
- Museum of Antiquities and Traditional Heritage



**9**

#### Recreational Sports

(# of non-prof. events/year)



**11**

#### Competitive Sports

(# of major prof. sports events/yr)



**2**

#### eSports

(# of tournaments/year)

1. Sports selected from list of 41 sports on [activecities.com](https://www.activecities.com)

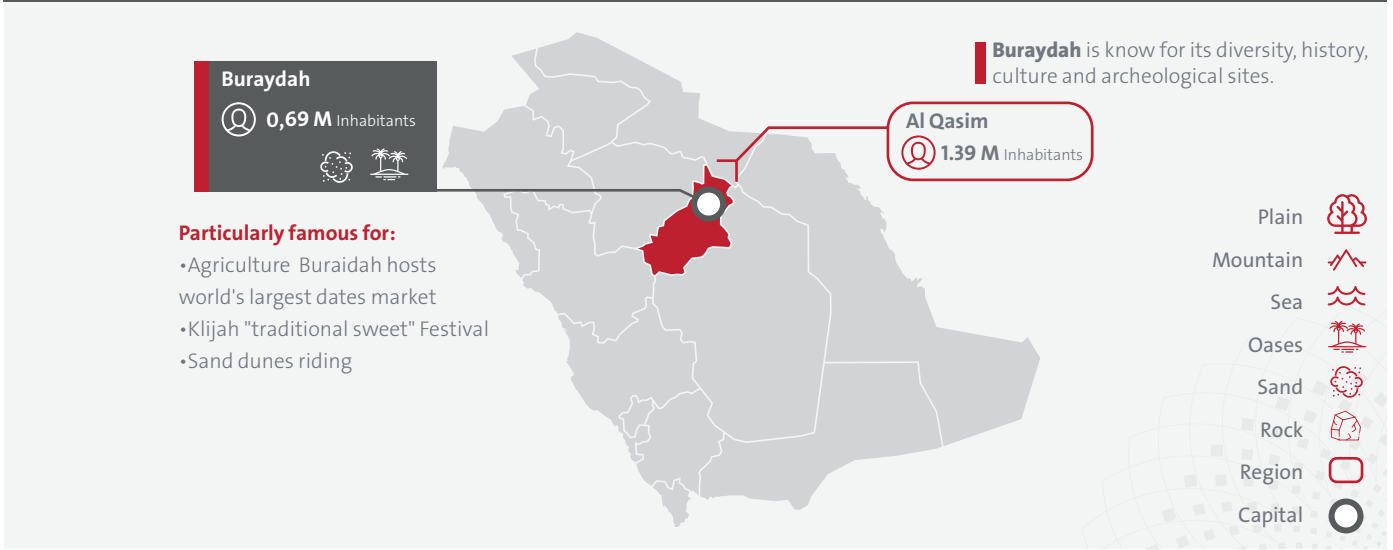
Note: Lists of landmarks and sports types are non-exhaustive

Source: Desktop research, Team analysis

# Buraydah

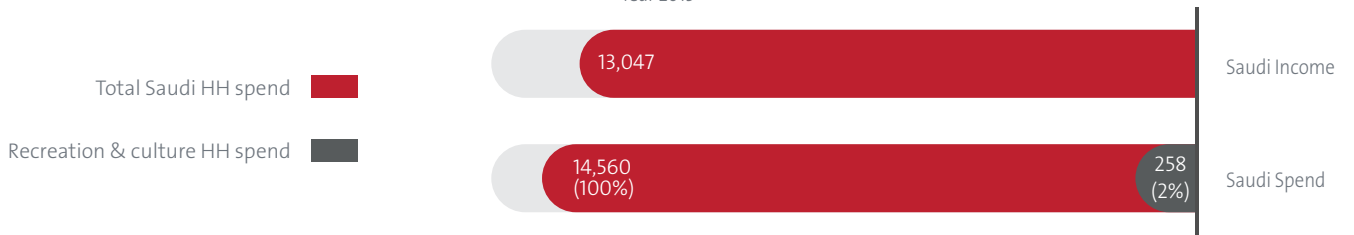
City of diverse history and culture

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



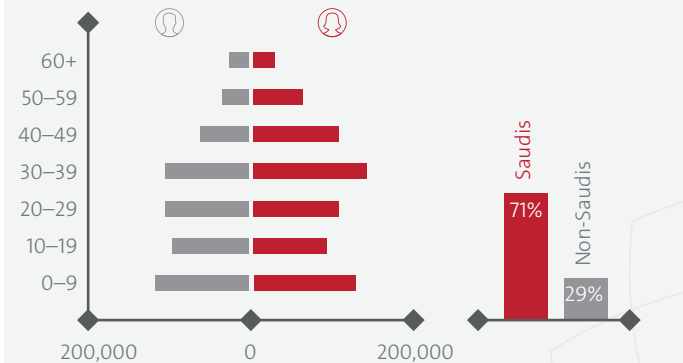
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

1. Average monthly household income and spend (SAR/month)

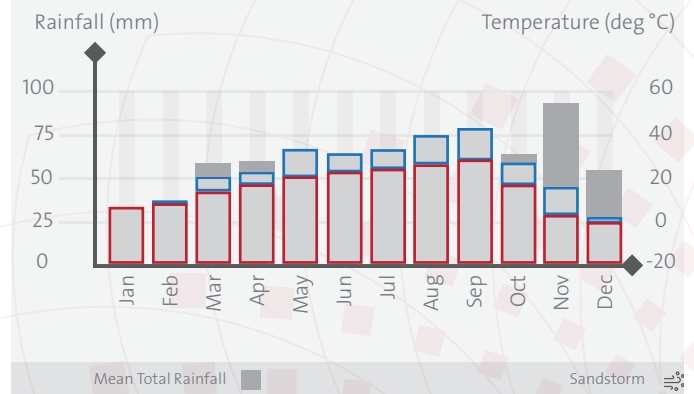
Source: GaStat, Desktop research, Team analysis

## Population

Year 2016



## Climate



## Key infrastructure highlights Al Qasim region

Non-Exhaustive



### Stadiums

- Department of Education Stadium
- King Abdullah Sports City (1983)
- Prince Salman bin Abdul Aziz Sports City



### Museums

Total number: 2

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Buraydah: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 0 large 1 medium 2 small	<b>18</b> <b>Cinema</b> (#of cinemas)	<b>7</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>5</b> <b>Guided Tours</b> (# of landmarks)	<b>2</b> <b>eSports</b> (# of tournaments /year)	<b>13</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>0</b> <b>Water Parks</b> (#of water parks)	<b>4</b> <b>Theatres</b> (#of theatres)	<b>19</b> <b>Exhibitions</b> (# of titles/year)	<b>5</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>11</b> <b>Recreational Sports</b> (# of non-prof. events/ year)
<b>12</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>18</b> <b>Live Events</b> (#of titles/year)		<b>8</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>9</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 61

Shows/  
Performance Arts  
**18 Events**

Culture and Arts  
**19 Events**

Sports  
**24 Events**

### Target offering where ent. categories do not match infrastructure



**9** Extr. & adv. sports<sup>1</sup>  
suitable for city geography:

**Extr. & Adv. Sports**

(# of sport types)

- Xpogo
- Parkour
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Bungee jumping
- Skydiving
- Wingsuit flying



**5** 5t Top landmarks for guided tours:

**Guided Tours**

(# of landmarks)

- The largest bird park in the Gulf
- The market for old inventory Planner
- Museum of buraidah
- Mared Palace
- Zubaida Road



**11**

**Recreational Sports**

(# of non-prof. events/year)



**13**

**Competitive Sports**

(# of major prof. sports events/yr)



**2**

**eSports**

(# of tournaments /year)

1. Sports selected from list of 41 sports on activecities.com

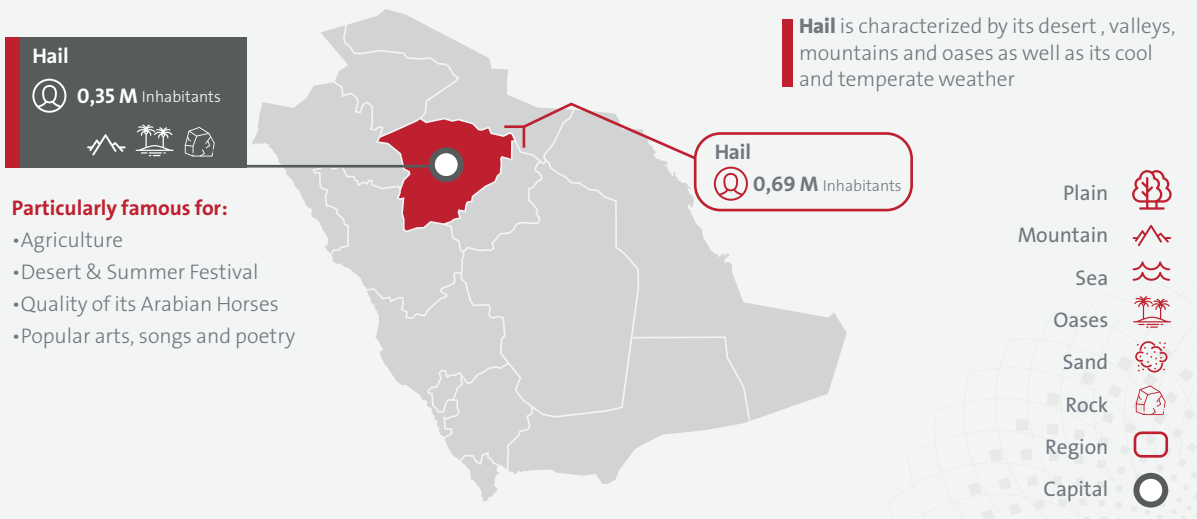
Note: Lists of landmarks and sports types are non-exhaustive

Source: Desktop research, Team analysis

# Hail

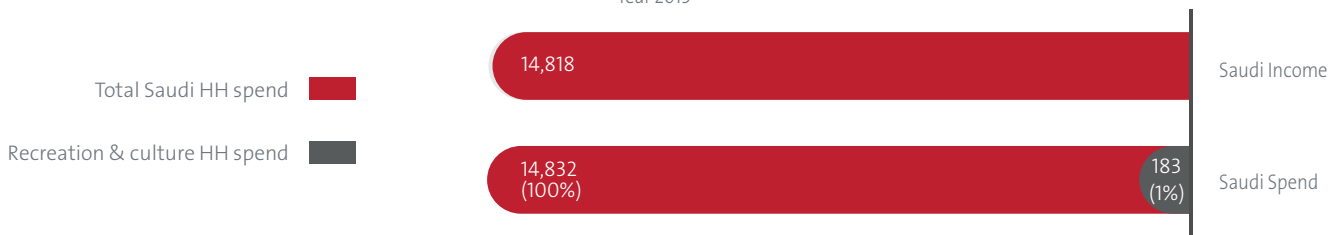
City of diverse nature and cool weather

## Overview



## HH Income & Spend<sup>1</sup>

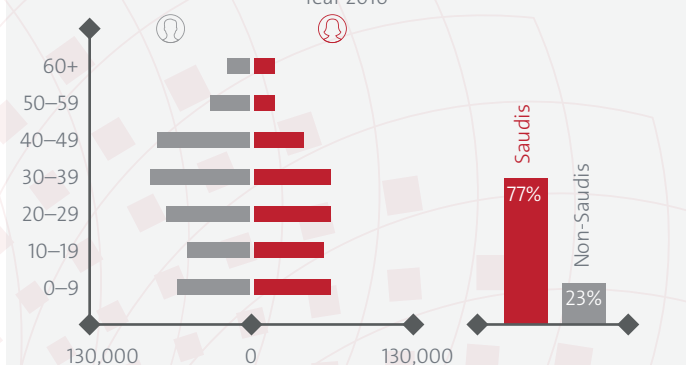
Year 2013



**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive  
<sup>1</sup> Average monthly household income and spend (SAR/month)  
 Source: GaStat, Desktop research, Team analysis

## Population

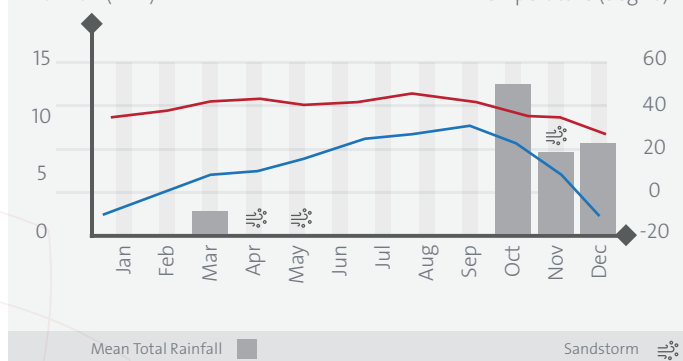
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)



## Key infrastructure highlights Hail region

Non-Exhaustive



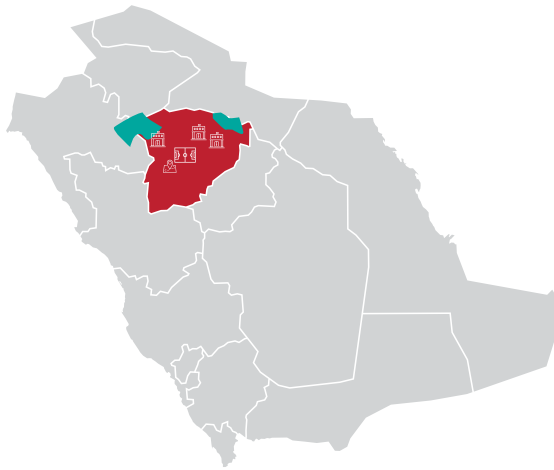
### Stadiums

- Prince Abdul Aziz bin Msaad Stadium



### Archeological sights

- Jubbah Archeological City
- Airif Castle
- Qishleh Ha'il



### UNESCO World Heritage Site

Hail Rock Art



### Museums

Total number: 5

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Hail: Entertainment offering summary – 2030



1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

Calendar events: 286

Shows/  
Performance Arts  
**160 Events**

Culture and Arts  
**88 Events**

Sports  
**38 Events**

Target offering where ent. categories do not match infrastructure



14

Extr. & Adv.  
Sports

(# of sport types)

14 Extr. & adv. sports<sup>1</sup>  
suitable for city geography:

- Mountain boarding
- Xpogo
- Parkour
- Rappelling
- Hang gliding
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Mountain biking
- Highlining
- Bungee jumping
- Skydiving
- Wingsuit flying



13

Guided Tours

(# of landmarks)

13 Top landmarks for guided tours:

- Barzan Palace
- Hail Rock Art
- Qishleh Ha'il
- Airif Castle
- Jubbah Archeological City
- Almguah Gate National Park
- Shoab Joe mountains AJA
- Qishlah Palace Castle
- Jabal al Manjour
- Umm Sanman
- Janin Cave
- Yatib
- Shuwaymis rock art site



15

Recreational  
Sports

(# of non-prof.  
events/year)



23

Competitive  
Sports

(# of major prof.  
sports events/yr)



3

eSports

(# of tournaments  
/year)

1. Sports selected from list of 41 sports on activecities.com

Note: Lists of landmarks and sports types are non-exhaustive

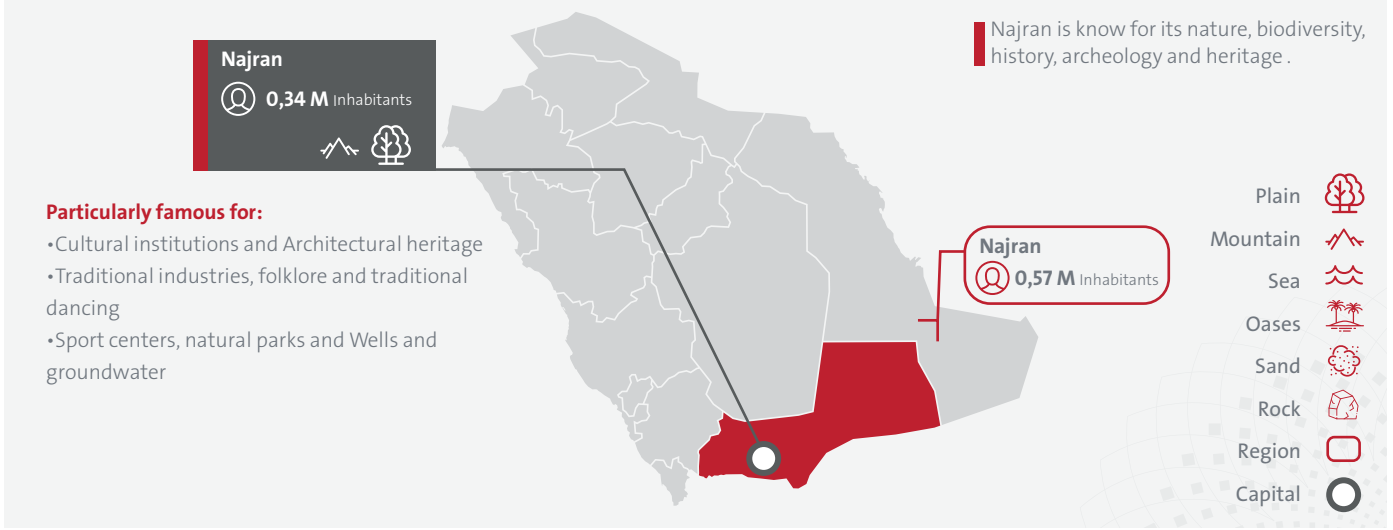
Source: Desktop research, Team analysis



# Najran

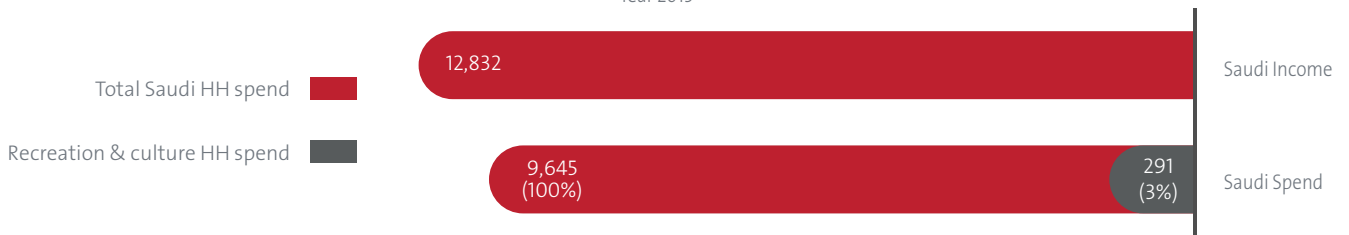
City of heritage and land of nature

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



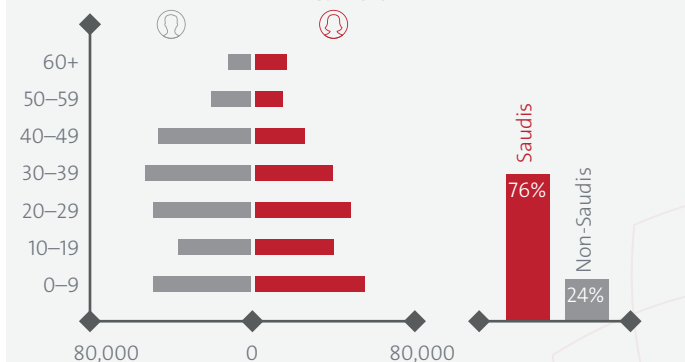
**Note:** Income , spend and population data are per region. Geographical areas are non-exhaustive

1. Average monthly household income and spend (SAR/month)

Source: GaStat, Desktop research, Team analysis

## Population

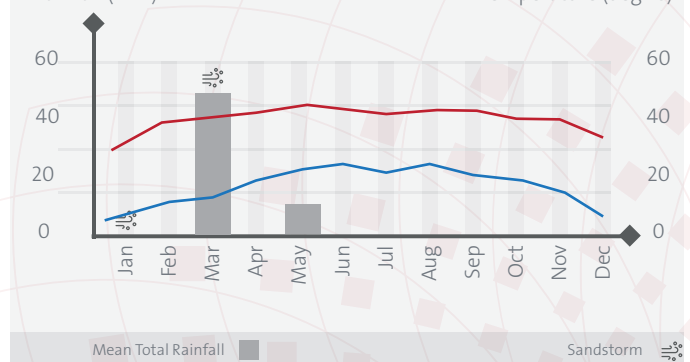
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)



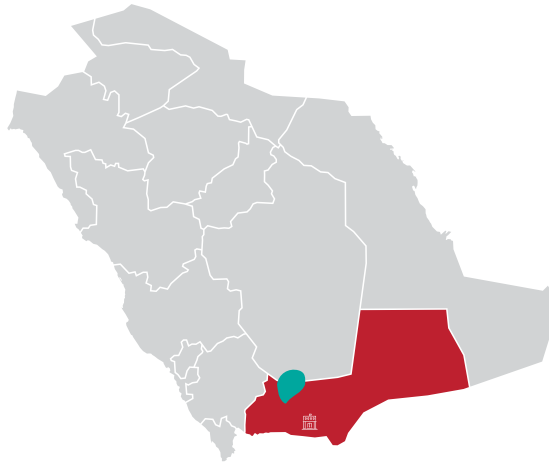
## Key infrastructure highlights Najran region

Non-Exhaustive



### Archeological sights

Amarah Historic Palace



### Museums

Total number: 2

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Najran: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 2 large 0 medium 5 small	<b>6</b> <b>Cinema</b> (#of cinemas)	<b>2</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>8</b> <b>Guided Tours</b> (# of landmarks)	<b>3</b> <b>eSports</b> (# of tournaments /year)	<b>21</b> <b>Competitive Sports</b> (# of major prof. sports events/ yr)
<b>0</b> <b>Water Parks</b> (#of water parks)	<b>2</b> <b>Theatres</b> (#of theatres)	<b>188</b> <b>Exhibitions</b> (# of titles/year)	<b>1</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>14</b> <b>Recreational Sports</b> (# of non-prof. events/year)
<b>4</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>132</b> <b>Live Events</b> (#of titles/year)		<b>4</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>14</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 355

Shows/  
Performance Arts  
**132 Events**

Culture and Arts  
**188 Events**

Sports  
**35 Events**

### Target offering where ent. categories do not match infrastructure



**14**

#### Extr. & Adv. Sports

(# of sport types)

#### 14 Extr. & adv. sports<sup>1</sup> suitable for city geography:

- Mountain boarding
- Xpogo
- Parkour
- Rappelling
- Hang gliding
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Mountain biking
- Highlining
- Bungee jumping
- Skydiving
- Wingsuit flying



**8**

#### Guided Tours

(# of landmarks)

#### 8 Top landmarks for guided tours:

- Al Okhdood Archaeological Site
- Amarah Historic Palace
- Abi Al-Rshash valley
- Nahoqa Valley
- Raaom Hill
- Najran Dam
- The Al-Aan Palace
- Najran Popular Market



**14**

#### Recreational Sports

(# of non-prof. events/year)



**21**

#### Competitive Sports

(# of major prof. sports events/yr)



**3**

#### eSports

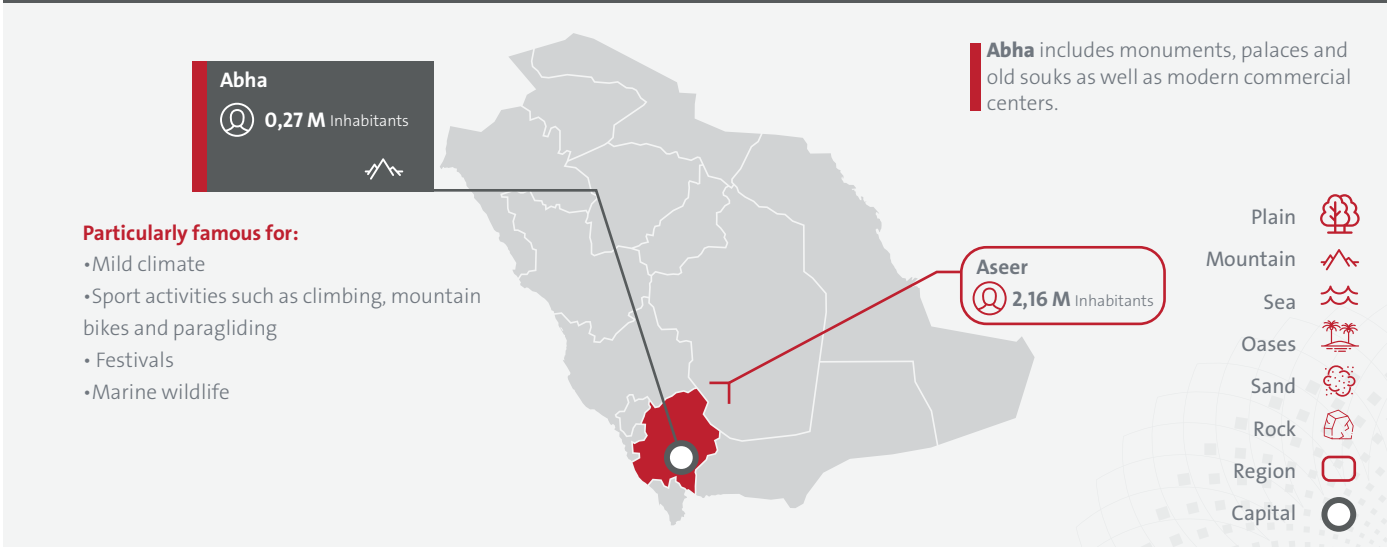
(# of tournaments/year)

1. Sports selected from list of 41 sports on activecities.com  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

# Abha

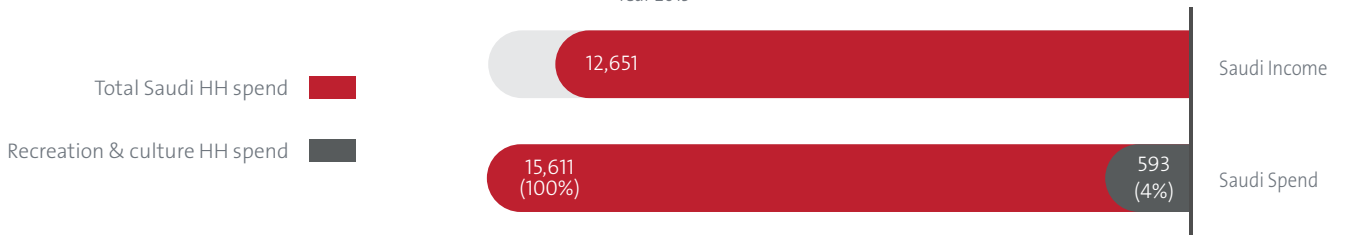
City of tradition and modernism

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



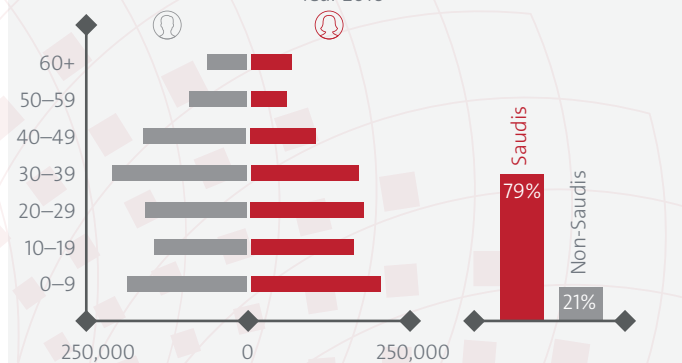
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

<sup>1</sup> Average monthly household income and spend (SAR/month)

Source: GaStat, Desktop research, Team analysis

## Population

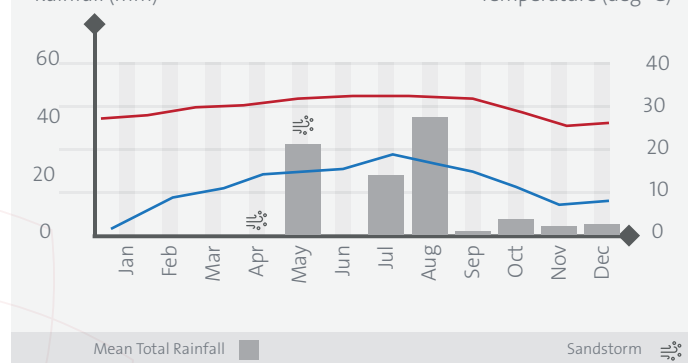
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)



## Key infrastructure highlights Aseer region

Non-Exhaustive



### Stadiums

Prince Sultan bin Abdul Aziz Stadium



### Theme parks

•Al Salam Theme Park  
•Abha Palace Theme Park



### Nature Reserve

Asir National Park



### Museums

Total number: 8



Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Abha: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 0 large 0 medium 2 small	<b>18</b> <b>Cinema</b> (#of cinemas)	<b>12</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>9</b> <b>Guided Tours</b> (# of landmarks)	<b>3</b> <b>eSports</b> (# of tournaments /year)	<b>19</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>0</b> <b>Water Parks</b> (#of water parks)	<b>5</b> <b>Theatres</b> (#of theatres)	<b>176</b> <b>Exhibitions</b> (# of titles/year)	<b>11</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>12</b> <b>Recreational Sports</b> (# of non-prof. events/year)
<b>17</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>85</b> <b>Live Events</b> (#of titles/year)		<b>3</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>14</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 293

Shows/  
Performance Arts  
**85 Events**

Culture and Arts  
**176 Events**

Sports  
**31 Events**

### Target offering where ent. categories do not match infrastructure



**14**

**Extr. & Adv. Sports**

(# of sport types)

**14 Extr. & adv. sports<sup>1</sup> suitable for city geography:**

- Mountain boarding
- Xpogo
- Parkour
- Rappelling
- Hang gliding
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Mountain biking
- Highlining
- Bungee jumping
- Skydiving
- Wingsuit flying



**9**

**Guided Tours**

(# of landmarks)

**9 Top landmarks for guided tours:**

- Asir National Park
- Al Miftaha Art Village
- Shada Archeological Palace
- Tihama Valleys
- Princes Sultans Park
- Al Habalah
- Al Soudah
- Raydah Escarpment Reserve
- Malaki Dam Lake and Wadi Jawah



**12**

**Recreational Sports**

(# of non-prof. events/year)



**19**

**Competitive Sports**

(# of major prof. sports events/yr)



**3**

**eSports**

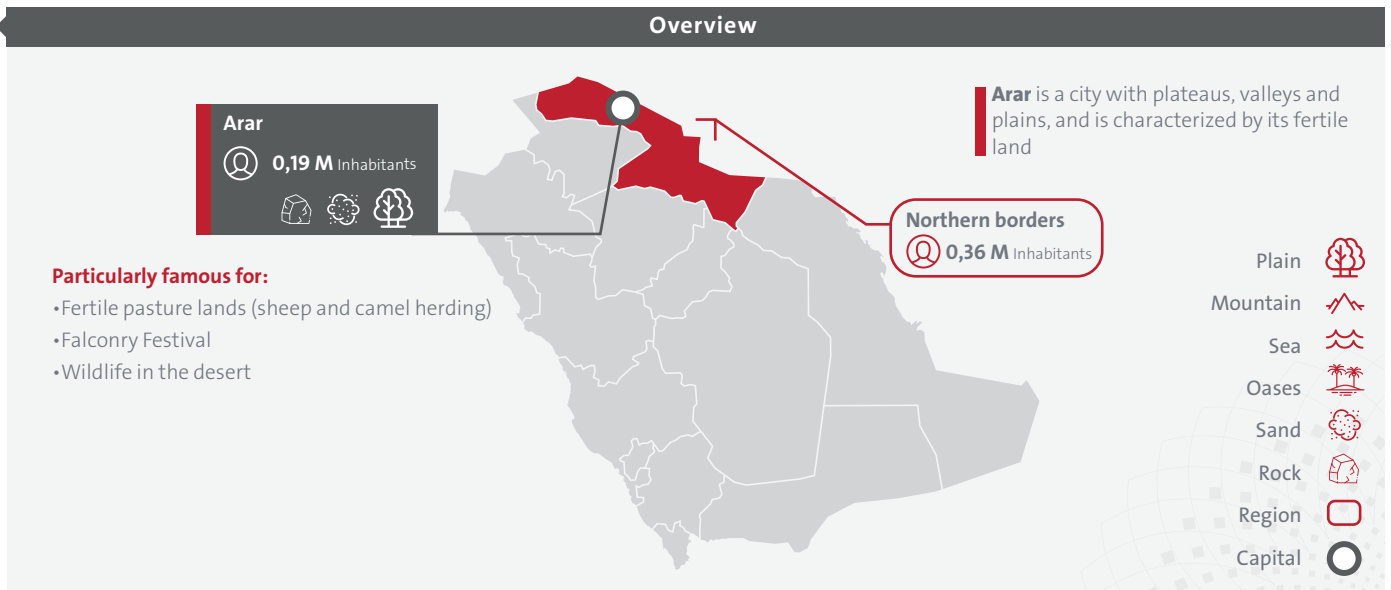
(# of tournaments /year)

1. Sports selected from list of 41 sports on [activecities.com](https://www.activecities.com)  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

# Arar

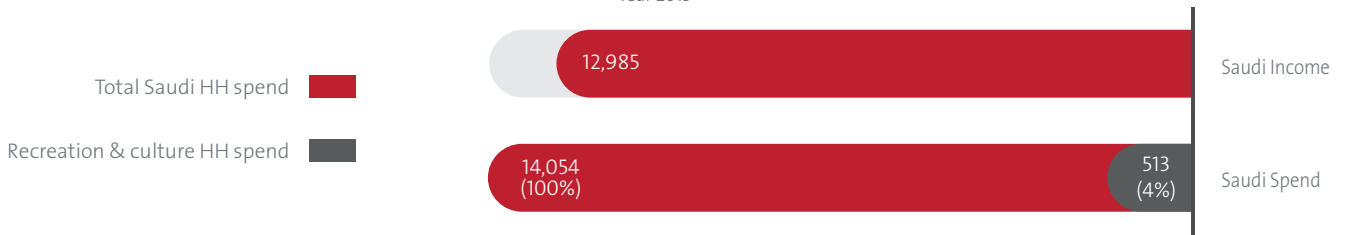
City of fertile land

## Overview



## HH Income & Spend<sup>1</sup>

Year 2013



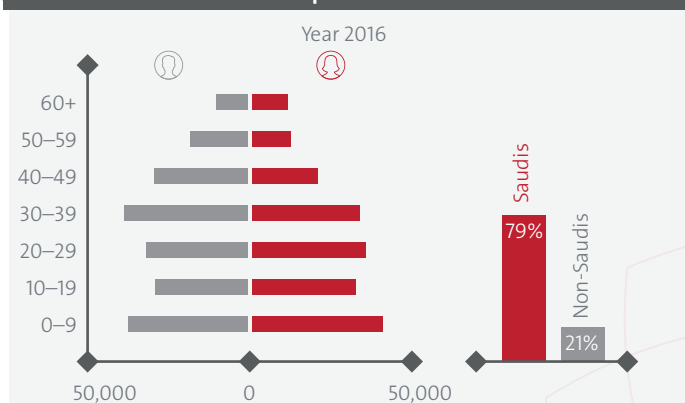
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive

1. Average monthly household income and spend (SAR/month)

Source: GaStat, Desktop research, Team analysis

## Population

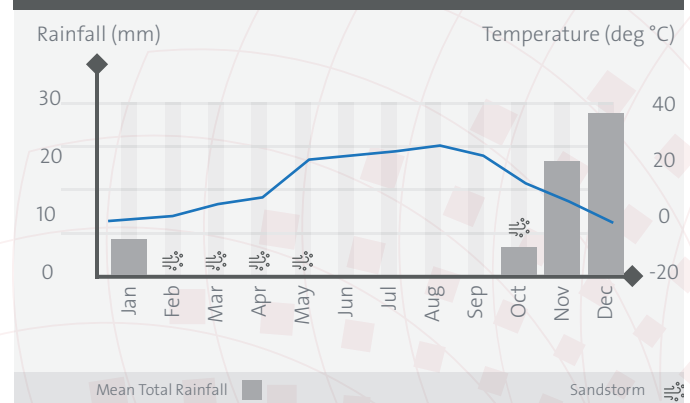
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)





## Key infrastructure highlights Northern Borders region

Non-Exhaustive



Museums

Total number: 1

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Arar: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 0 large 1 medium 2 small	<b>5</b> <b>Cinema</b> (#of cinemas)	<b>1</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>0</b> <b>Guided Tours</b> (# of landmarks)	<b>1</b> <b>eSports</b> (# of tournaments /year)	<b>11</b> <b>Competitive Sports</b> (# of major prof. sports events/ yr)
<b>0</b> <b>Water Parks</b> (#of water parks)	<b>1</b> <b>Theatres</b> (#of theatres)	<b>79</b> <b>Exhibitions</b> (# of titles/year)	<b>0</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>7</b> <b>Recreational Sports</b> (# of non-prof. events/year)
<b>2</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>77</b> <b>Live Events</b> (#of titles/year)		<b>2</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>9</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

of which iconic

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

Additional offering elements

Calendar events: 176

Shows/  
Performance Arts  
**77 Events**

Culture and Arts  
**79 Events**

Sports  
**18 Events**

Target offering where ent. categories do not match infrastructure



9

Extr. & Adv. Sports

(# of sport types)

9 Extr. & adv. sports<sup>1</sup> suitable for city geography:

- Xpogo
- Parkour
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Bungee jumping
- Skydiving
- Wingsuit flying



Guided Tours

(# of landmarks)

NA Top landmarks for guided tours



7

Recreational Sports

(# of non-prof. events/year)



11

Competitive Sports

(# of major prof. sports events/yr)



1

eSports

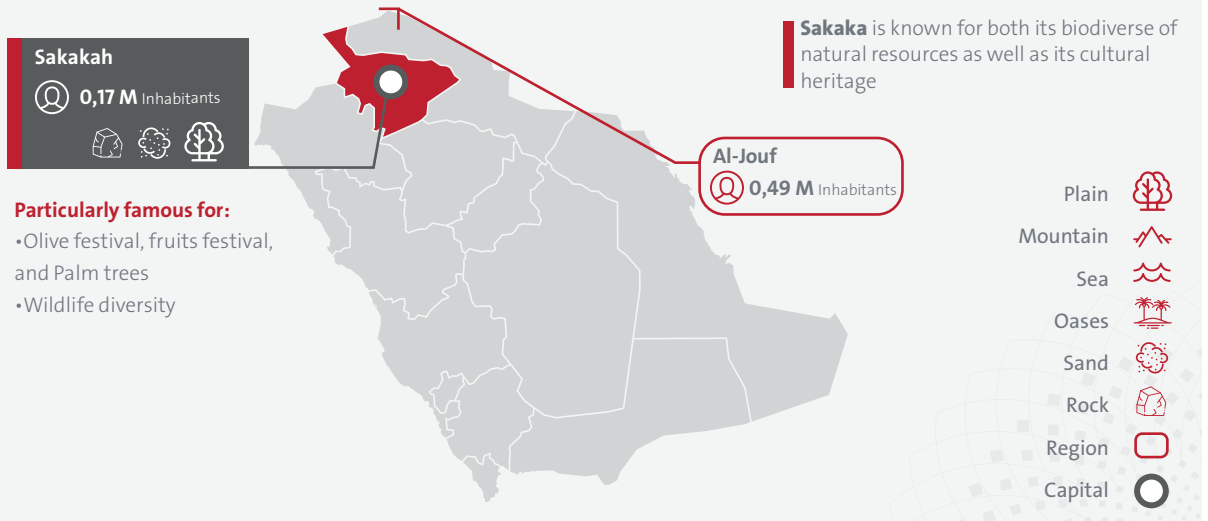
(# of tournaments /year)

1. Sports selected from list of 41 sports on activecities.com  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

# Sakakah

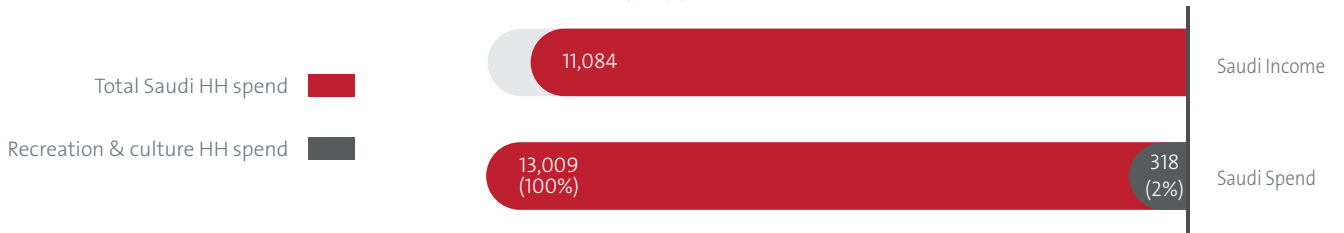
City of natural biodiversity and cultural heritage

## Overview



## HH Income & Spend<sup>1</sup>

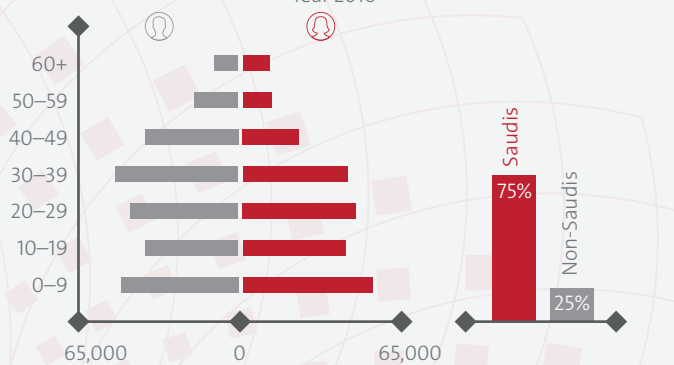
Year 2013



**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive  
<sup>1</sup> Average monthly household income and spend (SAR/month)  
 Source: GaStat, Desktop research, Team analysis

## Population

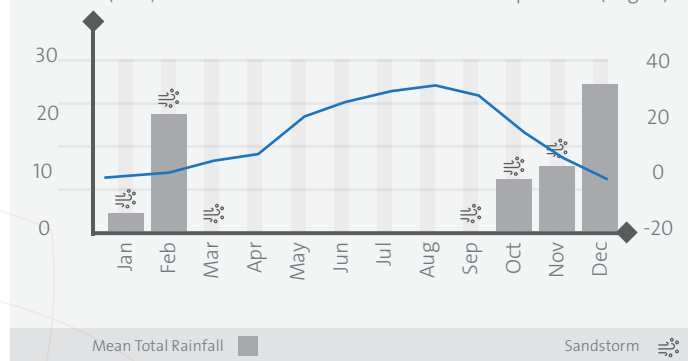
Year 2016



## Climate

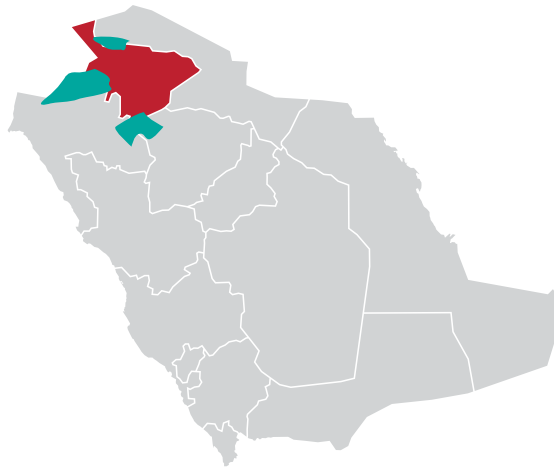
Rainfall (mm)

Temperature (deg °C)



## Key infrastructure highlights Northern Borders region

Non-Exhaustive



Museums












Total number: 5

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Sakakah: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
 <b>1</b> <b>Theme Parks</b> 0 large 0 medium 1 small	 <b>6</b> <b>Cinema</b> (#of cinemas)	 <b>2</b> <b>Museums</b> (# of museums)	 <b>0</b> <b>Nature Reserves<sup>1</sup></b>	 <b>11</b> <b>Guided Tours</b> (# of landmarks)	 <b>1</b> <b>eSports</b> (# of tournaments /year)	 <b>10</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
 <b>0</b> <b>Water Parks</b> (#of water parks)	 <b>1</b> <b>Theatres</b> (#of theatres)	 <b>56</b> <b>Exhibitions</b> (# of titles/year)	 <b>0</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			 <b>7</b> <b>Recreational Sports</b> (# of non-prof. events/year)
 <b>3</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	 <b>68</b> <b>Live Events</b> (#of titles/year)		 <b>2</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			 <b>9</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 141

Shows/  
Performance Arts  
**68 Events**

Culture and Arts  
**56 Events**

Sports  
**17 Events**

### Target offering where ent. categories do not match infrastructure



**9**

#### Extr. & Adv. Sports

(# of sport types)

#### 9 Extr. & adv. sports<sup>1</sup> suitable for city geography:

- Xpogo
- Parkour
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Bungee jumping
- Skydiving
- Wingsuit flying



**11**

#### Guided Tours

(# of landmarks)

#### 11 Top landmarks for guided tours:

- Dumat Al-Jundal
- Qasr Marid
- Za'abal Castle
- Al-Rajajil
- The oasis of Dumat Al-Jandal
- Sisrah Well
- Hudrah Cave: Rocky-Drawings
- Al Towair Site
- Al Rajajeal Antiquities "Erected Stones"
- Omar Bin Al Khattab mosque
- Lake of Dumat Al Jandal



**7**

#### Recreational Sports

(# of non-prof. events/year)



**10**

#### Competitive Sports

(# of major prof. sports events/yr)



**1**

#### eSports

(# of tournaments /year)

1. Sports selected from list of 41 sports on activecities.com  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

# Jazan

City of varied elements of picturesque nature

## Overview

Jazan is characterized by its sea, islands, mountains and plains.

### Jazan

0,14 M Inhabitants



### Particularly famous for:

- Festivals
- Port
- Mountains and hot springs
- Sports events and Adventure activities

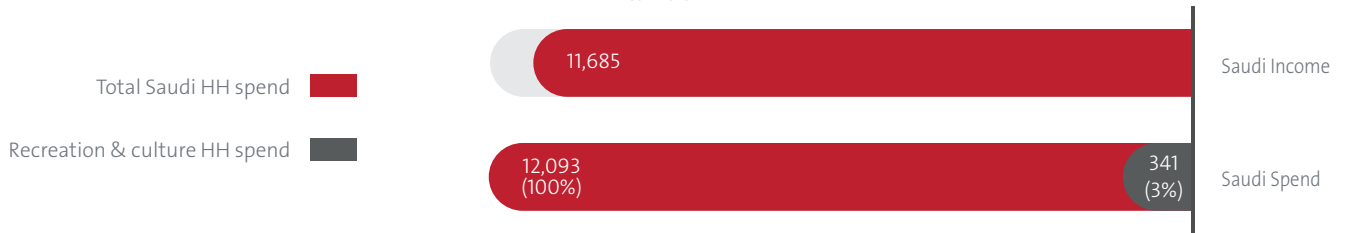


Jazan  
1,54 M Inhabitants

- Plain
- Mountain
- Sea
- Oases
- Sand
- Rock
- Region
- Capital

## HH Income & Spend<sup>1</sup>

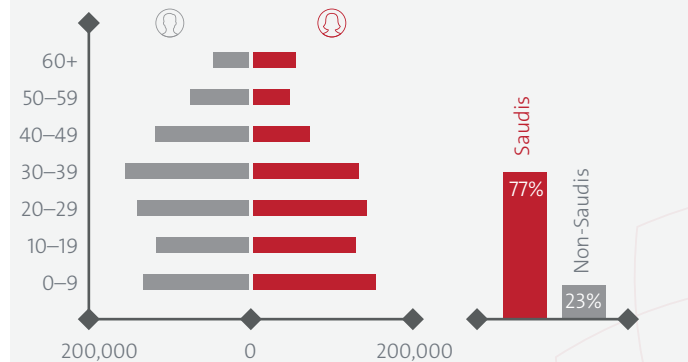
Year 2013



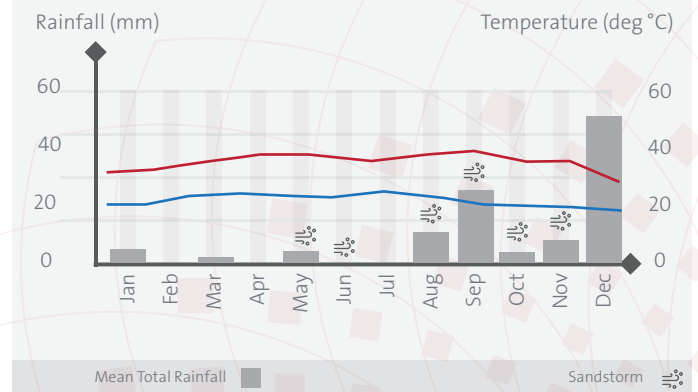
**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive  
 1. Average monthly household income and spend (SAR/month)  
 Source: GaStat, Desktop research, Team analysis

## Population

Year 2016



## Climate



## Key infrastructure highlights Jazan region

Non-Exhaustive



### Stadiums

King Faisal Sports City



### Nature Reserve

Asir National Park



### Museums

Total number: 2

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Jazan: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
<b>1</b> <b>Theme Parks</b> 0 large 1 medium 2 small	<b>12</b> <b>Cinema</b> (#of cinemas)	<b>8</b> <b>Museums</b> (# of museums)	<b>1</b> <b>Nature Reserves<sup>1</sup></b>	<b>6</b> <b>Guided Tours</b> (# of landmarks)	<b>1</b> <b>eSports</b> (# of tournaments /year)	<b>9</b> <b>Competitive Sports</b> (# of major prof. sports events/yr)
<b>0</b> <b>Water Parks</b> (#of water parks)	<b>3</b> <b>Theatres</b> (#of theatres)	<b>88</b> <b>Exhibitions</b> (# of titles/year)	<b>6</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			<b>6</b> <b>Recreational Sports</b> (# of non-prof. events/year)
<b>12</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	<b>42</b> <b>Live Events</b> (#of titles/year)		<b>1</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			<b>11</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis



## Additional offering elements

### Calendar events: 145

Shows/  
Performance Arts  
**42 Events**

Culture and Arts  
**88 Events**

Sports  
**15 Events**

### Target offering where ent. categories do not match infrastructure



**11**

**9 Extr. & adv. sports<sup>1</sup> suitable for city geography:**

**Extr. & Adv. Sports**

(# of sport types)

- Xpogo
- Parkour
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Bungee jumping
- Skydiving
- Wingsuit flying



**6**

**11 Top landmarks for guided tours:**

**Guided Tours**

(# of landmarks)

- Dumat Al-Jundal
- Qasr Marid
- Za'abal Castle
- Al-Rajajil
- The oasis of Dumat Al-Jandal
- Sisrah Well
- Hudrah Cave: Rocky-Drawings
- Al Towair Site
- Al Rajajeal Antiquities "Erected Stones"
- Omar Bin Al Khattab mosque
- Lake of Dumat Al Jandal



**6**

**Recreational Sports**

(# of non-prof. events/year)



**9**

**Competitive Sports**

(# of major prof. sports events/yr)



**1**

**eSports**

(# of tournaments /year)

1. Sports selected from list of 41 sports on activecities.com

Note: Lists of landmarks and sports types are non-exhaustive

Source: Desktop research, Team analysis

# Al-Bahah

City of cultural heritage and natural diversity

## Overview

### Al-Bahah

0,11M Inhabitants



#### Particularly famous for:

- Climate and forests
- Historic attractions
- Crafts and local industries
- Mountains for Adventure and Hiking

**Al-Bahah** is one of the Kingdom's prime tourist attractions known for its components of heritage, natural resources and cool weather.

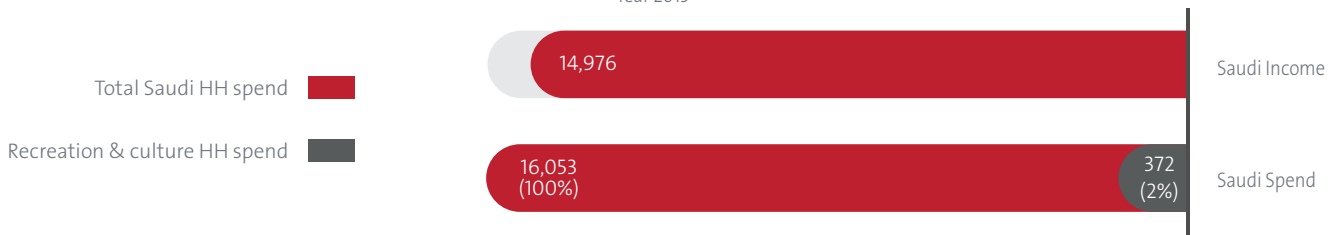
### Al-Bahah

0,47 M Inhabitants

- Plain
- Mountain
- Sea
- Oases
- Sand
- Rock
- Region
- Capital

## HH Income & Spend<sup>1</sup>

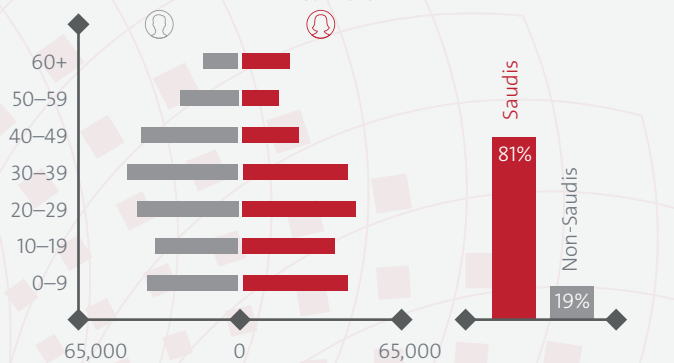
Year 2013



**Note:** Income, spend and population data are per region. Geographical areas are non-exhaustive  
<sup>1</sup> Average monthly household income and spend (SAR/month)  
 Source: GaStat, Desktop research, Team analysis

## Population

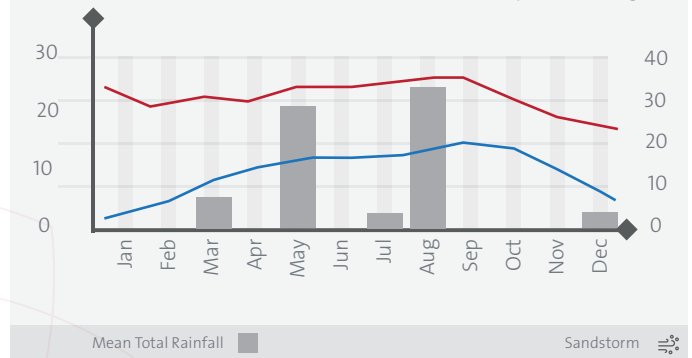
Year 2016



## Climate

Rainfall (mm)

Temperature (deg °C)



## Key infrastructure highlights Al-Bahah region

Non-Exhaustive



Museums

Total number: 2

Protected areas<sup>1</sup>

1. Protected areas are national parks and reserves either protected by Saudi Wildlife Authority or Ministry of Environment, Water, & Agriculture and other public entities

Source: Saudi Wildlife Authority, Desktop research, Team analysis

## Al-Bahah: Entertainment offering summary – 2030

Themed attractions	Shows/ Performance arts	Culture and arts	Nature	Sightseeing	Digital Ent.	Sports
 <b>1</b> <b>Theme Parks</b> 0 large 0 medium 1 small	 <b>4</b> <b>Cinema</b> (#of cinemas)	 <b>3</b> <b>Museums</b> (# of museums)	 <b>1</b> <b>Nature Reserves<sup>1</sup></b>	 <b>9</b> <b>Guided Tours</b> (# of landmarks)	 <b>1</b> <b>eSports</b> (# of tournaments /year)	 <b>7</b> <b>Competitive Sports</b> (# of major prof. sports events/ yr)
 <b>0</b> <b>Water Parks</b> (#of water parks)	 <b>5</b> <b>Theatres</b> (#of theatres)	 <b>69</b> <b>Exhibitions</b> (# of titles/year)	 <b>1</b> <b>Zoos, Aqua. &amp; Flora</b> (# of Zoos, Aqua. & Flora)			 <b>4</b> <b>Recreational Sports</b> (# of non-prof. events/ year)
 <b>4</b> <b>Family Ent Center<sup>2</sup></b> (#of FECs)	 <b>34</b> <b>Live Events</b> (#of titles/year)		 <b>1</b> <b>Urban Parks, Playgrounds</b> (M sqm green space)			 <b>15</b> <b>Extr. &amp; Adv. Sports</b> (# of sport types)

1 Nature reserves not assessed: Depending on KSA nature and requiring minimal capex investment for facilities, access control, maintenance etc.

2: including arcades

Source: North American Industry Classification System (NAICS), United Nations International Standard Industrial Classification, Team analysis

## Additional offering elements

### Calendar events: 114

Shows/  
Performance Arts  
**34 Events**

Culture and Arts  
**69 Events**

Sports  
**11 Events**

### Target offering where ent. categories do not match infrastructure



**15**

**Extr. & Adv. Sports**

(# of sport types)

**15 Extr. & adv. sports<sup>1</sup> suitable for city geography:**

- Mountain boarding
- Xpogo
- Parkour
- Rappelling
- Hang gliding
- Paragliding
- Vert ramp
- BMX
- Skateboarding
- Mountain biking
- Highlining
- Bungee jumping
- Skydiving
- Wingsuit flying



**9**

**Guided Tours**

(# of landmarks)

**9 Top landmarks for guided tours:**

- Zee Ain Heritage Village
- Dhee Ayn
- Mount shada
- The village of Mount tied down
- Mount Sorrow
- Sea Village
- Dar Fort Village
- Shamlani Museum
- Raghadan Forest Park



**4**

**Recreational Sports**

(# of non-prof. events/year)



**7**

**Competitive Sports**

(# of major prof. sports events/yr)



**1**

**eSports**

(# of tournaments /year)

1. Sports selected from list of 41 sports on activecities.com  
Note: Lists of landmarks and sports types are non-exhaustive  
Source: Desktop research, Team analysis

## 8.B. Metrics and Metrics Trajectories

### Details on Program Metrics and Metrics Trajectories (1/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Top recognized cities in the world</b>	Number of cities in the top 100 of most liveable cities of the Economist Intelligence Unit based on: Stability, Healthcare, Culture & Environment, Education and Infrastructure	0	0	0	1	Aspirations aligned with Vision 2030
<b>PISA Reading score</b>	Score on OECD Programme for International Student Assessment (PISA) Reading tests for 15-year-old students	N/A	460	460	460	Become regional leader in PISA reading scores by 2020, and reach entry point of most liveable countries by 2030

<b>Number of local universities that are ranked globally</b>	The number of universities in the top 200 universities and institutions globally as measured by the Times Higher Education World University Rankings	2	3	3	3	Reach top performers among countries in the subsequent livability bracket by 2020, and have all KSA universities currently considered in the study in the top 200 by 2030
<b>Global Talent Competitiveness Index 2017</b>	Annual Index developed by INSEAD that measures how countries grow, attract and retain talent	39	39	38	37	Improve “input” factors for the index by 2020, and become regional leader by 2030
<b>Unemployment rate</b>	Number of unemployed persons as a percentage of the labour force	13	11	10	9	Aspirations aligned with Vision 2030

## Details on Program Metrics and Metrics Trajectories (2/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Female employment rate</b>	Female labor force as a percentage of the total - labor force comprises people ages 15 and older who meet the International Labour Organization’s definition of the economically active population	21	23	25	28	Aspirations aligned with Vision 2030
<b>% of population that is a homeowner</b>	Percentage of the population that owns a home	50	53	57	60	Aspirations aligned with Housing VRP
<b>Housing stock households</b>	Number of available housing units divided by number of households	0.99	0.99	0.99	0.99	Maintain current levels until 2020, and reach entry point of most liveable countries by 2030

<b>Green space sqm/ capita</b>	Available green space, reachable within 15mins	0.9	1.09	1.27	1.46	Dedicate 60% of open space increase projection of MoMRA towards developing green spaces by 2020, and achieve WHO guidelines by 2030
<b>Number of steps taken per person per day</b>	The number of walking steps and individual would take on a single day	3807	3850	3920	4040	Maintain current levels until 2020, and reach entry point of most liveable countries by 2030

## Details on Program Metrics and Metrics Trajectories (3/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>PM 2.5 air pollution</b>	Average level of exposure of a nation's population to concentrations of suspended particles measuring less than 2.5 microns in aerodynamic diameter	106	102	97	93	Gain momentum for 2030 target with linear growth by 2020, and reach entry point of countries in subsequent livability bracket by 2030
<b>Direct international flights (either by city or by frequency)</b>	Number of direct international destinations flights of either by city or by frequency	Riyadh: 56, Jeddah: 84, Dammam: 33	Riyadh: 56, Jeddah: 84, Dammam: 33	Riyadh: 56, Jeddah: 84, Dammam: 33	Riyadh: 56, Jeddah: 84, Dammam: 33	Maintain current levels until 2020, and upgrade Jeddah to reach Helsinki road network level, Riyadh to reach Vancouver road network level, Dammam to reach current Riyadh road network level by 2030
<b>Road traffic deaths per 100,000 inhabitants</b>	Number of road traffic deaths per 100,000 inhabitants	28	26	25	23	Reduce 7% each year (in line with global benchmarks of 7-10%) by 2020, and reach entry point of most liveable countries by 2030
<b>#Hours that a commuter spends in traffic in a year</b>	Average number of hours spent per year in traffic as measured by the Inrix Global Traffic Scorecard	Riyadh: 39, Jeddah: 29, Dammam: 12	Riyadh: 39, Jeddah: 29, Dammam: 12	Riyadh: 39, Jeddah: 29, Dammam: 12	Riyadh: 39, Jeddah: 29, Dammam: 12	Maintain current positioning by 2020, and reduce Riyadh traffic to Dubai levels by 2030
<b>Annual journeys in public transport per capita</b>	Measures the average annual number of journeys per person across KSA through public transportation means	0	5	10	15	Increase based on metro Riyadh development plan by 2020, and reach entry point of most liveable countries by 2030

## Details on Program Metrics and Metrics Trajectories (4/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Penetration of electric cars</b>	Projections for electric car sales in 2030 as a percentage of total car sales	%0.0	%0.5	%1.0	%1.5	Increase at 50% rate, based on early adoption curve by 2020, and align with the targets of the Electrical Vehicle Initiative of the International Energy Agency by 2030
<b>% of renewable energy to total energy used</b>	Share of renewables in total energy requirements	0.0%	1.3%	2.6%	4.0%	Gain momentum for 2030 target with linear growth by 2020, and reach entry point of most liveable countries by 2030
<b>% of recycled waste from total waste produced</b>	Share of waste that is recycled of all waste produced	12.5%	22%	31%	40%	Gain momentum for 2030 target with linear growth by 2020, and reach average rank of most liveable countries by 2030
<b>Devices connected to internet per person</b>	The number of devices connected to the internet per person, including Consumer and Industrial IoT devices	3.6	4	5	6	Reach 1.5x of global average projections by 2020, and reach 2x of global average projections by 2030

<b>Network Readiness Index (Rank)</b>	Measures the propensity for countries to exploit the opportunities offered by information and communications technology (ICT)	33	31	28	25	Gain momentum for 2030 target with linear growth by 2020, and reach average rank of most liveable countries by 2030
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### Details on Program Metrics and Metrics Trajectories (5/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>International homicides by 100,000 inhabitants</b>	Total number of international homicides per 100,000 inhabitants	1.5	1.45	1.4	1.3	Gain momentum for 2030 target with linear growth by 2020, and become top performer amongst most liveable countries by 2030
<b>Level of violent crime</b>	Evaluation based on the question: "Is violent crime likely to pose a significant problem for government and/or business over the next two years?" as measured by the Social Progress Index	1	1	1	1	Maintain low levels of violent crime to remain at par with most liveable countries until 2030
<b>Perceived criminality</b>	An assessment of the level of domestic security and the degree to which other citizens can be trusted as measured by the Social Progress Index	3	3	3	2	Track criminality perception by benchmarking most liveable countries

### Details on Program Metrics and Metrics Trajectories (6/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>e-Government Survey Index</b>	Annual index published by the UN, resting on holistic view of e-government development, based on three important dimensions: (i) the availability of online services, (ii) telecommunication infrastructure and (iii) human capacity	44	37	31	24	Gain momentum for 2030 target with linear growth by 2020 in line with Vision 2030's target
<b>Corruption Perception Index 2016 (Rank)</b>	Measures the perceptions on the misuse of public power for private benefit as measured by the Corruption Perception Index 2016 of Transparency International organization	62	57	50	40	Gain momentum for 2030 target with linear growth by 2020, to reach entry point of most liveable countries by 2030

### Details on Program Metrics and Metrics Trajectories (7/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Gender Inequality Index</b>	Measures disparity of genders with reproductive health, empowerment and labor market participation & compensation of the United Nations Development Program	50	49	47	45	Reach UAE level by 2020, and become top performer amongst countries in subsequent livability bracket by 2030



<b>Hospital beds per 1,000 inhabitants</b>	The number of hospital beds available per 1,000 inhabitants	2.2	2.2	2.3	2.3	Follow projection of hospital developments under Privatization VRP by 2020, and reach entry point of most liveable countries by 2030
<b>Out-of-pocket health expenditure</b>	Expenditure spent on health and not covered by insurance or any other party	14.3	13.5	12.5	11	Maintain current levels until 2020, and become top performer amongst most liveable countries by 2030
<b>Life expectancy</b>	Average number of years to be lived by a group of people born in the same year, if mortality at each age remains constant in the future	74.3	74.7	75.2	76	Gain momentum for 2030 target with linear growth by 2020, and become top performer amongst most liveable countries by 2030
<b>Obesity rate</b>	Measures prevalence of obesity amongst 18+ adults (defined as having a BMI $\geq 30$ kg/m <sup>2</sup> )	28.7	28.7	28.7	28.7	Follow GCC and WHO recommendations and agreements until 2020, and reach entry point of most liveable countries by 2030

## Details on Program Metrics and Metrics Trajectories (8/9)

Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Diabetes prevalence</b>	Measures prevalence of diabetes among adults - Age-standardized prevalence of raised blood glucose/diabetes among persons aged 18+ years or on medication for raised blood glucose (defined as fasting plasma glucose value $\geq 7.0$ mmol/L (126 mg/dL) or on medication for raised blood glucose among adults aged 18+ years).	13.4	13.4	13.4	13.4	Follow GCC and WHO recommendations and agreements until 2020, and reach entry point of most liveable countries by 2030
<b>Number of NGOs per 1,000 inhabitants</b>	Calculates the number of non-religious NGOs active per 1000 inhabitants	0.01	0.01	0.01	0.05	Follow MLSO projection by 2020, and sustain continuous growth towards 2030
<b>Number of volunteers</b>	Number of volunteers	23k	115k	207k	300k	Gain momentum for 2030 target with linear growth by 2020 in line with Vision 2030's target

## Details on Program Metrics and Metrics Trajectories (9/9)

KPI	Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
Number of heritage infrastructure	<b>Quantity</b>	Measures the breadth and depth of the available infrastructure	246	314	382	450	Increase overall cultural infrastructure to match international cities and to revamp current existing venues (i.e. museums and archeological sites)



Number of heritage events	<b>Quantity</b>	Quantify the amount of events/festivals offered yearly	23	29	34	40	Increase overall offering of national/regional/urban events & festivals to create new opportunities for the Saudi population to engage with culture and foster Saudi national identity
Number of World Heritage Sites recognized by UNESCO	<b>Quantity</b>	Assess the importance of national heritage sites	4	5	6	7	Double the UNESCO recognized sites in Saudi to internationally showcase Saudi Arabia's heritage offering
Number of UNESCO intangible cultural heritage elements	<b>Quantity</b>	Assess the importance of national heritage elements	4	6	5	6	Add an additional intangible cultural heritage element recognized by UNESCO to internationally showcase Saudi Arabia's heritage offering

## Details on Program Metrics and Metrics Trajectories (1/5)

KPI	Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Sports venues</b>	Number	Total number of sports venues in the country	3,364	3,906	4,449	4,991	KPI gives an overview of the comprehensive sports offering available for the public both for entertainment purposes as well as participation in sports activities. Targets are set based on international benchmarks of best in class lifestyle countries
<b>Sports economy</b>	%	Share of sports of the total GDP of the country	0.1%	0.1%	0.2%	0.3%	KPI measures the breadth, depth and quality of sports offering as an indicator from consumption. Targets are set based on international benchmarks of best in class lifestyle countries
<b>Sportsmen in summer Olympics</b>	Number	Size of the Saudi sports delegation for the summer Olympics	7	n/a	n/a	7	KPI measures whether there is international success linked to the investments into the professional sports sector. Targets are set based on countries which were historically not winning any medals and eventually had radical improvement in the medal tables
<b>Share of active individuals</b>	%	Percentage of individuals who exercise on a weekly basis	13%	15%	16%	18%	KPI measures whether people are carrying out a healthy and active lifestyle. Targets are set based on international benchmarks

## Details on Program Metrics and Metrics Trajectories (2/5)

KPI	Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Number of cultural infrastructure</b>	Quantity	Measures the breadth and depth of the available infrastructure	158	240	322	405	Increase overall artistic infrastructure and introduce new types of venues (i.e. music venues), as well as iconic developments (i.e. opera houses & media city) to match international cities
<b>Number of cultural activities</b>	Quantity	Quantify the amount of events/festivals offered yearly	278	1908	3538	5167	Introduce new artistic activities (i.e. operas, comedy shows, concerts, dance performances) to match offering of international best-practices
<b>Participations in major international cultural festivals</b>	Quantity	Assess the quality of Saudi Arabia's artists	0	N/A	N/A	5	Increase the amount of Saudi Arabian artists participating in major international festivals across cultural sub-sectors (i.e. Art Basel, Cannes Movie Festival, etc.) to match best in class practices.. The chosen festivals are acknowledged globally and represent a proxy to determine Saudi Arabia's quality evolution across all cultural sub-sectors.
<b>Number of published books</b>	Quantity	Quantify the amount of book titles published across Saudi Arabia	230000	23667	24333	25000	Double the book titles published per year to stimulate at-home entertainment offering and gives Saudi citizens access to a larger spectrum of titles, moving towards availability levels offered by top livable countries
<b>Number of produced movies</b>	Quantity	Quantify the amount of movies produced in Saudi Arabia	0	4	9	13	Develop the local film industry in Saudi Arabia to become a regional champion and foster Arab values across the world
<b>Percentage of consumer expenditure on heritage &amp; cultural offering</b>	Percentage	Assess the level of public engagement with various cultural offerings	0.110%	0.1135%	0.1170%	0.120%	Improve engagement levels to achieve a ~2x increment in household cultural expenditure levels to reach the levels of 10 of the most livable countries utilized for the benchmarking exercise

## Details on Program Metrics and Metrics Trajectories (3/5)

KPI	Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Available entertainment infrastructure</b>	Quantity	Number of different out-of-home entertainment venues	154	189	225	260	KPI measures whether citizens have the entertainment infrastructure that are available in other global best in class countries
<b>Available entertainment offering</b>	Quantity	Number of entertainment events	216	263	310	358	KPI measures whether citizens have the entertainment event options that are available in other global best in class countries
<b>Participation in out-of-home entertainment</b>	%	Share of household spend on entertainment	1.7%	1.8%	2%	2.30%	KPI measures the participation of people in the entertainment sector. Targets are set based on international benchmarks
<b>Accessible media</b>	Quantity	Number of accessible media possibilities across the country (inc. TV, radio, newspaper)	181	257	333	409	KPI measures whether people have access to different at-home entertainment options. Targets are set based on international best practice

## Details on Program Metrics and Metrics Trajectories (4/5)

KPI	Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Number of F&amp;B venues</b>	#	Measure the number of F&B venues per million inhabitants	28410	29227	30042	30859	Nearly double the offering to match the restaurant availability levels of top-livable cities. Average restaurant per million values of benchmarked cities have been applied to Saudi's 13-largest cities' population levels to set targets. Tourism levels of benchmarked cities and iconicity of certain Saudi cities were considered while adjusting targets for KSA
<b>Number of Michelin-star chef operated restaurants</b>	#	Assess the number of premium restaurants	1	NA	NA	3	Increase the number of premium restaurants across Saudi Arabia to enhance the service offering's quality. 3-star Michelin chef's are recognized as the outmost level of food quality and the availability of restaurants owned/operated by them is utilized as a proxy for overall quality of the food & beverage offering
<b>Percentage of consumer expenditure spent on F&amp;B offering</b>	Percentage	Assess the level of public engagement in food & beverage offering	5.57%	5.57%	5.57%	5.57%	Maintain same level of spending in F&B offering once additional entertainment opportunities are introduced in the country. Maintaining current spending would continue to rank Saudi Arabia, amongst the other benchmarked countries, as one of the countries spending the highest

## Details on Program Metrics and Metrics Trajectories (5/5)

KPI	Unit	Definition	Baseline	2018	2019	2020	Rationale and Assumptions
<b>Sq. meters of shopping mall retail space per capita</b>	Meters squared	Measure the volume of retail space offered by shopping centers throughout the country	0.15	0.163	0.176	0.189	Expand the availability of retail space to match regional champion's (UAE) offering. Offering additional retail space is a proxy for enabling more possibility for leisure activities (i.e. shopping)
<b>Percentage of global brand representation</b>	Percentage	Assess the top brand penetration rate	n/a	n/a	n/a	n/a	Ease access for additional top-retail brands to enter Saudi Arabia to allow KSA to rank in the top 20 countries for "international retailer presence" ranked by CBRE through their early reports
<b>Number of iconic projects</b>	Quantity	measures the number of iconic projects in Saudi cities	0	0	0	1	Building 3 landmark projects in three main cities of Saudi Arabia to increase the city's reputation such as Dubai (City Walk, Marina Park, Design Zone, Burj Khalifa, etc.) to serve as a central hub for lifestyle and to improve the international perception of Saudi Arabia
<b>Number of amateur groups</b>	Quantity	Number of active amateur groups	0	150	300	450	increasing the number of active amateur groups to allow residents to participate

