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# Vision 2030 in the Home Stretch: Clear Achievements yet Limited Accountability

Andrew Leber 



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## Introduction

As a shorthand for the past decade of Saudi politics, the Vision 2030 project encompasses several interlocking processes: the personalization of political power around Crown Prince Mohammed bin Salman (MBS), the rewiring of the Saudi administrative state to ensure more effective policy implementation, the relaxation of long-standing social restrictions, a concerted effort to diversify the kingdom's oil-dependent economy, and the stern repression of any public dissent (outside of carefully controlled channels).

There is plenty of reason for the crown prince and his advisors to view the first half of Vision 2030's timeline—its formulation and its initial rollout—as a qualified success. For one, the crown prince remains in undisputed control of the Saudi state and its overall policy direction, despite the fallout of several international crises (some of his own making). Non-oil revenues are up, driven by a range of new taxes and fees. Steady gender integration of public spaces and new opportunities for entertainment and leisure activities have unfolded without notable backlash. More Saudi citizens are employed in the kingdom's private sector than ever before, helped by an expansion of public entertainment and domestic consumption. Though arbitrary arrests and detentions continue, much of the international stigma associated with Saudi Arabia over the brutal murder of media figure Jamal Khashoggi has faded—at least among the foreign countries, multinational firms, and financial elites that the kingdom is courting.

Still, many of these achievements—significant as they are for the kingdom and its leadership—represent low-hanging fruit compared with the ongoing challenge of building a Saudi economy that can truly “live without oil” and integrating it into non-oil global supply

chains.<sup>1</sup> As citizens and outside observers begin to price in the reputational and economic benefits of shedding conservative restrictions on social activity, Saudi Arabia continues to face daunting challenges in providing for a growing national population amid an anticipated decline in oil prices and revenues. A more efficient Saudi state still governs an economy heavily reliant on fossil fuels and byproducts. Outside of new extractive industries, chiefly in the mining sector, non-oil growth relies on successful state-led bets on the industries of tomorrow, including electric vehicles, data storage centers, luxury hotels, and a host of smaller startups.

As Vision 2030 heads into the home stretch, at least until the next multi-year plan is announced, Saudi policymakers will contend with the predictable frictions engendered by top-down projects of national development. The lack of formal political constraints on MBS and high-ranking officials does not eliminate the practical constraints of physical and human capital, as well as basic geography and history, on the scope and pace of change. Highly personalized decision making can center the international status concerns of elite policymakers over and above ensuring tangible gains for Saudi citizens writ large. Moreover, a highly repressive public sphere makes it difficult to openly debate the tradeoffs and payoffs inherent to any policy project with massive economic and social implications. Silencing critics can send grievances underground but does not eliminate them. Although clear information on Vision 2030's rollout is hard to come by, a case study of the kingdom's efforts to promote tourism indicates that despite obvious gains in this sector, achievements have been exaggerated, many major investments are of dubious value, and citizens are privately critical of various top-down investment schemes. A recent uptick in the release of Saudi detainees is a welcome step, but most policymaking processes remain insulated from bottom-up accountability.

## Vision 2030: A Brief Background

From debuting as a single white paper in April 2016, Saudi Arabia's Vision 2030 has become a catchall term for a wide-ranging revolution from above. In an initial phase, MBS and his advisors presented the project as a set of mostly technocratic changes: improving fiscal health by cutting government spending, especially subsidies; attracting foreign investment through clearer business regulations; and building up new economic sectors, such as logistics hubs. These elements, on the whole, required little change to the monarchy's apparent concession of much social and educational policy to religious clerics.<sup>2</sup> The core policy proposal of this phase was the idea of selling shares in state-owned oil company Saudi Aramco as a means of raising investment capital and addressing budget shortfalls. This measure, however striking, did not challenge the policy prerogatives of religious clerics, who have long been deemed a crucial source of legitimation for the Saudi monarchy. Still, the initial months (January 2016–June 2017) of Vision 2030 offered previews of more fundamental changes to social regulations. The kingdom's new General Entertainment Authority (GEA), for instance,



hosted closed-door concerts and mixed-gender cultural events that until recently would have been restricted or prohibited by religious conservatives.<sup>3</sup> In a more overt expression of the nascent policy shift, MBS's advisers even suggested to Western columnists that the crown prince might "take on the religious leadership, too."<sup>4</sup>

Behind the scenes, these policy proposals were underpinned by MBS and his advisers' overlapping efforts to sideline powerful rival princes and to establish meaningful control over a sprawling bureaucracy.<sup>5</sup> King Salman provided his son with a head start in aggrandizing personal power by appointing MBS to prominent positions in national security (as minister of defense), economic planning (as head of the Council of Economic and Development Affairs, or CEDA) and above all the line of succession (first as deputy crown prince in April 2015). This strong political position gave MBS both nominal and de facto authority to corral wayward ministries in the Saudi state, a process that ministers described as transforming "separate islands" or "isolated siloes" into a more unified state apparatus.<sup>6</sup> MBS also was empowered to repurpose existing state institutions or generate entirely new entities, circumventing existing bureaucratic roadblocks to pursue new economic policies. For example, the long-moribund Public Investment Fund (PIF) took its first steps toward becoming what Karen Young deems a "parallel Saudi state" under MBS appointee Yasir Rumayyan, initially serving to absorb some assets of rival princes in the name of the public interest.<sup>7</sup> Newer entities such as the GEA and a revitalized General Sports Authority became institutional homes for MBS loyalists and a means of executing various "trial balloon" policies with respect to social liberalization.

The summer and fall of 2017 marked a turning point into a second phase of Vision 2030, one marked by more rapid social liberalization, the expansion of artificially suppressed economic sectors such as public entertainment, and heightened repression of any domestic criticism. A pivotal development that paved the way for this second phase was the crown prince's sidelining of his most prominent rival, Muhammad bin Nayef (MBN), in June 2017. If television footage of MBN offering an oath of allegiance to MBS left any doubt about the latter's monopolization of power within the monarchy, such doubts were laid to rest by the "Night at the Ritz" in November of that year.<sup>8</sup> There, MBS and his closest advisors engineered the detention of hundreds of high-status royal family members, business leaders, and senior officials at the Ritz-Carlton Hotel in Riyadh, officially on suspicion of official corruption, and forced many of them to give up large amounts of money.<sup>9</sup> In practical terms, this act signaled MBS's dominance over the monarchy and appropriated sizable sums with which to fund various Vision 2030 schemes.

Only as these potential rivals were detained or deterred did MBS begin to openly pursue riskier policies of social liberalization. For example, some months after MBN had been forced to resign his status as crown prince, King Salman issued a directive paving the way for women to finally be allowed to drive within the kingdom—addressing a restriction long targeted by domestic activism and external critics.<sup>10</sup> It also was around this time that MBS began rhetorically framing the kingdom's recent past as an aberration, casting social

liberalization as “going back to what we were: a moderate Islam that is open to all religions and to the world and to all traditions and people.”<sup>11</sup> More policy changes followed to loosen further restrictions on women’s autonomy, even though a new Personal Status Law codified some forms of gender discrimination in areas such as divorce, child custody, and inheritance.<sup>12</sup> A few of the more visible gender barriers have been removed, as seen in the ending of requirements for most forms of gender segregation within restaurants. The physical barriers that once divided “family” and “male-only” sections of restaurants and cafes are now a thing of the past, even as gender mixing has become the norm in the kingdom’s public spaces—at least in the more upscale areas of major cities. Cinemas and music concerts have returned to the kingdom, with the GEA going so far as to host raves in the desert around Riyadh.<sup>13</sup> State-employed religious scholars not only have avoided criticizing these changes, but also have underwritten the monarchy’s efforts with religious rulings that justify reversing the legal consensus of past generations of clerics.<sup>14</sup>

Still, social liberalization has been mirrored by stern repression of most forms of public criticism or activism within the kingdom.<sup>15</sup> Back in early 2018, an economist friend remarked that Saudi Arabia was at least “not like the [United Arab] Emirates,” in that there was still room for private, closed-door debate and discussion of politics and policymaking, occasionally expressed publicly. Yet even by then, waves of arrests had begun targeting prominent independent religious clerics, ostensibly to ward off any criticism of new social policies but also to silence figures with a prominent following in Saudi society and elsewhere.<sup>16</sup> Subsequent arrests further targeted any individuals who stood out through their overt criticism or even their potential to mobilize opposition to state policies. Activists who championed women’s right to drive in the pre-MBS era, for example, were subjected to arbitrary detention and torture, even if most (but not all) were subsequently released.<sup>17</sup> Most prominently among the targeted actions of the regime, MBS’s personal “Tiger Squad” of paramilitaries assassinated longtime Saudi media figure Jamal Khashoggi in Istanbul in October 2018—a blunt means of silencing a knowledgeable critic with a prominent platform at the *Washington Post*.<sup>18</sup>

The fact that MBS survived the considerable international backlash and domestic concerns over the Khashoggi assassination indicates that there are no real rival contenders for power within the monarchy, at least for the foreseeable future. Saudi officials’ public accounts of Vision 2030 invariably present MBS as dominating decisionmaking, at times down to the most granular policy details.<sup>19</sup> Fahad Al-Tunisi, an initial author and ongoing supervisor of Vision 2030 projects, described a “beautiful” moment of MBS insisting on minor changes to terminology in the initial white paper.<sup>20</sup> Saudi Minister of Sport Abdulaziz bin Turki Al Saud likewise noted MBS’s “weekly follow-ups” on efforts to recruit football players, and that the crown prince had personally sketched out a set of rules governing Saudi football clubs.<sup>21</sup> Yet even though these officials portray MBS as open to private discussion of policy choices and receptive to personal lobbying, they also indicate that it is difficult or impossible

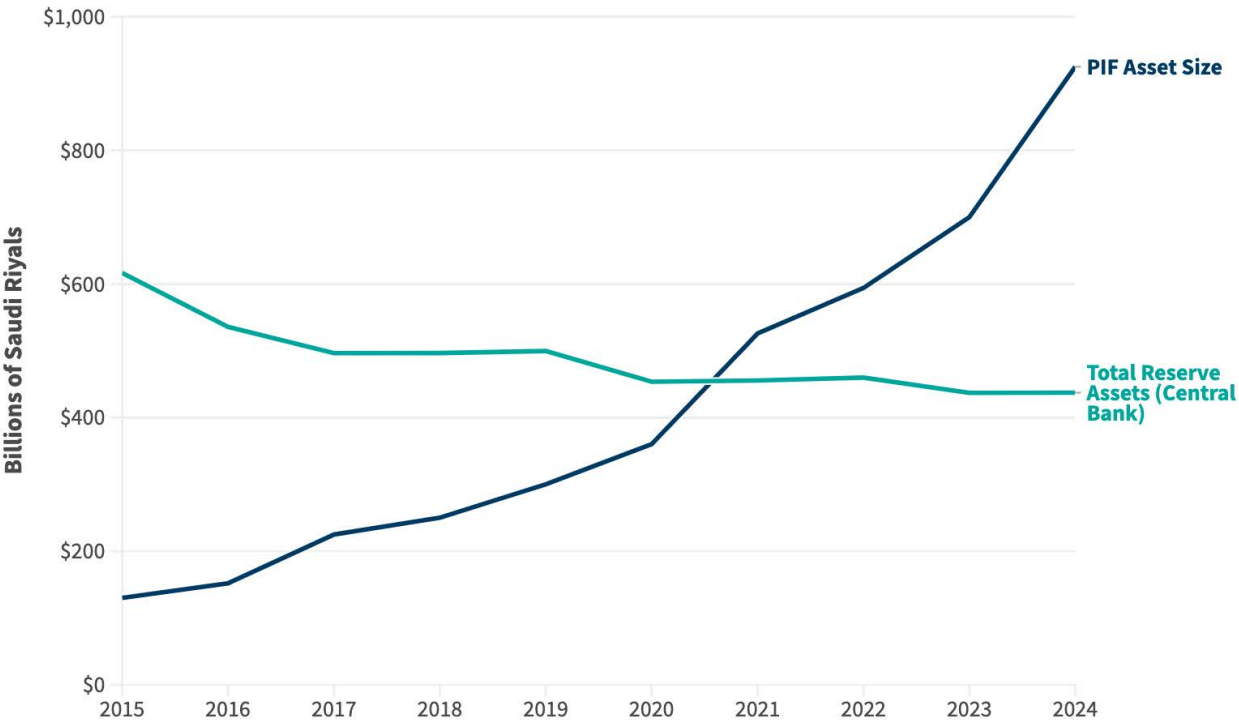
to overrule the crown prince once his mind is made up.<sup>22</sup> Even attempts to document “rules-based governance” within the Saudi state tend to underscore MBS’s ultimate authority in deciding what is in Saudi Arabia’s public interest.<sup>23</sup>

Setting aside political developments, Saudi officials within the Vision 2030 effort can point to clear policy achievements in the project’s initial phases. In fiscal terms, the kingdom has expanded its sources of non-oil revenue through a value-added tax (VAT; now at 15 percent) and other fees and taxes, now covering an estimated 66 percent of the public-sector payroll and accounting for more than 40 percent of overall revenue (per the Ministry of Finance’s 2024 estimates).<sup>24</sup> Unemployment is generally down, with jobs growth almost entirely in private-sector positions rather than the kingdom’s sprawling bureaucracy, even if it can be hard to account for new state-owned enterprises.<sup>25</sup> Much of this growth can be found in sectors previously suppressed by conservative social restrictions; an expansion in major cities’ restaurant scenes, for example, has helped add more than 70,000 jobs for Saudis in the food and beverage sector since 2016, and many more for non-Saudi expatriate workers.<sup>26</sup>

## The High Modernist Phase

As 2030 draws nearer, however, the vision plan and its attendant policymakers are moving into a third “execution and implementation” phase, in terms of the twin policy challenges of turning a (non-oil-based) profit and providing job opportunities for citizens. This phase is marked by a redoubled emphasis on state-led development, with public finances backing ventures ranging from vast infrastructural projects to small startups in hopes of “picking winners” and incorporating the kingdom into burgeoning global supply chains.<sup>27</sup> Though the Ministries of Finance, Economy and Planning, Investment, and others all play a significant role in this process, the PIF effectively serves as the Saudi state’s venture capital fund in setting up, managing, and eventually spinning off various domestic ventures.<sup>28</sup> Since its 2015 restructuring, transfers in from various other Saudi entities have transformed the PIF into one of the largest sovereign wealth funds in the region, if not the world (see figure 1).<sup>29</sup>

**Figure 1. Public Investment Fund Assets vs. Foreign Currency Reserve Holdings**



Note: Total reserve foreign currency holdings shown for scale.  
 Source: See endnote 29 for full sources.

Although the PIF’s activities abroad have been more likely to attract Western headlines, most of its holdings (70 to 80 percent, per various sources) are invested at home, with plans to further cut back overseas investments.<sup>30</sup> Within these holdings, domestic investments fall into four large buckets. The first group includes import-substitution ventures that target existing domestic demand currently met entirely or partially through purchases abroad. The second group is export-replacement ventures that seek to provide Saudi citizens with domestic alternatives to foreign tourism, encompassing local concerts, travel destinations, sporting events, restaurants, and shopping opportunities. In the third group are firms targeting various “enabling” goods and service that facilitate yet more economic activity, such as financial-technology startups.<sup>31</sup> Finally, there are “big bets” that deploy massive infusions of capital to situate Saudi Arabia within entire new sectors, such as electric vehicle (EV) supply chains or growing ecosystems of artificial intelligence (AI)-oriented firms.<sup>32</sup> These efforts are more ambitious than even diversification away from oil—already a substantial task—in their goal to make Saudi Arabia an indispensable part of the international political economy outside of the energy sector, along the lines of Taiwan’s importance in global semiconductor supply chains.<sup>33</sup>

The looming questions for the remainder of Vision 2030's run time and beyond is whether these bets will pay off, and by how much. The goalposts already are starting to shift for outside commentators and Saudi citizens alike. Permitting women to drive is no longer novel in Saudi Arabia, even as Saudi twenty-somethings willing to accept lower-paying jobs as an initial step inevitably become Saudi thirty-somethings who have greater financial expectations and obligations. Many of the policy achievements of the first seven years are low-hanging fruit: removing state-enforced barriers to economic and social activity that Saudi citizens and foreign businesses already were undertaking. In turn, factors that may have helped facilitate the initial stages of Saudi Arabia's national transformation—chiefly the centralization of political and administrative authority—may in turn prove more of a liability in this phase, particularly if state officials fail to grapple with limits on their ability to generate top-down economic change.

The concept of “high modernism” offers a framework for understanding these limits and other potential pitfalls that await Saudi policymakers in the years ahead. Coined by the late social scientist James Scott, the phrase high modernism describes political leaders' and policymakers' belief in using the power of the administrative state to impose rational order and progress onto a society in all its complexity.<sup>34</sup> To be sure, Saudi policymakers are not seeking the “sweeping, rational engineering of . . . social life” on the order of Soviet collectivization experiments or Tanzanian efforts at village resettlement.<sup>35</sup> Vision 2030 nevertheless runs the risk of ignoring practical barriers to proposed projects, prioritizing the aesthetics of a changing Saudi Arabia over material gains for citizens, and overlooking policy harms as well as social grievances by treating even constructive criticism as a political threat.

## Ignoring Practical Barriers

First, high modernist political leaders, policymakers, or planners typically seek “enormous changes in people's habits, work, living patterns, moral conduct, and worldview” to make social reality conform to a preexisting vision of what society *should* look like.<sup>36</sup> Vision 2030 has supremely ambitious goals, from de-centering religion as the focal point of Saudi identity and daily life to centering Saudi Arabia within the world as an economic and geopolitical powerhouse. It also incorporates several enormous infrastructural projects. Most prominent among these is Neom, a development zone in the far northwest of Saudi Arabia (along the Red Sea) encompassing several planned cities and industrial areas. Ideologically, Vision 2030 takes a “move fast and break things” approach to driving change that focuses on objectives rather than constraints. Still, high modernism's “nearly limitless ambition to transform nature to suit man's purposes” in turn suggests an unwillingness to grapple with practical boundaries to economic and social change.<sup>37</sup> This in turn encourages plans that run roughshod over local conditions, whether environmental or social.

The most striking example is a Neom sub-project called Trojena: a planned outdoor ski resort, complete with a roughly \$5 billion, 700-million-gallon artificial lake.<sup>38</sup> To further commit to this infrastructural bet, Saudi planners and policymakers in turn have secured

hosting rights for the 2029 Asian Winter Games. In an understated criticism, one Olympian skier remarked that “it makes sense to compete in places that have some level of infrastructure and some natural resources towards the sports that we are trying to do.”<sup>39</sup> Deploying enormous amounts of fake snow might pull off the equivalent of snow-dusted mountains at the 2022 Winter Olympics in Beijing, but it is hard to see the resort attracting annual ski tourism without the draw of an international competition.<sup>40</sup>

These projects sink enormous amounts of capital into complex economic bets, located far away from the kingdom’s existing population centers. Within the Neom economic zone, Trojena is accompanied by The Line, a 110-mile-long linear city with no cars, streets, or carbon emissions; The Oxagon, a partially floating manufacturing hub; and Sindalah, a luxury island resort (and the only full part of Neom to have opened to date).<sup>41</sup> Still more projects are under construction in other regions of the kingdom. One of these projects, Diriyah Gate, is a vast real estate development around the Al Saud ancestral home northwest of Riyadh.<sup>42</sup> Several iterations of tourism developments also have been attempted in the southern region of ‘Asir, though these have been subject to repeated delays.<sup>43</sup>

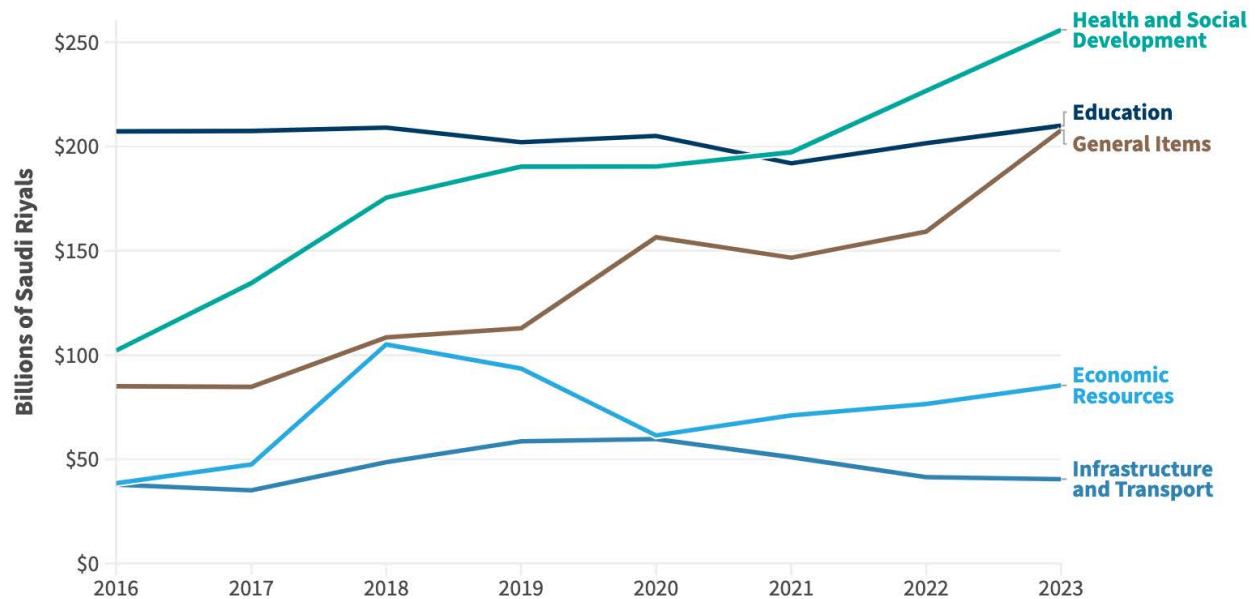
Past examples and contemporary developments suggest that these high modernist projects risk major cost overruns, unanticipated complexities, and opportunity costs from not investing in other, more mundane infrastructural projects. Under the previous reign of King Abdullah, a set of “economic cities” was intended to remake Saudi Arabia’s economic geography and attract substantial foreign investment—until the kingdom quietly abandoned or dramatically downsized these plans amid the global economic downturn of 2008–2009.<sup>44</sup> Likewise, generations of Egyptian urban planners and policymakers have promoted the idea that new “desert cities” can generate sizable economic returns and alleviate overcrowding in existing urban centers, even though all evidence suggests that these resources would be better spent improving essential services and regulating land use within existing cities such as Cairo and Alexandria.<sup>45</sup> Neom itself has been plagued by schedule delays and cost overruns, with a series of *Wall Street Journal* reports describing problems ranging from a lack of coordination between subprojects to abusive executives.<sup>46</sup> Likely as a result of these reports, CEO Nadhmi al-Nasr was replaced in mid-November 2024.<sup>47</sup>

Even Saudi officials have started to question the scale of their giga-project ambitions. The Line has been scaled back to just a 1.5-mile stretch of development, at least for the 2030 deadline.<sup>48</sup> More broadly, there is a growing recognition that pursuing so many “big push” policies at once is unsustainable for the Saudi economy, risking supply bottlenecks and inflationary pressures on local materials and services. In November, for example, Minister of Finance Mohammad Jadaan spoke to Al Arabiya over concerns about “the ability of [the] economy to sustain this spending” in driving the 2025 budget’s increased focus on “spending efficiency.”<sup>49</sup> Even staunch defenders of projects such as Neom have long distinguished between aspects of these projects with long-term potential, such as the green-hydrogen company underway as part of the development, and those that are more “aspirational.”<sup>50</sup>

As the Saudi monarchy walks back some of its more grandiose plans for economic transformation, smaller-scale ventures are still unlikely to translate into job opportunities for citizens without greater investment in basic education services. A constant refrain from private-sector employers is the challenge of hiring Saudi citizens with requisite skills to staff positions, even with substantial workplace quotas and fees designed to raise the cost of hiring expatriate employees. This “skills gap” will only worsen as the kingdom targets a wide range of highly skilled (and buzzword-heavy) sectors, including AI startups, green technology, data centers, e-gaming, fintech, and EV production.

Yet despite various initiatives to “upskill” Saudi citizens or provide vocational training, there is little evidence of a massive investment in Saudi education. Overall education spending increased by just 1 percent between 2016 and 2023, even as ill-defined spending on “general items”—which includes expenses related to various giga-projects—more than doubled (as shown in figure 2).<sup>51</sup> Education officials have attempted to frame this anemic rise as accomplishing more with less, but it seems to reflect an elite consensus that these kinds of basic services are a burden on the state rather than an essential investment for future growth.<sup>52</sup>

**Figure 2. Saudi Government Expenditures by Category**



Note: Not all categories shown.

Source: Statistics for budget allocation accessed via “Public Finance: Annual Government Revenues and Expenditures by Sector – Actual,” Saudi Central Bank (SAMA) Portal for Open Data, accessed January 16, 2025, <https://www.sama.gov.sa/en-US/EconomicReports/Pages/report.aspx?cid=124>.

## Prioritizing Aesthetics

High-modernist projects often are concerned with the aesthetics of change over and above practical realities, relying on “visual images of heroic progress towards a totally transformed future.”<sup>53</sup> When MBS announced Neom in 2017, for example, he pledged that it would “create something new in the world and take the world to a whole new level.”<sup>54</sup> To illustrate this envisioned future, the crown prince claimed that the city would be a technological leap forward as great as the jump “between this phone [holding up an old Nokia cellphone] and this one [holding up his own iPhone].”<sup>55</sup> Each new giga-project has been accompanied by slick introduction videos that often seem like the pilot for a science fiction show; many are produced by entertainment firms with close ties to Hollywood.<sup>56</sup> This marketing approach speaks to how the Vision 2030 project seeks to alter Saudi Arabia’s reputation and status globally as well as change its material circumstances—and to the fact that these two goals do not always align.

MBS and those around him have long been focused on the international image of the kingdom, particularly among Western audiences. In domestic interviews between 2016 and 2018, MBS laid out an expansive view of the kingdom as a central actor in the global economy, though he admitted that considerable work still would be needed for Saudi Arabia to reach its full potential.<sup>57</sup> The crown prince’s announcement of Neom likewise launched a discourse of making Saudi Arabia “moderate” again, an attractive site of shiny new cities and gleaming technology rather than an arid bastion of religious conservatism.<sup>58</sup> Comments in marquee interviews also reflect worries about Saudi Arabia’s reputation relative to immediate neighbors; in one 2018 comment, MBS complained to Bloomberg correspondents about losing top expatriate talent to Dubai and the United Arab Emirates “because . . . the quality of life [in Saudi Arabia] and the lifestyle is not good.”<sup>59</sup> MBS’s personal desire for international status and recognition is likely a factor as well. Although many of MBS’s 2016 and 2018 trips to the United States made good business sense, they also framed him as the equal of high-status individuals and institutions in the country, as he tried out a VR headset with Mark Zuckerberg, enjoyed a private dinner with major Hollywood figures, and joined a roundtable (albeit closed-door) discussion at Harvard University.<sup>60</sup> Yasmine Farouk accordingly identifies Saudi leaders’ desire for international recognition as a major driver of foreign policy decisions.<sup>61</sup> It stands to reason that these motivations factor into domestic policymaking as well, over and above any rational cost-benefit calculations.<sup>62</sup>

To be sure, efforts at “nation-branding” are a common enough activity for states to pursue. The United Arab Emirates and Qatar have been active in this space for some time.<sup>63</sup> Yet the heavy future orientation of Vision 2030—where almost any economic bet today can be justified against projected gains fifty years or more down the line—means that officials publicly discuss straightforward investments in clearly viable sectors in much the same terms as long-shot deals motivated primarily by personal whims or a desire to garner international headlines.



The kingdom's major expansion into mining, for instance, makes eminent sense.<sup>64</sup> Saudi Arabia has considerable untapped reserves of rare minerals, and the global mining industry is booming amid a surge in demand from EVs and high-tech manufactures. By contrast, a deal with EV manufacturer Lucid Motors is one example of Saudi officials' riskier efforts to leverage capital to integrate the country into future supply chains. The EV manufacturer can secure cheaper funding from the PIF than it can from international markets, though in part it must do so by integrating some Saudi facilities into the assembly of its luxury vehicles—such as by shipping premanufactured kits of vehicles to Jeddah for in-country assembly.<sup>65</sup> Still, the desire to simply get Saudi Arabia into the running as a part of an EV manufacturing chain is at least balanced by the potential for longer-term payoffs. Regarding flashier giga-projects, some defenders likewise try to distinguish between more “aspirational” features and those with longer-term potential, as in the case of the aforementioned green-hydrogen developments underway as part of Neom.<sup>66</sup>

A worst-case scenario would seem to be investments such as the PIF-backed LIV Golf venture, intended as a rival to the U.S. PGA tour. Ostensibly developed with an eye to eventually generating profits off the proceedings, Saudi policymaker interest appears rooted far more in PIF chairman Rumayyan's own interest in the game of golf—and desire for Saudi recognition within the rarified golf world—than in any rational case for deploying Saudi capital among competing proposals.<sup>67</sup> Thus far, the main beneficiaries of this venture have been the LIV Golf players who have collected multimillion-dollar payouts at the PIF's expense and the lawyers involved in extensive litigation over LIV's relationship with the PGA tour, especially after the two nominally agreed to a merger.<sup>68</sup> Neom itself is currently far from living up to the reputational promise of various conceptual drawings and videos, if an abortive social media campaign to promote life in the city is anything to go by.<sup>69</sup>

## Lack of Accountability

Sorting the wheat from the chaff amid Saudi Arabia's various economic bets is made more difficult by the lack of bottom-up accountability on those betting with the kingdom's capital. James Scott cautions that high modernism tends to go especially awry in the absence of “working, representative institutions” that help to ensure various top-down schemes “accommodate themselves sufficiently to local opinion.”<sup>70</sup> Even the Saudi Arabia of 2015 featured little in the way of representative institutions: its hand-picked Advisory Council exercised no independent authority, and the kingdom's subjects had no meaningful vote except for the partial election—since abandoned—of local municipal councils. Yet even a very narrow window for discussion of “politics,” let alone public criticism of policies, has been all but shut since then.

MBS and those around him believe in representative government—albeit in the sense that the monarchy should “represent” the public in pursuing policies that are in the national interest. “Any regime that did not represent its people collapsed in the Arab Spring,” the

then-deputy crown prince remarked to the *Economist* as early as January 2016.<sup>71</sup> Although accounts of Vision 2030 governance emphasize the accountability of officials, this is invariably “upward” accountability to the crown prince or to other officials rather than to the broader Saudi public. An episode of a documentary series on Vision 2030 (*Hekayat Wa’ad*) poses the question “How are officials held accountable?”<sup>72</sup> In answer, it offers examples of a centralized bureaucratic review, a field inspection, and MBS himself personally complaining about burned-out streetlamps on the way to the airport. Some phone apps allow individuals to report claims of corruption or criminal violations, but these mechanisms are more about enlisting citizen collaboration in addressing “deviations” from regime plans than meaningfully contesting policy choices.<sup>73</sup>

Instead, any form of bottom-up accountability through public discussion or criticism of Vision 2030 and its policy aims has been treated as a political threat. Jamal Khashoggi’s extensive, though broadly complimentary, commentary on Vision 2030—a “Citizen’s Vision 2030”—ran in late 2016.<sup>74</sup> Any similar form of commentary would be unimaginable today. Saudi economist Essam al-Zamel, for example, has been in detention since 2017, reportedly for criticizing rather than cheerleading initial proposals such as the Aramco initial public offering, which encountered considerable obstacles and raised far less than initially intended.<sup>75</sup> Saudi security services continue to make arrests based on critical online comments, with public discussion growing ever narrower to avoid triggering unpredictable “red lines.”<sup>76</sup> Although these actions are in line with an effort to clamp down on the merest hint of a political challenge, they also align with a high modernist view of any criticism or resistance as both fundamentally illegitimate and an obstacle that must be “swept aside.”<sup>77</sup>

At present, any public contestation of Vision 2030’s implementation takes place through controlled but occasionally pointed interviews on satellite television, or increasingly through podcasts. Officials are encouraged to participate in these interviews, in part because these appearances offer at least the performance of public accountability. A few presenters, such as Abdullah al-Mudaifer, are known for pressing their interview subjects particularly hard on questions that reflect broader public interest.<sup>78</sup> One of the more popular such venues is the *Sqrat* (Socrates) podcast from the Thmanyah podcasting group—now owned by the Saudi Research and Media Group, an entity with reportedly close ties to the Saudi state.<sup>79</sup> There, host Omar Aljeraisy explicitly claims he does *not* “press” his guests, who are typically officials involved in implementing aspects of Saudi Vision 2030.<sup>80</sup> He nevertheless hints at popular concerns in questions conveyed to officials from the show’s listeners.

These venues, while better than nothing, are a poor substitute for actual debate over the direction of Vision 2030. Even the best and the brightest among the various Vision 2030 cadres in government are unlikely to anticipate all of the negative effects of their policy choices or take heed of them should they arise. It reportedly took the death of Tabuk resident Abdul Rahim Al Huwaity, in a confrontation with security forces over Al Huwaity’s eviction from a Neom-designated area, for Saudi officials to develop adequate compensation policies for local residents affected by development.<sup>81</sup>

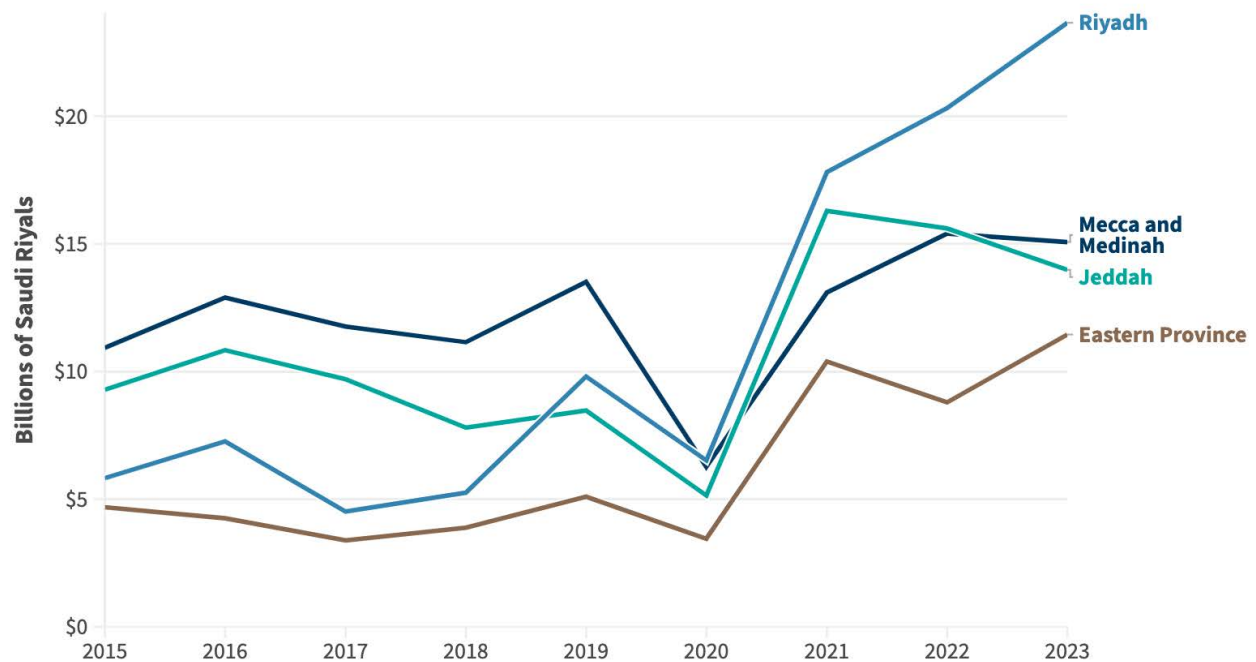
## Application: Tourism Sector

Tourism, one of the sectors newly invigorated by Vision 2030, illustrates the above concerns. On the one hand, opening up the country to tourism and other entertainment ventures has tangibly benefited the kingdom in terms of money spent within its borders. On the other hand, most increases in international tourism reflect new visits to religious sites such as Mecca and Medinah, rather than fundamentally reengineering the source of the kingdom's travel appeal. Nevertheless, the recent efforts in massive top-down investments and aggressive marketing campaigns have focused on Western-friendly luxury destinations. Saudi Arabia therefore risks spending billions to court high-end, implicitly Western tourists who are unlikely to visit the kingdom in large numbers, even as ordinary citizens complain that these ventures do little to expand affordable tourism infrastructure.

The Arabian Peninsula, as home to the Islamic holy sites of Mecca and Medinah, has been a global travel destination for centuries.<sup>82</sup> Only in 2019, however, did Saudi Arabia begin issuing a formal “tourist visa,” following a series of one-off visas for special events.<sup>83</sup> Tourism holds the potential to generate economic growth, both by attracting more visitors to the kingdom and by encouraging Saudi citizens to travel domestically rather than abroad. It could in turn generate more jobs for Saudi citizens, particularly given successes in “Saudizing” many of the front-end and managerial positions of hotels and attractions—though behind-the-scenes custodial positions remain far less Saudized.<sup>84</sup> It is also bound up in processes of social transformation, encouraging exploration of the kingdom by Saudi citizens and visitors alike amid the loosening of state-backed social restrictions. Tourist visits from abroad serve to rebrand the country in the eyes of foreign publics by proving them with direct experience of a more “moderate” kingdom.<sup>85</sup> Accordingly, numerous PIF-backed giga-projects, such as resorts planned along much of the Red Sea and in the southern mountains, focus on the tourism sector.<sup>86</sup> Expanded state capacity has in turn been reflected in Ministry of Tourism (MOT) data on the number of visitors and the amount of spending they generate within different regions of the kingdom—data that permit a clear assessment of official claims about the tourism expansion to date.<sup>87</sup>

Saudi tourism has been most successful as an export replacement, encouraging citizens to travel internally instead of abroad. Even prior to the pandemic, programs such as various Saudi “Seasons” sponsored marquee attractions in targeted areas.<sup>88</sup> Still, the number of domestic tourists has grown considerably in the immediate aftermath of the pandemic, particularly following the formation of the MoT in 2020. The forced “staycation” of the coronavirus lockdowns certainly encouraged this development (see figure 3).<sup>89</sup> In 2023, domestic travelers recorded around 82 million overnight stays, an 80 percent (36 million) increase over 2015–2016 numbers. These travelers in turn spent around SAR 62 billion (~\$16.8 billion) more domestically than the 2015–2016 average. To the extent that this represents hard currency kept within the kingdom rather than spent abroad, it amounts to over 11 percent of imports in the earlier time period.<sup>90</sup>

**Figure 3. Spending on Domestic Tourism by Region**

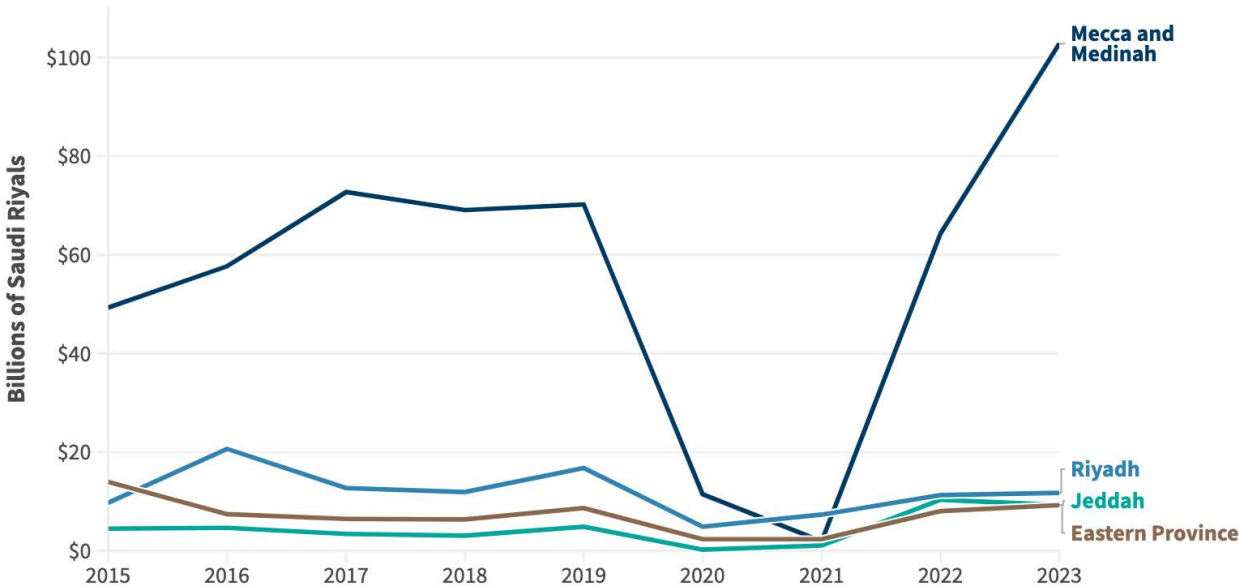


Note: Regions refer to governorates containing the relevant city, except for Eastern Province (which combines numbers for Al-Ahsa, Khobar, and Dammam).  
 Source: Domestic tourism indicators accessed at “Tourism Intelligence Center: Open Data,” Ministry of Tourism (Saudi Arabia), accessed December 7, 2024, <https://mt.gov.sa/tic/open-data>.

Domestic travel is diversifying as well, reflecting the greater attractions available in big cities such as the capital of Riyadh. Across 2021–2023, the governorate of Riyadh (encompassing most of the city) recorded 10 million overnight visits on average, an increase of more than 6 million over the 2015–2016 average. Spending from these visits likewise more than tripled, from SAR 6.5 billion to over SAR 20 billion. By contrast, the holy cities of Mecca and Medinah have seen little increase in domestic travel. Combined domestic travel spending in Mecca and the nearby city of Jeddah amounts to around 21 percent of all domestic travel spending—comparable to the nearly 21 percent spent in Riyadh and down considerably from the 33 percent it accounted for in 2015.

At first glance, international visits mirror these domestic achievements (see figure 4). In 2023, Saudi Arabia recorded substantially more overnight stays (10.5 million) and spending (an increase of SAR 49 billion, or around \$13 billion) from foreigners relative to the 2015–2018 baseline. The total number of foreign tourists in 2023 (over 27 million) is close to the MOT’s 2030 target, leading officials to revise targets upward to 70 million international visitors by 2030.<sup>91</sup> An International Monetary Fund (IMF) Article IV report mirrored official Saudi messaging in touting the potential of “tourism-led Giga projects” to drive further growth in tourism.<sup>92</sup> Taken at face value, the kingdom’s tourism statistics back up these reported trends: just 12 percent of visits in 2023 were recorded as being made for “religious” reasons, compared with 42 percent recorded as “leisure” travel.

**Figure 4. Spending on International Tourism by Region**



Note: Regions refer to provinces containing the relevant city, except for Eastern Province (which combines numbers for Al-Ahsa, Khobar, and Dammam).  
 Source: Inbound tourism indicators accessed at “Tourism Intelligence Center: Open Data,” Ministry of Tourism (Saudi Arabia), accessed December 7, 2024, <https://mt.gov.sa/tic/open-data>.

A closer look at the data, however, suggests almost that all increased international tourism to Saudi Arabia reflects a long-standing travel flow: religious pilgrimage. Officially, only 12 percent of overnight stays in 2023 were recorded as “religious” tourism, leading Saudi officials and the IMF to credit much of the expansion to “non-religious visits.” Still, Saudi tourism officials have also acknowledged that visits can result from multiple motivations; the Ministry of Hajj and Umrah, which is responsible for administering services for those on religious pilgrimage, even notes that “the tourist visa is preferred for beneficiaries wishing to perform Umrah [i.e., a pilgrimage to Mecca].”<sup>93</sup> MOT numbers indicate that much of the increase in international overnight stays (60 percent, or over 6 million) and spending (over 80 percent, or nearly \$11 billion) took place in the city of Mecca.<sup>94</sup> Jeddah, typically a “gateway” to Mecca for travelers, accounted for an additional 5.5 percent of increased visits and nearly 11 percent of increased spending. Accordingly, visits to the holy city outside of official Umrah visas are responsible for much of the kingdom’s headline tourism gains to date.<sup>95</sup>

These religious visits in turn have knock-on effects for the infrastructure and overall travel experience of the holy cities. Already, the number of Umrah visits—now viewed as a reliable moneymaker for the kingdom—is up considerably, with 2023 numbers up more than 50 percent from 2019 numbers and available 2024 data showing further increases.<sup>96</sup> Although this trend helps maximize revenue from a hotel infrastructure designed for peak Hajj capacity, it also means additional wear and tear on Mecca’s basic infrastructure. Tourist

visas also exacerbate a long-standing “pilgrim without permit” problem during the Hajj itself. Both overcrowding and infrastructural strain were in turn contributing factors to mass deaths in the 2024 Hajj.<sup>97</sup>

At the same time, Saudi Arabia’s marquee investments and advertising campaigns have focused heavily on attracting Western tourists on nonreligious visits.<sup>98</sup> These audiences and activities may well have greater dividends for the kingdom’s reputation in the West than domestic travelers or religious tourism.<sup>99</sup> The AIUla desert tourism development zone, for example, appears to be a modest success.<sup>100</sup> The MOT recorded more than 100,000 international stays in 2023 alone—more visits than other sizable Saudi cities such as Abha or Buraidah.<sup>101</sup> Still, it will take some time for revenue from AIUla (\$125 million in international receipts, \$140 million in domestic receipts) to overtake the reported \$10 billion invested in the region thus far, with billions more to come.<sup>102</sup> Various resort complexes along the Red Sea recently have begun opening, though the first hotels to open attracted only a few hundred international visits in the first half of 2024 (again, per MOT data). Long-promised developments in the Soudah Mountains of the ‘Asir region, meanwhile, are only just getting started despite years of lobbying by the region’s governor.<sup>103</sup>

Concerns circulate in Saudi society about whether these big bets will pay off, as reflected in questions posed on podcasts and talk shows. On *Soqrat*, host Aljeraisy has raised doubts about the reliability of tourism statistics and achievements in several interviews—including one with Minister of Tourism Ahmed Al Khateeb—given the large share of visitors headed to Mecca and Medinah.<sup>104</sup> Other interviews have questioned whether the kingdom’s tourism strategy was too focused on attracting foreigners rather than supporting internal travel, and in turn whether marketing toward foreign tourists excessively targeted Western audiences.<sup>105</sup> “Why do I feel you’re focusing only on the West? Is it because they are blond, and it’s cool to get tourists [like this]?” Aljeraisy asked the head of the Saudi Tourism Authority.<sup>106</sup> Yet even if some tourism officials acknowledge that Western tourists “wouldn’t replace the millions of [Muslim] visitors from Indonesia,” they tend to list off the kingdom’s connection to Islam as yet another set of heritage sites to market to visiting tourists rather than the main basis of the country’s tourism inflows.<sup>107</sup>

Still other questions touched on public spending choices as well as perceptions of a growing divide between the “haves” and “have-nots” of Saudi society, and the extent to which various state-backed projects cater to the former.<sup>108</sup> The *Soqrat* interview with Khateeb highlighted the focus of new tourism projects on an ultra-luxury tranche of Saudi and non-Saudi citizens alike.<sup>109</sup> In an interview with Mohammad Al Nasser, head of the Red Sea Development Authority, Aljeraisy in turn relayed concerns from Saudi citizens and residents that various beachfront property developments “were not for us” and that all of them targeted “high-income individuals rather than middle-income individuals.”<sup>110</sup> Even observers in the global hospitality industry feel that Saudi Arabia’s plans are too heavily slanted toward ultra-luxury offerings.<sup>111</sup> Tourism officials invariably claim that high-profile projects are intended to pave the way for a broader range of tourism offerings down the line, but they still feed a perception that many of Vision 2030’s investments are targeted primarily at a global elite (which includes wealthy Saudis) rather than the Saudi population writ large.

## Conclusion

This snapshot of Saudi tourism development highlights some of the achievements and the potential pitfalls of the Vision 2030 rollout. There is undeniable growth in domestic economic sectors that barely existed previously, reflecting interest from both domestic and international travelers. Yet the expansion for international tourism is mainly driven by further expansion of international travel flows that were quite robust long before Vision 2030 appeared on the scene—and with the potential for additional strain on tourism infrastructure in Mecca and Medinah. Various large-scale bets on five-star hotel resorts, from Neom in the north to ‘Asir in the south, run the risk of not only failing to recoup their sizable initial investments but also becoming symbols of a national policy project that uses public money to cater primarily to wealthy constituencies.

Despite Saudi officials’ claims to be acting in the public interest, these biases suggest a worst-case scenario from the perspective of Saudi citizens: Vision 2030 spending that mostly benefits the consultants, contractors, and managers working to get the projects off the ground, while saddling the country with a large number of white-elephant infrastructural projects generating few jobs or revenue streams. Combined with ongoing pressures to “rationalize” spending on basic services and impose new fees and taxes on the citizen and expatriate populations, the next decade may validate some of the sharpest critiques of Vision 2030 and similar plans as little more than Trojan horses for hollowing out the welfare state and enriching elite individuals and institutions at home and abroad.<sup>112</sup> This negative perspective would in turn clash with Saudi officials’ priority of providing meaningful jobs—or at least good job opportunities—to Saudi citizens as a means of warding off future social unrest.

Avoiding this outcome means reintroducing some form of accountability into Saudi policymaking beyond the upward accountability of the present system. One easy step would be to better incorporate representation from local areas into policymaking decisions for specific regions. The Royal Commission for AlUla seems to have benefited from good working relations with the surrounding community in building a successful tourism destination.<sup>113</sup> This success has proven hard to replicate elsewhere, however. Even three years on from renewed efforts at developing ‘Asir, for example, tangible projects under the Soudah Development Company are still a long way off.<sup>114</sup> The kingdom’s preexisting regional governor system might be further institutionalized to this end, rationalizing an awkward administrative structure that dates back to the kingdom’s founding. As such governors invariably are members of the Saudi royal family, MBS might be more willing to grant them leeway in the governance of their regions as long as they are seen as loyal overall.

More broadly, however, officials are only likely to go out of their way to accommodate local public opinion or avoid headline-grabbing boondoggles if there is at least some domestic space for public criticism. The limited opportunities for putting pressure on officials via podcasts and television shows are insufficient venues for citizens to offer meaningful feedback on Vision 2030’s economic and social effects and offer no means to meaningfully debate

its aims. Furthermore, even the limited space for social commentary remains fraught and uncertain, as seen in the recent trial of Saudi animation creator Abdulaziz Almuzaini and his subsequent return to the good graces of authorities.<sup>115</sup> At this point, releasing known critics of the regime and its policies—however quietly, under whatever pretenses—may be the one step that can jump-start a reversion to a more open public sphere within Saudi Arabia. Recent developments offer some encouragement on this note. A number of detainees have reportedly been released over the past few weeks, including some highlighted by Amnesty International, such as Mohammad al-Qahtani and Salma al-Shehab.<sup>116</sup> The Saudi monarchy likes to claim that it has no political prisoners; making this claim a reality would help keep Vision 2030 on track as it heads into its final years.



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