



**Saudi Arabia's Soft Power Under Vision 2030:
Challenges and Limitations**

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Abstract:

Saudi Arabia's pursuit of soft power under Vision 2030 marks a significant shift in the Kingdom's international engagement strategy. Through cultural liberalization, tourism and entertainment megaprojects, and sports diplomacy, Saudi Arabia seeks to reposition itself as a modern, open, and influential global actor. This study examines whether these substantial investments in international image-building have generated corresponding levels of attraction and legitimacy among external audiences. The study addresses three central questions: How has Saudi Arabia sought to develop and deploy soft power under Vision 2030? What political, economic, and structural factors constrain the effectiveness of these efforts? How do domestic governance practices and foreign-policy behavior shape the credibility of Saudi soft power? The study employs Joseph Nye's conceptualization of soft power, particularly the sources of attraction derived from culture, political values, and foreign policy, as its primary theoretical framework. Methodologically, the study uses a qualitative case-study approach, analyzing policy documents, official statements, existing academic literature, and selected developments in Saudi Arabia's cultural reforms, economic diversification, and foreign policy. The study argues that Saudi Arabia's principal soft-power constraint lies not in inadequate resources or international competition, but in a credibility dilemma embedded within its reform model.

Keywords: Saudi Arabia, Vision 2030, Gulf politics, soft power, rentier state, authoritarian modernization

INTRODUCTION

Vision 2030 is a comprehensive national transformation program launched in 2016 under the leadership of Crown Prince Mohammed bin Salman (MBS). Its central objective is to reduce Saudi Arabia's dependence on oil, diversify the economy, improve citizens' quality of life, and strengthen the Kingdom's position as an influential global actor. The Vision is built around three interconnected pillars: "A Vibrant Society," "A Thriving Economy," and "An Ambitious Nation." (Kingdom of Saudi Arabia, 2016). The vision marks a significant shift in the Kingdom's approach to international engagement and soft-power projection. It emphasizes governance, citizen

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communication, social development, entertainment, locally grounded cultural content, and a more dynamic society (Butt & Rafique, 2021). Soft power has become an important component of Vision 2030, which seeks to diversify the economy, modernize society, strengthen cultural diplomacy, and enhance the Kingdom's global position (Rasheed, 2018). Saudi Arabia is seeking to reshape its international image through tourism, cultural diplomacy, economic partnerships, and global connectivity (Grabowski, 2022). However, these efforts face significant challenges, including geopolitical tensions, environmental sustainability concerns, criticism of domestic policies, and human-rights issues (Froman, 2024). Consequently, the effectiveness and limitations of Saudi Arabia's emerging soft-power strategy deserve systematic examination (Rod, & Himmer, 2023).

This study focuses on the growing gap between Saudi Arabia's significant investment in soft-power resources under Vision 2030 and its limited ability to convert these resources into sustained international attraction and credibility. Since introducing Vision 2030, the Kingdom has undertaken extensive reforms to transform its international image and establish itself as a modern, globally connected state. Investments in tourism, sports, entertainment, cultural initiatives, international events, and economic partnerships have significantly expanded Saudi Arabia's global visibility (Grabowski, 2022). However, increased visibility does not imply soft power in Nye's sense, which depends on the capacity to generate attraction and influence through culture, political values, and foreign policy rather than coercion or material inducement (Henne, 2021; Farouk, 2023).

The problem is particularly significant because the Kingdom's reform agenda combines rapid social and economic liberalization with highly centralized political authority and continuing criticism concerning human rights and domestic governance (Froman, 2024). This raises questions about whether reforms designed to communicate openness and modernity can generate sustained attraction when they coexist with practices that may undermine the credibility of those projected values. Moreover, geopolitical tensions, environmental pressures, and the economic sustainability of large-scale transformation projects may further constrain Saudi Arabia's ability to sustain its soft-power ambitions (Froman, 2024). Accordingly, this study examines the structural, political, economic, and reputational challenges that limit the effectiveness of Saudi Arabia's soft-power strategy under Vision 2030.

Soft power, in its original formulation, is a state's ability to achieve its goals through attraction rather than coercion or payment. It rests on three sources: a state's culture, which is attractive to others; its political values, which it upholds at home and abroad; and its foreign policy, which is seen as legitimate and morally authoritative (Nye, 2008). Two features of this specification are frequently lost in applied work and are central to the argument here.

First, soft power cannot be measured simply by the resources or expenditure devoted to it. Its effectiveness depends on how external audiences perceive and respond to those resources. This distinction matters for Saudi Arabia, where substantial investments in festivals, tourism, sports, entertainment, and other initiatives can show the scale of soft-power efforts but do not necessarily indicate their effectiveness. Secondly, the credibility of a state's political values is essential to its soft-power capacity. Nye's formulation requires states to demonstrate these values through their domestic and international conduct (Nye, 2008). A significant gap between projected values and actual practices can therefore undermine credibility and reduce the attractiveness of the state's broader soft-power efforts. In Saudi Arabia's case, this suggests that cultural initiatives and foreign-

policy activities may be interpreted in the light of the Kingdom's domestic governance practices. Thus, the effectiveness of Saudi soft power depends not only on the scale of its investment, but also on the perceived authenticity, consistency, and credibility of the values it seeks to project.

LITERATURE REVIEW

Existing literature on Saudi Arabia's Vision 2030 analyzes the Kingdom's strategy to enhance its global standing through economic diversification, cultural modernization, and soft-power projection. Recent studies note that major investments in entertainment, sports diplomacy, and tourism seek to improve international perceptions and reduce dependence on hydrocarbons (Grabowski, 2022; Callen, 2024). However, scholars note a growing tension between greater global visibility and authentic soft-power attraction. Farouk (2023) and Froman (2024) argue that Saudi Arabia's reform model faces a 'credibility paradox,' as state-led social liberalization exists alongside centralized executive authority and strict limits on domestic political expression.

Studies on non-oil sectors also indicate that tourism and megaprojects encounter environmental risks, regional security issues, and social barriers that complicate external engagement (Zaghloul, 2024; Callen, 2024). In foreign policy, recent literature highlights Saudi Arabia's move toward pragmatic multi-alignment and transactional diplomacy among major powers (Calabrese, 2024; Quamar, 2024). While this approach secures economic and strategic agreements, scholars contend it produces material influence rather than normative public attraction (Farouk, 2023). Consequently, the literature emphasizes that the primary constraint on Saudi soft power is not resource scarcity, but the perceived gap between projected modernizing values and current domestic governance practices.

THEORETICAL FRAMEWORK

This study uses Joseph Nye's concept of soft power as its principal theoretical lens. Nye defines soft power as a state's ability to achieve its aims through attraction and persuasion rather than coercion or economic inducement (Nye, 2008). The framework identifies three main sources of soft power: a state's culture, its political values, and a foreign policy which is seen to be legitimate and morally authoritative. The framework is very clear in its distinction between soft power resources (e.g., investment in cultural festivals, investment in tourism) and hard power resources, megaprojects, and soft power outcomes (which are entirely dependent on perception and attraction from the outside). Furthermore, the framework asserts that the credibility and consistency of a state's domestic and International conduct are key; the greater the gap between what is projected and what is actually done, the less effective the soft power and the greater the credibility deficit.

RESEARCH METHODOLOGY

This study employs a qualitative and case-study research design to evaluate the opportunities and structural constraints of Saudi soft-power projection under Vision 2030. The research uses qualitative analysis of primary and secondary sources, including official policy documents (such as Vision 2030), government progress reports, press releases, elite interviews, and peer-reviewed academic literature. Through thematic synthesis, the study examines key areas: cultural reforms, women's empowerment, entertainment and tourism expansion, educational exchanges, political centralization, and foreign policy multi-alignment. It assesses how structural rentier dynamics and

domestic governance practices shape the International credibility and attractiveness of Saudi Arabia's soft power initiatives.

CULTURAL REFORMS AND SOFT POWER: VISIBILITY, SPECTACLE, AND THE LIMITS

Religious Authority and the Limits of “Moderate Islam”

Islam is the Kingdom of Saudi Arabia's official state religion. For most of its modern history, the Kingdom's legal and cultural framework has been shaped by a strict interpretation of Sunni Islam (Commins, 2006) and Wahhabism, which has historically constrained social freedom in entertainment, the arts, and women's rights (Adetunji, 2023). Further, according to a 2017 Pew Research Center Report, Saudi Arabia didn't allow religious freedom. The central cultural challenge of Vision 2030 is therefore reconciling a conservative Islamic identity with the imperatives of modernization (French, 2023), and it is a path toward moderate Islam.

Under Vision 2030, extremism is rejected, and the power of conservative religious police and hardline clerics is restricted. Mandaville's assessment of this formulation is enlightening: while the doctrine presents a newly tolerant Saudi Islam externally, it requires Saudi youth, as good Muslims, to submit to the monarchy's authority in the Kingdom's affairs (French, 2023). Moderation, in other words, is not a devolution of religious authority but a transfer of it—from the clerical establishment to the executive. This is a significant change in the Kingdom's internal politics. However, external audiences cannot straightforwardly read this as liberalization, because the operative variable is not the quantity of religious constraint but the identity of the body imposing it.

Domestic resistance to this reformulation is significant. Resistance is concentrated among religious elites and leaders and is most intense over extending freedoms to women (Bianco, n.d.). Interview evidence indicates that the state addressed this resistance through a deliberate media strategy, mobilizing sympathetic voices to build support for the Crown Prince's initiatives and thereby reducing the salience of clerical objection (M. Jaffar, personal communication, 4 Nov. 2024). Although Saudi Arabia's reforms are strategically projected towards external audiences as evidence of social transformation and modernization, they remain subject to domestic criticism and contestation. This creates a potential credibility gap: reforms intended to generate international attraction may be interpreted externally in light of the domestic constraints and criticisms surrounding their implementation. Soft power, therefore, cannot be assessed solely through the visibility of reforms; it also depends on whether external audiences regard the values and changes being projected as credible.

Women's Empowerment and the Paradox of Controlled Reform

Women's rights constitute the most important component of Saudi Arabia's cultural reforms under Vision 2030. Thus, women's role has been altered and transformed in Saudi Arabia's society. In 2018, the ban on women driving was lifted, ending Saudi Arabia's status as the only country in the world maintaining such a ban, and the decision attracted considerable international approval (Alyusufi, 2023). Vision 2030 set a target of 30% female workforce participation by 2030 (Alhawsawi & Jawhara, 2023), and the Kingdom reached that target ahead of schedule through a combination of legal reforms, programmatic support, and shifting social norms (Ahmed, 2020). Expanding Technical and Vocational Education and Training provision for women, including

opening technical colleges, increased female enrolment (Alnufaie & Beghum, 2021). Women have been permitted to attend sport events, and female labor force participation has risen across sectors (Shelton, 2023).

These gains coexist with substantial constraints.

- Elements of the male guardianship structure persist, requiring women to obtain permission from a male relative for activities including foreign travel and marriage; although the state has relaxed aspects of the system, it remains a material obstacle to gender equality (Kelly, 2021; Jalabi, 2021).
- Women entering technical fields continue to encounter gender bias, societal stereotyping, restricted course options and an absence of role models in non-traditional occupations, which limits both enrolment and post-graduation employment (Alnufaie & Beghum, 2021).
- Generational absorption of the changes has also been uneven, with older cohorts adapting more slowly to reforms such as the driving decision.

The decisive point, however, is neither the scale of the gains nor the persistence of the constraints. It is the state's simultaneous prosecution of the women's rights activists who campaigned for precisely these reforms. The detention of Loujain al-Hathloul, among others, sent a message that ran directly counter to the reforms themselves (Kelly, 2021), and this juxtaposition complicates the Kingdom's projection of progress and modernization to international audiences (Jalabi, 2021).

Entertainment, Tourism, and the Limits of Social Liberalization

The entertainment sector has received substantial state support, with objectives of creating over 100,000 jobs and contributing more than USD 23 billion to the economy. The General Entertainment Authority was established in 2017, cinemas reopened in 2018 after a thirty-five-year ban, and the sector is targeted to generate USD 64 billion in revenue by 2030 (Harshan, 2023).

The program has attracted international attention along with domestic objection and criticism:

- Conservative Saudi citizens have criticized music festivals, concerts, and fashion shows in Riyadh and Jeddah, with social media backlash indicating discomfort with mixed-gender public gatherings and Western-style entertainment formats (Torre, 2020). The government must therefore promote a progressive international image without violating the expectations of a deeply conservative society (Karasik & Taylor, n.d.). This dual-audience problem recurs throughout the Vision 2030 program and has no stable solution, since the two audiences read the same event in opposite directions.

A thriving economy is one of the most important pillars under Vision 2030. The aim is to reduce the Kingdom's reliance on the oil economy. As a result, the Kingdom is introducing legal reforms, launching tourism projects, and implementing new tourism laws (Saudi Tourism Authority, n.d.). The tourism sector faces compounded competitive and environmental pressures. The sector aims to attract international visitors, retain domestic leisure spending, generate employment, and reduce hydrocarbon dependence (Callen, 2024). The Kingdom has long received religious visitors, but it effectively closed non-religious tourism until the introduction of tourist visas in 2019 (Issa, 2021). "...Saudi surpassed its Vision 2030 tourism target seven years ahead of schedule, welcoming 100 million domestic and international visitors. The Kingdom has since raised the bar, setting a new

goal of 150 million tourists by 20230, further strengthening its position as a premier global destination” (Saudi Tourism Authority, n.d.).

However, this growth faces several constraints simultaneously:

- Intense global competition for visitors, conflict in the wider Middle East region (Torre, 2020).
- Restrictions on alcohol and unfamiliar social conventions that deter some foreign travelers; rising temperatures and extreme weather that discourage visits and encourage Saudi citizens to travel abroad (Zaghloul, 2024)
- Inflation in travel and accommodation costs, alongside a shortage of trained staff in the tourism sector (Alyoubi, 2024).

Note that these constraints are not additive but interactive. The social restrictions that deter leisure visitors are the same restrictions the state is reluctant to relax further for domestic reasons, and the climatic constraint is not amenable to policy at all. Consequently, the tourism strategy depends on a segment—visitors attracted by novelty, spectacle, and megaproject architecture rather than by permissiveness or climate—that is smaller than the strategy’s revenue targets.

Education, Knowledge Exchange, and Soft-Power Projection

Education has been an explicit instrument of Saudi Arabia’s soft power, through investment in domestic institutions such as the King Abdullah University of Science and Technology and through large-scale scholarship provision (Almnakrah, 2019). The King Abdullah Scholarship Program, launched in 2005, sent tens of thousands of students to the United States, the United Kingdom, and Canada, generating the people-to-people connections and long-term diplomatic ties that educational exchange is intended to produce (Alyusufi, 2023). Between 2005 and 2019, more than 200,000 Saudi students studied abroad, including 98,000 in the United States, returning with technical training and exposure to other societies and contributing to domestic modernization (Alzubaidi et. al., 2019).

The program’s soft power yield is limited by conditions of return:

- Graduates report frustration with the shortage of appropriate employment and restrictions in certain sectors, particularly for women (Alotaibi & Alshehri, 2023).
- Saudi unemployment reached 12.6 percent in 2020, with youth unemployment above 28 percent (Williams, 2022), creating a mismatch between educational investment and labor market absorption (Konopka & Strykhotzkyi, 2021).
- The resulting brain drain — talented graduates who do not find the professional freedom, career opportunities, or social conditions they expect — weakens the Kingdom’s capacity to build the skilled workforce Vision 2030 requires (Almoaibed, 2024).

Cultural Diplomacy and Limits of Global Appeal

Cultural diplomacy allows states to project identity and values internationally, and Saudi Arabia has invested substantially in the required institutions while achieving limited external reach (Calabrese, 2024). South Korea, through television drama and popular music, and the United States, through Hollywood, have shaped global perceptions of their societies on a scale the Kingdom has not yet approached (Konopka & Strykhotzkyi, 2021). Saudi Arabia has established cultural institutions, including the Misk Art Institute and the King Abdulaziz Center for World Culture

(Ithra). Still, these initiatives' international reach and influence remain comparatively limited, and the Red Sea International Film Festival, launched in 2021 to support Saudi filmmakers and cultural projects internationally, has limited reach compared with the established industries of the United States, Europe, and India (Mosly, 2024).

The standard explanation is that:

- Cultural influence grows slowly, and the Kingdom's institutions are young. Successful cultural exports are generally produced by sectors with substantial creative autonomy, and their appeal frequently derives from their capacity to depict their own societies critically. Korean cinema and television achieved international standing largely through an unsparing treatment of Korean class relations and social pressure. A cultural sector operating under state direction, in an environment where political expression is constrained, is structurally ill-positioned to produce that kind of output. The cultural export deficit therefore stems from the same configuration that produces the credibility constraint elsewhere: the state can fund cultural production. Still, it cannot fund the autonomy that lets it travel.
- A related observation concerns social change that the state does not direct. Everyday Saudi social life is changing in ways the state neither initiated nor controls—patterns of sociability are shifting from the physical majlis (meetings/gatherings) to digital platforms, particularly among young Saudis. This shift became especially important during the COVID-19 pandemic. Likewise, food/kitchen culture is shifting from traditional food to fast food, so even Saudi chefs incorporate traditional flavors into contemporary fast-food dishes. These changes are often cited as evidence of Vision 2030's cultural impact. They are better understood as autonomous actors, and presenting their work as an extension of state policy can itself be seen as an attempt to claim soft power—an interpretation that external audiences may not necessarily accept ("Saudi Arabia reinvents itself," 2024).

Political Values, Centralized Authority, and the Limits of Reform

Saudi Arabia faces a number of political challenges as it seeks to implement Vision 2030. These challenges relate to governance structure, regional and international relations, economic transitions, and societal expectations (Heibech, 2021).

The Centralization of Authority

The concentration of decision-making power under Crown Prince Mohammed bin Salman is the most consequential political development of Vision 2030. The Crown Prince has consolidated control across key areas of governance, sidelining royal-family rivals and centralizing decision-making (Ozarowski, 2021). This departs from a governance tradition in which the royal family maintained balance and prevented power struggles through distributed decision-making, and excluding princes who previously participated in governance risks internal dissatisfaction (Berni, 2023).

The trade-off is well identified in the literature: centralization has enabled reforms to proceed at speed, but it has also made policy outcomes dependent on the judgement and preferences of a single individual, with consequent risks to long-term political stability (Rafique & Butt, 2022). Thus, centralization is the mechanism that undermines the Kingdom's soft-power image.

The Absence of Political Reforms

Saudi Arabia remains an absolute monarchy, and the economic and social changes initiated under Vision 2030 have not been accompanied by political reforms. There is no electoral system, political parties are prohibited, and political dissent is heavily suppressed (Silva, 2024).

This matters more over time than it does now, because of the Kingdom's demographic structure.

- Survey evidence indicates that more than seventy per cent of the population is under thirty-five (Tanis, 2022), and this cohort is more globally connected and politically aware than preceding generations because of access to social media and international travel. As a population maturing in a rapidly changing society, it may demand greater political participation, and the lack of channels for that demand is a plausible source of future tension and disaffection (Grabowski, 2022).
- The suppression of free expression, the detention of protesters and the absence of representative institutions have also attracted sustained criticism from Western states, which strains relationships with key international partners and complicates efforts to attract foreign investment (Grabowski, 2022).

The Human Rights Record

The Kingdom's human rights record remains a major constraint domestically and internationally, with criticism directed at its treatment of protesters, human rights defenders, and women's rights advocates. The killing of the journalist Jamal Khashoggi in 2018 caused severe damage to the Kingdom's international standing (Nuruzzaman, 2019). It raised significant concern in Europe and North America about maintaining close diplomatic and trade relations, particularly with Western democracies. These concerns bear directly on Vision 2030's investment objectives, as international businesses weigh the reputational risk of engagement (Gardner, 2021).

The Khashoggi killing did not merely damage Saudi Arabia's reputation; it weakened the credibility through which its subsequent reforms are interpreted. As Nye (2008, 2019) argues, soft power depends not only on attractive resources but on their perceived credibility and consistency with state conduct. Consequently, the episode continues to shape external perceptions of Saudi liberalization, limiting its capacity to generate attraction despite the scale of reform.

Reconfiguring the Rentier Social Contract

Economic diversification is Vision 2030's core objective and is presented as essential to the Kingdom's future stability (Quamar, 2022). The reforms it requires carry substantial domestic political risk:

- Privatization and fiscal consolidation may exacerbate inequality if they cause job losses or reduce welfare provision (Sweidan & Elbargathi, 2023). Saudi nationals have long depended on public-sector employment and oil-funded subsidies, and cuts to these benefits are likely to spark discontent if the private sector does not absorb a growing workforce ("Saudi Arabia reinvents itself," 2024).
- Youth unemployment remains a significant problem, and a failure to generate employment outside the hydrocarbon sector could produce social tension (Guendouz & Ouassaf, 2020).

This is the rentier bargain under revision, and the terms of the revision are unfavorable to citizens in the short run: reduced allowances, new taxation, and fewer well-paid public sector positions all

cut against the principles that have organized state–society relations in the Kingdom (Odnoletkova & Patzek, 2021). Vision 2030's success depends on domestic stability and regime legitimacy, which in turn depend on socioeconomic transformation delivering sufficient employment for the youth cohort and growth that does not track oil prices (Bohl, 2024).

The soft-power implication lies in the changing basis of the rentier bargain. As material benefits are reduced without a corresponding expansion of political participation, the state's social contract becomes more difficult to sustain and justify. This tension may also affect external perceptions of political and institutional stability, particularly as Saudi Arabia seeks to attract foreign investment. Thus, the credibility of the reform process depends not only on economic transformation but also on how investors and other external audiences assess the durability of the underlying political settlement.

Foreign Policy: Rivalry, Bloc Management, and Multi-Alignment

Vision 2030's domestic objectives are inseparable from the Kingdom's external environment: diversification requires foreign capital, tourism requires regional stability, and both require a manageable international reputation (Jacobs, 2023). The Kingdom must therefore manage relations with regional rivals, address security threats, balance global partnerships, and address adverse international perceptions simultaneously (Borck, 2023).

Rivalry with Iran and Intervention in Yemen

The long-standing rivalry with Iran remains the Kingdom's principal regional challenge, with both powers competing for influence across the Middle East. The war in Yemen, beginning in 2015, has been a substantial drain on Saudi resources and a focal point of that competition; it has damaged the Kingdom's international image and exposed Saudi territory, including oil facilities, to Houthi missile and drone attacks (Naghizadeh, 2019). Iranian influence in Iraq, exercised through Shia militias, and in Lebanon, exercised through Hezbollah, further constrains Saudi regional reach (Settembrini, 2019). The restoration of diplomatic relations between Riyadh and Tehran in 2023 under Chinese mediation reduced immediate tensions without resolving the underlying competition (Al Jazeera, 2023).

The Yemen intervention has been costly to Saudi Arabia financially and in terms of international standing. This has drawn criticism over the resulting humanitarian crisis in Yemen and has not yet delivered clear strategic gains for the Kingdom (Felsch, 2020). Its persistence diverts resources from domestic priorities and complicates the Kingdom's international relations (Cerioli, 2023).

The Yemen intervention is particularly significant within Nye's framework because it affects the credibility of Saudi Arabia's foreign policy, one of the key sources of soft power. While domestic repression can undermine the credibility of political values, military intervention and its humanitarian consequences can similarly weaken perceptions of the Kingdom's foreign policy as legitimate and responsible. Cultural diplomacy or domestic liberalization alone cannot offset the resulting reputational cost, because external audiences assess these dimensions in relation to one another. Thus, when foreign-policy conduct contradicts the image of openness and moderation projected through Vision 2030, investment in cultural attraction may generate visibility without producing a corresponding increase in soft power.

Managing the Gulf Cooperation Council

Maintaining cohesion within the Gulf Cooperation Council presents a second-order challenge (Wajid, 2023). The 2017 blockade of Qatar, led by Saudi Arabia, the UAE and Bahrain, produced significant fractures within the bloc; its termination through the Al-Ula Declaration in 2021 resolved the immediate dispute without addressing the underlying issues, as Qatar's independent foreign policy — including its relations with Iran and its support for the Muslim Brotherhood — remains a source of tension (Miller, 2019). Careful management is required to prevent further division, since bloc unity underpins regional stability (Tok, 2021).

Saudi-Emirati relations are the more consequential intra-bloc dynamic for Vision 2030. The two states align on many issues, including their rivalry with Iran, but diverge economically, and Saudi Arabia's objective of establishing Riyadh as the Gulf's premier business hub puts the Kingdom in direct competition with Dubai and Abu Dhabi (Webster & Pelayo, 2023). This competitive dimension recurs in the investment domain, where Dubai remains the preferred destination for many Western investors and where Saudi social policy and legal framework operate as comparative disadvantages (Al Yousif, 2020).

Multi-Alignment: Washington, Beijing and Moscow

The Saudi-US relationship has historically rested on oil, security, and regional stability, and has been strained by geopolitical shifts and by human rights concerns, particularly following the Khashoggi killing and the position taken by the Biden administration (Ebrahim, 2023; Alsubaie, 2018). In response, the Kingdom has diversified its external partnerships. China became Saudi Arabia's largest trading partner in 2022, with agreements worth billions of dollars signed between the two states (Porter, 2023), and is a significant partner in infrastructure, technology, and renewable energy — a relationship the Kingdom must manage while preserving its position with Washington amid intensifying US-China competition (Gause, 2024). The partnership with Russia within the OPEC framework remains a key element of Saudi energy policy, made more delicate by the war in Ukraine and requiring careful handling to avoid damaging relationships with the West (Fulton, 2020).

The strategy is coherent on its own terms. Diversifying partnerships, prioritizing economic interests, maintaining non-alignment on great-power disputes, and pursuing both security cooperation and energy diplomacy reduce dependence on any single partner and have positioned the Kingdom as a regional broker (Bradshaw, et. al., 2019). But the Kingdom competes with these partners from a position of structural disadvantage across several domains: research and development capacity, where the United States leads in technology and innovation, China in artificial intelligence, and Russia in defense and space technology; military procurement, where substantial defense expenditure coexists with dependence on imported hardware; and higher education, where the gap relative to leading US and Chinese institutions remains substantial (Halabi & Yara, 2023). Balancing among powers itself creates exposure during periods of acute great-power tension, and great-power involvement in unresolved regional conflicts periodically cuts across Saudi regional ambitions (Cook & Indyk, 2022).

Multi-alignment is better understood as transactional influence than as an expression of soft power. By leveraging its energy resources, market size, and financial capital, Saudi Arabia secures strategic

access, partnerships, and diplomatic flexibility. These instruments can generate substantial state-to-state influence, but they do not necessarily produce public attraction—the defining feature of soft power. The distinction, therefore, is between influence achieved through material incentives and influence generated through attraction: Saudi Arabia's external strategy has been effective in the former, but less successful in translating that influence into the latter.

Material Constraints: Fiscal Exposure and Climate

Attracting foreign investment is a core component of Vision 2030, and the National Investment Strategy sets ambitious targets (Moshashai, Leber & Savage, 2020; Kingdom of Saudi Arabia, 2024). Tourism reforms and relaxed social restrictions have partly pursued this objective. Still, investor concern persists about political stability and human rights (Naimi, 2022), and regional competition from the UAE and Qatar remains intense (Al Yousif, 2020). The megaproject portfolio illustrates the exposure. NEOM was initially budgeted at USD 500 billion for completion by 2030; reports suggest completion may extend to 2050, with total costs revised toward USD 1 trillion. The Public Investment Fund has funded the project, and despite discussions with foreign firms about infrastructure components, the Kingdom has had limited success securing external financing partnerships (Salami, 2022).

This matters for the argument because the megaprojects are the flagship of the soft power strategy. If external financing does not materialize at scale, the projects become a claim on domestic fiscal capacity just as the state reduces transfers to citizens—turning the soft power investment into a domestic legitimacy cost. The reputational constraints on foreign investment and the fiscal constraints on the reform program therefore reinforce each other rather than operate independently.

The second pressure is environmental. As a major hydrocarbon producer, the Kingdom faces pressure to reduce emissions (Almulhim, 2020), and climate change threatens both hydrocarbon and non-hydrocarbon sectors. The Kingdom has committed to net zero by 2060 while still deriving about 70% of government revenue from oil (Al-Sarihi, 2019). Climate effects directly affect the tourism ambitions central to Vision 2030, with rising temperatures and extreme weather discouraging visitors and intensifying the constraints imposed by summer heat (Dwortzan, 2020). Climate change also raises infrastructure development costs, may render parts of the country less viable for long-term economic activity (Bohl, 2024), and complicates efforts to attract international tourists and investors (Shehri, 2022).

The interaction is significant and largely absent from the soft power literature. The sectors designated to replace hydrocarbon rents — tourism, entertainment, real estate and logistics in coastal and desert megaprojects — are among the most climate-exposed sectors available, and their exposure increases along the same timeline as the diversification they are meant to deliver.

The central problem is that reforms are delivered through executive discretion while that discretion remains visibly intact. The detention of activists, restrictions on political organization, and concentrated decision-making signal to external audiences that these reforms are not institutionally secured. Thus, KSA reforms face a credibility constraint.

CONCLUSION

The constraint on Saudi Arabia's soft-power strategy is not a lack of resources or expenditure, but the credibility gap created by reforms delivered through concentrated executive authority and accompanied by the continued visibility of that authority. This produces international visibility without a corresponding increase in international attraction, as external audiences receive limited evidence of institutional change. The constraint extends across all three of Nye's soft-power resources: cultural initiatives may attract less when creative autonomy remains constrained; political values lose credibility when domestic liberalization is not matched by broader institutional change; and foreign-policy actions, including the Yemen intervention, add legitimacy costs. These challenges are further compounded by the high financial costs of major development projects and the environmental vulnerabilities of sectors expected to support revenue diversification beyond oil. Through its energy resources, economic market, financial capital, tourism, cultural reforms and expanding diplomatic partnerships, the Kingdom has increased its strategic relevance and secured greater international engagement. Yet these forms of influence remain largely transactional and therefore do not necessarily generate the public attraction that lies at the core of soft power.

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