A new Saudi Arabia? Rebranding the nation using renewable energy

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Abstract

In 2016, Saudi Arabia released Saudi Vision 2030, a document containing ambitions and goals for 2030. The document contains two goals regarding renewable energy: achieving a capacity of 9.5GW in renewable energy by 2030, and localising part of the renewable energy value chain. This thesis researches how the KSA uses these renewable energy goals to change its nation brand, and how this affects its leadership position in global energy. Using online databases and existing literature, this thesis assesses both the situation regarding the renewable energy and the localisation in 2016, and the realisation of the goals by 2024. Then a thematic analysis of the websites and X-accounts of Vision 2030 and Green Initiative is carried out. Lastly, this study analyses the behaviour and rhetoric of Saudi Arabia within OPEC, the UNGA, and COP-meetings. The thesis argues that while Saudi Arabia uses renewable energy to shape its image, this is not the main component or goal of its nation branding strategy. Rather, the KSA presents itself as a transforming, ambitious nation, and as a potential economic partner for investors. Regarding sustainability, Saudi Arabia brands itself as a leader in renewable energy, especially in regional context. The thesis argues that despite the developments regarding renewable energy in Saudi Arabia, the country continues to prioritise oil production and export. As a result, its position in global energy has not changed significantly and in the long run, its nation brand might not be as effective.

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1. Introduction

In April 2016, Saudi Arabia released 'Saudi Vision 2030', a document containing ambitious plans and goals for Saudi Arabia which are to be achieved by 2030. This policy plan did not come out of nowhere; while still a wealthy state with a strong government, Saudi Arabia is also facing some challenges. The most obvious and perhaps pressing is the uncertainty surrounding the oil market. Between 2014 and 2017, the world experienced a significant drop in oil prices which had dire consequences for the Saudi economy (Grand and Wolff 2020, 4). This dependency poses a big risk to Saudi Arabia, especially when considering the world's efforts to stop global warming and switch to more sustainable energy options. Meanwhile, other challenges are also emerging on the horizon. Soon, the Kingdom of Saudi Arabia (KSA) will no longer be able to employ its citizens in its boosted public sector and keep up the amount of social benefits citizens receive, resulting in unemployment and possible dissatisfaction (Ibid., 7-8). Social media, improved education, and Saudi Arabia's struggle to upkeep its rentier-state economic model might lead to Saudi citizens demanding more of their government (Ibid., 9). Furthermore, Saudi Arabia faces challenges from Iran, its own conservative religious authorities and culture, and traditional decision-making structures (Ibid., 9-10).

In this period of challenges a change in leadership took place, as King Salman and his son Mohammed bin Salman (MBS) came into power in January 2015. In this time of flux, the new leaders chose to implement a number of changes, concentrating their power and rolling out plans to reform the country (Ibid., 12-13). At the end of 2015 the global business consultancy firm McKinsey published a report which analysed the Saudi economy and presented a number of recommendations for how it could be made more competitive and durable (Al-Kibsi et al. 2015). Meanwhile, the world is currently experiencing a period in which having a competitive identity as a country is considered an important asset in the international realm (van Ham 2001, 2-3). Having a competitive identity is thought to contribute to attracting more tourism and having a positive influence on the economy (Lee 2011, 2). The internal challenges, the new leadership, the McKinsey report, and the international competitive identity trend all seemed to culminate in the announcement of Saudi Vision 2030, a document which promises to transform Saudi Arabia in multiple ways. In this thesis, the topics of nation branding, Vision 2030, and renewable energy will be researched. The research question that this thesis poses is the following: *How is Saudi Arabia using the Saudi Vision 2030 renewable energy initiatives to reshape its nation brand, and what are the*

implications for the country's global energy leadership status? Before embarking upon the study, the topics and the current status of research will be introduced.

Saudi Vision 2030 (2016) is an 85-page long document which is divided into three larger themes, namely "a vibrant society", "a thriving economy", and "an ambitious nation" (11). The first theme relates mostly to culture, religion, social life, and quality of life (Ibid., 14-33). The second chapter contains Saudi Arabia's goals for transforming its economy and becoming less dependent on oil. In order to do this, the Kingdom wants to attract more foreign talent, include more women in the workforce, improve its education, privatise state-owned companies, boost the private sector, and become a nation for innovation and entrepreneurship (Ibid., 34-61). The last chapter details the KSA's ambitions to improve the government, amongst others through increasing transparency, improving efficiency, and boosting the non-profit sector (Ibid., 62-77). The three themes can be divided further, ultimately translating into 96 strategic objectives, for which eleven Vision Realisation Programs have been set up. For each of the themes, a number of key performance indicators (KPI) are presented in the document, according to which progress can be measured. All in all, the document is comprehensive and ambitious, and if Saudi Arabia wants to achieve all its goals, it needs to be fully committed.

When Saudi Vision 2030 was first presented, this did not go over quietly. The plan's announcement was covered by news outlets all over the world, their analyses ranging from sceptic to enthusiastic, and everything in between (Black 2016; Hanware 2016; Zavis 2016). Since the launch, a number of developments regarding Saudi Vision 2030 have been widely publicised, such as the fact that women are now allowed to drive cars by themselves, the futuristic city "The Line", and financial reforms. Saudi Arabia has shown efforts to promote its plan as well, as MBS went on a tour through the US and Europe in 2018 to talk about Vision 2030, and by posting about it on Twitter (@saudivision2030) (Grand and Wolff 2020, 14). Additionally, websites and representatives of the country often refer to Vision 2030 online and in speeches, both nationally and internationally. Academics have also analysed the plan, focusing on different aspects, such as the economy, women's rights, sustainability, and education, using different theoretical frameworks. Over the years, interim assessments of whether the country is on its way to meet the vision's goals have also been published (Ibid.; Winarni and Pratama 2022). While initially positive, in December 2023 the Saudi government signaled some of the goals might be slightly postponed (Henderson 2023).

As will be detailed shortly, a few studies have been published which incorporate the concept of nation branding in studying Vision 2030 and the government's efforts surrounding

it (Madani 2022; Winarni and Pratama 2022). While it has many definitions, nation branding is essentially the practice of influencing and/or branding a country by the government, with the goal of enhancing or changing the country's international image (Szondi 2008, 4-5). The topic of nation branding is interesting, because its advocates claim it has great potential results and because it is practiced by policymakers all over the world (Lee 2011, 2). However, the research that combines nation branding and Vision 2030 is still quite limited, as it only covers music festivals and the topic of competitive identity, connected to Islamic conservatism (Madani 2022; Winarni and Permana 2022). Meanwhile, the topic of sustainability in Vision 2030 has not yet been looked at through the lens of nation branding, though this is especially interesting considering Saudi Arabia's reputation as the biggest oil producer in the world. Moreover, the aforementioned research has not yet been tied to the position of Saudi Arabia on the global stage. This thesis will contribute to the existing literature by combining the aforementioned elements. It will assess the realisation of the Vision 2030 energy reforms goals, how Saudi Arabia is using the energy reforms to change its nation brand, and how this affects Saudi Arabia's global leadership position in energy.

This study is relevant for a number of reasons. It will add to the literature on nation branding and to the research on Saudi Vision 2030. Nation branding is currently a popular topic in the field of International Relations, however there is far from one approach to it. In an attempt to provide some clarity, Fan (2010) published an article recalling the origins of nation branding, and showcasing the different ways in which it has been used in academia. By focusing on Saudi Arabia's efforts to rebrand itself, this study will contribute to the literature on nation branding as attempt to "alter, improve, or enhance a nation's image/ reputation" (4) carried out by the government (Fan 2010). Authors such as Anholt (2007) and Lee (2011) argue that nation branding is a way of using national brands or products to become more competitive as a nation in the international realm. However, this study will look at nation branding from a different angle, as it will assess whether Saudi Arabia is able to introduce and use a new national product: renewable energy. Using a new product for nation branding has been researched before, for example by Lee (2011), but it is not as common and therefore will be an important addition to the nation branding literature.

This study will also add to the existing literature by providing another case study. Currently, there are few studies on KSA's efforts at nation branding, none of which focus on sustainability. Thus, a new perspective on nation branding by the KSA will be taken. Additionally, most studies on nation branding look at either the marketing techniques, or how policies and characteristics of a nation constitute a nation brand. This study will add to the

literature by combining the two, as it will look at both Saudi policies on, and active promotion of its renewable energy efforts. This thesis will also contribute to the existing literature by researching the topic of renewable energy through the lens of nation branding, which has not been done yet. By combining the two topics in an era of unprecedented global sustainability efforts, this thesis will undertake the first steps in a potentially very interesting and broad research avenue. This study will also add to the existing literature by putting the topics 'Saudi Vision 2030' and 'nation branding' together, which has rarely been done. As a result of this, an insight will be gained into how Saudi Arabia is using its long term plan to rebrand itself, and what the geopolitical implications of the rebranding strategy are. Moreover, it will focus on one of the lesser researched aspects of Vision 2030, contributing to a fuller understanding of the document and its consequences. Lastly, this thesis will provide an update on the realisation of Saudi Arabia's energy reform goals.

In addition to its academic relevance, this study has both geopolitical and societal relevance. Currently, Saudi Arabia's international reputation mainly consists of two factors: Islamic conservatism and oil. Saudi Arabia is a very influential player in international society due to its influence on oil production and oil sales (Mirkow 1993, 159). If the country truly wants to rebrand itself, this oil-based reputation will need to change to something completely new, which also requires a change in its policy and behaviour. These changes might have serious consequences for its position in the international energy market and in international society. This study will show if and how Saudi Arabia tries to rebrand itself, and how this affects its international position in energy. This thesis also has societal relevance, as the results could help inform international players on where they stand with regards to Saudi Arabia's renewable energy efforts. Thus, if they were to see the results of this study, it might lead them to lend support to the Saudi initiatives or to be sceptical of their discourse. All in all the study will provide a useful addition to the existing research and might prove to be a stepping stone for more research into how Saudi Arabia uses Saudi Vision 2030 for nation branding, and how this influences its international position.

Before embarking upon this study, I will provide an overview of the chapters. In the next chapter, the necessary background information will be given in the form of a literature review. This chapter will include literature on nation branding, on nation branding efforts by Saudi Arabia, on Saudi Vision 2030 in general, on the connection between nation branding and Vision 2030, and on energy reforms and sustainability efforts connected to Saudi Vision 2030. Thereafter, the methodology will be presented. Here, the concept of nation branding and the theoretical framework that are used in the study will be explained. Additionally, the

data collection techniques and the case selection are elucidated. The limitations of the study will also be mentioned here. The following four chapters form the core of the study. First, the baseline situation, so the state of renewable energy in the KSA in 2016, and the energy reform goals that are presented in Saudi Vision 2030 will be analysed. In the following chapter the progress and realisation of these goals in 2024 will be assessed, which is done by looking at the programs that have been set up, the choices and priorities that have been made, and the actual accomplishments. In the next chapter it will be researched if and how Saudi Arabia is using these energy reforms to rebrand itself, using the concept of nation branding and looking at the discourse the KSA uses online. In the last analytical chapter, the behaviour of Saudi Arabia in international organisations will be looked at in order to study the implications of the rebranding efforts for Saudi Arabia's global leadership position in energy. In order to do this, the KSA's behaviour in international organisations will be looked at. Lastly, a conclusion will be presented along with suggestions for future research.

2. Literature review

Nation branding

This study will be based on the concept of nation branding, which is closely connected to soft power. In order to properly understand both concepts, the most important literature on these concepts will first be covered, starting with soft power. In his influential article, Nye argued that countries can have different kinds of power: hard power and soft power, respectively meaning military and economic means, and the ability to influence and co-opt through culture, ideology, and institutions (Nye 1990). Since then, many academics have co-opted the concept of soft power and have based their research on this, including studies on nation branding. There are multiple definitions and conceptions of nation branding, thus an overview will be presented here. The term nation branding was first coined by Simon Anholt in the 1990s, who suggested countries could shape and improve their international image by highlighting certain characteristics, applying marketing techniques and devising a nation-wide strategy (Viktorin et al 2018, 9). Since then, the concept has been used and researched by both governments and academics and it has even been argued that in contemporary international relations, it is essential for countries to have and promote a nation brand (Van Ham 2001). While a relatively new term, nation branding is related to other, more researched topics, namely country-of-origin effects, place branding, and public diplomacy (Lee 2011, 3-5). Research on country-of-origin effects focusses on products and their relation to the national image, place branding on locations, and public diplomacy is a diplomatic practice focused on communication with foreign audiences (Ibid.). As will be illustrated below, different concepts of nation branding combine these and other aspects to become a comprehensive branding strategy.

Despite all the differences regarding the concept of nation branding, authors on the subject do agree that it concerns the full image of a country in international society (Fan 2010, 2). A nation brand is the result of experiences, meanings, images, prejudices and more associations that people have, thus it cannot simply be decided or changed, however it can be influenced, amongst others through nation branding (Ibid., 3). Most authors agree that the practice of nation branding involves a government, usually as the initiator (Gudjonsson 2005, 285). What nation branding consists of exactly depends per author, and also changes according to the goal of nation branding according to the author. Anholt argues that a nation brand is holistic and is the result of 6 dimensions, namely exports, governance, investment & immigration, culture & heritage, people and tourism (McGrath and Frankel 2021, 1). He

argues that the goal of having, enhancing, or influencing a nation brand is to attain a competitive identity, which results in more tourism, foreign investments, attracting talent, and political influence (Anholt 2007, 28-29). Some authors think of nation branding in a more simplistic manner and believe it to be a form of place branding, in which marketing and communication techniques are applied with the goal of promoting a nation's image (Fan 2006, 6). Nation branding can also be conceived of as "strategic self-presentation of a country" (5) with the goal of gaining capital by promoting the country's interests (Szondi 2008). Another substantial part of the authors thinks of nation branding as a practice with the goal of changing or improving a nation's international image (Fan 2010, 4). Gudjonsson (2005) is one of the proponents of this conceptualisation, as he thinks of nation branding as using branding tools to improve the nation's image by "adding to the value of its brands" (285), the brands being related to the geography, the people, the politics or the economy of the country (289).

There are a number of important notes and critiques on nation branding that should be mentioned as well. A critique of nation branding that has often been raised is that nation branding is not so different from propaganda and is in fact just a form of manipulation (Anholt 2011, 21). However, proponents of nation branding often stress that it is more than just applying a marketing tool; a nation brand should be evident in the policies, communication, and behaviour of a country (Fan 2010, 6). In fact, it has been argued that a nation's brand is only effective when it is lived by the country and its citizens (Szondi 2008, 5). Another important critique has been offered by Aronczyk (2018, 231), who argues that the use of the term 'brand' in nation branding reveals that instead of delivering improvements in nations' images, the practice is really meant to transfer power from the government and the people to businesses and industries. She asserts that nation branding is an unequal, undemocratic practice which is not meant to benefit all, and actually has negative implications (Ibid., 236-239). Similarly, Kaneva (2014, 63) criticises the assumption that having a competitive identity is necessary due to the undisputed existence of a global market, which is often made by scholars on nation branding. Additionally, she questions the egalitarian promises that are made by proponents of nation branding and explains why nation branding is a non-democratic endeavour (Ibid., 64, 66-67). Lastly, she argues that nation branding essentialises and misrepresents national culture and overlooks minorities (Ibid., 69). All in all, this section has attempted to review the most important works and critiques on nation branding, which will be applied in this study.

Saudi Vision 2030

Now we turn to the literature that has been written on Saudi Vision 2030. The largest part of the literature on Vision 2030 has been written about Saudi Arabia's ambition to diversify its economy and become a knowledge economy. Nurunnabi (2017, 547) argues that in order for Saudi Arabia to achieve the latter, human capital, innovation, communication technology, the economy, education, and employment are important to assess and improve. He concludes that the country has good plans to address those sectors, and would benefit from increasing spending on research as well (Ibid., 559). Amirat and Zaidi (2020, 1162) reiterate these points and find that currently, human capital in the KSA is not yet extensive enough to form the basis of a knowledge economy. They provide a number of recommendations, such as improving employment opportunities and restructuring the education system (Ibid.). Moshashai et al. (2020, 395-396) argue that the financial plans in Vision 2030 rely on uncertain predications about, amongst others, the sale of the state oil company and the country's ability to attract foreign talent. Additionally, they question to what extent both Saudi Arabia's government and its citizens are prepared to change the rentier-state structure of the country (Ibid., 397, 400). In 2020, Grand and Wolff published an elaborate report in which they conclude that the country has made considerable progress in "tasks that can be directly managed by the state" (57), including uncontroversial fiscal and financial reforms such as developing capital markets and the banking system. However, they show that many of the more challenging goals, especially concerning transforming the economy, are far from being reached (Ibid). This is reiterated by Habibi (2019, 8), who also argues that the murder of Khashoggi in 2018 negatively impacted foreign investment, one of the vital ingredients for the KSA to achieve its goal of becoming a knowledge economy.

Other aspects of Saudi Vision 2030 have also been researched, including education, women's rights, the general achievability of the document and the plan's realisation so far. Allmnakrah and Evers (2020, 33) argue that the proposed education reforms are ultimately meant to contribute to transforming the economy. They suggest that in order to reform education effectively, teacher's voices should be taken into account, and critical thinking should be stimulated (Ibid., 34-36). Mitchell and Alfuraih (2018, 42) also link the educational reform goals to the desired transformation of the economy. Additionally, they argue that the country should focus on curriculum, adapting it to produce critical and academically prepared students (Ibid.). Eum (2019) looks at the position of women in Saudi Arabia and argues that while Vision 2030 proposes reforms to enhance their rights, this is a by-product of economic ambitions. AlArjani et al. (2021, 7) research the achievability of the development goals in

Saudi Vision 2030 and conclude that the economic growth goals are 47%, the clean energy goals 67%, and the employment goals 78% attainable. In their interim assessment, Grand and Wolff (2020) found that the KSA made considerable progress in improving government services and has facilitated "bold" social changes (Ibid., 58-60). Nevertheless, the authors question whether the country is on its way to meet all its goals, especially regarding transforming the economy, and criticise the KSA's involvement in the conflict in Yemen and its focus on megaprojects such as the futuristic city NEOM (Ibid., 59). The Saudi government itself has also published a report on the progress which has been made by 2020, in which the initiatives and accomplishments are highlighted (Vision 2030 2020).

As this thesis will focus on renewable energy, we will now turn to the literature on the topics of sustainability and renewable energy in Vision 2030. Amran et al. (2020, 17) find that renewable energy, especially solar and wind energy, is promising in Saudi Arabia, especially if the local development of renewable energy technologies is improved. Moreover, they highlight the importance of developing agendas for renewable energy use to incorporate and inspire local and financial support (Ibid., 17). Yamada (2016) argues that as a result of Saudi Vision 2030 and government restructuring, a solar sector is on the rise. Still, he warns that the KSA should keep an eye on the efficiency of the renewable energy sector and he highlights the importance of attracting skilled workers (Ibid., 7). Salam and Khan (2017, 21-22) are enthusiastic about the vision's proposed public-private partnership in solar energy, and they stress the importance of education, research, and knowledge sharing. However, they add that in order to make solar energy a conventional energy source, economic measures such as lessening subsidies should be rolled out (Ibid., 20). Altouma et al. (2024) studied Saudi Arabia's CO2 emissions, looking at the most prominent sectors and variables that influence the emissions. They believe that Vision 2030's goal of increasing the production and use of renewable energy is an essential step in achieving less CO2 emissions, which will especially be efficient if some sectors are electrified and heat pumps are employed (Ibid., 11). Jurgenson et al. (2016, 1) suggest that Saudi Arabia should look at the successful South Africa's renewable energy program, because its goals were similar to those of Saudi Arabia. They believe adapting this program to Saudi Arabia could not only contribute to achieving its set goals, but also ensuring local economic development (Ibid., 2).

A few researchers have assessed Saudi Vision 2030 using the frame of nation branding. Winarni and Pratama (2022) argue that through Vision 2030, Saudi Arabia is trying to change its identity and its global image by creating a "*competitive* Saudi identity" (118). They believe the religious leaders and conservative culture, as well as the oil-based rentier

state-structure might prove to be barriers to the proposed reforms (Ibid., 116). Additionally, they argue that the current negative reputation of Saudi Arabia, and the Khashoggi murder might impede the country's ability to achieve its vision (Ibid., 117). In her article, Alhussein (2022, 1, 4) argues that since 2016, Saudi Arabia is putting in effort to gain soft power and change its global image by using and strengthening its cultural resources. Despite these efforts, she believes the murder of Khashoggi and the war in Yemen both serve as impediments to the country's soft power (Ibid., 13-14). Nevertheless, she states that the country is attracting more tourists and is gaining soft power due to its efforts in developing the tourism and entertainment sectors, and developments in women's rights (Ibid., 16). At the same time she thinks the new image that the KSA is promoting might result in a clash with the country's current religious identity (Ibid., 15). Madani also looks at a cultural branding effort, namely the MDL Beast music festival that was organised in 2019, and argues that Saudi Arabia aimed to present itself a changed, proud, and nationalist country through the festival (2022). Lastly, Alsaaidi (2020, 3) wrote her thesis on the KSA's use of Twitter to carry out nation branding and found that Saudi Arabia is effectively using Twitter to put forward the values of Vision 2030. All in all, the literature on nation branding and Saudi Vision 2030 is useful background information for this study, but at the same time it becomes clear that there is still little research combining the topics of nation branding, Vision 2030, and sustainability, which is why this study will form a useful contribution to the existing literature.

3. Methodology

The research methodology consists of several steps. Before explaining the research methods, the theoretical framework and the conception of nation branding that will be applied in this study will be presented. In this study, Saudi Vision 2030 will be looked at through the lens of soft power in a neoliberal world. This means that it is assumed that in the contemporary international society, societies and nations are market-oriented, and that competition plays an important role in policy- and decision-making. The conception of nation branding that is applied here views a nation brand as an 'umbrella', thus including many sectors and national aspects to form the nation's international image. Additionally, nation branding is a government-led effort which aims to enhance or change the international image of the country, with the goal of gaining soft power. Despite the important role of the government, nation branding is only effective if the brand is lived by both the government and the people.

Now the research methods will be explained. For each of the analytical chapters, another research method will be employed. First, the text in Saudi Vision 2030 on renewable energy and the renewable energy goals themselves will be analysed, looking at page 44, 46, and 49 of the document specifically. Then the baseline, so the production and use of renewable energy and the level of localisation of the renewable energy value chain in Saudi Arabia in 2016, will be studied. This will be done using primary sources, from both the Saudi government and from international energy, sustainability, or research organisations, as well as secondary literature. In addition to literature, databases on (renewable) energy will be used to find exact numbers on the renewable energy production. At the end of the chapter, the changes that Saudi Arabia needs to make between 2016 and 2030 will be assessed. This analysis will be supplemented by secondary literature on the attainability, requirements and possible impediments for these goals.

In the next chapter, a number of data collection techniques will be used to assess the current realisation of these goals. First, the implementation programs and the policies that have been set up by the KSA will be analysed. In doing this, the renewed goals for both the production of renewable energy and the localisation of the renewable energy value chain will be taken into consideration. Then, the renewable energy projects which have already been awarded or completed will be assessed in order to establish the progress which has been made. Additionally, the interim reports that have been written, both by Saudi Arabia and other authors, will be taken into account. This will be supplemented by online databases on the production of renewable energy, for example from the International Energy Agency (IEA).

Next, the policies and devised structures will be compared and contrasted to the recommendations that have been made by academics, as detailed in the former chapter. Lastly, this chapter will reflect on Saudi Arabia's accomplishments and priorities and use these to study the way in which the country is rebranding itself through its actions.

In the chapter that follows it will be assesssed if and how Saudi Arabia is using renewable energy to rebrand itself online. First, the official website for Vision 2030 and the official website for the Green Initiative, an initiative that has been launched to unite all sustainability efforts by Saudi Arabia, will be studied.[1] These two websites have been chosen, because they are the most prominent websites when searching online for renewable energy efforts by Saudi Arabia, and because they are government-driven. The primary research method will be to carry out a text analysis and an image analysis, similar to Govers and Go (2004), with the goal of establishing the core message and themes of the websites. Additionally, the websites will be studied using a 'website as artefact' approach, looking at the purpose, the technology, the use, the appearance, and the experience (Engholm and Klastrup 2013, 4). In order to carry out the image analysis, screenshots will be made of the images on the websites, and themes will be established based on the objects in the pictures (Govers and Go 2005, 80-82). To carry out the text analysis, the text of the website will first be put into a Word document, and then the ATLAS.ti software will be used to determine the most commonly used words. As word frequency indicates the "patterns of word used and the sentimental content of the text" (2), this method can help uncover the core message of the website (Rajput et al. 2020). Only the text and pictures which can be assessed through the navigation menu will be taken into account, meaning the descriptions of the individual programs or projects will be excluded. This will be done because they are more difficult to access for the website users, thus they are not integral to the core message which Saudi Arabia wants to convey. It is important to mention that websites can be changed constantly, and therefore the analysis is only of the two websites in one moment of time, namely in the beginning of April 2024 (Engholm and Klastrup 2010, 3).

Additionally, social media activity by Saudi Arabia will be taken into account by looking at the X-accounts @Saudivision2030 and @Gi_saudi. Due to time constraints, it is not possible to carry out a content analysis for all the messages, videos, and pictures that have been uploaded. Instead, from both accounts, all tweets from three periods of one week, namely the 27th of November to the 4th of December 2021, the 15th-21st of January 2023 and

[1] https://www.vision2030.gov.sa/en/ and https://www.greeninitiatives.gov.sa/.

the 7th-13th July 2023, will be categorised according to their subject using advanced search on X. From the findings, the relative importance and role of energy reforms are inferred. The three weeks that will be analysed were randomly generated using an online source given the following limits: 1st of March 2021 - 2nd of April 2024. These social media accounts have been chosen, because both X-accounts are actively used, and they have more followers than accounts on other social media platforms, making these accounts the most important for Saudi Arabia.

The last chapter will look at Saudi Arabia's global leadership position in energy and will assess whether this has changed since 2016. First, Saudi Arabia's position will be assessed by looking at statistics on both nonrenewable and renewable energy-production and distribution. Then the behavior and rhetoric of representatives of Saudi Arabia within the Organisation of the Petroleum Exporting Countries (OPEC) and the United Nations (UN) will be studied. These organisations have been chosen because they are very involved in global energy, and because they provide suitable avenues for showing leadership, and for expressing the priorities and needs of the country. For OPEC, the thesis will look at policy decisions made by the organisation in 2016 and 2023 to establish its priorities and whether there have been any changes. Additionally, press releases and speeches from these years will be studied to find if and in what context renewable energy is mentioned. Lastly, speeches delivered by representatives of Saudi Arabia will be taken into consideration. Next, the General Assembly (GA) and the Conference of Parties (COP) to the UN Framework Convention on Climate Change will be looked at. The rhetoric and priorities within statements by Saudi Arabia at the General Debate and the COP meetings will be studied, as well as the Intended Nationally Determined Contributions (INDC) which Saudi Arabia submitted. Additionally, the voting behavior and priorities of representatives of Saudi Arabia within these meetings will be looked at. Taken altogether, these findings will be used to draw a conclusion about the priorities of Saudi Arabia and if and how renewable energy has changed its position on this global stage.

There are also a number of limitations to this study. First, Saudi Arabia has an authoritarian regime which closely controls information and data that can be accessed. Therefore, it should be taken into account that the information that is used might be incomplete or biased. Second, this study only looks at two websites and two X-accounts to assess how Saudi Arabia is presenting itself regarding renewable energy. While the case selection has been carried out carefully, using more sources would provide a fuller picture. Furthermore, while useful, a word-frequency analysis provides limited results, as connections

between words or synonyms are not properly taken into account. Additionally, for both the word-frequency analysis and a thematic analysis, interpretation bias can occur. Another limitation of this thesis is the fact that there is no clear picture of Saudi Arabia's nation branding as a whole, which makes it difficult to draw a conclusion about how big the role of renewable energy is in Saudi Arabia's attempt to rebrand itself. Moreover, nation branding is only effective if it is also lived by the country, but due to the closed nature of the country, as well as limited capacity, this cannot be taken into account. Lastly, I myself am not embedded in the Saudi context, as a result of which misunderstandings or misinterpretations can arise. Naturally, I reflect on my own position, education, and observations, but this does not mean they are all eliminated from my research.

4. Renewable energy: baseline and goals

In this chapter the baseline and the process that lies ahead for Saudi Arabia will be established. First, the goals that are described in Vision 2030 are presented. Then, the production of renewable energy and the localisation of the renewable energy value chain in Saudi Arabia in 2016, when Saudi Vision 2030 was published, will be studied. In the next section, the aforementioned findings will be compared and contrasted to find what progress needs to be made between 2016 and 2030. Using the findings and existing literature, the possible chances and challenges will be discussed. Before embarking upon these tasks, the term 'renewable energy' will be clarified. According to the United Nations (UN) (n.d.) renewable energy is "derived from natural sources that are replenished at a higher rate than they are consumed." The most common sources of renewable energy are solar, wind, geothermal, ocean, and bio-energy, as well as hydropower (Ibid.). These are also the sources of renewable energy that will be considered in this thesis. Most renewable energy comes in the form of electricity, however renewable energy sources can also directly produce light or heat (Green Rhino Energy, n.d.). While it will be attempted to take into account all these energy forms, this thesis will focus on electricity, as this is the primary output.

Saudi Vision 2030 renewable energy goals

In Saudi Vision 2030, Saudi Arabia's goals surrounding sustainability can be found in the sections 'a vibrant society' and 'a thriving economy'. Sustainability is a broad topic and therefore includes goals such as fighting desertification, increasing the efficiency of waste management, protecting nature, and increasing the use of renewable energy. The topic of renewable energy is only mentioned in the section 'a thriving economy'. The following text can be found in Saudi Vision 2030 (2016): "In the manufacturing sector, we will work towards localizing renewable energy and industrial equipment sectors" (44), as well as the following paragraph:

> Even though we have an impressive natural potential for solar and wind power, and our local energy consumption will increase three fold by 2030, we still lack a competitive renewable energy sector at present. To build up the sector, we have set ourselves an initial target of generating 9.5 gigawatts of renewable energy. We will also seek to localize a significant portion of the renewable energy value chain in the Saudi economy, including research and development, and manufacturing, among other stages. From inputs such as silica and petrochemicals, to the extensive expertise of our leading Saudi companies in the production of different forms of energy, we have all the raw ingredients for success. We will put this into practice with the forthcoming

> launch of the King Salman Renewable Energy Initiative. We will review the legal and regulatory framework that allows the private sector to buy and invest in the renewable energy sector. To localize the industry and produce the necessary skill-sets, we will also encourage public-private partnerships. Finally, we will guarantee the competitiveness of renewable energy through the gradual liberalization of the fuels market. (Ibid., 49).

Thus, the thesis will look at two main goals, namely generating 9.5 gigawatts of renewable energy, and localising the renewable energy value chain. Let us now move on to the next section to see how far the KSA has to come.

Baseline: renewable energy and its value chain localisation in 2016

First, the amount of renewable energy in Saudi Arabia in 2016 will be studied. There are many ways to measure renewable energy, so in order to provide a complete picture, the primary energy supply, the production of renewable energy, and the consumption of renewable energy will be reviewed. The primary energy supply consists of a country's energy production and energy imports, minus energy exports, international bunkers, and plus or minus stock changes (Organisation for Economic Co-operation and Development (OECD) 2024a). Lastly, by looking at the production and the consumption it can be inferred how much renewable energy Saudi Arabia imported in 2016.

First of all, according to the World Bank, 0.01% of Saudi Arabia's total energy consumption in 2016 consisted of renewable energy (The World Bank 2023). It is not specified how much energy the country consumed exactly, nor what the renewable energy sources are. The latter can be partially found by looking at data on the production of renewable energy by the KSA. According to UNdata (2024) Saudi Arabia's primary production of renewable energy consisted of 165.6 Tera joules in 2016. To put this into perspective, the total primary production of energy of the KSA was 28,131,126.31 Tera joules, so renewable energy comprised 0.00059% of the country's primary energy production (Ibid.).

Zooming in on the production of renewable energy, in 2016 Saudi Arabia produced 46 million kilowatt-hours of solar energy (Ibid.). The earliest available data for produced wind energy in Saudi Arabia is from 2017, in which the country produced 5 million kilowatt-hours of wind energy. These statistics can also be found in the report on renewable energy by the International Renewable Energy Agency (IRENA) (2022, 19, 41). In the UN database, there is no data on the Saudi production of geothermal energy, ocean energy, hydro energy, or bioenergy. As this data is collected through annual questionnaires by the UN statistics

division, it seems most likely that the Saudi government has chosen not to share data on these energy sources. There is limited information on Saudi Arabia's use of solar thermal heat (meaning that solar energy is turned into heat). The earliest available data is from 2017, in which there was no (0) direct use of solar thermal heat (UNdata 2024). To put the aforementioned numbers in perspective: in total, Saudi Arabia produced 344,809 million kilowatt-hours of electricity in 2016 (IAE 2018, 761).

Lastly, according to the OECD (2024b), in 2016 0.000% of Saudi Arabia's primary energy supply consisted of renewable energy. This does not mean Saudi Arabia used no renewable energy. To put it in absolute numbers, the country's primary energy supply of renewable energy was 11.431 thousand toe, which is equal to 132.9 million kilowatt-hours or 478.59 Tera joules (Ibid.). Of this amount, 313 Tera joules of energy came from imported solid biofuels (IEA 2018, 500). As its primary energy supply consisted of more renewable energy than its renewable energy production, it seems like back in 2016, Saudi Arabia used more renewable energy than it produced. It must be noted that in some databases, the numbers differ somewhat. For example, in the World Energy Statistics 2018 report by the IEA, it says Saudi Arabia produced only 1 million kWh of solar electricity in 2016, and there are no available numbers for different sources of renewable energy (Ibid., 752). Thus in total, the IAE report states that Saudi Arabia only produced 1 million kWh of renewable electricity (Ibid., 764). It has been attempted to verify the findings by confirming them with the use of different datasets or reports. Thus, the numbers that are presented have been double checked. Nevertheless, it is important to take into consideration that the actual value might differ slightly.

Next, the localisation of the value chain of renewable energy in Saudi Arabia in 2016 will be assessed. As the section before illustrated, Saudi Arabia did not have a large solar- or wind power capacity in 2016. Therefore, it seems unlikely that the country already had the ability to produce the products that are necessary for producing renewable energy. Nevertheless, according to AlOtaibi et al. (2020, 2), whose article was funded by the King Abdulaziz City for Science and Technology, Saudi Arabia started researching solar energy technologies already in 1977. They state that in 2016, the country's academic community was already quite developed when it comes to photovoltaic energy, but that its manufacturing was still very limited (Ibid.). In fact, almost all required goods were imported. (Almarshoud and Adam 2021, 2050). Still, already in 2016 the KSA was initiating the localisation of the value chain, as the KSA was testing cell metallisation (AlOtaibi 2020, 4). And, contributing to the potential for localisation, the KSA does have many of the required materials available: silica

from sand, inverters, which are needed to enable people to actually use the renewable energy in their own homes, cables, steel, and installation contractors (Ibid, 3-5). Nevertheless, it can be stated that in 2016, Saudi Arabia had to practically start the localisation of the renewable energy value chain from scratch.

2016-2030: achieving the goals

In this section, the baseline that has been established will be compared to the goals that Saudi Arabia has set for itself. First, the renewable energy goal will be discussed. In 2016, Saudi Arabia's capacity for renewable energy was 24 MW (IRENA 2022, 6). So, in order to reach its own goal of reaching 9.5 GW, the KSA has to increase their renewable energy capacity to 396 times what it was in 2016. It seems obvious that the biggest potential lies in the use of solar power, as Saudi Arabia has a sunny climate and plenty of space to build solar parks (Tlili 2015, 870). Still, this is not the only renewable energy they want to produce. Already in 2016, the National Renewable Energy Program (NREP) was announced, which was later updated with increased and specified targets. In the version published in 2019, a number of steps were laid out: in 2020, the KSA wanted to achieve a capacity of 3.45 GW in renewable energy, and already in 2023, the country aimed to have increased its renewable energy capacity to 9.5 GW (Krane 2019, 9). Additionally, in the plan it was specified that in 2019, a capacity of 2.225 GW in solar power, and 0.85 GW in wind power should be tendered (NREP 2019, 3). By 2030, Saudi Arabia aims to have built over 35 renewable energy parks, increasing its total renewable energy capacity to 58.7 GW (Ibid., 2,4). The Saudi government also added the goal of producing 20% of its internal power from renewable energy sources, which it later increased to 50% (Allhibi et al. 2018, 747; Takla and El-Shaeri 2023). Lastly, from 2020 onwards the level of localisation of the renewable energy value chain was to be over 60% (NREP 2019, 12).

When Saudi Vision 2030 was announced, many analysts and academics were quick to provide recommendations and describe pitfalls for the KSA's renewable energy goals. As mentioned in the literature review, Jurgenson et al. (2016) recommend Saudi Arabia to look to South Africa for inspiration, as it managed to build a renewable energy sector in a relatively short time and in a sustainable manner, by attracting foreign investment and involving local businesses (Ibid.). Allhibi et al. (2018) found that Saudi Arabia is suitable for generating wind energy, especially in the east coast region and on the western coast (748). Already in 2015, Tlili cautioned that in order to ensure solar plants will be as efficient as possible, more research on the consequences of "climatic and geographical factors" (874) is needed.

Additionally, he suggested looking into the possibility of using solar power as cooling system, as cooling requires a lot of energy in Saudi Arabia (Ibid.). Besides solar and wind energy, Tliti also considered other renewable energy sources, concluding that hydropower, geothermal energy, hydrogen, and biomass have considerable disadvantages and are therefore not as suitable for Saudi Arabia (Ibid., 877-879). Amran et al. (2020, 17) provide several recommendations, namely improving the development of solar and wind resources and technologies, attracting specialists to Saudi research institutes, allowing for flexible planning methods, carefully scheduling activities keeping in mind supply and demand, installing fuel cells technology, and using monetary incentives to keep resources affordable. Lastly, Ratikainen (2017, 47-49) also points out that in order to build a competitive renewable energy industry and to attract foreign investment, Saudi Arabia needs to come up with policies that create an attractive business environment.

Second, the localisation of the renewable energy value chain will be considered. While the text in Saudi Vision 2030 is not very specific, in the NREP the goals regarding this topic are specified. In the program, it is explained that the Ministry of Energy will make tender offers with the goal of attracting private investment and stimulating market innovation (NREP 2019, 9). At the same time the Public Investment Fund (PIF) is aiming to develop large-scale renewable energy projects and to boost the localisation process (Ibid.). The KSA has short-, medium-, and long-term localisation goals, which were decided upon based on their relative difficulty, and on their cost competitiveness (Ibid., 10). The short-term goals include localising the production of wind towers, rotor blades, solar modules, and assembling inverters (Ibid.). The medium-term targets are producing solar cells and nacelle housing for wind turbines (Ibid.). Long-term goals include producing polysilicon, drivetrain parts, and more (Ibid.). The short-term goals, which were to be completed by 2017, aimed to increase localisation to 30% by, amongst others, setting up guidelines for the tendering processes, determining the baseline for the levelised cost of electricity, and initiating the development of the value chain of renewable energy (Ibid., 12). By 2018-2019, the KSA wanted the localisation to have increased to 40-60% by making the tenders conditional to local value, and by setting up industrial clusters (Ibid.). From 2020 onwards, the country wants to increase localisation to over 60% and to switch from focusing on the internal demands to exporting parts of the value chain (Ibid.).

Similar to the renewable energy goals, analyses of the Saudi localisation goals were published, though this did take some more time. In 2019, Almarshoud and Adam published an article analysing the solar energy value chain. They believe the localisation will provide

significant benefits, including job creation and the transfer of knowledge to the local industry (Ibid., 10). In order to achieve a Saudi solar energy value chain, they recommend, amongst others, producing a national strategic plan including policies and financial plans, minimising administrative work for projects, lowering the barriers for getting finances, working together with skilled countries and companies, providing assistance to companies who want to be involved, and devising a plan to produce a high-skilled workforce (Ibid., 11). In their article, AlOtaibi et al (2020, 7) predict that the KSA will be able to fully localise producing structures and electrical, largely localise admin, and partly localise photovoltaic modules and inverters by 2023. The authors believe the rise of the renewable energy sector will create up to 60,000 jobs by 2023 (Ibid.). Nevertheless, they recommend extensive planning to actually realise the job creation, to be able to train people to work in this field, to allocate the necessary budget, and to ensure the renewable energy will be bought and used (Ibid., 8). Mulligan (2023, 20) does note it is not desirable to fully 'Saudisise' employment within the manufacturing part the renewable energy sector, as this does not match the skills of educated Saudi citizens, significantly raising manufacturing costs, and as subsidies would be needed to protect the industry from foreign competition. Therefore, he stresses it is important the KSA devises a long-term strategy to decide on a priority; either localisation or creating a competitive industry (Ibid., 25).

This chapter has laid out the goals that Saudi Arabia has set and established the baseline from which it had to start. In the next chapter, an update on the realisation of the renewable energy and localisation goals in 2024 will be given. This will be done by assessing the programs, projects, and initiatives which have been undertaken by the KSA. In this chapter we will also see whether Saudi Arabia did follow the recommendations that were put forward by researchers or not.

5. Realisation of the renewable energy goals

In this chapter, the realisation of the Saudi Vision 2030 renewable energy goals by 2024 will be assessed. This will be done by looking at the structures and policies that have been set up and implemented by the country, as well as the projects that have been announced, started, and completed. Taken together, this will provide an indication of whether Saudi Arabia is on track to meet its goals. Additionally, as both actions and framing are integral to nation branding, looking at the policies and projects that the KSA is carrying out is an important part of assessing its nation branding efforts.

Policies

After the release of Saudi Vision 2030, the KSA established the Ministry of Energy, Industry, and Mineral Resources, which was later split up into the Ministry of Energy and the Ministry of Industry and Mineral Resources, in order to oversee the implementation of the document (Obeid 2022, 180). As mentioned in the former chapter, the ministry announced the NREP following the release of Saudi Vision 2030. In the original program, the goals of 3.45GW of renewable energy by 2020 and 9.5 GW of renewable energy by 2023 were set (Roscoe 2019). Additionally, for 2020 a goal of 35% local content was set for the localisation of the Saudi renewable energy sector (Vision 2030 2016b, 74). Already in 2019, the country adapted some of its targets and aimed to increase its capacity to 27.3 GW by 2023 and 58.7 GW by 2030 (NREP 2019, 2). In order to achieve this and to realise these goals, the KSA set up two different tracks.

In 2017, the Renewable Energy Project Development Office (REPDO) was established to realise 30% of the total desired capacity. The most important task of REPDO is to tender different renewable energy projects, meaning it invites companies and developers to bid on projects with the goal of getting it allocated and thus being able to develop it. In order for a developer to be able to place a bid, they have to prequalify as managing member, technical member, or both (Saudi Power Procurement Company 2022). The bids have to be in line with the requests for the proposal and with commercial requirements (Ministry of Energy 2021). Besides self-explanatory requirements, such as being able to finance the project, there are Local Content criteria, meaning that with their bid, the developers have to add value to the Saudi economy (NREP 2020, 5). Local Content is measured by looking at added employment, goods and services purchased in Saudi Arabia, training of Saudi employees, spending on the development of local suppliers, and depreciation of assets during the project (Saudi Electricity

Company, n.d., 2). For each project, there are minimum local content thresholds to be met, or else developers have to pay a compensation for not sufficiently contributing to the Saudi economy (Von Hammerstein and Baş 2020). After having received the bids from the previously prequalified companies, the tender is awarded based on price and local content (Obeid 2022, 183). At first, the localisation goals were quite steep, being 30% in 2017, 40-60% in 2018-2019, and 60% or more from 2020 onwards (NREP 2019, 12). However, in a more recent plan Saudi Arabia stated the localisation in 2020 was 17-19%, and aimed for 33-35% localisation in 2024-2025, and 40-45% localisation from 2028 onwards (NREP 2020, 11).

The other 70% of renewable energy capacity is to be achieved through PIF, a sovereign wealth fund which is meant to contribute to the (diversification of the) Saudi economy (PIF 2022a, 2). PIF does not carry out tenders, but allocates projects to companies directly after negotiations (Economist Intelligence 2023). In 2017, PIF released a vision realisation program which lasted until 2020 (PIF 2022a, 4). According to the fund itself, in this period it managed to unlock "sustainable new sectors in the Kingdom, such as […] renewable energy production" (Ibid.). An important development in this first period was acquiring half of ACWA Power, a company that was until then active in power generation and water desalination, which is to become active in renewable energy as well (PIF 2021, 23). In 2021 PIF published a new program, covering 2021-2025 (Ibid., 1-110). In this program, PIF reiterates the goals that Saudi Arabia has set for itself, and lists some of the opportunities that renewable energy poses (Ibid., 75). Then the strategic objectives are mentioned, which are: growing the assets of PIF, unlocking new sectors, localising technology and knowledge, and building economic partnerships (Ibid.). Additionally, in 2022 PIF published a document named 'Green Finance Framework', which provides guidelines for what kind of projects are eligible to receive 'green bonds, sukuk, loans, and other debt instruments' (PIF 2022a, 7). Besides providing these supporting financial measures, PIF also promises to reinvest possible proceedings in green projects (Ibid.).

In addition to setting up the two aforementioned paths to develop renewable energy power generation plants, Saudi Arabia implemented some other policies in order to reach the Saudi Vision 2030 and NREP goals. In order to incentivise companies to invest in renewable energy in the KSA, a number of stimulants are provided. These include custom duty exemptions, custom duty drawback, soft loans, land for lease, funds for the salaries of Saudi employees, ownership, and unrestricted repatriation of capital (Invest Saudi, n.d., 28). As these incentives show, it is possible and very much encouraged, for foreign companies to

invest in the Saudi renewable energy sector, while this is not possible for its oil industry (Obeid 2022, 186). Both the tender rounds and the investment incentives also highlight the big role of the private sector in developing a renewable energy sector. While a little late, the KSA did introduce a law on private sector participation in the beginning of 2021 in order to regulate this (Ibid.). Additionally, in 2023 the country signed 7 agreements with different companies with the goal of localising different components of the renewable energy industry, such as energy storage technology and training of graduate students (Farraj 2023). It is likely that the KSA has plans for the coming 6 years, as well as regulations which are to guide the way to achieving the ambitious goals for 2030. However, very little information about these plans and regulations can be found online. Therefore, it is difficult to assess what measures Saudi Arabia is undertaking in order to localise the renewable energy value chain and realise a capacity of 58.7 GW in renewable energy by 2030.

Projects

Now, the renewable energy projects of the KSA will be assessed. In total, REPDO has carried out four tendering rounds. The first tender consisted of two different projects: a 300 MW solar plant and a 400 MW wind plant (Roscoe 2017). The following rounds, which were expected to be 1.02 GW and 1.73 GW, only got announced in 2019 and 2020, and differed from the plans that were made earlier (REPDO 2017, 6). The second round consisted of 6 projects, totalling 1.47 GW in solar power (SaudiGulf Projects 2019). The third tender round consisted of 4 solar plants with a total capacity of 1.2 GW (Ministry of Energy 2021). In 2022, Saudi Arabia picked up the pace and announced the fourth tender round, which consisted of both solar and wind projects with a capacity of 3.3 GW altogether (SaudiGulf Projects 2022). The most recent round, the fifth, was announced in 2023 and will be awarded in 2024, totalling 3.7 GW in solar power (Saudi Power Procurement Company 2023). PIF's first investment in renewable energy only took place in 2022, during which it invested in one project, a 1.5 GW solar plant (PIF 2022b, 80). More recently however, PIF pressed forward and awarded four projects, totalling 6.6 GW (Economist Intelligence 2023). All of the projects that have been awarded by PIF have been given, at least partially, to ACWA Power, which has been invited to meet the lowest price (Ibid.). It is also worth mentioning that a number of the projects have broken records for their low development prices and low costs for electricity (Obeid 2022, 183).

So how is Saudi Arabia faring with regards to its goals? The initial, relatively modest, goal was to have tendered 3.45 GW of renewable energy in 2020 and 9.5 GW by 2023

(REPDO 2017, 6). Taken together, the first three rounds consisted of a total of 3.37 GW, meaning the goal was not achieved, though it was close. The second goal, however, was achieved, as a total of 14.77 GW had been allocated to developers by the end of 2023. However, the revised goal that was set by the KSA, to reach 27.3 GW by 2023, is still far from being reached. On the Green Initiative website, a map with all the planned renewable energy projects can be found. In total, the map includes 4 wind- and 13 solar power plants. Of these, only two projects are not 'under development', thus already finished and generating power, namely the Sakaka solar plant and the Dumat Al Jandal wind plant, the two projects that together made up the first REPDO tender round. Along with the development of renewable energy power plants, statistics also show that Saudi Arabia is increasing its production of renewable energy. According to the UN, the country produced 954 million kWh of solar electricity in 2021, over 20 times as much as when Saudi Vision 2030 was released, back in 2016 (UNData 2024). Additionally, the wind electricity production climbed from zero back in 2016 to 409 million kWh in 2021 (Ibid.). The developments are also reflected in the yearly report by IRENA (2023, 18) which shows that in 2022 Saudi Arabia had a renewable energy capacity of 443 MW. Currently, more recent numbers on the production of energy are not available, but it seems logical these will continue to show the development of renewable energy in Saudi Arabia.

Assessing the policies and projects

Now that the policies and projects have been explained, they will be compared and contrasted to the recommendations and cautions that has been found in the literature. First, the policies to increase the renewable energy capacity will be assessed. As recommended by Jurgenson et al. (2016) Saudi Arabia has tried to attract foreign direct investment, for example by providing incentives to invest, developing brochures, and through PIF. In general, data from the OECD (2024c) shows that foreign investment in Saudi Arabia has fluctuated since the announcement of Saudi Vision 2030, while in general it seems to be on the rise. Back in 2020, however, Grand and Wolff (57) found that the KSA still failed to attract as much foreign direct investment as the country had hoped and needs. It is difficult to find data on how much of the foreign direct investment is invested in renewable energy, but Al-Tamimi et al. (2023) have found that renewable energy is positively correlated to net foreign direct investment, suggesting that there is indeed foreign investment in renewable energy coming in. Still, as noted before, it is difficult to find information on the policies and regulations Saudi Arabia has put in place to encourage foreign direct investment. Obeid (2022, 185) recommends

making more documentation available, as it would improve transparency and increase confidence in the renewable energy sector. Meanwhile the KSA is, as was recommended, building both wind- and solar plants, and does not seem to focus on other means of renewable energy. At different institutions, such as the Prince Sultan University and the King Abdullah City for Atomic and Renewable Energy, research on (the localisation of) renewable energy technology is being carried out, and it seems researchers from outside of Saudi Arabia have been attracted to work there (Renewable Energy Lab 2021; Schneegans 2023). Lastly, with regards to planning, it does seem like the country is being flexible, as its planning has been adjusted several times.

Next let us look at the localisation policies Saudi Arabia has undertaken. The most obvious policy which encourages localisation is the Local Content requirements in the tender rounds. Other than that, however, it is difficult to find information on the policies and regulations that have been implemented to stimulate localisation of the renewable energy value chain. The KSA did, as was recommended, enable investors to get easier financing, for example through soft loans and the PIF Green Finance Framework (PIF 2022a). Additionally, the country is working to train and educate its population to be able to work in the renewable energy sector, especially in high-skilled jobs, for example through the National Power Academy (n.d.). Nevertheless, it is uncertain whether Saudi Arabia has devised a plan to make sure creating the high-skilled workforce is done properly. It is unknown how many jobs have been created in the renewable energy sector, and to what extent the KSA has played an active role in stimulating and regulating the upcoming sector. In general though, it seems Saudi Arabia has made the choice to prioritise creating a competitive industry rather than striving for 100% Saudisation, in accordance with Mulligan's (2023) suggestion. In its plans, the KSA strived to localise the production of structures, inverters, and modules on a short term, and electrical on a longer term (NREP 2019, 10). Meanwhile, the country does not share its goals for localising admin, and did not share its achievements regarding localising the renewable energy value chain so far. Thus, it seems like Saudi Arabia has different priorities than the ones that were recommended by AlOtaibi et al. (2020). Lastly, a considerable amount of the projects have been awarded to ACWA power or affiliates of the company, while there are no regulations in place which prevent quasi-monopolies (Obeid 2023, 185).

As the former sections illustrate, there are a lot of developments in the Saudi renewable energy sector. At this moment, it cannot be said for sure whether the KSA will meet its localisation and renewable energy capacity goals by looking at the information that is available. If the country wants to meet the goals, it will have to put in some serious effort and

speed up the allocation of renewable energy plants, as well as seriously invest in research and development within the country, and perhaps most importantly, enhance transparency in order to attract foreign investment. With regards to localisation, the country would benefit from devising an extensive plan in which it sets clear priorities, as well as investing in education and training. Nevertheless, with an increase of 2000% in renewable energy production in 5 years, the investments that are being done, and the establishment of government entities to oversee the process, it can be said for sure that Saudi Arabia is putting effort into reaching the Saudi Vision 2030 renewable energy goals. Still, when compared to its oil- and gas production, renewable energy is obviously not the country's top one priority. All in all, it remains to be seen whether the KSA will adapt its current approach and manage to meet its goals.

6. Branding Saudi Vision 2030 renewable energy online

This chapter centres on how the Saudi government uses its official online channels to brand the country online. It will be argued that the KSA is presenting itself as an ambitious, transforming country and a potential economic partner. With regards to renewable energy, Saudi Arabia presents itself as working actively to combat climate change, especially by using solar and wind energy, and by afforestation. In order to show this, the website and the X-account from both Vision 2030 and the Green Initiative will be looked at. As mentioned in the methodology section, first the websites will be analysed using a 'website as artefact' approach (Engholm and Klastrup 2010). Then, the content of the websites, namely the text and the images that are used, will be looked at using a word frequency and a thematic analysis. For the X-accounts, the themes of the tweets will be analysed. Altogether, this data will provide a detailed picture of how Saudi Arabia presents itself online and what role renewable energy plays in its rebranding effort.

Saudi Vision 2030

First, the Saudi Vision 2030 website was looked at as artefact. The most important finding was that its primary function is to introduce its visitors to the subject, and the secondary function was to provide more detailed information about Saudi Vision 2030. The website itself was easily accessible for internet users and its navigation is also straightforward. The website encourages its users to find and read information through clickable phrases such as 'read more'. As the background and text are simple and elegant, and the images colourful, the latter draw the user's attention. Lastly, the layout of the website prioritise the images and the 'about' information, which has an introductory character, over videos or links to other projects or programs. With this background information in mind, let us move on to analysing the website.

For the text analysis, the word document with the text from the websites was put in ATLAS.ti to carry out a word frequency analysis. The words 'vision', 'Saudi', 'Arabia' and 'Kingdom' were excluded from the analysis as their prevalence is self-explanatory and not relevant to the analysis. In the analysis, a cut off of 0.5% of the entire text was used, which means 20 words were included in the analysis. The results can be observed below in Table 1.

Word	Count	% of total
will	25	1.14
development	22	1.00
bin	21	0.96
Salman	21	0.96
future	19	0.87
transformation	18	0.82
national	17	0.77
economy	16	0.73
investment	16	0.73
sector	16	0.73
world	15	0.68
nation	14	0.64
society	14	0.64
Mohammed	12	0.55
plant	12	0.55
Prince	12	0.55
province	12	0.55
Abdulaziz	11	0.50
citizens	11	0.50

Table 1. Word frequency analysis for the Saudi Vision 2030 website. The themes in bold are considered the most important due to their prevalence.

Looking at the word frequency, a number of observations can be made. First, the website clearly talks about the future, using words such as ‘will’, ‘development’, ‘future’, and ‘transformation’. Related to one of the main themes of Saudi Vision 2030, ‘economy’ is mentioned 17 times, making it the most mentioned theme on the website. Additionally, the words ‘investment’ and ‘sector’ are mentioned 16 times, the first of which refers to economy as well, while the second points to different goals of Vision 2030. The words ‘national’ and ‘nation’ indicate that the website promotes a nationalistic sentiment. Nevertheless, the word ‘world’ also features 15 times, showing that the position in the world is also deemed important. The words ‘society’ and ‘citizens’ suggest that this is not a government-only project, but society is considered an important part of Saudi Vision 2030. Lastly, it is clear that the monarchy is considered important on the Saudi Vision 2030 website, as the words ‘bin’, ‘Salman’, ‘Mohammed’, ‘prince’, and ‘Abdulaziz’ all refer to it. The topic of renewable energy cannot explicitly be observed in the most frequently used words, although it can be connection to the word ‘plant’, which sometimes refers to solar installations. From the word frequency analysis, it can be concluded that on the Saudi Vision 2030 website, renewable energy or the broader topic of sustainability is not one of the biggest priorities. Rather, the role of the monarchy and the economy are deemed important to portray. Looking into the text itself, the word energy is mentioned 10 times, most often on the subpage on environment and

nature. Here, the website mentions the KSA's goal of increasing its use of renewable energy. Additionally, with regards to the topic of sustainability, Saudi Arabia is portrayed as a leader.

For the Saudi Vision 2030 website, a total of 181 images were screenshotted. Of these, 67 were duplicates, often referring to the same program or project. Despite them being duplicates, they have been included in the analysis, as they make up an important part of the subpages and their repetition can actually point to their importance. As explained before, the images were assigned a theme based on objects in the pictures. Some images did not fit into the themes and were allocated to 'other', such as a picture of a woman, a gavel, and a man wearing a face mask. In some cases, an image could potentially be placed into two themes, in this case the most dominant theme was chosen. In table 2 below, the frequency of the themes is displayed. Beneath the table, three examples of images on the Saudi Vision 2030 website for the three most common themes are given.

Theme	Count	%
nature	38	20.99
modern city	19	10.50
science	15	8.29
other	13	7.18
culture/heritage	13	7.18
energy	11	6.08
family	11	6.08
industry	9	4.97
infrastructure	9	4.97
religion	9	4.97
business	7	3.87
event	6	3.31
monarchy	6	3.31
hospitality/tourism	5	2.76
education	5	2.76
entertainment	5	2.76

Table 2. Themes of images on the Saudi Vision 2030 website. The themes in bold are considered the most important due to their prevalence.

Figure 1. Example of an image on the Saudi Vision 2030 website with the theme 'nature'.

Figure 2. Example of an image on the Saudi Vision 2030 website with the theme ‘modern city’.

Figure 3. Example of an image on the Saudi Vision 2030 website with the theme ‘science’.

The most important visual theme on the Saudi Vision 2030 website is nature, which comprises almost 21% of all the pictures. As images provide the website’s visitors with an impression, it seems Saudi Arabia wants the users to get the impression that nature plays an important role in Vision 2030. The themes ‘Modern city’, ‘industry’, and ‘business’ can all be connected to the economy, showing that Saudi Arabia wants the website to reflect the importance of (improving) the economy within Saudi Vision 2030. Similarly, the themes ‘industry’, ‘business’, and ‘hospitality/tourism’ all relate to employment, another aspect of Vision 2030 which the government apparently wants to highlight. The prevalence of the

theme ‘science’ indicates that the KSA aims to portray itself and Vision 2030 as cutting-edge and skilled. Meanwhile, the themes ‘culture/heritage’, ‘family’, and ‘religion’ together make up more than 20% of the website, signalling that the country wants to hold on to its more traditional norms and values, while combining this with transformation and development. The theme energy makes up about 6% of the images on the website, showing that while Saudi Arabia wants to present it as an aspect of Vision 2030, it is not one of its priorities. While some images did reappear a few times, none were frequent enough to indicate the KSA wanted to highlight them.

Lastly, we will turn to an analysis of the Saudi Vision 2030 X-account. The @saudivision2030 X-account was established in April 2016 and since then posted a total of 1956 tweets.[2] In the three weeks that were analysed, 11 tweets were uploaded to the X-account. Of these, three were translations of another post, leaving 8 posts for the analysis. Of these tweets, 5 related to the economy, 2 to housing, and 1 to nature. From this small sample, it seems that @saudivision2030 mainly wants to highlight the developments in the Saudi economy and thus present Saudi Arabia as an economic partner. However, since the sample is relatively small, this data only gives an indication of the X-activity and does not provide any proof. Using X advanced search, it could be found that the word ‘energy’ was used in 11 times, and the Arabic word for energy was used at least 33 times. So in total a little over 2% of the tweets by @saudivision2030 were about renewable energy.

Now it is time to put together the findings and draw a conclusion about how the Saudi government presents Saudi Arabia and Saudi Vision 2030 through the official online Saudi Vision 2030 channels. First, the text-, image-, and social media analysis show that with regards to its image, presenting itself as a potential partner or investment opportunity seems to be the biggest priority of Saudi Arabia. From the text it also shows that the KSA wants to present itself as a country with ambitious goals that is in the process of being transformed. In both the text and the images, the role of the monarchy in this process is highlighted. The themes of the images on the website do not always match the words or themes that result from the text analysis. The most obvious difference lies in the theme nature, which accounts for almost 21% of the images on the website, but does not appear in the frequently used words in any way. This contradiction suggests that Saudi Arabia wants to leave the visitor with the impression that the country is a beautiful country, which is concerned with nature and the environment, while the text analysis shows this is not its priority. Zooming in on renewable

[2] By April 2, 2024.

energy, both the text-, image-, and social media analysis show that Saudi Arabia does present itself as working on and thinking about renewable energy, but this is not its biggest priority. Looking at the text itself, words such as ‘leading’, ‘innovative’, and ‘global model’ are used in connection to renewable energy, showing that the country wants to present itself as a global leader with regards to this subject.

Green Initiative

Now, the Green Initiative website will be looked at as artefact. The main function of the website is to provide information to its visitors. Again, the website is easily accessible and can be navigated without any problems. The appearance of the website is very green, which gives a nature-related, and sustainable impression. The layout of the website mostly prioritises the goals that Saudi Arabia has set, as these are often mentioned at the top of the subpage. Additionally, achievements and goals that are expressed in numbers draw the attention of the visitor due to their dynamic presentation. Due to the words, colours, and numbers used, the website leaves behind a positive impression.

For the text analysis, again a word-document was uploaded into ATLAS.ti to carry out a word-frequency analysis. The words ‘Saudi’, ‘Arabia’ and ‘Arabia’s’ were not included in the analysis, as their prevalence is not as relevant. Again, a cut-off of 0.5% was used, leaving 24 words for the analysis, which can be found in Table 3.

Word	Count	%
climate	196	2.31
green	180	2.13
SGI	168	1.98
action	156	1.84
initiative	155	1.83
MGI	131	1.55
initiatives	111	1.31
will	90	1.06
energy	77	0.91
global	72	0.85
change	69	0.81
East	66	0.78
Middle	66	0.78
emissions	57	0.67
forum	57	0.67
regional	56	0.66
stay	55	0.65
latest	54	0.64
new	54	0.64
sign	54	0.64
read	51	0.60
future	49	0.58
achieve	46	0.54
goals	45	0.54
targets	43	0.51

Table 3. Word frequency analysis for the Green Initiative website. The words in bold are considered the most important due to their prevalence.

As can be seen Table 2, this website focusses a lot more on topics related to sustainability. The words ‘climate’, ‘change’ and ‘emissions’ suggest that Saudi Arabia is aware of and concerned for the threat that climate change poses to the world. ‘action’, ‘SGI’, ‘initiative’, ‘initiatives’, and ‘MGI’, all point to the actions that Saudi Arabia is undertaking relating to climate change and sustainability, indicating that the country is actively working on this. The word ‘green’ is also used extensively, which likely mostly refers to eco-friendly. ‘Regional’, ‘Middle’, and ‘East’ indicate that the KSA considers the region important in the context of climate change, although the prevalence of ‘global’ shows it is certainly not limited to the Middle East. The word energy is mentioned 77 times and places 9th of all the words mentioned on the website, indicating it is quite important for Saudi Arabia within its sustainability efforts. The words ‘achieve’, ‘goals’, and ‘targets’ relate to the goals Saudi Arabia has set, which it seemingly finds important to showcase. The words ‘stay’, ‘new’, and ‘sign’ all occur frequently, because at the bottom of numerous (sub)pages the visitor is encouraged to sign up to receive updates on the progress that is being made in SGI and MGI, thus the KSA wants to engage the website visitors. Looking at the text itself, ‘renewable(s)’ is

mentioned 23 times. The word ‘energy’ is connected to many different topics, including transition, leader, producer, program, sources, and capacity. Often, the text surrounding the word is an explanation of the goals that Saudi Arabia has set.

For the image analysis, a total of 233 images were screenshotted from the Green Initiatives website. Again, duplicates, of which there were 78, were included in the analysis as their prevalence can also indicate their importance. After a process of familiarisation with the data, 15 themes were decided on, including one rest category. In table 4 below, the frequency of the themes can be found. Beneath the table, three examples of images on the Green Initiative website from different themes can be found.

Theme	Count	%
landscape	48	20.60
energy	40	17.17
person	26	11.16
plants	21	9.01
gardening	19	8.15
trees	15	6.44
other	15	6.44
animal	14	6.01
sea	8	3.43
monarchy	7	3.00
city	6	2.58
industry	5	2.15
sky	5	2.15
science	4	1.72

Table 4. Themes of images on the Green Initiative website. The themes in bold are considered the most important due to their prevalence.

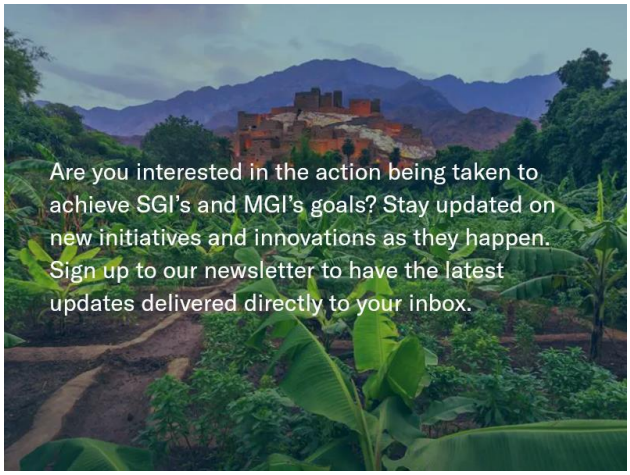

Figure 4. Example of an image on the Green Initiative website with the theme ‘landscape’. This is the image that reappeared 25 times on the website.

Figure 5. Example of an image on the Green Initiative website with the theme ‘energy’.

Figure 5. Example of an image on the Green Initiative website with the theme ‘energy’.

The most frequently featured visual theme on the Green Initiative website is ‘landscape’. This suggests that the website wants to show its users the beautiful nature that Saudi Arabia has to offer. This category is, however, skewed by the reappearance of the same picture of a landscape at the end of many (sub)pages, which also includes text inviting visitors to sign up to receive updates, 25 times. This indicates that the KSA wants to actively involve the visitors, hoping to draw them back to the website. The next theme is ‘energy’, which makes up over 17% of all the images on the website. This shows that Saudi Arabia wants to show the visitors of this website that it gives a great deal of attention and importance to the topic of (renewable) energy. Within this theme, there are two main motifs, namely solar panels which are featured 20 times and windmills, which are featured 21 times. The theme ‘person’ is also prominent, mainly because the local speakers at a forum are all introduced

with a picture. The next prominent themes are ‘plants’, ‘gardening’ and ‘trees’, which indicates that the KSA wants people to think of the country as a (literal) green country and that further fostering plants and trees is a part of the Green Initiative. Other reoccurring themes are animals and the sea, which make up about 6% and 3.5% of the images on the website. This suggests that while they are part of the Green Initiative, they are not presented to the visitor as being the highest priority. Lastly, the role of the monarchy is again highlighted, although this happens only 7 times.

To complete the analysis, posts on the @Gi_Saudi X-account were taken into account. The account was created in March 2021 and has since then posted 2998 tweets.[3] In the three weeks that were analysed, 28 posts were uploaded to @Gi_Saudi. Half of these tweets were Arabic translations of the English post, thus the analysis looked at the theme of 14 tweets. Again, the three weeks that were analysed only comprised about 0.9% of all the tweets, thus the findings only give an indication of the X-activity of the account and are not statistically significant. In these tweets, the themes energy (7), trees (4), city (1), sea (1), and agriculture (1) were reflected. The tweets about energy were mainly about clean hydrogen and reducing emissions more generally. Both solar and wind energy were not mentioned in these tweets. Looking at all the tweets, 145 of the posts included the word ‘energy’, and at least 140 tweets included the Arabic translation. Thus, about 9.5% of the tweets on the X-account were about energy.

Looking at the text-, image- and X-analysis, a number of observations about Saudi Arabia’s self-presentation can be made. First of all, with regards to sustainability, the KSA is presenting itself as conscious of the challenges that climate change poses to the world. Additionally, the website and X-account both highlight the fact that Saudi Arabia is working to diversify its energy resources and use more renewable energy. Moreover, the country is showing it is working on afforestation in Saudi Arabia and in the region. In this case, the images, text and social media activity show similar priorities and actions being undertaken. In conclusion, taking into account the results of both the Saudi Vision 2030, and the Green Initiative findings, it can be said that Saudi Arabia is mainly presenting itself as an ambitious, quickly developing country, and a great economic partner. Zooming in on the topic of sustainability, it can be seen that the KSA presents itself as taking action to combat climate change and to contribute to the world by focusing on renewable energy, specifically wind and polar power, and planting trees both locally and regionally. In its self-presentation, the

[3] By April 2, 2024.

country does not shy away from using words such as ‘leader’ to describe its goals and achievements. Interestingly, both the Vision 2030 and the Green Initiative website have been updated since this research has been carried out, in the case of the Vision 2030 website quite extensively. This suggests that the Saudi government wanted to change its self-presentation and highlight a different part of its Vision 2030 efforts.

7. Global energy leadership

The former chapters have illustrated that since the announcement of Saudi Vision 2030, the KSA has made some significant changes regarding renewable energy. In the years following the announcement, the country has set ambitious goals and devised policies to realise them. Additionally, online Saudi Arabia is using Saudi Vision 2030 to rebrand itself as an ambitious, transforming country. With regards to sustainability, the country is presenting itself as working hard to combat climate change and as a leader in renewable energy. However, nation branding as understood in this thesis is more than just a marketing strategy, and instead also requires the actions and policies of the country to align with the brand it is trying to put forward. For this reason, the realisation of the renewable energy goals was taken into account, and now the implications for Saudi Arabia's position in global energy will be looked at. This will be done for two reasons, namely to get a fuller understanding of Saudi Arabia's nation branding efforts and to see the geopolitical implications of Saudi Arabia's rebranding attempt. The latter is especially interesting, as Saudi Arabia is known for being an oil giant and derives much of its political influence from this position. Therefore, it is important to review whether Saudi Arabia has changed its behaviour on the global stage regarding oil, renewable energy, and climate change.

Saudi Arabia as leader in global energy

In order to understand Saudi Arabia's position in global energy, first some simple statistics will be presented. Since 2016, Saudi Arabia has reduced its oil production every year, mainly due to lower oil prices (OECD 2024d; IAE 2023, 86). At the same time, the country increased its renewable energy capacity to 0.6% of the total electricity capacity by 2021 (IRENA 2022, 100). This number is slowly increasing and is expected to increase faster when all the renewable energy projects which have been allocated are completed, but it is still very unsure whether the KSA's goal of producing 50% of its own electricity consumption will be attained. Regardless of the progress regarding this goal, the majority of the oil that Saudi Arabia produces, is meant to be exported (IAE 2019, 474). This means that even if Saudi Arabia reaches its domestic goals, it is likely that its oil production will remain high. According to the IEA (2023, 133), if Saudi Arabia carries out its stated policies, the oil production of the OPEC countries will increase by 2030 and only start decreasing afterwards, while the relative share of Saudi Arabia in oil production will rise above 50%. When looking at the pledged sustainability goals, the IEA expects the oil production of the OPEC countries to remain

stable until 2030 and to make a sharp decline between 2030 and 2050 (Ibid.). In any scenario, Saudi Arabia will continue to play an important role in the production of oil, as the country is the home to approximately 17% of the world's oil reserves (OPEC 2023a). Additionally, the KSA is not only in the top 3 of oil producing countries, but is also the largest crude oil exporter (IEA 2021, 13). All in all, this results in Saudi Arabia being positioned as a global leader in energy. Now, we will see if and how this position is influenced by Saudi Arabia's recent renewable energy goals.

OPEC

Next, the position and behaviour of Saudi Arabia in OPEC will be assessed. In order to properly do this, the organisation will first be introduced. OPEC is an organisation that is meant for oil exporting countries, and it has the goal of keeping the oil market and the price of oil stable. Decisions are made unanimously in the organisation, meaning that in case a document or decision has been approved, Saudi Arabia also voted 'yes' (OPEC 2021, 8). OPEC does not publish minutes of its meetings, but only press releases on decisions which have been made or speeches which have been delivered by its officials. As a result, it is not possible to assess Saudi Arabia's individual behaviour within OPEC, so instead the general standpoint of and developments within OPEC will be taken into consideration. This is still useful, because in addition to decisions being made unanimously, historically Saudi Arabia has had a large influence on the decisions that are made by OPEC, due to the fact that it can considerably increase the costs of non-compliance for the other member countries (Fattouh 2021, 1, 5). Still, the country is not all powerful within OPEC and often uses a 'tit-for-tat' strategy, thus it is important to keep in mind that while OPEC decisions and actions give an indication of Saudi Arabia's position in global energy, the two do not correspond with each other entirely (Ibid., 2).

So how did OPEC behave with regards to renewable energy back in 2016 and how did this change since then? In 2016, six speeches were uploaded in which renewable energy is addressed, including the outlook for the global oil market, a speech on the future of energy, and OPEC's statement at COP22. The speech on the future of energy is the only one which talks about renewable energy more extensively. In this speech, the former Secretary General of OPEC predicts the demand for energy will increase, and stresses the problem of energy poverty (Barkindo 2016a). He expresses OPEC's support for the COP21 agreement and recognises the danger that climate change poses to the world (Ibid.). He advocates for a mix of energy sources, including the development of renewable energy sources, but he does not

believe renewable energy will overtake oil and gas soon (Ibid). In the other speeches, Barkindo recognises the growth of renewable energy and also expresses its support for this development, but does stress that oil will remain the 'fuel of choice for many years to come' (Barkindo 2016b). Additionally, OPEC officials often mention the role that its member countries are playing in developing renewable energy, and contributing to the COP agreements (El-Badri 2016).

Next, a number of speeches from Saudi officials within OPEC will be assessed, which were delivered by Khalid Al-Falih in 2017 and Prince Abdul Aziz Bin Salman in 2021. By looking at these speeches, the position and opinion of Saudi Arabia within OPEC can be determined more accurately. First, in 2017 in his speeches, Al-Falih (2017a) often refers to the Declaration of Cooperation which was agreed upon by many oil-producing country in order to stabilise the oil market, and stresses the importance of cooperation. He mentions the importance of market stability and energy security, and compliance with the declaration (Al-Falih 2017b). In none of his speeches, renewable energy is mentioned in any way, indicating that this was not the priority of Saudi Arabia at the OPEC conferences. In 2021, Prince Abdul Aziz Bin Salman (2021b) talked about the successful cooperation between the OPEC+ countries and the uncertainty regarding COVID-19. Additionally, he talked about Saudi Arabia's sustainability initiatives, the importance of technological advancements, and the fact that OPEC should be "part of the solution to climate change" (Bin Salman 2021a). Now we will jump to 2023, to see if OPEC has changed its narrative or even its policies regarding renewable energy. In this year, only four speeches were published, all of them discussing the topic of renewable energy. Similarly to 2016, OPEC officials highlight the importance of using all energy sources to achieve both energy security and reducing emissions (Al-Qahtani 2023). Additionally, the current Secretary General stresses that reducing emissions does not equal replacing oil with renewable energy (Al Ghais 2023b). Al Ghais (2023a) also mentions the 'chronic underinvestment' in energy industries, and denounces the calls for an end to financing oil projects.

Logically, OPEC's actual policies and actions do not really focus on renewable energy. With regards to this subject, the organisation does hold meetings with, amongst others, representatives of the UN Convention on Climate Change, and attends COP meetings. (OPEC 2016). In its policies, however, the organisation focusses solely on oil and gas. The most important action that was undertaken by OPEC in 2016 was negotiating and agreeing upon the Declaration of Cooperation, an agreement between OPEC countries and numerous other oil producers to adjust their production with the goal of stabilising the oil market

(OPEC, n.d.). In 2017, the Declaration of Cooperation was prolonged, meaning the countries continued to voluntarily cut their oil production (OPEC 2017). Looking at the more recent policies of OPEC, in 2023 the member states again carried out voluntary cuts in their oil production, also through the Declaration of Cooperation (OPEC 2023b).

Considering all of the findings, it can be stated that since 2016, both the rhetoric and the behaviour of OPEC has not significantly changed. Naturally, the organisation prioritises oil and market stability over contributing to renewable energy. While OPEC does claim to support the development of renewable energy, its officials actively try to change the narrative of development of oil and renewable energy being mutually exclusive. However, the speeches by both of the Saudi officials do signal a change in attitude of Saudi Arabia within OPEC. Since 2017, the country has changed from not mentioning sustainability at all to strongly expressing that OPEC and its members should contribute to combatting climate change. Additionally, by highlighting the Saudi sustainability efforts, the country presents itself as a leader in sustainability, including renewable energy.

UN

Next, the behaviour of Saudi Arabia within the UN with regards to sustainability and renewable energy will be assessed. The UN is a suitable venue for countries to showcase their priorities and leadership to the rest of the world. In the case of the UN, it is possible to find notes detailing the statements and voting behaviour of individual countries. Therefore, studying the KSA's rhetoric and voting behaviour within the UN will complement the earlier findings and help paint an accurate picture of Saudi Arabia's position within global energy. There are many different platforms within the UN which can be studied, so within the scope of this study, some priorities had to be set. For this reason, the behaviour and voting behaviour of Saudi Arabia within the UN GA, and COP will be discussed, as the former will paint a picture of the KSA's general priorities, while the second will zoom in on its rhetoric and priorities regarding sustainability and climate change.

First, let us look at the GA. To start, the country's statements at the yearly General Debate since 2016 will be taken into account. Between 2016 and 2021, representatives of Saudi Arabia delivered seven statements to the General Debate. In three of these speeches, Saudi Arabia mentions sustainability or energy in the context of Saudi Vision 2030. In his speech in 2016, MBS briefly refers to the 2030 Agenda for Sustainable Development and mentions the launch of Saudi Vision 2030, but does not go into detail about renewable energy (UNGA 2016, 34). Also in 2017, the topics of Sustainable Development and Saudi Vision

2030 are briefly mentioned (UNGA 2017a, 2). In 2021, King Salman Al-Saud recorded a statement in which he talks about sustainability somewhat more extensively (UNGA 2021, 33). He mentions the Saudi and Middle East Green Initiative and the fact that Saudi Arabia is working on 'energy solutions' (Ibid.). In general though, the statements by Saudi Arabia centre on security issues in the Middle East. Each year, the KSA representative mentions the Palestine-Israel conflict, the war in Yemen, the war in Syria, the threats of Iran to international security, terrorism, and the big role that Saudi Arabia plays in facilitating humanitarian and development aid. The only exception was in 2019, when Saudi Arabia talked almost only about the attack by Iran on Saudi oil facilities which happened a week before the General Debate (UNGA 2019, 40). From the frequency of the aforementioned topics, it can be stated that within the General Debate, Saudi Arabia's priority is international security, and the country does not present itself as particularly involved with renewable energy. At the same time, Saudi Arabia does not mention oil, thus prioritising sustainability over oil in its rhetoric.

Next, the behaviour and rhetoric of Saudi Arabia in other meetings of the GA will be assessed. In order to see if and how the country is attempting to rebrand itself, first the GA records from 2015-2016, which includes the moment that Saudi Vision 2030 was launched, will be looked at. Then, the records from the GA of 2021-2022, will be used to determine Saudi Arabia's current stance within the UN. In 2015-2016, Saudi Arabia did not deliver a speech on a subject relating to sustainability or renewable energy (UNGA 2017b). Additionally, there were no votes at the GA on either of these subjects. The GA did adopt numerous resolutions without vote, meaning the KSA also approved of the resolution, including the 2030 Agenda for Sustainable Development, a resolution on the protection of the global climate and on harmony with nature (Ibid., 223, 232). Usually, Saudi Arabia's votes align with those of the G77. In 2021-2022, Saudi Arabia also did not provide a statement relating to sustainability or renewable energy (UNGA 2023a). With regards to the resolutions, again no resolutions regarding these topics was put to a vote, while a number of (similar) resolutions were adopted without vote (UNGA 2023b, 218-234). Additionally, while it is not yet possible to find minutes on more recent events, such as the Climate Ambition Summit and the political forum on sustainable development, Saudi Arabia did not deliver any speakers or statements for these events (UN 2023a; UN 2023b).

Lastly, the behaviour of Saudi Arabia at the COP will be assessed. In 2015, the KSA first shared its INDC, in which it focused on energy efficiency, renewable energy, carbon capture, and utilisation of gas (UNESCWA 2015, 3). However, in this INDC, the country also

stressed the importance of oil production for Saudi Arabia, and it only vaguely mentioned specific goals for reducing greenhouse gas emissions (Ibid., 1-7). In its updated INDC, which was announced in 2021, the country does clearly present a goal, namely to remove 278 million tons of CO2 (or an equivalent) by 2030 (UNFCCC 2021, 2). In general, the updated INDC is more specific and elaborates more on its ambitions. Lastly, the country is described as 'a developing country with limited sources economy and historically low GHG emission contribution', and the stated goal is described as 'the highest possible ambition' (Ibid., 12). While the INDC is generally considered ambitious, it has also been critiqued. Dargin (2021, 323-326) summarises these critiques, which include the fact that there is no clear baseline established, that there is little available data to track the progress, that the country does not plan on reducing its carbon emissions except as by-product of its economy diversification, and that its ambitions are dependent on oil exports and its economy. In 2021, Saudi Arabia also pledged to achieve net-zero emissions by 2060 (BBC 2021).

Next, the position of Saudi Arabia within COP meetings will be assessed. This will be done by looking at the statements made by Saudi Arabia at both the COP22 in Marrakech in 2016 and the COP28 in Dubai in 2023. Both of the statements were uploaded in Arabic and have been translated using online software.[4] First, let us look at the statement by the minister of energy of Saudi Arabia to the COP22. In the statement, the country announces that it has ratified the Paris Agreement, and then continues to talk about Saudi Vision 2030 (UNFCCC, n.d., 2). The country talks about combining traditional and renewable energy sources, and especially highlights the potential of solar energy (Ibid., 3). The minister even states the ambition to eventually stop using oil for its domestic energy consumption (Ibid.). Lastly, he stresses the need for developing clean technologies for using hydrocarbons (Ibid.). At COP28, the statement by Saudi Arabia clearly focusses on reducing emissions in whichever way the country finds suitable (UNFCCC 2023, 3). The KSA stresses the relevance of national circumstances and promotes 'dealing realistically and responsibly with environmental challenges and their economic repercussions' (Ibid., 2). The country also mentions some of its own accomplishments, focusing on carbon capture, clean hydrogen, and its regional leadership (Ibid., 4-5). At the COP meeting itself, Saudi Arabia declared its opposition to phasing out oil, which was one of the most discussed topics at the conference (Williams and Mooney 2023).

[4] DocTranslator, available at: https://www.onlinedoctranslator.com/en/translate-arabic-to-english_ar_en

All in all, it can be stated that within the GA, Saudi Arabia does not prioritise renewable energy and does not brand itself as a leader on this subject. Additionally, the country did not change its behaviour or rhetoric regarding sustainability and climate change between 2016 and 2022. At the COP meetings, Saudi Arabia announced more ambitious nationally determined goals throughout the years. However, the country's behaviour does not reflect this, as the 2023 statement is quite reserved, and the KSA showed unwillingness to commit to phasing out oil. While the country does give a few examples which hint to it being a regional leader, this is in general not the picture that the country is painting.

Taking all of the findings in this chapter into consideration, it seems that the position of Saudi Arabia within global energy has not significantly changed. The country is still the number one exporter of oil, which shows in its behaviour and rhetoric in both OPEC and the UN. In both venues, the focus seems to be on using all energy sources to reduce GHG emissions, rather than reducing the production and use of oil. While the country does consider itself and its INDC's 'ambitious', in general Saudi Arabia does not present itself as a leader in renewable energy. Thus, it can be concluded that while renewable energy does appear in Saudi Arabia's rhetoric, it does not significantly impact its position in global energy.

8. Conclusion

Let us now return to the research question: *How is Saudi Arabia using the Saudi Vision 2030 renewable energy initiatives to reshape its nation brand, and what are the implications for the country's global energy leadership status?* In order to answer this question, the findings will first be summarised and will then be discussed.

The first analytical chapter established that the goals that the Saudi government set in Vision 2030 were to increase the country's renewable energy capacity to 9.5 GW and to localise the renewable energy value chain. While these goals were still somewhat limited, the KSA quickly updated them, and set a number of very ambitious goals, namely to increase the renewable energy capacity to 58.7 GW and to achieve 60% localisation of the renewable energy value chain, which was later lowered to 40-45%. In order to achieve this, the country basically had to start from scratch, as there were no wind power facilities and very few solar power installations. The chapter on the realisation of the goals up until 2024 concluded that currently, Saudi Arabia has not reached its interim goal for capacity in renewable energy, and would need to make significant progress in order to reach the goal for 2030. Regarding the level of localisation, it is difficult to assess whether this has been reached due to limited available information. However, the policies and lack of news and publications on this suggest this is not the case. The government did implement a number of policies enabling and stimulating development of renewable energy plants and its localisation. However, the KSA has thus far failed to provide elaborate documentation on its plans, its policies, and the actions it is undertaking. If it were to do this, this would increase its transparency, which is, according to the literature, an important step towards achieving its goals.

The next chapter analysed online branding efforts by the Saudi government. The main conclusion is that Saudi Arabia presents itself as an ambitious and transforming country, as well as a potential economic partner to investors. When zooming in on the topic of sustainability, the Saudi government presents itself as being concerned with climate change and reducing emissions, both in a regional and global context. Looking at this topic, the KSA gives a lot of attention to renewable energy, suggesting this is its priority with regards to sustainability. Additionally, the country presents itself as a leader on the topic of sustainability and specifically renewable energy. The subsequent chapter established that despite the developments in, and its goals with regards to renewable energy, Saudi Arabia's priorities still lie with oil production. It concluded that OPEC as a whole is mainly concerned with changing the narrative surrounding the role of oil in the context of climate change. Meanwhile, Saudi

Arabia did change its attitude within the organisation, as it discussed climate change more often and highlighted its leadership position on this topic. Within the UN, Saudi officials prioritise security issues over sustainability and renewable energy and do not present Saudi Arabia as a leader in renewable energy. Zooming in on the COP, Saudi Arabia's statements stress the importance of combining oil and renewable energy, and mention some of the country's accomplishments in sustainability. Generally, within the UN, Saudi Arabia does not present itself as either a leader in, or as concerned with renewable energy.

So what conclusion can be drawn regarding the research question of this thesis? The analysis has shown that Saudi Arabia uses both direct actions and marketing techniques to rebrand itself as, amongst others, a greener country. In its nation branding efforts, the government does not focus on localisation, but regularly employs its Vision 2030 renewable energy goals. While the KSA uses renewable energy to shape its image, both renewable energy and sustainability are not the main priorities of the country in its branding strategy. Instead, renewable energy is part of a bigger narrative, namely that of a new Saudi Arabia, a country that is developing, innovative, and ambitious. Additionally, in its online branding the country mostly presents itself as a potential economic partner for investors and companies. However, when looking at the country's policies, its online branding, and its speeches on sustainability and renewable energy, Saudi Arabia does present itself as a regional leader. Lastly, what implications does this have for its position in global energy? The findings suggest that overall, Saudi Arabia's nation branding efforts do not have a large influence on its position on the global stage. Through its continuing oil production and its behaviour in OPEC and the UN, it becomes clear that Saudi Arabia does not prioritise renewable energy over oil and thus does not significantly change its rhetoric or behaviour on the global stage. The country's officials did, however, mention sustainability and renewable energy more often in the years since 2016, thus the country does attempt to include the topics in its rhetoric, presumably as part of its nation branding efforts. All in all, it seems the Saudi government wants to include renewable energy in its nation brand and is willing to spend money and make an effort towards this goal. However, it should not come at the expense of its oil profits. Thereby, the country does not fundamentally change, and its nation branding efforts will likely not be as effective in the long run.

The findings of this study constitute a contribution to the topic of nation branding in a number of ways. From the analysis, it is clear that Saudi Arabia does not regard nation branding as merely a marketing technique, as the country is working on both actual change in the form of policies, and online branding. However, at the same time the government is not

willing to fundamentally change the priorities of the country, suggesting that while superficial reforms and a more extensive change in rhetoric may not be the most effective form of nation branding, it can certainly be used by countries wishing to change their image. Furthermore, this study has contributed to the body of scholarship which conceptualises nation branding as a strategy that can be used to improve or even change a country's image, rather than something which can only be done using the already existing characteristics. Next to engaging with the concept of nation branding, this thesis has also contributed to the literature on Saudi Vision 2030 by providing an update on the realisation of the renewable energy goals in the document. Besides academic relevance, this thesis also has societal and geopolitical implications. The study has shown that Saudi Arabia is indeed investing in renewable energy, however the country is behind on its own timeline, which might be useful information for potential investors. Meanwhile, the results have shown that while the country is investing in renewable energy, it is still prioritising oil, which could be important knowledge for international players, such as potential investors or actors within the UNFCCC. Moreover, the thesis argues that while there are changes in Saudi Arabia's rhetoric, one does not need to expect its position as oil giant and influential player in global energy to change anytime soon.

Nevertheless, the results of the thesis also have a number of limitations. As mentioned before, this study looks at one aspect of Saudi nation branding, but the bigger picture has not been established either in this study or in others. Consequently, the results on the use of renewable energy as nation branding technique cannot be put into perspective. While it was not possible within the scope of this thesis, the analysis would have been strengthened by including more websites, social media platforms, and international organisations, or looking at a wider timeframe, which includes the years before Vision 2030 was announced. Moreover, as a substantial part of the sources on the developments of renewable energy parks is from the Saudi government and there is no way to validate them, the findings on the realisation of the renewable energy goals might slightly differ from reality. Lastly, part of a country's position on the global stage is the way it is perceived by other countries and their citizens. Within the scope of this thesis, it was not possible to research this. However, this results in a somewhat incomplete conclusion on the effects of the nation branding efforts on Saudi Arabia's position in global energy.

This thesis has also highlighted a number of potential research avenues. First of all, it would be interesting and useful to research Saudi Arabia's nation branding efforts more extensively. This could for example be done by studying how the Saudi government uses Saudi Vision 2030 as a whole to rebrand itself. Additionally, the widely publicised mega

projects, such as NEOM and the LINE, could be studied, as they provide a good indication of the image that the KSA is trying to put forward. Another way to research this would be to look at the kind of content that Saudi Arabia sponsors on social media platforms. Scholars could also add to the literature on both nation branding by Saudi Arabia and Saudi Vision 2030 by studying if, and how, this document and its implementation have affected public opinion on the country and its government in different parts of the world, including Saudi Arabia itself. As mentioned before, the websites that were researched and thus the self-presentation of Saudi Arabia have already changed, which introduces another interesting research avenue, namely looking into how the Saudi government has changed the national image it tries to put forward since Saudi Vision 2030, or even in the years before the KSA announced Vision 2030. Following this study, scholars could also research how the topic of sustainability is utilised by other countries in their nation branding efforts. Lastly, as the years are progressing and 2030 is coming closer, it is important that more interim assessments of the progress regarding the document are published. All in all, this thesis can hopefully provide a basis for, or a contribution to, more research on the topics of nation branding and Vision 2030 in the future.

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