



SUSTAINABILITY PROFESSIONALS IN SAUDI ARABIA

2023

# MARKET RESEARCH

## THE STATE OF SUSTAINABILITY IN SAUDI ARABIA: CHALLENGES AND OPPORTUNITIES

### US\$ 82.2 BILLION CONSTRUCTION SECTOR GDP

Saudi Arabia's construction sector has recorded its highest growth in 2022 by 8.8% The Construction Sector GDP amounted to about US\$ 182.2 billion...

### MEGA PROJECTS ON THE WAY OF SUSTAINABILITY

Over 2.9 Trillion dollars in mega projects, and a private sector on the way to a sustainable, resilient recovery, are driving the building sector widespread opportunities...

# Executive Summary

This white paper written by the Sustainability Professionals of Saudi Arabia Network (SPSA), provides an overview of the current state of sustainability in Saudi Arabia, highlighting the challenges the country faces and the opportunities it possesses to advance sustainable practices. It explores initiatives taken by the government, private sector, and civil society to promote sustainability, while also identifying areas that require further attention and action.

## What?

- Saudi Arabia has placed a strong focus on sustainability as part of its Vision 2030 plan.
- The country has set ambitious targets for renewable energy, aiming to generate 50% of its electricity from renewable sources by 2030
- Sustainability is being prioritized in urban development projects, with initiatives such as the development of the King Salman Park and the transformation of the historic Diriyah area into a cultural and tourist destination.
- The government has implemented regulatory reforms to facilitate sustainable practices, including the introduction of the Saudi Green Building Code and reforms in the construction permit system.
- Women's empowerment and gender equality have gained significant attention, with reforms enabling women's participation in various sectors, including employment and driving.
- The country actively participates in global environmental initiatives such as the Paris Agreement and has taken steps to address climate change and reduce carbon emissions.



- There is a growing emphasis on sustainable tourism, with projects like the Red Sea Project focusing on preserving natural ecosystems and promoting eco-friendly practices.
- Education and awareness programs are being implemented to promote sustainability and environmental consciousness among citizens.
- The government has placed importance on sustainability and environmental considerations in overall policy-making, ensuring long-term sustainability and the preservation of natural resources.



SUSTAINABILITY PROFESSIONALS IN SAUDI ARABIA

## SPSA Pillars

### People



**Giving priority to the welfare of People of all backgrounds, ethnicity, religion, etc.**

### Planet



**Protect our planet's natural resources and climate for future generations.**

### Prosperity



**Ensure prosperous and fulfilling lives in harmony with nature.**

### Peace



**Foster peaceful, just and inclusive society.**

### Partnership



**Implement the agenda through a solid global partnership.**

## Vision:

Create a thriving community of sustainability professionals who are equipped with the knowledge, resources, and connections needed to drive positive change towards a more sustainable future in Saudi Arabia.

## Mission:

Creating an international multi-sector platform in Saudi Arabia that adopts sustainable measures and collaborates to find solutions to today's most pressing economic, environmental and socio-political problems.

**Established**



**FACTS**



**ISSP**

ORGANIZATIONAL MEMBER

**6000+ Members**



**Members from 92+ Countries**



SUSTAINABILITY PROFESSIONALS IN SAUDI ARABIA

## Word from SPSA Founder and President:

It is my pleasure to welcome you to our special place for Sustainability Professionals of Saudi Arabia (**SPSA**). I am Mohammed S. Al-Surf, holder of PhD in Sustainable and Green Construction, Founder of the Green Building Training Center (**GBTC**) and the Sustainability Professionals in Saudi Arabia Network (SPSA) with more than 6000 members. I am also a Saudi citizen who is not only proud of my heritage of my lovely homeland, but also concerned about our future regionally as well as globally as concerns everything in sustainability. It was out of my love of my homeland and concern for our collective futures and responsibility to the world in general, that I embarked on launching this organization.

**SPSA** was established with the vision of creating a platform for sustainability professionals of Saudi Arabia to come together, share knowledge, and collaborate towards a more sustainable future. Our organization is committed to promoting sustainable practices, raising awareness, and driving change in the region. We believe that by working together, we can create a better tomorrow.

The sustainability industry in Saudi Arabia faces several challenges, including a general lack of awareness about sustainability practices and standards as well as the absence of a formal professional organization to support those working in the field. Though there are professionals interested in advancing sustainability, they currently have no centralized body to facilitate networking, set standards, or build global partnerships.

This lack of awareness and professional infrastructure poses problems for both sustainability professionals and the organizations they work with or advise. Without established best practices or professional development resources, professionals may find it difficult to keep their knowledge and skills up to date with the rapidly evolving sustainability field. They also lack a platform to promote sustainability practices, share insights, or advocate for policy changes.

It's from these challenges that I took as an opportunity to pave the way for sustainability professionals of Saudi Arabia to come together under one entity and promote their capabilities and help them develop their skills in various fields of sustainability that can serve to promote the success of the Saudi Vision 2030.



**Dr. Mohammed S. Al-Surf**  
**Founder and President of SPSA**

# Saudi Construction Industry Highlight

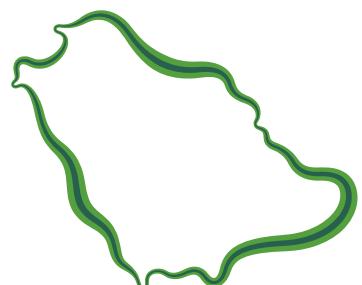
**The Saudi Arabia Construction Market size is estimated at USD 65.58 billion in 2023, and is expected to reach USD 75.12 billion by 2028, growing at a CAGR of 4% during the forecast period (2023-2028).**

The Saudi Arabian construction market is expected to witness significant growth and offer lucrative potential due to its Vision 2030, NTP 2020, and several ongoing reforms to diversify away from oil. Vision 2030, NTP 2020, the private sector investment boost, and the ongoing reforms are expected to be the growth drivers for the Saudi construction market during the forecasted period. Saudi Arabia's Vision 2030, along with a significant investment in housing and infrastructure development promoted across the country by local authorities, is revitalizing the construction industry and generating interest in a growing number of international players.

## Giga Infrastructure Projects in Saudi Arabia to Boost the Construction Market Sector

### Statistics

4% Increase Construction market size growth 2024-2027 (AAGR)



### 6% GDP

The building and construction sector in Saudi Arabia contributes 6% to the GDP, making it the second-largest non-oil sector in the country, according to the Chairman of the Saudi Contractors Authority (SCA)



### Construction Sector

**\$ 182.2b**

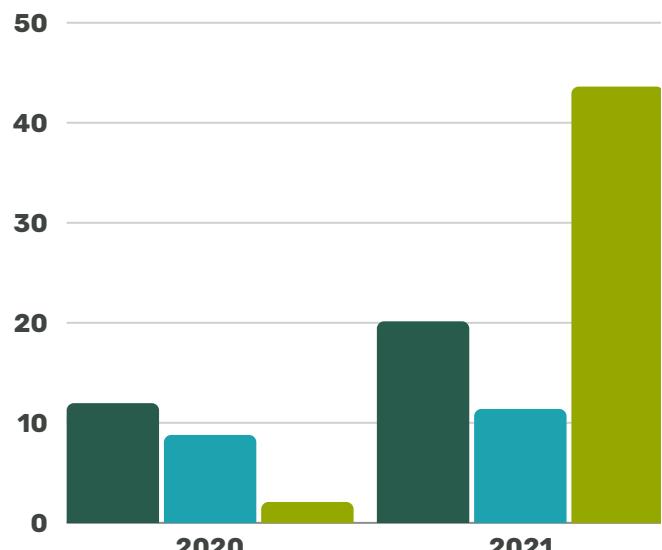
Saudi Arabia's construction sector has recorded its highest growth in 2022 by 8.8%. The Construction Sector GDP amounted to about US\$ 182.2 billion...

### Mega Projects

**\$ 2.9t**

The Kingdom of Saudi Arabia is witnessing an unprecedented construction and urban mega projects boom that will reshape the future of the Kingdom and the region.

■ Building      ■ Energy  
■ Infrastructure



# Introduction

Saudi Arabia, as one of the world's largest oil producers, recognizes the need to transition towards a more sustainable and diversified economy while addressing environmental challenges. This paper examines the progress made in promoting sustainability through various economic, environmental, and social dimensions.

Saudi Arabia, known as the Kingdom of Saudi Arabia, is a country located in the Middle East, renowned for its vast oil reserves and significant role in the global energy sector. As the world grapples with the challenges posed by climate change, Saudi Arabia recognizes the need to transition towards sustainability and embrace environmentally-friendly practices.

This introduction provides an overview of the current state of sustainability in Saudi Arabia, highlighting the significance of initiatives undertaken by the government, private sector, and civil society to promote sustainability in the country.

**Contribution to GDP:** The construction sector has been a key contributor to Saudi Arabia's GDP. In 2020, the construction industry's contribution accounted for around 5.6% of the country's total GDP, according to data from the General Authority for Statistics (GASTAT).

**Employment:** The construction sector is a significant provider of employment opportunities in Saudi Arabia. It employs a substantial workforce, including both Saudi nationals and expatriate workers. In 2020, the number of people working in the construction industry reached approximately 2.7 million, making it one of the largest employing sectors in the country.

**Investments and Project Pipeline:** Saudi Arabia has a robust pipeline of construction projects across various sectors. The government has made significant investments to develop infrastructure, industrial cities, healthcare facilities, educational institutions, residential buildings, and commercial complexes. The total value of construction projects in the pipeline was estimated at around \$1.3 trillion in 2020, according to reports from MEED Projects.

**Mega Projects:** The kingdom is known for its mega projects, including city developments, economic zones, and flagship initiatives. Notable projects include NEOM, Qiddiya, Riyadh Metro, King Abdullah Financial District, and the expansion of holy sites in Makkah and Madinah. These projects aim to drive economic diversification, enhance tourism and entertainment offerings, and support sustainable urban development.

# Introduction

## **Construction Materials Consumption:**

Saudi Arabia's construction industry is a significant consumer of construction materials. Cement, steel, glass, and other building materials are in high demand to meet the needs of ongoing projects and urban development. The country is one of the largest consumers of cement globally, reflecting the scale of construction activities.

**Government Initiatives and Reforms:** The Saudi Arabian government has implemented several initiatives and reforms to stimulate the construction industry. These include regulatory changes to streamline the permitting process, encourage private sector participation, and attract foreign investment. The introduction of the Saudi Building Code and the implementation of the new construction permit system have aimed to enhance efficiency and transparency in the industry.

**Sustainability and Green Building:** The construction sector in Saudi Arabia has shown increasing interest in sustainability and green building practices. The adoption of sustainable design principles and the implementation of green building certifications, such as LEED and Estidama, have gained traction. Saudi Arabia is focusing on energy-efficient buildings, waste reduction, and the use of environmentally friendly materials in construction.

## **Importance of Sustainability:**

Sustainability has become a global imperative as nations strive to mitigate the adverse effects of climate change, minimize environmental degradation, and ensure a prosperous future for generations to come. Saudi Arabia, with its commitment to sustainable development, recognizes that the pursuit of economic growth should go hand-in-hand with environmental stewardship and social progress.

## **Vision 2030 and Sustainability Goals:**

Saudi Arabia's Vision 2030, launched in 2016, serves as a blueprint for the country's economic and social transformation. It outlines a broad range of goals, including economic diversification, job creation, enhancing education and healthcare systems, and leveraging renewable energy sources. Sustainability is a fundamental pillar of this vision, emphasizing the need for a more sustainable, resilient, and diversified economy.

## **Economic Implications of Sustainability Initiatives:**

By embracing sustainability, Saudi Arabia aims to reduce its dependency on oil revenues and foster economic diversification. Initiatives such as the National Industrial Development and Logistics Program (NIDLP) and investments in renewable energy projects bolster the growth of sustainable industries, stimulate innovation, attract foreign investment, and create employment opportunities. These initiatives are poised to reshape the Saudi economy, enhance competitiveness, and foster the emergence of a more sustainable and inclusive business ecosystem.

# Introduction

**Environmental Considerations and Sustainable Practices:** Saudi Arabia faces significant environmental challenges, including water scarcity, air pollution, and habitat degradation. Recognizing the urgency to address these issues, the country has taken significant steps towards sustainability. Renewable energy projects, water conservation programs, waste management initiatives, and the preservation of fragile ecosystems through protected areas and national parks showcase Saudi Arabia's commitment to mitigating environmental impacts and ensuring the sustainable use of resources.

**Social Dimensions of Sustainability:** Sustainability initiatives in Saudi Arabia also emphasize the importance of social progress and inclusivity. Women's empowerment, community engagement, and educational reforms are integral components of the country's sustainable development agenda. By empowering women, increasing participation in the workforce, promoting social cohesion, and enhancing education, Saudi Arabia aims to create a more equitable society and improve the quality of life for its citizens.



# Saudi Arabia Construction Market Segmentation by Sectors

The key sectors in the Saudi Arabia construction market are commercial construction, industrial construction, infrastructure construction, energy and utilities construction, institutional construction, and residential construction.

## **Commercial Construction:**

The project types in this sector include leisure and hospitality buildings, office buildings, outdoor leisure facilities, retail buildings, and other commercial construction. The commercial sector's growth will be supported by investments in leisure and hospitality, office space, retail markets, data center, and logistic center construction projects.



# Saudi Arabia Construction Market Segmentation by Sectors

## **Industrial construction:**

The project types in this sector include chemical and pharmaceutical plants, manufacturing plants, metal and material production and processing plants, and waste processing plants. The sector growth over the forecast period will be supported by investment in the manufacturing and industrial sectors, as well as an improvement in the wider economy.



## **Infrastructure construction:**

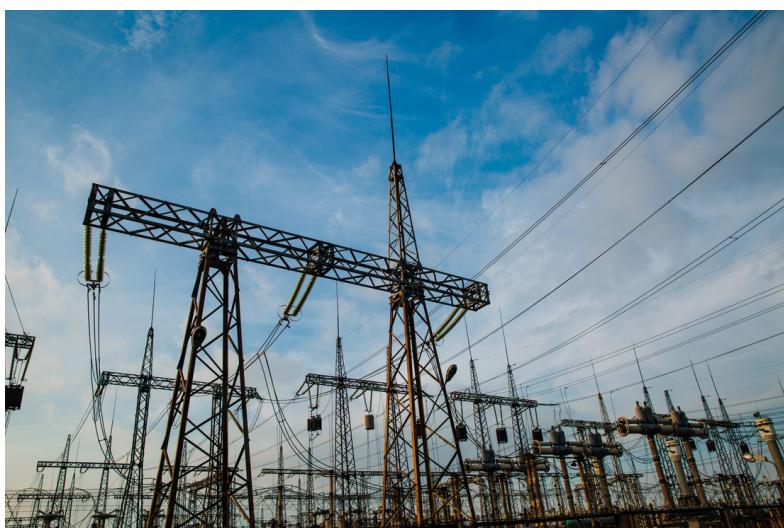
The project types in this sector include rail infrastructure, road infrastructure, and other infrastructure projects. The growth of the sector over the forecast period will be supported by public and private sector investments in transport infrastructure projects.



# Saudi Arabia Construction Market Segmentation by Sectors

## **Energy and utilities construction:**

The project types in this sector include electricity and power, oil and gas, telecommunications, sewage infrastructure, and water infrastructure. The growth of the sector during the forecast period will be supported by the government's aim to increase renewable energy capacity by 2030 and achieve zero net carbon emissions by 2060.



## **Institutional construction:**

The project types in this sector include educational buildings, healthcare buildings, institutional buildings, research facilities, and religious buildings. Forecast-period growth in the institutional construction sector will be supported by investments in the construction of new educational and healthcare buildings.



# Saudi Arabia Construction Market Segmentation by Sectors

## **Residential construction:**

The project types in this sector include single-family housing and multi-family housing. The sector growth will be supported by investments in developing housing projects, coupled with the government's target to increase homeownership by 2030 as a part of the Saudi Vision 2030 Plan.



Since its launch, The Housing Program focused on setting new standards for the development of the housing sector to enable citizens to obtain various housing options. This support will increase the percentage of Saudi families that own houses. In the previous stage, the program was able to facilitate procedures of immediate entitlement for citizens to real-estate, instead of the 15-year waiting period, which doubled the movement of supply and demand in the program and its housing options and contributed to increasing the ownership rate from 47% in 2017 to over 60% in 2022. In the next stage, the Housing Program will resume its efforts to increase the percentage of Saudi families owning houses to 70% by 2030. The widespread public and private sector developments are in a boom trying to close the gap between housing supply and related infrastructure and demand, offering opportunities for the sector that are well over 100 billion US\$.

# Saudi Arabia Construction Market Drivers & Restraints

## **Market Drivers:**

One of the primary market drivers for the construction industry in Saudi Arabia is the ambitious Vision 2030 initiative, which aims to diversify the country's economy and reduce its dependence on oil.

This initiative has led to the launch of several mega-projects, including the \$500 billion NEOM city project, the Red Sea tourism project, and the Qiddiya entertainment city project. These large-scale developments are expected to create a surge in demand for construction services in various sectors, including infrastructure, residential, and commercial.

Moreover, the need for affordable housing is another significant driver for the construction market, as Saudi Arabia faces a growing housing deficit. The government has launched several programs, such as the Sakani program and the Housing Ministry's PPP initiatives, to support the construction of affordable homes for Saudi citizens.

## **Market Restraints:**

Despite the promising outlook, the construction market in Saudi Arabia faces several restraints. The country is currently experiencing a labor shortage in the construction sector, driven by the implementation of Saudization policies, which aim to increase the employment of Saudi nationals and reduce reliance on foreign workers. This labor shortage may lead to higher labor costs and project delays, potentially hampering market growth.

Additionally, fluctuations in global oil prices can impact government spending, as oil revenues remain a significant source of income for Saudi Arabia. A decline in oil prices may lead to budgetary constraints and reduced investments in infrastructure and construction projects.

Lastly, geopolitical tensions in the Middle East may pose risks to the overall investment climate in the region, potentially deterring foreign investments and affecting the growth of the construction market in Saudi Arabia.

# The Triple Bottom Line:

The Triple Bottom Line is a critical framework to assess the state of sustainability in Saudi Arabia. The report emphasizes the interconnectedness of economic, social, and environmental factors, recognizing that sustainable development requires a balanced approach that considers all three dimensions. Through this lens, the report examines the economic viability of sustainable practices, the social well-being of communities, and the environmental constraints and impacts of development. By evaluating Saudi Arabia's progress across these three dimensions, the report provides a comprehensive understanding of the country's sustainability landscape and identifies opportunities and challenges in achieving a more sustainable future. Embracing the Triple Bottom Line approach is essential for Saudi Arabia to ensure economic prosperity, social well-being, and environmental resilience for current and future generations.



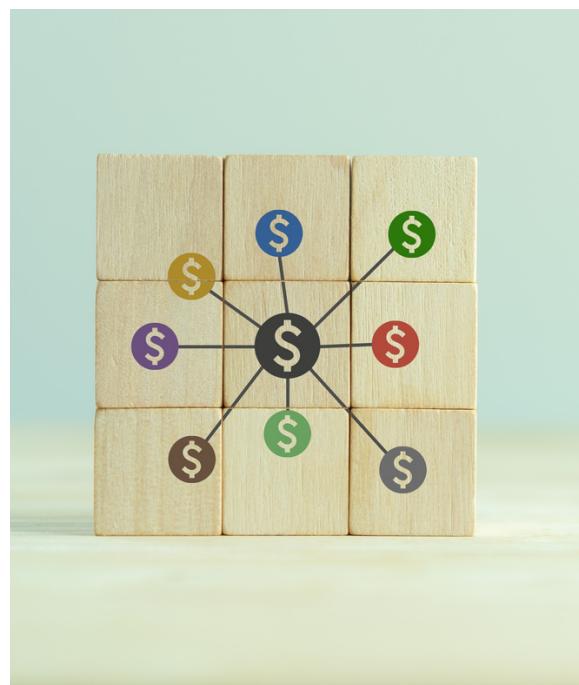
# Economic Sustainability:

Economic sustainability is a crucial aspect of Saudi Arabia's vision for the future. As a country heavily reliant on oil and gas revenues, Saudi Arabia recognizes the necessity of diversifying its economy to ensure long-term stability and prosperity. This section delves into the various initiatives and strategies taken by the country to promote economic sustainability, highlighting the impact they have on sectors such as renewable energy, local manufacturing, circular economy practices, and economic competitiveness.



## Diversification Efforts:

Recognizing the volatility of oil prices and the need for economic resilience, Saudi Arabia has embarked on an ambitious journey of economic diversification. Through initiatives like the National Industrial Development and Logistics Program (NIDLP), the country aims to reduce its dependence on oil and gas revenues while fostering the growth of other industries. This diversification drive is expected to create new economic opportunities, attract foreign investment, and improve the country's long-term economic stability.



# Economic Sustainability:

## Renewable Energy Transition:

Saudi Arabia has set ambitious goals for renewable energy deployment, aiming to generate 50% of its electricity from renewable sources by 2030. This transition to renewable energy is not only driven by environmental concerns but also by its potential to enhance economic sustainability. The country's investments in large-scale solar and wind projects, such as the Sakaka Solar PV Plant and the Dumat Al Jandal Wind Farm, spur job creation, promote technology transfer, and position Saudi Arabia as a leader in the renewable energy sector. These initiatives contribute to the country's economic growth while reducing reliance on fossil fuel imports.



## Local Manufacturing:

One of the key pillars of economic sustainability is the promotion of local manufacturing and industrial development. By nurturing local industries and encouraging domestic production, Saudi Arabia aims to reduce the reliance on imports, create employment opportunities, and enhance self-sufficiency. Initiatives like the establishment of renewable energy equipment manufacturing facilities within the country not only stimulate economic growth but also contribute to building a robust and diverse industrial sector.

# Economic Sustainability:

## Circular Economy:

The circular economy concept, which revolves around minimizing waste, optimizing resource use, and promoting recycling and repurposing practices, plays a crucial role in economic sustainability. Saudi Arabia has shown a growing commitment to circular economy principles through initiatives like the Circular Carbon Economy (CCE) and the National Waste Management Program (NWMP). By implementing strategies to reduce waste generation, increase resource efficiency, and adopt sustainable waste management practices, the country aims to foster economic growth while minimizing environmental impacts.



## Economic Competitiveness:

By embracing sustainability practices, Saudi Arabia enhances its economic competitiveness in the global marketplace. Sustainability is increasingly becoming a criterion for investment decisions and trade agreements. By positioning itself as a leader in clean energy, sustainable industries, and eco-friendly products, Saudi Arabia attracts foreign investment, promotes exports, and solidifies its economic position on the international stage.

# Environmental Sustainability:

Environmental sustainability is of paramount importance for Saudi Arabia as the country faces significant environmental challenges, including water scarcity, air pollution, and habitat degradation. This section explores the various initiatives and strategies undertaken by Saudi Arabia to promote environmental sustainability, focusing on areas such as renewable energy development, water conservation, waste management, and biodiversity preservation.



# Environmental Sustainability:

## Renewable Energy Transition:

Acknowledging the need to reduce carbon emissions and mitigate the impacts of climate change, Saudi Arabia has embarked on an ambitious path towards renewable energy. The country aims to significantly increase the share of renewable energy in its energy mix, with targets to reach 50% of electricity generation from renewable sources by 2030. The implementation of solar and wind energy projects, such as the Sakaka Solar PV Plant and the Dumat Al Jandal Wind Farm, showcases Saudi Arabia's commitment to clean energy production and its contribution to reducing greenhouse gas emissions and combatting climate change.



## Water Conservation:

Saudi Arabia is known for facing tremendous water scarcity challenges, making water conservation a top priority. Through the implementation of various initiatives, such as desalination plants, wastewater treatment systems, and public awareness campaigns, the country aims to promote efficient water use, reduce water waste, and explore alternative water sources. These efforts not only address immediate water-related issues but also contribute to the long-term sustainability of water resources in the region.

# Environmental Sustainability:

## Waste Management:

Recognizing the importance of responsible waste management practices, Saudi Arabia has prioritized initiatives to reduce waste generation, promote recycling and waste-to-energy solutions, and ensure proper disposal of hazardous materials. The National Waste Management Program (NWMP) targets the establishment of sustainable waste management systems, including waste separation, recycling facilities, and the development of modern landfills. Through these efforts, Saudi Arabia aims to minimize environmental pollution, conserve resources, and promote a circular economy.



## Biodiversity Preservation:

Saudi Arabia's diverse ecosystems and rich biodiversity are an integral part of the country's natural heritage. To protect and preserve this biodiversity, Saudi Arabia has established protected areas, national parks, and nature reserves. These initiatives aim to conserve fragile ecosystems, safeguard wildlife habitats, and promote sustainable tourism that respects and values the natural environment. By conserving biodiversity, Saudi Arabia helps maintain ecosystem services and supports the sustainable development of the country.

# **Social Sustainability:**

Social sustainability refers to the concept of enhancing and maintaining social well-being, equity, and cohesion within a society both in the present and for future generations. It focuses on creating an inclusive and just society that promotes human rights, equal opportunities, and social justice. Social sustainability encompasses aspects such as quality of life, social harmony, access to healthcare, education, housing, and community engagement. It involves promoting social cohesion, addressing social inequalities, fostering diversity and inclusion, and ensuring the overall well-being and happiness of individuals and communities. Social sustainability recognizes that a sustainable society is one that meets the social needs and aspirations of its citizens and respects the rights and dignity of every individual.



# Environmental Sustainability:

## Women's Empowerment:

There have been encouraging advancements in women's empowerment and their participation in the workforce in recent years.

Initiatives like the Saudi Vision 2030's National Transformation Program (NTP) aim to promote gender equality and empower women economically and socially.

Women's empowerment is a multidimensional concept that encompasses various social, economic, and political aspects. It is about allowing women to have control over their own lives, making choices that impact their well-being, and enhancing their access to opportunities and resources. In the context of Saudi Arabia, significant efforts have been made to promote women's empowerment, driven by the country's ambitious Vision 2030 plan.



## Community Engagement:

The government, in collaboration with civil society organizations, is actively engaging communities to raise awareness about sustainability issues, promote eco-friendly practices, and ensure social inclusivity.

Community engagement refers to the process of involving and empowering individuals, groups, and communities to participate actively in decision-making, problem-solving, and shaping the development of their own communities. It aims to foster collaboration, inclusivity, and a sense of ownership among community members as they contribute to identifying needs, setting goals, and implementing initiatives that benefit the community as a whole.

# Case Studies

## King Salman Park Project:

The King Salman Park, currently under development in Riyadh, is an ambitious project that not only aims to create a recreational attraction but also prioritizes environmental sustainability. Spanning over 13.4 square kilometers, the park incorporates sustainable design principles, renewable energy integration, and extensive green spaces. The project includes a 7.5-kilometer-long linear park, water features, and outdoor recreational spaces. It aligns with Saudi Arabia's commitment to environmental conservation and provides an urban oasis that promotes biodiversity, reduces urban heat island effect, and encourages sustainable lifestyles.



Source: <https://kingsalmanpark.sa>

### Size and Location:

The King Salman Park Project spans over an area of approximately 13.4 square kilometers, making it one of the largest urban parks globally. The project is situated in the northern part of Riyadh, surrounded by residential and commercial areas.

### Vision and Objectives:

The vision of the King Salman Park Project is to create a world-class urban park that provides environmental, social, and recreational benefits to the community. The project aims to enhance the quality of life, promote social interactions, and contribute to Riyadh's transformation into a more sustainable and livable city.

# Case Studies

## Environmental Sustainability:

The project prioritizes environmental sustainability and green infrastructure. The park will feature extensive green spaces, including gardens, lawns, and tree-lined pathways. The integration of sustainable design principles, such as efficient water management systems, rainwater harvesting, and renewable energy generation, aims to minimize the park's environmental impact and enhance its ecological value.

## Recreational Amenities:

The King Salman Park will offer a wide range of recreational amenities and facilities. These include playgrounds, sports fields, walking and cycling tracks, picnic areas, and water features. The park will provide opportunities for various leisure activities, exercise, relaxation, and family gatherings.

## Cultural and Entertainment Zones:

The project incorporates cultural and entertainment zones that celebrate Saudi Arabia's rich heritage and promote arts and culture. These zones will feature museums, exhibition spaces, performance venues, and interactive experiences that showcase the country's history, art, and cultural heritage.

## Community Engagement:

The King Salman Park Project emphasizes community engagement and the inclusion of local residents in the planning and development processes. The project aims to create a sense of ownership and pride among the community by encouraging their active participation and incorporating their input in shaping the park's design and programming.

## Job Creation and Economic Impact:

The development of the King Salman Park is expected to generate significant economic benefits, including job creation and investment opportunities. The project will create job opportunities during the construction phase and subsequently through employment in park management, maintenance, and associated services.



Source: <https://kingsalmanpark.sa>

# Case Studies

## The Sports Boulevard:

The Sports Boulevard project is part of the country's efforts to promote sports, enhance public health, and create vibrant recreational spaces for the community. The project aims to foster a culture of physical activity and sports participation among citizens and residents.



Source: <https://sportsboulevard.sa/>

### Size and Location:

The Sports Boulevard is a linear park that is 135 km in length and connects Hanifah Valley in the West to Al Sulai Valley in the East via Prince Mohammed bin Salman Road, one of the largest main roads in Riyadh.

It is an oasis thriving with cultural and artistic events, sports and environmental activities that offer its visitors exceptional experiences and lifestyles in a sustainable development setting surrounded by vast green spaces of trees and gardens.

### Vision and Objectives:

The Sports Boulevard will transform Riyadh into one of the world's best places to live and work. It will encourage an active lifestyle and wellbeing with sustainability at its core in alignment with the Vision 2030 objectives. It will be an economic driver, as industries across diverse sectors can take advantage of the investment opportunities that are already being created. Our collaborative style is designed to suit the requirements of the public and private sectors through strategic investments.

# Case Studies

## Connectivity and Design:

The Sports Boulevard project is designed to transform existing roads into dedicated pedestrian and cycling pathways. It connects various sporting facilities, recreational areas, parks, and neighborhoods, fostering a sense of community and encouraging active lifestyles. The project incorporates modern urban design principles to create an attractive and safe environment for sports and recreation.

## Sports Facilities and Amenities:

The Sports Boulevard project features a wide range of sports facilities and recreation amenities. These include open-air gyms, jogging tracks, bike lanes, skate parks, and playgrounds. The project aims to provide accessible and inclusive spaces for people of all ages and abilities to engage in sports and physical activities, promoting health and well-being.

## Community Engagement and Events:

The Sports Boulevard project encourages community engagement by organizing sports events, tournaments, and recreational activities. It serves as a focal point for community gatherings, social interactions, and celebrations of physical fitness and athletic achievements. The project aims to create a vibrant and active community by fostering a spirit of sportsmanship and healthy competition.

## Sustainable and Green Spaces:

The Sports Boulevard project incorporates sustainability principles in its design and implementation. It emphasizes the use of environmentally friendly materials, energy-efficient lighting, and effective waste management practices. The inclusion of green spaces, trees, and landscaping enhances the aesthetic appeal of the project while promoting environmental sustainability.



Source: <https://sportsboulevard.sa/>

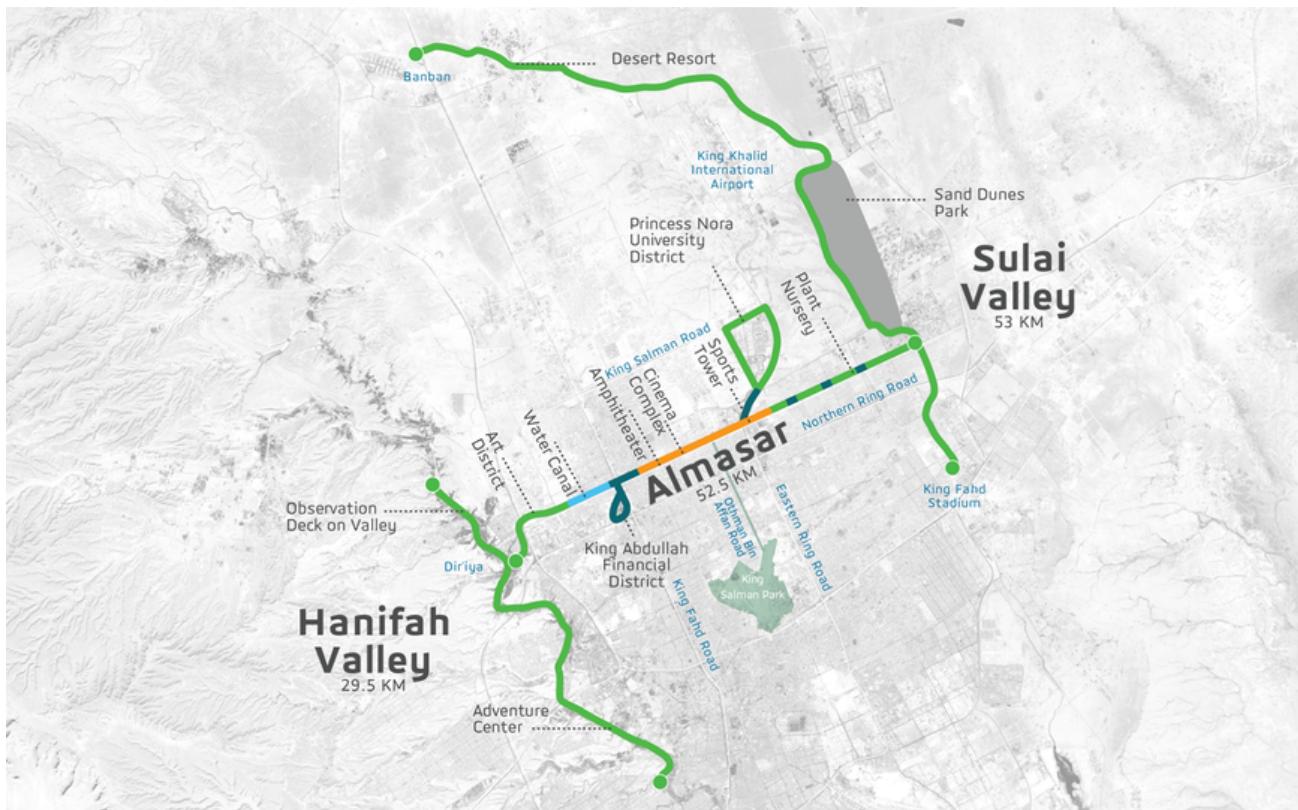
# Case Studies

## Economic and Social Impact:

The Sports Boulevard project contributes to economic growth by promoting sports-related industries, such as sports equipment manufacturing, fitness services, and recreational tourism. It also generates employment opportunities in the construction, maintenance, and operation of sports facilities. Moreover, the project enhances social cohesion, community well-being, and national pride by promoting a healthier and more active lifestyle among the population.



Source: <https://sportsboulevard.sa/>



Source: <https://sportsboulevard.sa/>

# Case Studies

## The Red Sea Project:

The Red Sea Project is a tourism development initiative that places great emphasis on environmental sustainability. Covering an area of over 28,000 square kilometers along the Red Sea coastline, the project aims to create a luxury tourism destination while minimizing ecological impact. The project focuses on preserving marine life, protecting coral reefs, and ensuring sustainable waste management. It emphasizes sustainable design, low-carbon transport systems, and the use of renewable energy sources, showcasing Saudi Arabia's commitment to sustainable tourism and environmental conservation. The Red Sea Project is an ambitious initiative led by the Public Investment Fund (PIF) of Saudi Arabia. It aims to develop a luxury tourism destination along the pristine coastline of the Red Sea. This project is part of the Saudi Vision 2030 plan to diversify the country's economy and tap into the potential of tourism as a key sector.



Source: <https://www.redseaglobal.com>

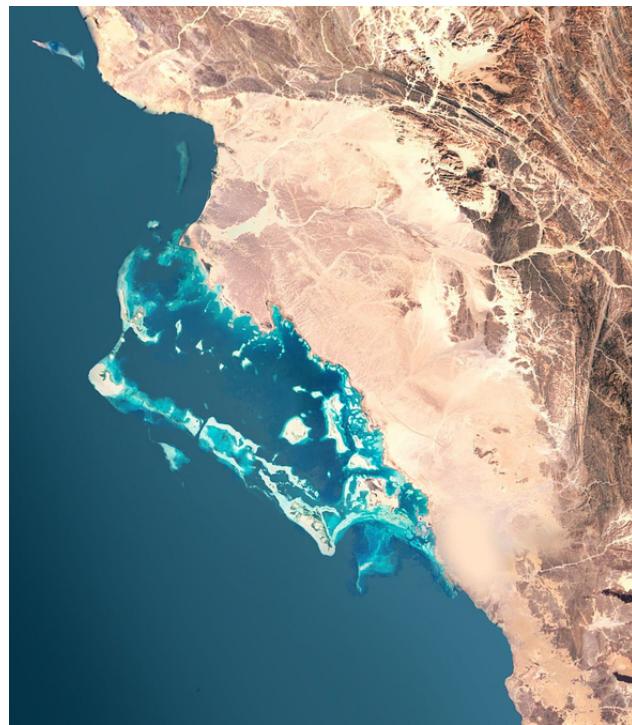
# Case Studies

## Size and Scope:

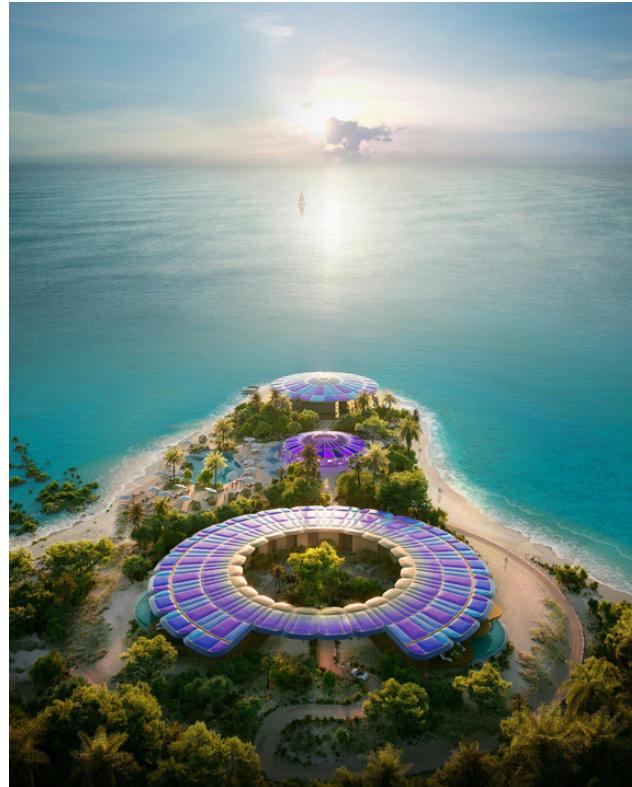
The Red Sea Project covers an expansive area of more than 28,000 square kilometers, encompassing an archipelago of more than 90 islands, coral reefs, and a vast stretch of coastline. It aims to create a distinctive and sustainable tourism experience that showcases the exceptional natural beauty of the Red Sea region.

## Environmental Preservation:

Environmental preservation is at the core of the Red Sea Project. The development plans prioritize the protection and conservation of the region's unique ecosystems, including coral reefs, seagrass beds, and mangroves. The project incorporates innovative ecological management practices to ensure minimal impact on the environment and reduce carbon emissions.



Source: <https://www.redseaglobal.com>



Source: <https://www.redseaglobal.com>

# Case Studies

## Sustainable Design and Energy:

The Red Sea Project is committed to sustainable design practices. This includes low-carbon infrastructure, renewable energy integration, and efficient use of resources. The project aims for a carbon-neutral footprint through the use of clean energy sources such as solar and wind power. The adoption of sustainable design principles helps minimize the project's environmental impact while enhancing energy efficiency.

## Tourism Offerings:

The Red Sea Project seeks to provide a world-class tourism experience. It will offer luxury hotels, resorts, residential units, and a range of recreational activities such as scuba diving, snorkeling, sailing, hiking, and cultural experiences to visitors. These offerings aim to attract international tourists and position the region as a premier leisure destination, while preserving the natural beauty and cultural heritage of the area.

## Socioeconomic Benefits and Local Engagement:

The Red Sea Project aims to create significant socioeconomic benefits for the local communities. It promotes job creation, entrepreneurship, and skills development for Saudi citizens. Furthermore, the project prioritizes local engagement and consultation to ensure that the local communities benefit from the opportunities emerging from the project's development.

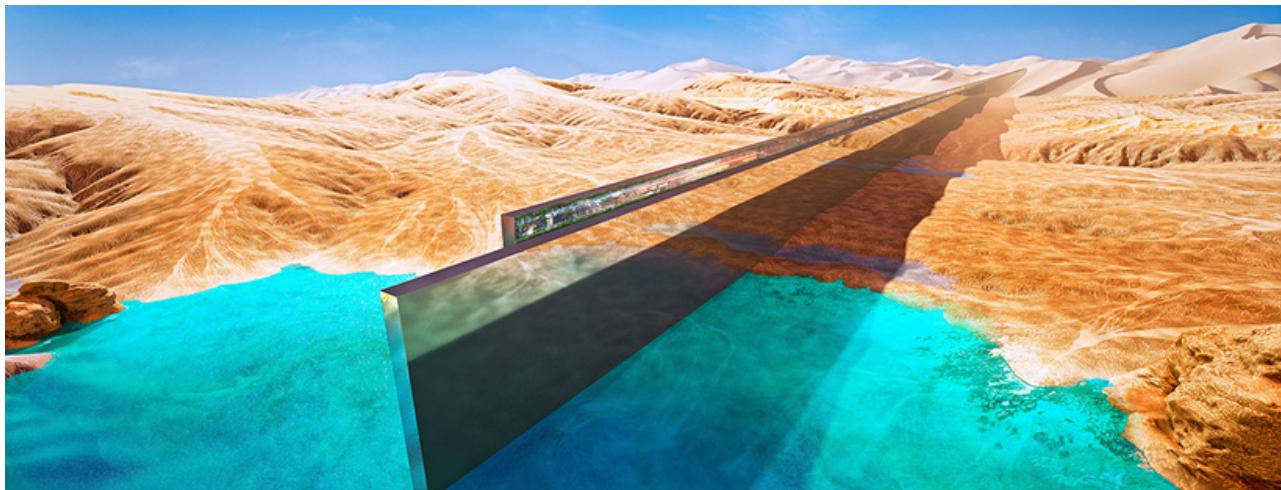


Source: <https://www.redseaglobal.com>

# Case Studies

## NEOM

NEOM is a flagship project of the Public Investment Fund (PIF) in Saudi Arabia. It is envisioned as a futuristic mega-city located in the northwest region of the country. NEOM aims to be a global model for urbanization, sustainability, and technological innovation. The project spans over 26,500 square kilometers and will incorporate urban planning concepts that prioritize environmental conservation, sustainability, and livability. NEOM aims to be a leading hub for sustainable development and environmental conservation. The city will rely on renewable energy sources, primarily solar and wind power, to achieve a 100% renewable energy target. The integration of smart grid technologies, efficient water management systems, and sustainable transportation solutions will further reduce the city's ecological footprint. NEOM will prioritize the preservation of natural resources, biodiversity conservation, and environmentally friendly infrastructure development.



Source: <https://www.neom.com>

# Case Studies

## Vision and Objectives:

NEOM is positioned as a transformative project that seeks to be a leading global destination for innovation, business, tourism, and sustainable living. Its objectives include economic diversification, job creation, attracting foreign investment, fostering innovation, and positioning Saudi Arabia as a global leader in various industries.

## Sustainable Development:

Sustainability is at the core of NEOM's development. The project aims to become a beacon of sustainable living, integrating renewable energy, smart infrastructure, efficient water management, and eco-friendly transportation. With a goal of achieving a carbon-neutral and zero-waste future, NEOM focuses on sustainable construction, green spaces, and efficient resource use.

## Size and Location:

NEOM is strategically planned to be situated in the northwest region of Saudi Arabia, near the Red Sea coast. It is one of the world's most ambitious cross-border projects, covering an extensive area of around 26,500 square kilometers, extending into Egyptian and Jordanian territories.



Source: <https://www.neom.com>

# Case Studies

## **Key Sectors and Industries:**

NEOM plans to leverage various sectors and industries to drive its growth. These include technology, energy, water, biotech, food, entertainment, tourism, advanced manufacturing, and more. Key projects within NEOM include the development of cutting-edge technologies, renewable energy generation, sustainable farming practices, and transformative tourism experiences.

## **Progress and Future Phases:**

NEOM has witnessed progress in the form of initial infrastructure development, such as The Line Project, Oxagon, and Trojena. The project is being executed in various phases, with the initial phase focusing on the establishment of essential infrastructure and sector-specific initiatives. Future phases will involve the development of additional sectors, attractions, and communities.

## **Governance and Regulation:**

NEOM benefits from a specially designed governance framework that grants it a high level of autonomy, allowing for easier implementation of regulations and policies. The project has a separate legal entity governed by a regulator, facilitating streamlined decision-making and an enabling environment for businesses and investments.

## **Economic Impact and Investment:**

NEOM aims to attract significant domestic and international investment, contributing to Saudi Arabia's economic diversification goals. The project is expected to generate job opportunities, spur economic growth, and facilitate innovation-driven industries.



Source: <https://www.neom.com>

# Case Studies

## Qiddiya

Qiddiya is an entertainment mega-project being developed near Riyadh. Spanning over 300 square kilometers, Qiddiya aims to become a major entertainment, leisure, and sports destination. The project is designed to provide diverse recreational opportunities for visitors and residents, showcasing Saudi Arabia's cultural heritage. Qiddiya incorporates environmental sustainability as a core principle in its development. The project aims to minimize its ecological impact and adopt sustainable design and construction practices. Qiddiya will prioritize energy efficiency, waste management, green spaces, and the use of renewable energy sources. The project also emphasizes the conservation of natural resources, including water, and showcases sustainable transportation solutions to reduce carbon emissions.



Source: <https://www.qiddiya.com>

# Case Studies

## Vision and Objectives:

Qiddiya's vision is to create a world-class entertainment and sports destination that caters to diverse audiences and promotes leisure and entertainment opportunities within Saudi Arabia. The project aims to stimulate economic growth, boost tourism, and provide quality recreational facilities for citizens, residents, and international visitors.

## Size and Location:

Qiddiya is situated on a vast area exceeding 334 square kilometers, making it one of the largest entertainment projects worldwide. It is strategically positioned about 40 kilometers west of Riyadh, allowing easy access for visitors from the city and beyond.

## Entertainment and Leisure Offerings:

Qiddiya will offer a diverse range of entertainment and leisure experiences. The project plans to feature theme parks, water parks, sports facilities, concert venues, performance arenas, motor sports tracks, racing circuits, golf courses, cultural centers, and residential units. These offerings aim to cater to individuals, families, and sports enthusiasts, providing a myriad of recreational and entertainment options.

## Thriving Sports Hub:

In addition to entertainment, Qiddiya seeks to become a global sports hub. It plans to host major sporting events, tournaments, and competitions, attracting athletes, teams, and spectators from around the world. The project's infrastructure will support a wide range of sports, including athletics, motorsports, equestrian events, golf, and more.



Source: <https://www.qiddiya.com>

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## Economic Impact and Job Creation:

Qiddiya is expected to have a significant economic impact, generating job opportunities and contributing to the country's economic diversification. The project aims to attract domestic and international investment, stimulate various sectors of the economy, and create jobs across a range of industries, such as hospitality, entertainment, construction, and service sectors.

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## Construction and Phases:

Qiddiya is being developed in multiple phases. The first phase focuses on constructing essential infrastructure and key entertainment and sports facilities. Future phases will involve expanding the offerings, implementing additional attractions, and developing residential and commercial zones.

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Source: <https://www.qiddiya.com>

# Case Studies

## Diriyah Gate Development:

The Diriyah Gate Development project aims to transform the historic Diriyah area in Riyadh into a global cultural and tourist destination. This UNESCO World Heritage site is recognized for its rich historical and cultural significance. The Diriyah Gate Development project places a strong emphasis on environmental sustainability and preserving the historic site's natural and cultural heritage. The project focuses on preserving and restoring the area's historical buildings, enhancing green spaces, and implementing environmentally friendly construction practices. The project also incorporates sustainable transportation options and aims to improve energy efficiency and water conservation within the development.



Source: <https://www.dgda.gov.sa>

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Diriyah, a SAR 64 billion development project, is a 7 km<sup>2</sup> mixed-use historic, culture and lifestyle destination. Diriyah will become the Kingdom's historic and cultural heart, proudly showcasing to the world Saudi Arabia's 300+ years of history through an engaging and inspiring set of heritage, hospitality, education, retail and dining experiences for residents, tourists and frequent visitors. The new global landmark, Diriyah, will be created in a Najdi architectural style and showcase authentic Saudi Arabian environments.



Source: <https://www.dgda.gov.sa>



Source: <https://www.dgda.gov.sa>

## **Historical Significance:**

Diriyah holds immense historical and cultural importance in Saudi Arabia. It was the birthplace and erstwhile capital of the First Saudi State and served as the home of the ruling Al Saud family. Diriyah's rich heritage includes numerous landmarks, traditional architecture, and historical sites that reflect the country's early history.

## **Preservation of Cultural Heritage:**

One of the key focuses of the Diriyah Gate Development project is the preservation and restoration of Diriyah's cultural heritage. Efforts are underway to conserve historical buildings, restore them to their former glory, and showcase the unique architectural and cultural elements of the area. The site has been recognized as a UNESCO World Heritage site, further emphasizing the significance of preserving its historical authenticity.



Source: <https://www.dgda.gov.sa>

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## **Sustainable Development:**

The project places a strong emphasis on sustainable development principles. The restoration and development of the area aim to be environmentally friendly, utilizing sustainable materials and energy-efficient technologies. In addition, landscapes and green spaces are carefully designed to blend with the surroundings and maintain a harmony between the natural environment and the built heritage.

## **Tourism and Cultural Experiences:**

Diriyah Gate Development seeks to attract visitors from around the world by offering a range of tourism and cultural experiences. The project includes the development of museums, exhibition spaces, interactive cultural displays, art galleries, and public performance venues. These initiatives aim to showcase Saudi Arabia's rich history, culture, and traditions to both domestic and international tourists.

## **Residential and Commercial Zones:**

The project also includes plans for residential and commercial zones within the Diriyah area. These zones will provide modern urban living spaces and commercial facilities while adhering to the principles of architectural preservation and sustainability. The development will create opportunities for residential communities, businesses, and various services to thrive in this historic setting.

## **Revitalization of Social Fabric:**

The Diriyah Gate Development project is expected to revitalize the social fabric of the area, presenting opportunities for the local community to actively engage in cultural events, economic activities, and tourism. The development aims to foster a sense of community pride, provide new job opportunities, and improve the quality of life for residents in the area through sustainable economic growth.



Source: <https://www.dgda.gov.sa>

# **Case Studies**

## **The National Industrial Development and Logistics Program**

Launched in 2019, the National Industrial Development and Logistics Program is transforming the Kingdom into a leading global player in the energy, mining, logistics and industry sectors. These high-growth sectors are diversifying Saudi Arabia's economy, creating quality jobs and securing sustainable growth for future generations.

As a reliable and responsible energy provider to the world, the Kingdom is entering a new green era. By investing heavily in renewable energy solutions such as wind and solar, the Program promotes a clean energy and low carbon future, supporting Saudi Arabia's goal of net zero emissions by 2060. Amid the global effort towards reducing emissions, Saudi Arabia's minerals - valued at \$1.3 trillion - are in high demand. The Program has made remarkable improvements to industry regulations and legislation, positioning the Kingdom as a leading nation in mining. Leveraging the Kingdom's competitive advantage as the crossroad of three continents, the Program is unleashing Saudi Arabia's potential as a global logistics hub with high efficiency, quality and speed.

# Case Studies

As part of the effort to support the growth of the Kingdom's premier industrial infrastructure, the newly launched Strategy for Industry is enabling Saudi Arabia to secure global supply chains and export high-tech products to the world. Through programs such as Made in Saudi to enhance local content in oil and non-oil sectors, the Program is paving the way for Saudi Arabia's Fourth Industrial Revolution which will harness new technologies for the betterment of society.



Source:<https://www.vision2030.gov.sa/en/vision-2030/vrp/national-industrial-development-and-logistics-program/>

## **Objectives:**

The NIDLP has several key objectives:

1. **Economic Diversification:** The program aims to reduce Saudi Arabia's dependence on oil revenues by driving the development of non-oil industrial sectors.
2. **Industrial Localization:** The NIDLP seeks to develop local manufacturing capabilities and encourage technology transfer, innovation, and value-addition within industries.
3. **Global Competitiveness:** Enhancing the competitiveness of Saudi industries in regional and global markets through improved productivity, quality, and efficiency.
4. **Job Creation:** Generating employment opportunities for Saudi nationals by attracting investments, fostering the growth of industries, and developing a skilled workforce.
5. **Sustainable Development:** Promoting environmentally friendly and sustainable industrial practices, encouraging energy efficiency, and minimizing environmental impact.

# Case Studies

## National Renewable Energy Program (NREP):

Saudi Arabia's National Renewable Energy Program (NREP) seeks to diversify the country's energy sources and reduce reliance on fossil fuels. The program aims to develop 58.7 gigawatts (GW) of renewable energy capacity by 2030, primarily through large-scale photovoltaic solar and wind projects. Examples of these projects include the Sakaka Solar PV Plant with a capacity of 300 MW and the Dumat Al Jandal Wind Farm with a capacity of 400 MW. These projects promote clean energy generation, reduce greenhouse gas emissions, and contribute to the global effort of combatting climate change.



# Case Studies

## Objectives:

The NREP seeks to achieve several objectives:

1. Renewable Energy Generation: The program aims to increase the share of renewable energy in Saudi Arabia's total energy mix.
2. Economic Diversification: By developing the renewable energy sector, the program contributes to economic diversification and reduces the country's reliance on oil and gas revenues.
3. Job Creation: The NREP generates employment opportunities and supports the growth of related industries, such as manufacturing, installation, and operation and maintenance of renewable energy projects.
4. Environmental Sustainability: By promoting clean and renewable energy sources, the program contributes to reducing greenhouse gas emissions, enhancing environmental sustainability, and mitigating the impacts of climate change.



## Key Components:

The NREP consists of several key components, including:

1. Renewable Energy Projects: The program focuses on developing large-scale renewable energy projects, primarily in solar and wind energy sectors. These projects contribute to increasing the country's renewable energy capacity, reducing reliance on fossil fuels, and fostering the growth of a sustainable energy sector.
2. Auction Programs: The NREP employs competitive bidding processes through auction programs to attract private sector investment in renewable energy projects. The programs encourage cost-effective deployment and ensure transparency and efficiency in the procurement of renewable energy resources.
3. Local Content Development: The program encourages the localization of renewable energy value chains in Saudi Arabia. This includes promoting local manufacturing and content requirements in renewable energy projects, creating job opportunities, and nurturing a competitive renewable energy industry within the country.
4. Technology Transfer and R&D: The program emphasizes technology transfer and research and development collaborations to drive innovation and enhance the adoption of advanced renewable energy technologies in Saudi Arabia.

# Challenges and Future Directions

Despite the progress made, several challenges persist in achieving sustainability goals in Saudi Arabia. These range from cultural perceptions, institutional barriers, and the need for technology transfer to incorporating sustainability considerations in urban planning, transportation, and waste management.

Challenges and future directions are crucial aspects to consider when discussing sustainability initiatives in any context. In the case of Saudi Arabia, while significant progress has been made in promoting sustainability, there are still challenges that need to be addressed. Additionally, future directions play a pivotal role in driving further sustainable development.



# Challenges

- **Cultural Perceptions and Mindsets:** Addressing deep-seated cultural perceptions and mindsets related to sustainability represents a challenge. Encouraging behavior change and widespread adoption of sustainable practices requires raising awareness, education, and overcoming resistance to change.
- **Institutional Barriers:** Overcoming institutional barriers and bureaucratic hurdles is crucial. Effective coordination and cooperation between different government agencies, private sector entities, and civil society organizations are essential for the successful implementation of sustainability initiatives.
- **Technology Transfer and Capacity Building:** The transfer of advanced technologies and building a skilled workforce capable of implementing sustainable practices are ongoing challenges. Investing in research and development, knowledge transfer, and providing training opportunities can help overcome these challenges.
- **Integrated Urban Planning:** Promoting sustainable urban development requires integrated urban planning that prioritizes compact, well-connected, and resource-efficient cities. Coordination between urban planners, architects, and policymakers is necessary to ensure sustainable transportation, efficient land use, and effective resource management.

# Future Directions

- **Enhanced Regulation and Enforcement:** Strengthening regulatory frameworks and enforcement mechanisms can ensure compliance with sustainability standards and regulations. Regular monitoring, stricter enforcement, and accountability mechanisms can drive progress and foster a culture of sustainability.
- **Public-Private Partnerships:** Promoting public-private partnerships can leverage the resources, expertise, and innovation of both sectors to pursue sustainable development goals. Collaborative efforts between government entities and private companies can accelerate the implementation of sustainable practices across various sectors.
- **Circular Economy and Waste Management:** Greater focus on the adoption of circular economy practices in waste management, resource use, and recycling can contribute to resource efficiency and reduce waste generation. Implementing efficient waste management systems and promoting the reuse and recycling of materials can minimize environmental impact.
- **Sustainable Transportation and Energy:** Expanding sustainable transportation infrastructure and promoting the use of electric vehicles can help reduce carbon emissions. Furthermore, investing in renewable energy projects and supporting research and development in clean energy technologies can foster the transition to a sustainable and low-carbon energy system.
- **Education and Public Awareness:** Continued investment in education and public awareness campaigns is essential for promoting sustainable practices. Educating citizens, particularly the younger generation, about the importance of sustainability and equipping them with the knowledge and skills needed to actively engage in sustainable practices can drive long-term change.

# Conclusion

In conclusion, Saudi Arabia has made significant strides in promoting sustainability across various dimensions, including economic, environmental, and social aspects. The country's commitment to sustainability is evident through initiatives such as the development of renewable energy projects, promotion of green building practices, women's empowerment, community engagement, and the preservation of natural resources.

However, there are still challenges to address on the path to sustainable development. Overcoming cultural perceptions, institutional barriers, and resistance to change require ongoing efforts. Strengthening regulatory frameworks, enhancing enforcement mechanisms, and promoting public-private partnerships are crucial steps towards ensuring effective implementation of sustainable practices. Additionally, investing in education, capacity building, and technology transfer is essential for driving further progress.

Looking towards the future, sustainable development in Saudi Arabia will benefit from integrated urban planning, circular economy practices, sustainable transportation, and increased public awareness. By embracing these future directions and addressing the challenges, Saudi Arabia can continue its journey towards a more sustainable and resilient future.

It is important to recognize that sustainability is an ongoing process that requires continuous commitment, collaboration, and adaptation. By fostering a culture of sustainability, Saudi Arabia can not only create a better future for its citizens but also contribute to global efforts in addressing climate change, conserving natural resources, and promoting social well-being. Through the collective efforts of government, private sector, and civil society, Saudi Arabia has the potential to become a role model for sustainable development and inspire positive change worldwide.

## **Disclaimer:**

The information provided in this report on the state of sustainability in Saudi Arabia is based on available data, research, and analysis at the time of preparation. While every effort has been made to ensure accuracy, the dynamic nature of sustainability issues and the evolving landscape may result in changes or updates not reflected in this report. Furthermore, the report provides a general overview and should not be considered as exhaustive or comprehensive. The findings, conclusions, and recommendations presented are based on the understanding and interpretation of the available information and should be contextualized within the specific time period and socio-economic context. Readers are encouraged to further research and consult authoritative sources for the most up-to-date and specific information related to sustainability in Saudi Arabia. The authors and publishers of this report cannot be held responsible for any decisions or actions taken based on the information presented herein.

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The background of the card shows a modern office environment with desks, computers, and large windows overlooking a green landscape.