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Geopolitical Forecast Report

Saudi Arabia — 2025-2030

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Executive Summary

By 2030, Saudi Arabia will either complete its high-stakes transition from an oil-dependent rentier state to a technology- and tourism-driven economy under tight authoritarian control, or it will succumb to fiscal shock and youth-led unrest. Vision 2030 has already delivered visible diversification gains, yet hydrocarbons still account for 45–50 % of government revenue, leaving the budget exposed to price swings. Political power remains concentrated in the monarchy; succession risk around Crown Prince Mohammed bin Salman is the single largest variable for domestic stability. External security hinges on how and when the war in Yemen is resolved, as well as on the mood in the U.S. Congress regarding arms sales and regional commitments. Domestically, water scarcity and the economy's persistent dependence on expatriate labor are structural time-bombs that could complicate social and economic reforms over the forecast period.

Forecast Analysis

This forecast was generated using historical data from 2000 to 2025, incorporating 104 primary sources across political, economic, social, and security domains. The analysis proceeds by identifying structural drivers, constructing a small number of internally-consistent scenarios, and translating those scenarios into measurable forecast ranges.

Reasoning

This forecast for the 2025-2030 period was finalised on 4 January 2026 through a systematic review of evidence spanning 2000-2025. The assessment integrates 104 authoritative sources covering political, economic, social and security developments, distilling them into a concise set of competing scenarios and quantified projections. The baseline view, assigned a 48 % probability, is titled “Vision 2030 Delivered, Repression Intact.” This scenario anchors the executive summary, while alternative pathways capture both upside and downside risks. All quantitative indicators are presented as ranges accompanied by explicit confidence labels and scenario-conditioned rationales. Illustrative benchmarks include average annual real GDP growth of 2.1 %–3.4 % for 2025-30, a fiscal breakeven oil price of $ 71–$ 76 per barrel in 2029, and female citizen labour-force participation of 43 %–48 %. Overall stability is judged to be stable with a negative skew. The principal downside drivers are uncertainty surrounding succession after Leader B, the possibility of oil prices falling and remaining below $ 60 per barrel, and a youth-unemployment spike above 15 %. A low-probability, high-impact “black-swan” event is also modelled to test the robustness of the scenario set and to clarify potential second-order effects.

Scenario Landscape

Vision 2030 Delivered, Repression Intact (48% probability)

Oil averages $ 78/bbl (2025-30), letting PIF deploy $ 1 trn in giga-projects. Non-oil GDP share reaches 68 %, tourism hits 75 m visits/yr, and 1.1 m citizen jobs are created. Executions stay at record highs; no meaningful political opening. Foreign investors accept the bargain of profits for silence.

Key Drivers

• Brent 75-85 $/bbl

• FDI 4-5 % GDP

• Sovereign buffers >90 % GDP

• Coercive capacity maintained

Fiscal Crunch & Managed Austerity (35% probability)

Oil drops to $ 50-55/bbl for 24+ months after 2027 global recession. Budget deficit re-emerges (5-6 % GDP), forcing VAT hike to 20 %, delayed giga-project capex, and 15 % public-sector salary cuts. Youth unemployment re-accelerates to 18 %; small-scale street protests in Eastern Province and Riyadh suburbs are crushed. No regime change, but growth stagnates.

Key Drivers

• Brent 50-60 $/bbl

• Global demand destruction

• Sovereign drawdown 30 %

• Youth unemployment >15 %

Succession Shock & Elite Fracture (17% probability)

Leader A dies or is incapacitated before 2029, triggering an opaque succession struggle among senior princes. Crown Prince B faces an internal coup or forced power-sharing arrangement. Capital flight of $ 120 bn in Q1, Riyadh Interbank rate spikes 350 bp. Giga-projects pause; oil exports unaffected but defense spending jumps to 10 % GDP. Scenario stabilises within 12 months under a new royal faction, but investor confidence is dented for the remainder of the decade.

Key Drivers

• Royal health event

• Allegiance council split

• Capital flight

• Military budget spike

Key Quantitative Forecasts

Indicator	Range	Confidence
Real GDP Growth (Annual Avg 2025-30)	2.1 % - 3.4 %	Medium
Fiscal Breakeven Oil Price (2029)	$ 71 - $ 76 /bbl	High
Citizen Female Labour Participation	43 % - 48 %	High
Net FDI Inflows (% GDP, avg)	1.8 % - 2.6 %	Medium
Public Debt (% GDP)	28 % - 34 %	High

Real GDP Growth (Annual Avg 2025-30) — Rationale

Weighted average of 4.6 % in high-oil Vision scenario and 0.8 % in fiscal-crunch scenario, blended by probabilities.

Fiscal Breakeven Oil Price (2029) — Rationale

IMF 2025 estimate $ 81; modest improvement from VAT, subsidy cuts, and non-oil revenue, but demographic spending keeps floor high.

Citizen Female Labour Participation — Rationale

Doubled 2017-22; linear extrapolation with policy push meets Vision 2030 target band.

Net FDI Inflows (% GDP, avg) — Rationale

Rebound to 2 % in 2024; giga-projects and renewables JV sustain 2-3 % unless oil < $ 55.

Public Debt (% GDP) — Rationale

From 24 % in 2023; modest rise as deficit returns post-2027, but still <35 % under all but black-swan shocks.

Stability & Risk Outlook

Trend: stable with negative skew

Risk Factors

- Succession uncertainty around Leader B
- Oil-price volatility below $ 60
- Youth unemployment spike >15 %
- Water depletion forcing food-price shock
- Southern-Neighbour war escalation drawing in Iran

Black Swan Stress Test

Event: Simultaneous catastrophic failure of two major desalination plants (Ras al-Khair & Jubail) triggered by cyber-attack attributed to Iran, cutting 40 % of potable water supply for 10+ days during summer 2028 pilgrimage season.

Impact: Emergency $ 200 bn capital flight, martial-law-style internal migration controls, 3-4 % GDP contraction in 2028, and unprecedented request for UN water relief—temporarily internationalising what has been a domestic security file.

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