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Out of Thin Air but More than a Mirage

The Politics of Saudi Arabia's Nascent Music Industry

Amr ABDELRAHIM

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Abstract

This study critically examines Saudi Arabia's nascent music industry, which is promoted as a key element of Vision 2030, Crown Prince Mohammed bin Salman's strategic framework to diversify the kingdom's economy. It explores how state-led investments in music and entertainment intersect with authoritarian governance. The author neither dismisses these investments as conspicuous spending nor reproduces an alarmist narrative of impending cultural imperialism. The article takes a political sociology approach to understand how Saudi entertainment plans consolidate domestic power and reshape regional cultural landscapes.

The study underscores the challenges of building a music industry from the top down. However, even if these efforts may not contribute to achieving economic diversification or cultural influence, they are already reshaping the cultural landscape of Saudi Arabia and the wider Middle East and North Africa. The heavy degree of involvement of state-affiliated entities in the Saudi music industry is representative of how the centralization of ownership and control over various economic sectors contributed to the renewal of Saudi authoritarianism since 2016. Interviews, observations, and desk research are drawn upon to describe how the complex network of domestic, regional, and international stakeholders that are exploiting the Saudi state's newfound interest in music and becoming entangled in rent-distribution networks.

Moreover, professional opportunities in Saudi Arabia will likely have a profound impact on the cultural scenes of neighboring countries with struggling economies, such as Egypt, as new mobilities and migrations make them increasingly dependent on the Gulf.

Résumé

Cette étude porte un regard critique sur l'industrie musicale saoudienne qui est présentée comme une composante importante de la stratégie de diversification économique promue par le prince héritier Mohammed ben Salman. Elle analyse l'enchevêtrement des investissements étatiques dans le secteur de la musique avec les enjeux d'une gouvernance autoritaire. L'article souligne les défis de cette construction d'une industrie musicale « par le haut ». S'il est loin d'être certain que ces efforts contribueront de manière significative à la diversification économique du royaume ou à l'accroissement de son influence culturelle, ils participent néanmoins à la consolidation du pouvoir saoudien et remodelent le paysage culturel régional.

La forte implication d'entités publiques et para-publiques dans l'industrie musicale saoudienne est représentative du contrôle et de la concentration de ressources dans les mains du prince héritier dans de divers secteurs économiques depuis 2016. L'auteur a recours à des entretiens, des observations ethnographiques et des recherches documentaires pour décrire le vaste réseau d'acteurs nationaux, régionaux et internationaux qui cherchent à exploiter le nouvel intérêt de l'État saoudien pour la musique et qui bénéficient en réalité de la redistribution de la rente pétrolière.

L'étude s'interroge également sur les conséquences durables des politiques culturelles saoudiennes sur la région. Les opportunités professionnelles en Arabie saoudite produisent d'ores et déjà des nouvelles formes de mobilités depuis des pays voisins en crise économique, comme l'Égypte, rendant ainsi leurs scènes culturelles plus dépendantes des pays du Golfe.

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Introduction

On December 19th, 2019, the launch of MDLBEAST Soundstorm, an electronic music festival near Riyadh, Saudi Arabia, made global headlines. A first-ever in a country where music had been banned from public spaces, Soundstorm came as part of a concerted effort by the Saudi government to ramp up its investments in culture and sports events. The introduction of state-sponsored popular entertainment might not be the biggest transformation in the country in the wake of its change in leadership in 2015. It is, however, the most spectacular phenomenon unfolding in the “new” Saudi Arabia. From classical concertos to desert raves, media outlets are irresistibly drawn to photographs of young Saudis dressed in traditional *thawbs* and *gutrahs* listening and dancing to live music.¹

The power of such images rests in their ability to both uproot and perpetuate longheld beliefs about Saudi Arabia – a country long depicted as stuck in time, held back by an anachronistic current of Islam that supposedly owes its rigorism to the harsh conditions of nomadic life in the unrelenting geography of the Arabian Peninsula.² Many accounts of Saudi Arabia also center on its oil resources. When the country erupted into the center of the global economy, the sudden influx of petrodollars transformed its cities and lifestyles. Tragically, or so the dominant narrative goes, its new cosmopolitan elite could not help but squander its wealth since it never had to toil the land to make a living.³

These tropes figure prominently in most analyses of the economic and social reforms pushed by Mohammed bin Salman (MBS), the heir to the Saudi crown who has been ruling the country since 2015. Saudi society is seen as a precarious cohabitation between a growing intelligentsia immersed in a globalized culture and “one of the most backward populations in the world”.⁴ Before the rise of MBS, the secret to the Saudi monarchy’s resilience allegedly lay in its ability to cater to both groups, protecting the privileges of the former and refraining from adopting “liberal” reforms that could anger the latter.⁵ Vision 2030, the Saudi crown prince’s ambitious plan to transform the kingdom, is believed to have put an end to this balance. State-led entertainment plans are seen as an acceleration of the pace of social

1. See for instance: J. Dutton, “Saudi Arabia’s SRMG Invests in Music Streamer Anghami, Spotify’s Middle East Rival”, *Al-Monitor*, August 22, 2023, available at: www.al-monitor.com.

2. P. Ménoret, *L’Énigme saoudienne : les Saoudiens et le monde, 1744-2003*, Paris : La Découverte, 2003, p. 10.

3. *Ibid*, p. 26.

4. *Ibid*, p. 10.

5. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, London: Lexington Books, 2022, pp. 57-58.

liberalization in the kingdom, intended to earn the support of “young, affluent, and connected”⁶ Saudis, at the cost of alienating religious conservatives. Consequently, MBS has been hailed by some as an enlightened autocrat pushing forward necessary reforms in a country that is hostile to all change.⁷ Proponents of the crown prince often omit that the constituencies who supposedly benefit the most from the new Saudi state (youth, women, artists) are also the first ones to feel its ire when they fall out of step.⁸

Music is at the heart of this narrative. A culturalist paradigm undergirds the widespread perception that Saudi Arabia was a land without music.⁹ The Saudi government itself is reappropriating this trope by presenting its ambition to “foster” a local music industry as revolutionary, all the while claiming that it is only a return to the less conservative Saudi Arabia that supposedly existed before the rise of Islamic Revivalism in the seventies and eighties.

But, massive investments in sports and culture have also become a lodestone for criticism. The image of lavish spending by oil-rich princes permeates many critiques of Saudi entertainment plans. Massive concert halls and stadiums have become emblematic of the “waste” and “conspicuous consumption” that allegedly motivate “white-elephant” projects across the Gulf. Disentangling fact from fiction, when it comes to the economic rationale of these projects, is made difficult by the saturation of the media landscape by Saudi-paid advertorials and PR campaigns designed to cover up criticism of alleged human rights violations and attract foreign investment to the country.

This study is an attempt at a critical study of Saudi futurities that does not fall prey to the dominant paradigms of waste and fundamentalism. It seeks to glean what is going on behind Saudi officials' apparent hubris. To that end, the music sector is a particularly insightful research object. It is not immediately evident how the government's massive investments are contributing to Vision 2030's goal of diversifying the Saudi economy, as mature music industries account for 1-2% of their respective countries' gross domestic products (GDPs). Culture and entertainment, therefore, invite us to pay attention to the politics of state-led development. Music is at the nexus of different phenomena unfolding in the “new” Saudi Arabia: the controlled liberalization of public spaces under a novel brand of authoritarianism, the centralization of ownership and control over various economic sectors in the name of reform, the instauration of new clientelist networks, and the kingdom's rising regional ambitions.

6. Statement by P. Pacifico, “ATM23: Sport and Music Matters in Saudi Arabia”, YouTube, October 23, 2023, available at: www.youtube.com.

7. P. Mishra, “The Enduring Fantasy of the Modernizing Autocrat”, *The New York Times*, October 25, 2018, available at: www.nytimes.com.

8. “Saudi Rapper Faces Arrest for Mecca Girl Music Video”, BBC, February 22, 2020, available at: www.bbc.com.

9. Statement by P. Pacifico, “ATM23: Sport and Music Matters in Saudi Arabia”, op. cit.

It is necessary to “unpack”¹⁰ the Saudi Arabian state and its society to understand how entertainment plans contribute to these developments. While many analysts claim that state-sponsored sports and culture events are designed to counterbalance the negative impact of austerity measures on its legitimacy, such system-wide explanations fail to capture the different effects of Saudi investments in music across social groups.

Similarly, discussions on the international effects of these events are rarely based on empirics. Saudi officials' dreams of soft power and regime critics' culture-washing accusations both presuppose that state-sponsored entertainment achieves its intended effect on international audiences, a claim that cannot easily be verified. This study's wager is that it is more productive to study the production side of the Saudi cultural apparatus, that is to say how various domestic and international actors exploiting the opportunities generated by public investments in music are inadvertently participating in the consolidation of the Saudi regime.

The following discussion uses different types of qualitative data. In addition to a literature review of scholarly work on culture in Saudi Arabia, desk research was carried out to reconstruct the configuration of the Saudi music sector and the trajectories of its various participants. The paper also relies on interviews with Egyptian musicians and music executives, as well as observations and informal conversations during the third edition of XP Music Futures, an industry conference that took place in Riyadh, the capital of Saudi Arabia, between the 7th and the 9th of December 2023.

This paper argues that a political sociology approach is needed to understand the role of music in Vision 2030. It analyzes the official rationale for state-led projects in music and weighs the scale of these investments against their potential returns. The entanglements between media, culture, and politics in Saudi Arabia are investigated to show how the centralization of ownership and control over the nascent live and recorded music industries is characteristic of regime change under MBS. Consequently, Saudi creatives and global music industry executives exploiting the kingdom's new-found interest in music become intertwined in rent distribution networks. The study also explores the ripples of Saudi entertainment plans in the Egyptian music scene. The creative migrations and transnational clientelist networks that go into building “the music industry of the future”¹¹ will transform the region's cultural landscape regardless of the eventual outcome of the kingdom's hegemonic ambitions.

10. S. Hertog, *Princes, Brokers, and Bureaucrats: Oil and the State in Saudi Arabia*, Ithaca: Cornell University Press, 2010, p. 9.

11. Statement by P. Pacifico, All That Matters, “ATM23: Sport and Music Matters in Saudi Arabia”, op. cit.

A tale of two kingdoms? Unpacking “old” and “new” Saudi Arabia

“Easy money has transformed a Bedouin tribe into a multinational of waste. Nothing is more difficult than to save money you own but have not earned.”¹²

—French journalist Stéphane Marchand cited by Pascal Ménoret.

Common sense beliefs about the role of oil in Saudi Arabia inform both admiration and dismissal of the economic and social reforms undertaken by Saudi officials since 2015. It is crucial to briefly revisit some of these beliefs to understand the complexity of what is going on in Saudi Arabia.

Saudi Arabia’s entry into “the age of austerity”¹³ under MBS is not a mere outcome of a decline in global crude oil prices. Vision 2030 and its adjacent entertainment plans are part of a regime change amidst a structural crisis in the Saudi state. This crisis was made more pressing by a drop in oil prices in 2014, but it arose from the inadequacy of the power and resource-sharing system in the face of new domestic and international realities. The following section briefly explores the political economy of Saudi Arabia. It distances itself from the dominant paradigm of the rentier state by arguing that the distribution of power and resources in a given society is not a mechanical outcome but the result of historical processes. Consequently, massive music investments are not conspicuous spending by a wasteful state and/or society. They are integral parts of a political transformation.

A brief history of Saudi rentierism

Unlike most Gulf states, Saudi Arabia did not achieve its independence in the latter half of the twentieth century. Its history can be traced back to an alliance between Muhammad bin Saud and Muhammad bin Abd Al-Wahhab, a political leader and a religious reformer from the center of the Arabian Peninsula, in 1744. While the first two Saudi states were short-lived (1744-

12. P. Ménoret, *The Saudi Enigma: A History*, London: Zed Books, 2005, p. 19.

13. S. Hertog, “Challenges to the Saudi Distributional State in the Age of Austerity”, in: M. Al-Rasheed (ed.), *Salman’s Legacy: The Dilemmas of a New Era in Saudi Arabia*, Oxford: Oxford University Press, 2018, pp. 45-72.

1814; 1824-1891), the third time proved to be the charm for King Abdulaziz bin Saud (1902-1953), who managed to bring four-fifths of the Arabian Peninsula under his control by the late 1920s.

The Kingdom of Saudi Arabia was proclaimed in 1932, the same year that the first oil fields in the region were discovered in neighboring Bahrain.¹⁴ The beginning of oil production in 1938 and the 1973 oil boom would shape the newly established state. Flush with oil money, the Saudi royal family was able to build modern state institutions and solidify its hold over the country through a wide array of development projects.¹⁵ Henceforth, “black gold” became central to Saudi Arabia’s political economy – the redistribution of oil revenue ensured the unity of the royal family, the cooptation of elites, and the construction of a strong repressive apparatus – and its alliance with the United States, who ensured the security of the latter in exchange for unhindered access to its oil reserves.

Considering the structuring role that oil played in Saudi state-building efforts, it is not surprising that the theories of the “rentier state” or “the resource curse” have been the dominant paradigms used to study the country.¹⁶ This so-called “curse” arises when an abundantly available resource offers a state a steady flow of income with little to no contribution from its domestic workforce. Proponents argue that oil rent systematically leads to corruption, clientelism, and weak bureaucratic apparatuses since rentier states do not have to raise taxes on their population. Consequently, they are said to be “politically autonomous from [their societies],” and episodes of political crisis only arise when global crude oil prices plummet.¹⁷

While the “rentier state” theory has been contested on empirical, theoretical, and epistemological grounds¹⁸, its greatest shortcoming is its reliance on a single variable to produce a system-wide explanation. Saudi Arabia is certainly an oil-dependent country. After the first Oil Boom, the contribution of oil rent to its GDP skyrocketed, reaching a peak of 87.1% in 1979.¹⁹ While this percentage decreased as oil prices waxed and waned, it remains significant (23.7% in 2021).²⁰ The situation is starker when one

14. P. Ménoret, *L'Énigme saoudienne : les Saoudiens et le monde*, op. cit., p. 91.

15. See S. Hertog, *Princes, Brokers, and Bureaucrats: Oil and the State in Saudi Arabia*, op. cit.; S. Yizraeli, *Politics and Society in Saudi Arabia: The Crucial Years of Development 1960-1982*, Oxford: Oxford University Press, 2012; T. C. Jones, *Desert Kingdom: How Oil and Water Forged Modern Saudi Arabia*, Cambridge (MA): Harvard University Press, 2010.

16. See the seminal work of H. Beblawi, “The Rentier State in the Arab World”, *Arab Studies Quarterly*, Vol. 9, No. 4 (Fall 1987), pp. 383-398. For a more recent use in the Saudi context, see: D. Moshashai, A. M. Leber, and J. D. Savage, “Saudi Arabia Plans for its Economic Future: Vision 2030, the National Transformation Plan and Saudi Fiscal Reform”, *British Journal of Middle Eastern Studies*, Vol. 47, No. 3, pp. 381-401.

17. S. Hertog, *Princes, Brokers, and Bureaucrats: Oil and the State in Saudi Arabia*, op. cit., p. 10.

18. M. Hachemaoui, “La rente entrave-t-elle vraiment la démocratie ? Réexamen critique des théories de l'État rentier’ et de la ‘malédiction des ressources””, *Revue française de science politique*, Vol. 62, No. 2, 2012, pp. 207-230.

19. “Oil Rents (% of GDP) – Saudi Arabia”, World Bank, available at: data.worldbank.org.

20. Ibid.

accounts for oil-related economic activities. In 2023, the non-oil sector reportedly only accounted for 50% of the Saudi economy (according to official estimates, which are generally exaggerated). The Saudi state, the main driving force behind the economy, has almost entirely been reliant on oil revenue (it has contributed an average of 75% of the state budget since 2010, with a peak of 93% in 2011 and a historic low of 53% in 2020 due to the Covid-19 pandemic).²¹

However, the specific way oil rent is captured and redistributed by a given group is the result of a historical process. American political scientist Steffan Hertog pointedly demonstrates how Saudi rentierism is the end point of politics rather than an overdetermining economic model. Oil is part of a constantly evolving concentration of power and wealth, and not a system-wide economic model that can be applied to all kinds of social behavior.²²

Consequently, political transformations in the kingdom cannot be reduced to mechanical outcomes of fluctuations in global crude oil prices. State-led investments in music are certainly impacted by the price of the oil barrel,²³ as both the Saudi state's fiscal balance and its broader economy remain rent-dependent. But, this one variable is not sufficient to understand Saudi entertainment plans. The latter are part of a decade of political, economic, and social transformation ushered in by MBS. The crown prince's ascension is not merely a "Thatcherian revolution"²⁴ that cut social spending in response to the 2014 oil bust. It is an attempt to build a "new" Saudi Arabia. Consequently, it is necessary to "unpack the state"²⁵ to historicize current developments, of which the nascent culture and entertainment industries are but one aspect.

The rise of Mohammed bin Salman

For the past two decades, the Saudi state faced increasingly urgent challenges that undermined the status quo it had maintained to varying degrees of success since the sixties. First and foremost, the royal family approached a succession crisis. Ever since the ouster of King Saud bin Abdulaziz by his half-brother Faysal in 1964, the crown was passed on horizontally among the children of the kingdom's founder.²⁶ At the same time, each of the major lines of the royal family was given a part of the state apparatus as a fiefdom. Decisions had to be taken collegially, with the monarch acting as a *primus*

21. D. Moshashai, A. M. Leber, and J. D. Savage, "Saudi Arabia Plans for Its Economic Future: Vision 2030, the National Transformation Plan and Saudi Fiscal Reform", op. cit., p. 385.

22. S. Hertog, *Princes, Brokers, and Bureaucrats: Oil and the State in Saudi Arabia*, op. cit., p. 9.

23. R. A. Proctor, "Why Is Saudi Arabia Cutting Funding, Reducing Costs on Ambitious Projects?", *Al-Monitor*, June 16, 2024, available at: www.al-monitor.com.

24. "Transcript: Interview with Muhammad bin Salman", *The Economist*, January 6, 2016, available at: www.economist.com.

25. S. Hertog, *Princes, Brokers, and Bureaucrats: Oil and the State in Saudi Arabia*, op. cit., p. 9.

26. M. Al-Rasheed, "Mystique of Monarchy: The Magic of Royal Succession in Saudi Arabia", in: M. Al-Rasheed (ed.), *Salman's Legacy: The Dilemmas of a New Era in Saudi Arabia*, op. cit., pp. 45-72.

inter pares, thereby ensuring the cohesion of the ruling group. However, at the turn of the new millennium, the surviving sons of King Abdulaziz bin Saoud were octogenarians, and their children and grandchildren numbered in the thousands. It became hard to conceive how horizontal succession could be maintained.²⁷

The Saudi economic model was also subject to structural strains. The country was in the middle of its demographic transition, and millions of youths would need to be absorbed into the state-dominated labor market.²⁸ In 2011, the Saudi government attempted to limit the outbreak of protests by paying public sector employees 100 million dollars (\$) in bonuses and pledging to create 600,000 new jobs.²⁹ This could only be done at the cost of an increase in state expenditure, and when oil prices fell from a historic high of \$110 per barrel in 2013 to \$30 per barrel in early 2016, Saudi Arabia had to use up its foreign currency reserves or seek out sovereign credit.³⁰ The fiscal crisis thus increased the urgency of solving the Saudi economy's underlying structural contradictions. The Saudi government drained one-third of its reserves in two years to cover a public deficit that reached 11.5% of the GDP in 2016.³¹ The Saudi monarchy also had to deal with several international challenges, such as the Arab Spring and the rise of Islamist parties across the region, the increasing influence of Iran and Turkey, and the onset of the civil war in Yemen.

The sudden rise of MBS, a relatively unknown figure before his father climbed on the throne, cannot be disentangled from these multiple crises. The fundamental rupture in Saudi politics that he personifies was made possible by a feeling of urgency within the ruling family, who had unsuccessfully attempted to address some of these structural challenges in previous decades. The previous monarch, King Abdullah (2005-2015), had attempted to rationalize the line of succession and diversify the economy.³² These attempts were met with limited success. With different branches of the royal family controlling fiefdoms within the state, decisions were negotiated and implemented unevenly. In the words of American political scientist Michael Mann, the Saudi state possessed a high degree of infrastructural power (its ability to penetrate society) but a low level of despotic power (the concentration of power within one institution).³³

27. B. Haykel, T. Hegghammer, S. Lacroix (eds.), *Saudi Arabia in Transition: Insights on Social, Political, Economic and Religious Change*, Cambridge: Cambridge University Press, 2015, p. 2.

28. Ibid.

29. Ibid.

30. F. G. Cause III, "Challenges to Regime stability", in: M. Al-Rasheed (ed.), *Salman's Legacy: The Dilemmas of a New Era in Saudi Arabia*, Oxford: Oxford University Press, 2018, p. 38.

31. Ibid., p. 39.

32. T. C. Jones, "The Dogma of Development: Technopolitics and Power in Saudi Arabia", in: B. Haykel, T. Hegghammer, S. Lacroix (eds.), *Saudi Arabia in Transition: Insights on Social, Political, Economic and Religious Change*, op. cit., pp. 31-47.

33. M. Mann, "The Autonomous Power of the State: Its Origins, Mechanisms and Results", *European Journal of Sociology*, Vol. 25, No. 2, 1984, pp. 185-213.

This changed in January 2015 when Salman bin Abdulaziz ascended to the throne. The new king quickly changed his predecessor's order of succession by appointing his nephew Mohammed bin Nayif and his son MBS as crown prince and deputy crown prince.³⁴ King Salman also removed members of other branches of the royal family from ministries and security apparatuses and appointed Mohammed bin Nayif and MBS as chairs of the newly created Council of Political and Security Affairs and Council for Economic and Development Affairs, giving them near total control of the state. In 2017, MBS was appointed as crown prince and sole chair of these supra-institutional committees,³⁵ when bin Mohammed bin Nayif and other influential members of the ruling family were politically sidelined and plundered during a high-profile "anti-corruption" campaign.³⁶

This power grab not only solved the issue of the succession order, but it also vested more power in MBS than any Saudi royal has ever held. Various checks and balances within the Saudi state were eliminated: the abolition of the religious police, the so-called Committee for the Promotion of Virtue and the Prohibition of Vice (CPVPV), stripped the clergy of its power over society. Widespread repression against clerics, journalists, and both liberal and Islamist activists weakened civil society. MBS was free to implement his vision of the "new" Saudi Arabia. Henceforth, economic reform and individualization of power would mutually enforce and serve as justification for each other. The Saudi government's renewed interest in music cannot be disentangled from this political project, with culture and entertainment doing much more than playing second fiddle in Vision 2030.

34. M. Al-Rasheed, "Mystique of Monarchy: The Magic of Royal Succession in Saudi Arabia", *op. cit.*, p. 50.

35. *Ibid.*

36. F. Dazi-Héni, "Mohammed Bin Salman: The Remaking of the Foundations of Saudi Monarchy?", Arab Reform Initiative, November 22, 2017, available at: www.arab-reform.net.

Diversion or diversification? The economy of entertainment

“In my twenty years in the music industry, I have never had a conversation that did not start with: ‘You would never build the music industry like it is today if you were to build it today, but it is what it is, so let us work with what we have got’. Well, in Saudi Arabia, we are building the music industry of tomorrow”.³⁷

—Paul Pacifico, CEO of the Saudi Music Commission.

In response to its fiscal crisis, Saudi Arabia implemented austerity measures long advocated for by international financial institutions. Energy and water subsidies were slashed in December 2015. Other landmark decisions include the implementation of a value-added tax (VAT) and other taxes on specific classes of goods.³⁸ These measures posed a problem, as their social cost could not be absorbed without revising the foundations of the Saudi distributional state. In 2016, the kingdom had to backtrack on its decision to cut public sector salaries and benefits after facing severe backlash.³⁹ Wider changes were needed if the state was to enter “the age of austerity” and abandon its long-held responsibilities (state employment, free public services, energy subsidies).⁴⁰

The rise of MBS was exactly such a paradigm shift. In 2016, the then-deputy crown prince announced nothing short of a “transformation” of the kingdom.⁴¹ This transformation was to be achieved by following “Vision 2030”, a strategic roadmap crafted by McKinsey and Company.⁴² Admittedly, this document serves to legitimize Bin Salman’s swift rise to power – the sincerity or feasibility of its goals has been scrutinized by commentators. However, Vision 2030 merits closer inspection, as it provides the official rationale for Saudi investments in music. The following section analyzes Saudi Arabia’s entertainment plans and their potential contribution to economic diversification.

37. Statement by P. Pacifico, “ATM23: Sport and Music Matters in Saudi Arabia”, op. cit.

38. S. Kerr, “Saudis Unveil Radical Austerity Program”, CNBC, December 29, 2015, www.cnbc.com.

39. B. Hubbard, “Saudi Arabia Restores Public Sector Perks Amid Grumbling”, *The New York Times*, April 23, 2017, available at: www.nytimes.com.

40. S. Hertog, “Challenges to the Saudi Distributional State in the Age of Austerity”, op. cit.

41. “Saudi Arabia Vision 2030: A Story of Transformation”, p. 5, available at: www.vision2030.gov.sa.

42. F. Dazi-Héni, “Mohammed Bin Salman: The Remaking of the Foundations of Saudi Monarchy?”, op. cit.

Rationalizing the spectacle

Vision 2030 sets out to transform Saudi Arabia into “a vibrant society”, “a thriving economy”, and “an ambitious nation.” Each pillar respectively represents cultural, economic, and governance reforms.⁴³ The underlying goal of the strategy is to increase government revenue through taxation and decrease expenditure by stripping down the welfare state. The plan hinges on diversification. Non-oil-related activities are expected to produce taxable revenue and private-sector jobs for Saudi nationals.

By 2030, Saudi officials hope to grow the share of non-oil exports in government revenue to 50% and increase the share of the private sector in the domestic economy from 40% to 65%. Such a structural transformation requires a massive injection of capital (\$1 trillion by some estimates).⁴⁴ The Saudi government intends to cover some of this cost through its sovereign wealth fund, the Public Investment Fund (PIF), and public offerings on its national oil company.⁴⁵ However, international capital markets are expected to do much of the heavy lifting when it comes to financing Vision 2030, and direct foreign investment inflows have indeed skyrocketed since 2016.⁴⁶

The imperative of attracting foreign capital is at the heart of Vision 2030. Since MBS visited Silicon Valley during his first international tour,⁴⁷ Saudi officials have spent unprecedented amounts of effort on improving the country's public image. The “ambitious nation” pillar promises governance reforms to create a more business-friendly environment in the kingdom. Vision 2030 also intends to increase the kingdom's “cultural and entertainment offering” to create a “vibrant society”.⁴⁸

Beyond making Riyadh more accommodating to executives of foreign corporations, whom Saudi Arabia expects to move their regional headquarters to the kingdom,⁴⁹ massive investments in culture seek to increase domestic consumption. The government hopes to redirect the spending of affluent Saudis, who travel abroad for leisure, back to the kingdom. The “development” of heritage sites and the organization of cultural events are also designed to make the country a more attractive

43. N. Habibi, “Implementing Saudi Arabia's Vision 2030: An Interim Balance Sheet”, *Middle East Brief*, No.127, Crown Center for Middle East Studies, April 2019.

44. Y. Abi Farraj, “Saudi Arabia's Vision 2030 Will Need around \$1 Trillion in Investments over Several Years: Report”, *Economy Middle East*, May 6, 2024, available at: www.economymiddleeast.com.

45. To this date, Saudi Aramco has raised around \$42 billion through the sale of 2.14% of its shares in two public offerings. See N. Turak, “Oil Giant Saudi Aramco Begins Massive Share Sale to Raise around \$12 Billion”, CNBC, June 2, 2024, available at: www.cnbc.com.

46. “Foreign Direct Investment, Net Inflows (BoP, current US\$) – Saudi Arabia”, World Bank, available at: <https://data.worldbank.org>.

47. C. Aswad and A. McDowall, “Saudi Prince Aims for Silicon Valley Appeal to Gleam at Home”, Reuters, June 23, 2016, available at: www.reuters.com.

48. “Saudi Arabia Vision 2030: A Story of Transformation”, op. cit.

49. P. Magid and R. Uppal, “Saudi Deadline on Regional HQs Has Foreign Firms Scrambling-sources”, Reuters, October 27, 2023, available at: www.reuters.com.

tourist destination. In 2019, in a landmark move, Saudi officials “opened the country to the world” by introducing a tourist visa. By 2030, Saudi Arabia aims to welcome 75 million international tourists annually, competing with leading destinations like France and Egypt (100 million and 15 million arrivals in 2023, respectively).⁵⁰ Tourism is projected to contribute 10% of the GDP by 2030,⁵¹ and while religious pilgrimage would contribute over half of these numbers, leisure tourism is still expected to play an important part.⁵² Concerts and festivals are often employed to promote tourism in the kingdom, as evidenced by Winter at Tantora, an annual festival that takes place near the historical site of Hegra (Al-Ula).⁵³

Building an industry out of thin air

Saudi Arabia was certainly not a land without music before the advent of MBS. Traditional and popular music scenes flourished “underground” and in digital spaces. When the Saudi government relaxed gender segregation laws and lifted the ban on public music performances – in reality, social liberalization has been very limited, as the state’s hold over society has not relaxed, and physical and virtual spaces are more policed than ever before –,⁵⁴ it was not faced with a “blank canvas”. However, its sudden demand for large-scale cultural events could not be met by existing venues and event production companies. Massive entertainment infrastructure projects have risen from the ground at a speed that surpasses past state-led development in culture in the United Arab Emirates and China to accommodate an increasingly crowded agenda of live events.⁵⁵ Moreover, Saudi officials’ ambitions to “foster” local artists’ growth have also led them to develop a recorded music industry. The speed of these developments has been made possible by the heavy involvement of the Saudi state in most projects. While some see this as an opportunity to build “the music industry of tomorrow”,⁵⁶ it also poses the question of whether doing so from the top down is really feasible.

Saudi Arabia is pumping massive amounts of money into the entertainment sector, reportedly allocating \$64 billion to the music sector between 2018 and 2028.⁵⁷ A lot of that money is going into building

50. “Number of International Tourist Arrivals in France from 2010 to 2023 (in millions)”, Statista, available at: www.statista.com; “Number of Tourist Arrivals in Egypt from 2010 to 2022”, Statista, available at: www.statista.com.

51. “Egypt Achieves Its Highest Ever Rate of Tourist Traffic in 2023”, *Egypt Independent*, February 20, 2024, available at: www.egyptindependent.com.

52. S. Castelier, “As Hajj Kicks Off, Saudi Arabia Looks to Expand Tourism Sector”, *Al-Monitor*, June 13, 2024, available at: www.al-monitor.com.

53. “Bocelli Performs in Al-Ula in Third Winter at Tantora”, *Saudi Gazette*, January 22, 2022, available at: www.saudigazette.com.

54. D. L. Wheeler, “The Janus-faced New Media in Saudi Arabia”, in: N. Miladi and N. Mellor, *Routledge Handbook on Arab Media*, London: Routledge, 2020, p. 348-360.

55. Interview with a European diplomat in charge of cultural affairs in Riyadh, December 6, 2023.

56. Statement by P. Pacifico, “ATM23: Sport and Music Matters in Saudi Arabia”, op. cit.

57. N. Habibi, “Implementing Saudi Arabia’s Vision 2030: An Interim Balance Sheet”, op. cit.

infrastructure at a breakneck speed.⁵⁸ At an estimated cost of \$40 billion, the Qiddiya project (a 340 million square meter area including theme parks, shopping malls, and venues for sports and cultural events) stands out.⁵⁹ However, other large infrastructure projects were completed at lightning speed in past years. In Riyadh alone, the Saudi government has spent millions of dollars constructing venues for its annual “season” of festivities. These new infrastructures include Boulevard City (2019) and Boulevard World (2022), two adjacent entertainment zones spanning 1.3 million square meters and containing an amphitheater and two multipurpose arenas for musical performances, as well as a gigantic festival site in the north of the capital. The Saudi government has also announced plans to build two opera houses in Riyadh and Jeddah.⁶⁰ In past years, state-affiliated companies have also constructed smaller venues more suited to their publicly stated goal of developing a “grassroots” music scene.⁶¹

These projects are often embedded in real estate development, a sector that has long been dominated by the royal family. Architectural glitz and superlatives, such as “largest indoor stadium”, “largest illuminated sphere”, or “largest mirrored building”,⁶² are designed to make new residential areas and tourist destinations more attractive. For instance, Al Maraya, a music hall that welcomed big international acts like Andrea Bocelli, Mariah Carey, and James Blunt, is used to promote the Al-Ula heritage site. Similarly, the blueprint of Neom, the futuristic city on the Red Sea and flagship project of Vision 2030, has seen the addition of a gargantuan theatre carved into the mountainside.⁶³

58. The Kingdom Arena in Riyadh was reportedly “built in 60 days”, see “Riyadh Season’s Boulevard Hall built in 60 days”, *Construction Week Saudi*, October 2, 2023, available at: www.constructionweeksaudi.com.

59. N. Habibi, “Implementing Saudi Arabia’s Vision 2030: An Interim Balance Sheet”, *op. cit.*

60. S. Nour, “Saudi Arabia Set to Open First Ever Opera House in Diriyah”, *Vogue Arabia*, December 19, 2023, available at: www.vogue.me.

61. “Maintaining a Thriving Grassroots Culture”, *XP Music Futures 2023*, panel discussion attended by the author on December 6, 2023.

62. “World’s Largest Light Ball Illuminates Riyadh Season 2022”, *Arab News*, December 19, 2022, available at: www.arabnews.com.

63. “Neom Announces Utamo”, Press release, December 13, 2023, available at: www.neom.com.

Techno-Futurism and music infrastructure



© Francesco Lorenzetti/Shutterstock.com

Description: The Al Maraya music hall in Al-Ula is a prime example of the futuristic aesthetic of Vision 2030 megaprojects.

Whether such projects are sustainable and profitable is debatable. What is even more dubious is spending millions of dollars on concerts and spectacles. Vision 2030's goal to enhance "the quality and range of entertainment and cultural activities available to Saudi citizens"⁶⁴ has led the Saudi government to create the General Entertainment Authority (GEA). After significant funds were redirected to the new government body from other ministries,⁶⁵ it quickly began organizing massive sports and cultural events. In its first year alone, the GEA's agenda included "266 activities across 14 Saudi cities over three months".⁶⁶

The scale and frequency of these events increased further as the kingdom scrambled to salvage its public perception after the assassination of journalist Kamal Khashoggi in 2018 (see below). The following year saw the launch of MDLBEAST Soundstorm, with first-class acts, which often incur additional expenses. The fifth edition of the festival, which took place between the 12th and 14th of December, featured international stars like Eminem, Tyler The Creator, Linkin Park, Muse, and Calvin Harris. In addition to the cost of flights and accommodation of hundreds of live musicians and technicians, such events often use the latest stage technology and audio equipment.⁶⁷ They are often organized by an umbrella of

64. N. Habibi, "Implementing Saudi Arabia's Vision 2030: An Interim Balance Sheet", op. cit.

65. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in "New" Saudi Arabia*, op. cit., p. 97.

66. Ibid.

67. Interview with an Egyptian promoter in Riyadh, December 8, 2023.

international promoters, event production, and public relations agencies, who charge a high bill.⁶⁸ While the cost of these events, just like that of its underlying infrastructure, is rarely disclosed, it must be tremendous.

MDLBEAST also operates multiple record labels, with the stated purpose of developing the recorded music industry. MDL Beast Records is signing rising stars from across the region such as the Egyptian rapper Tul8te. While the advances paid to these artists are probably a minor expense for the company, its ambition to become a leading distribution company is not. MDLBEAST's ability to draw on an international pool of marketers, digital distribution experts, and entertainment lawyers hinges on outbidding Western labels and distribution companies. With profit margins being razor thin in the recorded music industry, it is unclear whether such investments are intended to be profitable.

Expecting a return on investment

Saudi spectacles are not lucrative live shows. Ticket prices at Soundstorm and GEA events rarely offset the cost of massive investments in infrastructure and events. For instance, in 2023, the Royal Commission for Riyadh City organized a production of the musical "The Phantom of the Opera". The production reportedly cost around \$10 million as international actors, musicians, and technicians had to be flown in and accommodated in the Saudi capital for three months.⁶⁹ With tickets being sold for around \$25 (SAR 100), the organizers would have had to sell around 7,000 out of the 8,000 available tickets at every single one of the 59 performances to barely break even. Similarly, general admission tickets for Soundstorm cost around \$100 (SAR 400), far below the price of comparable international and regional festivals.⁷⁰

Saudi officials claim that such events are meant to attract investments and offer opportunities for emerging Saudi talent. They portray the state's intervention as a catalyst for an emerging grassroots music scene. They argue that conventional metrics are not suited for evaluating the impact of public investments in culture, "as opposed to car manufacturing, where gains in productivity can be measured".⁷¹ However, it is unclear whether the nascent Saudi music industry can survive once the state withdraws its financial support, as it has already begun doing.⁷² GEA activities created an artificial spike in demand for live music. Admittedly, since the ban on public performances of music was lifted, companies, restaurants, and hotels in the

68. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in "New" Saudi Arabia*, op. cit., p. 97.

69. "Phantom of the Opera' Show Debuts in Riyadh Dubai", *Arab News*, September 28, 2023, available at: www.arabnews.com.

70. MDLBEAST website, available at: www.mdlbeast.com.

71. Statement by Paul Pacifico, "Sound Governance: Crafting the Future of Music Policy", XP Music Futures 2023, panel discussion attended by the author on December 8, 2024.

72. R. A. Proctor, "Why Is Saudi Arabia Cutting Funding, Reducing Costs on Ambitious Projects?", op. cit.

kingdom have flocked to organize concerts and DJ sets.⁷³ However, these opportunities are dwarfed by the amount of money injected into the industry by the state, casting doubt on the ability of bookers and musicians to make a steady living if the state lessens its involvement in the music scene.

The ability of this top-down approach to achieve official goals of “sustainability” and “fostering grassroots music” is unclear, as the speed with which the Saudi music industry is developing surpasses even that of similar cases in China and the United Arab Emirates.⁷⁴ While Saudi Arabia is presenting a comprehensive long-term strategy, including compulsory music education in schools, vocational training for musicians, technicians, and industry professionals, and creating a national conservatoire,⁷⁵ their priority thus far has been organizing large concerts featuring Western and Arab stars. Consequently, few resources are directed toward building infrastructure for local artists. There is no “venue ladder” for the live music and party economies.⁷⁶ While some small state-sponsored venues have emerged in recent years, such as the Warehouse in Jax district and Anghami Lab in Boulevard City, these are also part of top-down efforts. With the state crowding out the private sector, and small actors unable to establish their own spaces, it is doubtful whether Vision 2030 will succeed in building a sustainable music industry.

Should Saudi Arabia somehow overcome these hurdles, it is unclear whether it is worth the trouble. The music industry’s potential contribution to diversification efforts will likely be limited. In larger and more mature European markets, music contributes around 1-2% of the GDP. Even accounting for synergies between music and other forms of mass media like film and television, the impact of entertainment on economic growth would not be a game changer: it constituted 5% in the United States in 2023.⁷⁷ Hence, the main intended outcome of public investments in music seems to be as a marketing device for the country’s drive to increase domestic consumption and tourism. It is impossible to quantify such downstream effects on other economic sectors. While the tourism sector’s growth has fallen short of Saudi officials’ ambition, it has still been significant. Two-thirds of the way into the completion of Vision 2030, the Tourism industry reportedly generated approximately \$66 billion and attracted considerable private-sector investments.⁷⁸ However, even if the music industry were key to achieving Saudi Arabia’s ambitions in tourism, regional instability and rising temperatures in the Gulf do not make the latter a sustainable alternative to the oil sector.

73. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

74. “Maintaining a Thriving Grassroots Culture”, op. cit.; “XP 2022 Outcomes Report”, *Vibelab*, 2022, p. 3.

75. Statement by P. Pacifico, “ATM23: Sport and Music Matters in Saudi Arabia”, op. cit.

76. “Maintaining a Thriving Grassroots Culture”, op. cit.

77. Ibid.

78. Ibid.

While the preeminence of public actors appears to be a hurdle to the development of a sustainable Saudi music industry, it is a central feature of the redeployment of state power under MBS. It is necessary to “unpack the state” to glean how culture and media are intertwined with the control and distribution of resources in a rentier state.

Culture, control, and cooptation: Music and Saudi authoritarianism

“I grew up [after 1979]. We would never talk about being DJs in a public setting. It was something that only the closest friends knew about and supported [...] [MDLBEAST] is probably the biggest purpose that has ever fallen on me. It is something I hold very close to my heart [...] I always wanted to have a DJ career, and I feel like I had one, but this is a step above that. This is opening doors for so many people to do what they love, the things that I could not do when I was in my twenties.”⁷⁹

—Ahmed Al Amari (Baloo), Chief Creative Officer at MDLBEAST

Official promotional material and press advertorials depict the transformations occurring in Saudi Arabia’s cultural landscape as a grassroots movement.⁸⁰ It is certainly true that the greater visibility offered by new-found access to public spaces and state coffers allowed young Saudi musicians and entrepreneurs to streamline their careers. However, this is only one side of the story.

Culture, mass media, and power have been intertwined throughout Saudi Arabia’s history. In that sense, the current government’s venture into music is nothing new. Since the nineties, Saudi royals have been producing and distributing commercial music abroad despite banning it at home.⁸¹ What is new about Saudi investments in culture under MBS is an unprecedented degree of centralization and the emergence of new clientelist networks around the country’s de-facto ruler.

The notion of the “social contract” is often employed when discussing the unsettling effects of austerity politics in contemporary Saudi Arabia. Many analysts assume that circuses replaced bread as the centerpiece of state-society relations when the Saudi distributional model became unviable. Since the Saudi government was unable or unwilling to enact limited

79. MDLBEAST, “Baloo Interview | BEAST TV | #Soundstorm21”, YouTube, May 9, 2022, available at: www.youtube.com.

80. “XP 2022 Outcomes Report”, op. cit., 2022, p. 3.

81. M. Kraidy, “Prince Al-Waleed Bin Talal, Media Mogul,” in: N. Sakr, J. Skovgaard-Petersen, and D. Della Rata (eds.), *Arab Media Moguls*, London: I.B. Tauris, 2015, pp. 113-128.

democratization and political liberalization to absorb social discontent, it supposedly introduced Western entertainment to cultivate a sense of national pride and gain legitimacy among the country's youth.⁸²

What is the intended audience of Saudi spectacles?



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Description: Two migrant workers watch young partygoers listening to electronic music while catching a break at XP Music Futures 2023 in Riyadh. While Saudi officials claim that state-sponsored entertainment improves the quality of life of all citizens, the price of these spectacles puts them out of reach for many Saudis, not to mention migrant workers (40% of the total population in 2022). The latter continue to carry out most low-paying manual work, raising questions about whether a partial Saudization of the service sector is sufficient to absorb the country's youth bulge into the labor market.

The conceptual shortcomings of the notions of “legitimacy” and the “social contract” have been discussed in detail elsewhere.⁸³ One limitation is particularly salient in analyses of Saudi entertainment. System-wide explanations of the effects of state-sponsored musical events take for granted their homogeneous reception across different constituencies. Available surveys contradict such claims. They indicate that, far from cultivating consensus, entertainment plans exacerbate class contradictions.⁸⁴ The backlash from conservative segments of Saudi society has been significant,

82. R. Madani, “The New Image of Saudi Cultural Shift; MDLBEAST Music Festival; Saudi Vision 2030”, *Cogent Arts and Humanities*, 2022.

83. L. Wedeen, *Ambiguities of Domination: Politics, Rhetoric, and Symbols in Contemporary Syria*, Chicago: University of Chicago Press, 2015, pp. 26-33.

84. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 56.

forcing the state to alternate between using repression⁸⁵ and rolling back some of its entertainment plans.⁸⁶ The following section turns to the production side of the nascent Saudi music industry. In the absence of ethnographic data on individual experiences of state-sponsored entertainment, which could nuance unfounded claims that Saudi audiences incorporate nationalist political messaging or become distracted from real politics,⁸⁷ it is more fruitful to analyze how the capture and redistribution of resources occurring in media and culture is contributing to the consolidation of the crown prince's regime.

The media and the consolidation of the Saudi monarchy

The history of mass-mediated culture in the Arabian Peninsula can be traced back to the introduction of the phonograph in the 1930s and the creation of the first radio stations in the region by the British during the Second World War.⁸⁸ Saudi royals quickly put these new technologies into action creating an “imagined community” among the diverse populations of an immense territory who suddenly found themselves living within a single polity (state-building) and legitimating the rule of the House of Al Saud (regime consolidation). In 1949, the Mecca Radio Station came into existence under the authority of Prince Faysal bin Abdulaziz.⁸⁹ Shortly after toppling his brother and climbing to the throne, Faysal inaugurated state television in 1965,⁹⁰ further expanding the monarchy's cultural apparatus.

As mass media took on a central place in the Saudi royal family's political project, it repeatedly came under fire from various social movements. Communication and information infrastructure were recognized as tools through which the state increased its grip over society. The Ikhwan revolt (1927-1930) was opposed to the use of telegraph lines, while the inauguration of the Mecca Radio Station sparked resistance from clerics.⁹¹ Activism against the introduction of television in the mid-sixties sowed the seeds for the Sahwa, the Islamic Revivalism movement that came

85. The Imam of the Great Mosque of Mecca is among the most notable political figures arrested for criticizing official entertainment plans. See A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 56.

86. There are numerous examples like the GEA asking Saudi concertgoers to refrain from swaying back and forth. The Authority also reportedly restricted the number of licenses issued for electronic dance music events because public drug use became too salient. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

87. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 56.

88. A. Hammond, “Saudi Broadcasting Media – A Tool for Regional Influence”, in: N. Miladi and N. Mellor, *Routledge Handbook on Arab Media*, London: Taylor & Francis Group, 2020, p. 338.

89. Ibid.

90. Ibid., p. 339.

91. Ibid.

to shape politics in the kingdom for decades.⁹² From then onward, both social movement actors and state officials would frame issues in religious terms.⁹³ Consequently, when Saudi Arabia attempted to coopt religious activists during the eighties, greater restrictions were put on mass-mediated culture.

While the impact of the conservative turn of the eighties is often exaggerated⁹⁴ – MBS himself often paints a rosy picture of pre-1979 Saudi society to frame Vision 2030 as a return to a previous, more authentic way of life⁹⁵ –, it did severely constrain the production and circulation of music within the kingdom, as it went from being broadcasted on state television to being banned from public spaces in the span of a few years.⁹⁶

A major shift occurred in the late nineties when Saudi Arabia seized the opportunities provided by new information and communication technologies (NTIC) to build an outward-looking media empire that dominated music and television in the Middle East and North Africa (MENA) throughout the subsequent decade. On a structural level, NTIC undermined Arab states' hegemony by shattering their monopolies over cultural production. However, transnational satellite television, and subsequently the internet, also confronted Arab states with new opportunities when it came to policing public expression.

Saudi officials realized they needed to adapt their media strategy when domestic audiences, who had been kept in the dark about the Iraqi invasion of Kuwait for three days, simply switched to CNN to follow news about the First Gulf War (1990).⁹⁷ The Saudi government could no longer rely only on censorship: confiscations of satellite dishes by the religious police failed to yield meaningful results, and while certain channels could be banned from Arabsat, a communications satellite operator owned by a consortium of Arab states, they were still accessible through other satellites.⁹⁸

Other factors also contributed to the emergence of a Saudi media empire at the turn of the twentieth century. The withdrawal of Iraqi money in the wake of the war,⁹⁹ as well as the waning influence of Egypt and Syria, left the

92. M. Kraidy, "Saudi Arabia, Lebanon and the Changing Arab Information Order", *International Journal of Communication*, Vol. 1, 2007, p. 145.

93. Clerics opposed television because they deemed it to be a form of idolatry, a practice proscribed in revivalist interpretations of Islam. In response, the King argued that while "painting and sculpture are idolatry, [...] photography is good because it is nothing but a combination of light and shade, depicting Allah's creatures but leaving them unchanged". Additionally, opposition to the project was assuaged by the promise that the new technology would be used to spread Islam. See M. Kraidy, "Saudi Arabia, Lebanon and the Changing Arab Information Order", op. cit., p. 145.

94. See, for example, "1979, the Year That Changed Arts and Culture in Saudi Arabia", *Al Arabiya News*, October 27, 2017, available at: www.english.alarabiya.net.

95. J. Khashoggi, "By Blaming 1979 for Saudi Arabia's Problems, the Crown Prince Is Peddling Revisionist History", *The Washington Post*, April 3, 2018, available at: www.washingtonpost.com.

96. M. Kraidy, "Saudi Arabia, Lebanon and the Changing Arab Information Order", op. cit., p. 145.

97. Ibid., pp. 139-156.

98. Ibid.

99. A. Hammond, "Saudi Broadcasting Media – A Tool for Regional Influence", op. cit., p. 341.

Arab media landscape in need of investment.¹⁰⁰ This favorable context did not go unnoticed by wealthy Saudi royals who were looking for ways to increase their influence, as evidenced by the trajectory of media tycoon Al-Walid bin Talal (WBT). WBT is the son of Talal bin Abdulaziz, a prominent member of the second generation of the royal family who was sidelined due to his political stances. Following the logic of cultivating consensus within the royal family that characterized politics before the rise of MBS, WBT was nevertheless able to make a fortune in real estate through his Kingdom Holding Company.¹⁰¹ In 1994, he financed the launch of the ART network (Arab Radio and Television), setting the first stone on his path to becoming the leading figure of Arab audiovisual media.¹⁰²

Saudi-owned transnational television channels (MBC, ART, Orbit) soon shifted their focus to entertainment, broadcasting American movies and series and, more importantly, pioneering the reality television format in the region. In 1995, Kingdom Holding purchased stocks in Rotana Audio Visual, an innocuous music label worth only \$1 million at the time of the purchase. In the following years, WBT would transform it into “a horizontally and vertically integrated music conglomerate that became akin to MTV, Atlantic Records, and Ticketmaster merged in one entity”, all the while increasing his stake in the company (25% in 1995, 48% in 2002, and 100% in 2003).¹⁰³ After acquiring a massive music library, Rotana launched four music channels that dominated daytime television during the 2000s. With a near-monopolistic position, the company soon signed exclusive production, distribution, and marketing contracts with the most prominent Arab pop stars.¹⁰⁴

Hence, Saudi expansion into media and culture was marked by deterritorialization, with company headquarters and studios based in Beirut, Cairo, and Dubai, while investments flowed in from Riyadh. British media scholar Naomi Sakr argues that “this configuration permitted a form of media liberalization that was not possible inside the kingdom”.¹⁰⁵ To continue coopting clerics and religious activists within the Saudi regime, a compromise had to be found. Public and private media outlets based in Saudi Arabia continued to abide by conservative norms. In return, clerics stopped condemning the programming of Saudi-owned Pan-Arab television channels even though they knew that “the King and senior princes [facilitated their] reception inside Saudi Arabia”.¹⁰⁶

100. M. Kraidy, “Prince Al-Waleed bin Talal, Media Mogul”, op. cit.

101. Ibid.

102. Ibid.

103. Ibid.

104. Ibid.

105. N. Sakr, “Saudi Arabian Television: The Challenge of Connecting with Reality”, in: G. Ogola (ed.), *The Future of Television in the Global South: Reflections from Selected Countries*, London: Palgrave Macmillan, 2023, p. 31.

106. Ibid.

This dual media system was representative of the inner workings of the Saudi regime. Its content was shaped by consensus and conflict between princes, clerics, and businessmen. At the same time, it constituted a terrain where power relations could be renegotiated. By investing in transnational media, different factions of the royal family and politically connected commoners traded oil and real-estate revenue for influence.

Hiding in plain sight: The state and the music scene

King Salman's coronation and his son's rise to power put an end to this configuration. Saudi-owned media and media based in Saudi Arabia are singing the same tune today.¹⁰⁷ The transformation from a diffuse and multipolar media empire to a more coherent state cultural apparatus sheds light on the political implications of Saudi investments in music and entertainment. More generally, it showcases how economic reforms are being used to consolidate the power of the crown prince.

In 2017, MBS spectacularly consolidated his power by detaining 400 rich and powerful Saudis in a luxury hotel in Riyadh. Among the princes, ministers, and other influential individuals arrested were two media tycoons. Waleed al-Ibrahim, the founder of MBC Group, reportedly sold sixty% of the company's stakes to the state under duress. WBT managed to escape expropriation but was forced to fall in line.¹⁰⁸ His Kingdom Holding Group has been one of the main drivers behind infrastructure projects used for state-sanctioned spectacles, with his Rotana Group providing the entertainment.¹⁰⁹

The question of ownership points us to the prominence of the **Public Investment Fund (PIF)**, the Saudi sovereign wealth fund that has become the driving force behind Vision 2030. Assets seized during the 2017 anti-corruption purge were reportedly transferred to the PIF on direct orders of the crown prince.¹¹⁰ Yassir Al-Rumayyan, the sovereign wealth fund's governor, is a close aide to MBS who was subsequently installed as president of Saudi ARAMCO's board of directors. The PIF was a launching pad for the young prince's conquest of power, being among the first institutions put under his supervision in March 2015.¹¹¹ He still chairs its board of directors, and since then, the fund has become the main investor in megaprojects like Neom and the Qiddiya attraction park. It has also acquired stakes in smaller

107. N. Sakr, "Saudi Arabian Television: The Challenge of Connecting with Reality", op. cit., p. 49.

108. A. Hammond, "Saudi Broadcasting Media – A Tool for Regional Influence", op. cit., p. 341.

109. "Quelques mois après sa libération, Al Walid ben Talal reçu par MBS", *L'Orient-Le Jour*, July 13, 2018, available at: www.lorientlejour.com.

110. S. Kirchgaessner, "Revealed: Newcastle Chairman's Links to Saudi 'Anti-corruption' Drive", *The Guardian*, October 16, 2021, available at: www.theguardian.com.

111. N. Habibi, "Implementing Saudi Arabia's Vision 2030: An Interim Balance Sheet", op. cit.

venues across the country.¹¹² The PIF reportedly owns multiple companies specializing in organizing cultural events, such as MDLBEAST.¹¹³

MDLBEAST appeared out of nowhere as the official brand behind the first edition of Soundstorm in 2019. In the span of a few weeks, the organizers not only hired world-famous electronic dance music DJs like David Guetta and Steve Aoki, but also paid a host of American and European social media influencers to advertise the massive music festival.¹¹⁴ The company's sudden rise – there is no trace of its existence before the announcement of the festival¹¹⁵ – and its capacity to channel as much money into its first event put its independence into question. Close ties between MDLBEAST and the Saudi crown are further substantiated by the organizers' ability to obtain security clearances to lease a festival space that can host hundreds of thousands of attendees in record time. MDLBEAST has also invested heavily in record labels. The main one, MDLBEAST Records, has signed several rising musical stars from across the MENA to establish itself as a leading record label and distribution company in the region. The company also operates a foundation that invests in music education and the promotion of local artists.

The company is deliberately ambiguous about its ownership and governance.¹¹⁶ Neither MDLBEAST nor the PIF publicly disclose their relationship. On the contrary, the brand cultivates a grassroots aesthetic by pushing forward figureheads from the former underground music scene, such as its “Chief Creative Officer” (CCO), Ahmed Alamari (see below). Despite these appearances, it is well known by music professionals that events of such scale surpass the capabilities of Saudi underground music scene organizers. MDLBEAST is seen as an intermediary between Western companies specializing in marketing, public relations, and event production on the one hand, and the Saudi state on the other. The “para-public” status of the company appears to be an open secret, as at least one interlocutor was aware of overlaps between the boards of MDLBEAST, the PIF, and the GEA.¹¹⁷

The **GEA** and the **Ministry of Culture** are the main official state actors in the field of music, with the former in charge of providing entertainment and cultural activities “to enhance Saudi citizens' quality of life”, and the latter focusing on long-term projects to foster a homegrown music industry. The GEA is undoubtedly the more important of the two actors. It is the main regulator, investor, and client in the Saudi music scene. Its chairman, Prince Turki al Sheikh, is another close confidant of the crown prince, who has become one of the most powerful figures of the “new” Saudi

112. See publicly disclosed information on the PIF's portfolio, available at: www.pif.gov.sa.

113. “Entertainment Sector in Saudi Arabia”, German-Saudi Arabian Liaison Office for Economic Affairs, available at: www.saudiarabien.ahk.de.

114. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 112.

115. The earliest available snapshot of the MDLBEAST webpage on the Wayback Machine is from December 2019. A search for the company name produced no results before that date.

116. “XP 2022 Outcomes Report”, op. cit., 2022, p. 3

117. Interview with a European diplomat in charge of cultural affairs in Riyadh, December 6, 2023.

Arabia since his appointment in 2018.¹¹⁸ On the other hand, the **Music Commission**, one of eleven “semi-independent” bodies constituting the Ministry of Culture, appears to be more active in music education, vocational training, and strategic planning.¹¹⁹

The Ministry claims that these commissions are semi-independent technocratic bodies. For instance, the CEO of the Music Commission is a British music professional. However, upon closer inspection, the institution is subject to a great deal of central control. Since its creation in 2018, the Ministry of Culture has been headed by Badr bin Abdullah Al Saud, another young prince with close ties to MBS. His name became known to the wider public in 2017 when he was revealed to be the individual who purchased Leonardo da Vinci's *Salvator Mundi* on the crown prince's behalf.¹²⁰ Between 2015 and 2018, the minister also chaired the Saudi Research and Media Group (SRMG), a company that has been in the hands of the Salman clan since the early nineties.¹²¹

Badr bin Abdullah also holds other key positions associated with culture and heritage under Vision 2030. He is the governor of the Royal Al-Ula Commission (RCU) and sits on the board of the **Misk Foundation**. The foundation is also a state-affiliated actor active in culture and entertainment. It was created by MBS in 2011 when he served as an advisor to his father, the then-governor of Riyadh. Before his takeover, the Misk Foundation acted as a laboratory for the crown prince's ideas. Since then, it has acted in concert with state institutions and international partners to implement projects in line with Vision 2030.¹²²

State domination is not a coincidental hurdle to the emergence of a music-related private sector.¹²³ It is a deliberate strategy designed to consolidate the power of the Saudi crown prince. By transferring state and state-affiliated assets to the PIF, the Saudi government is not withdrawing from the economy, but rather “redeploying” in a way that escapes accountability.¹²⁴

118. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 96.

119. “XP 2022 Outcomes Report”, op. cit., p. 8.

120. D. D. Kirkpatrick, “Mystery Buyer of \$450 Million ‘Salvator Mundi’ Was a Saudi Prince”, *The New York Times*, December 6, 2017, available at: www.nytimes.com.

121. Ibid.

122. “Mohammed bin Salman's Misk Foundation to Be Reviewed Following Scandals”, *Middle East Eye*, September 8? 2020, available at: www.middleeasteye.net.

123. D. Moshashai, A. M. Leber, and J. D. Savage, “Saudi Arabia Plans for Its Economic Future: Vision 2030, the National Transformation Plan and Saudi Fiscal Reform”, op. cit., p. 385.

124. See A. Montambault Trudelle, “Tools of Regime Stability: The Political Economy of Sovereign Wealth Funds in Gulf Rentier States”, *Review of International Political Economy*, 2024, pp. 1-26; or B. Hibou, “Retrait ou redéploiement de l'État ?”, *Critique internationale*, No. 1, 1998, pp. 151-168.

Making a living as window dressing

The Saudi state often attempts to camouflage its footprint in the entertainment sector by shoving civil society to the forefront. In public addresses, officials depict themselves as mere intermediaries or catalysts:

“There are all these things happening at the top, and all these things happening at the grassroots level. We are trying to connect them”; “Commerce needs government support as a catalyst. To catalyze does not mean to become the sector. As the Music Commission, we must be able to nudge [emerging actors in the field] just enough, pull back, and let them take off.”¹²⁵

The notion of “window dressing” is often used in scientific literature on authoritarian resilience in the MENA. It refers to incumbent regimes implementing ostensibly reformist policies without much impact on the ground to maintain respectability on the international stage. It is not relevant to this study to explore whether reforms under MBS are merely “window dressing” or whether they offer a “window of opportunity” for advancing some social agendas.¹²⁶ Rather, we turn to the impact authoritarian window dressing has on those who occupy the storefront, that is to say, the professional opportunities it provides to those who participate in producing Saudi spectacles.

When the Saudi government decided to sponsor entertainment for domestic and international audiences, it naturally turned to existing actors with experience in the field of culture. The previous decade had seen the emergence of a generation of social media-savvy Saudis. More and more Saudi youth were Western-educated and fluent in globalized cultural forms. Between 2005 and 2015, the King Abdullah Scholarship program sent more than 250,000 male and female students abroad.¹²⁷ Moreover, after introducing the Internet comparatively late, Saudi Arabia quickly achieved one of the highest internet penetration rates in the region.¹²⁸ Saudi youths quickly began using new media to circumvent state censorship on cultural production. With comedy sketches and music drawing increasingly large audiences online, new careers in content production, marketing, and advertisement became available in the so-called creative industries.¹²⁹ Singer and internet sensation Alaa Wardi is the most prominent example of young Saudi musicians starting their careers on the internet. He rose to prominence by posting *a cappella* covers of classical Arab songs rather than through the

125. Statement by Paul Pacifico, “Sound Governance: Crafting the Future of Music Policy”, op. cit.

126. E. Bjarnegård and D. Donno, “Window-Dressing or Window of Opportunity? Assessing the Advancement of Gender Equality in Autocracies”, *Politics & Gender*, Vol. 20, No. 1, 2024, pp. 229-234.

127. H. Alaoui and R. Springborg (eds.), *The Political Economy of Education in the Arab World*, Boulder (CO): Lynne Rienner, 2021.

128. D. L. Wheeler, “The Janus-faced New Media in Saudi Arabia”, op. cit.

129. N. Sakr, “Saudi Arabian Television: The Challenge of Connecting with Reality”, op. cit., p. 45.

music he released with the alternative rock band Hayajan.¹³⁰ The internet also allowed multiple underground indie rock music, house, and techno scenes to communicate and flourish outside of policed public spaces.¹³¹

After 2016, young middle-class musicians and creative professionals, who had been careful to avoid drawing official attention to their countercultural activities suddenly became central to the ambitions of the state.¹³² They filled the ranks of newly created official and unofficial state institutions, thereby draining existing civil society organizations of their staff and bringing cultural events that could become subversive spaces, under state control. The careers of these young Saudis became tied to the destiny of the crown prince. The Saudi music sector came to be shaped by a continuation of previous governance practices: the instauration of a clientelist network through which oil rent is redistributed to social actors, ensuring their cooperation and economic dependency, if not necessarily their loyalty and political affiliation with the regime.

Ahmed Alamari, the “Chief Creative Officer” of MDLBEAST best represents how former members of the underground music scene are coopted as cultural technocrats. While he is older than the generation of young Saudis described above, growing up in the eighties and nineties, he also came into contact with globalized culture at an early age. While studying in Washington, he was exposed to electronic music and amassed a vinyl collection, which he put to use in illicit house parties upon returning to the kingdom:¹³³ “We found our way around cultural rules, and we did our thing... quietly”¹³⁴. Alamari moved to Dubai in 2004, becoming a well-integrated participant in the regional electronic music scene and performing under the pseudonym of DJ Baloo in several Arab countries.¹³⁵ More than a decade later, he seized the opportunity provided by Vision 2030 and joined 9SS, a design and communications agency with no record before 2016,¹³⁶ that quickly became

130. J. Filiu, “Alaa Wardi, star surdouée de la pop arabe, Saoudien d’origine iranienne”, *Le Monde*, July 2, 2017, available at: www.lemonde.fr.

131. MDLBEAST, “Baloo Interview | BEAST TV | #Soundstorm21”, op. cit.

132. N. Sakr, “Saudi Arabian Television: The Challenge of Connecting with Reality”, op. cit., p. 45.

133. “*I had a multicultural upbringing. I grew up between here and the States. When I first started playing on records in Washington DC, I was two years into my undergrad. I left DC and flew back to Saudi, and I shipped, I think, nine or ten boxes worth of records. Saudi was... You know, it was impossible. I would not be able to buy my music anywhere. It was just shipped or brought in. I would have friends bring me records*”. See E. Mullins, “Baloo, DJ and Creative Director of MDLBEAST Talks SOUNDSTORM, the Saudi Electronic Scene & More: Interview”, *We Rave You*, December 3, 2021, available at: www.weraveyou.com.

134. MDLBEAST, “Baloo Interview | BEAST TV | #Soundstorm21”, op. cit.

135. “Baloo – Sowing the Seeds for Saudi’s Music Scene”, *Scene Noise*, June 28, 2023, available at: www.scenenoise.com.

136. The earliest available snapshot of 9sscreative.com on the Wayback Machine is from the 7th of March 2016. The website has since disappeared, and the domain is available for purchase. See also Creative Seed Studios, “9SS Creative Spotlight Video”, YouTube, August 10, 2016, available at: www.youtube.com.

involved in several state initiatives¹³⁷ before being absorbed into MDLBEAST.¹³⁸

Similar trajectories are plenty within MDLBEAST and other government-controlled cultural actors, with some individuals moving repeatedly between sectors, using their connections in public and para-public entities to launch their own private companies, and later obtaining seats in official commissions.¹³⁹

Other Saudis have benefited from government-led entertainment plans to launch businesses. “There are massive gaps in the supply chain” in both live and recorded music markets.¹⁴⁰ Massive demand by the state, and to a lesser extent by corporate clients, has created opportunities for a wide array of professions associated with event production. At the same time, labels and studios across the kingdom are vying for lucrative deals to produce music for advertisements, political communications, and even films, should the state’s ambitions to build a homegrown movie industry come to fruition.¹⁴¹

The Warehouse, a small venue on the Western outskirts of Riyadh, illustrates how young Saudis who attempt to make a living in the interstices of authoritarian projects become entangled in clientelist networks. The Warehouse is situated in Jax District, an industrial warehouse complex that was transformed into a “cultural hub” under the aegis of the Ministry of Culture and the PIF-owned Diriyah Development Company. Nevertheless, Jax is presented as an “organic” initiative that emerged from a “grassroots culture”.¹⁴² Mohammed al-Attas, one of the founders of the Warehouse, appears in advertorials and panel conversations. His trajectory as a musician is summoned to “authenticate” the project:

“The Warehouse was born out of Mohammed’s own experience as a struggling rising artist scouring the nation for suitable spaces where he could perform or practice his music”.¹⁴³

The venue is presented as a platform for emerging artists: “We let anyone play and we give them a 70% split of ticket sales to encourage them”.¹⁴⁴

137. See Ahmed Alamari’s Facebook page, available at: www.facebook.com.

138. The official report of the second edition of XP Music Futures mentions 9SS, alongside several other organizers. This seems to corroborate the hypothesis that MDLBEAST is mostly an umbrella for disparate and mostly foreign companies. The report mentions British and American event production companies (Ginger Owl, TAIT), as well as American, Dutch, and Emirati PR agencies (KARV Communications, LIGHTBLUE, The Media Nanny). Several of these companies are also involved in Soundstorm. See “XP 2022 Outcomes Report”, op. cit., p. 5.

139. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

140. Statement by Paul Pacifico, “Sound Governance: Crafting the Future of Music Policy”, XP Music Futures, panel discussion attended by the author on December 8, 2024.

141. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

142. “Maintaining a Thriving Grassroots Culture”, op. cit.

143. “XP Conversations Saudi Spotlight: Mohammed Al-Attas”, Scene Noise, August 30, 2024, available at: www.scenenoise.com.

144. “Maintaining a Thriving Grassroots Culture”, op. cit.

Similarly, MDLBEAST's Ahmed Alamari explains that many "discreet" party organizers who launched event brands after 2019 were promoted by his company.¹⁴⁵ Whether most Saudi musicians can (or would want to) benefit from these resources is doubtful, but what matters is that Saudi creatives who participate in the state's entertainment projects do not only do so to further their careers. They leverage their positions to hire pairs and make collective gains for participants of former underground music scenes.¹⁴⁶

However, The Warehouse is also entangled in larger networks of power and rentierism. Mohammed's father, Hamza al-Attas, is listed as a co-founder. He managed a real estate development company owned by Saleh Kamel, one of the eminent politically connected businessmen who were purged in 2017.¹⁴⁷ The Warehouse also received support from the GEA, which allowed it to launch a venue in Jax District.¹⁴⁸

Furthermore, Vision 2030 created opportunities for Saudi musicians. The most spectacular examples are artists like singer/songwriter Fulana¹⁴⁹ and DJ Cosmicat.¹⁵⁰ When Saudi Arabia started targeting international audiences with its cultural event in 2019, it began promoting local female artists. This catapulted them from the relative anonymity of the Jeddah underground music scene to the main stages of festivals with hundreds of thousands of attendees. The annual music conference XP Music Futures (see below) also features initiatives that allow local artists to gain visibility by performing in front of music executives from across the world (XPerform).

Most Saudi musicians are not so fortunate, but they might still benefit from investments in music infrastructure:

"Back in the day, when there were no venues, my house was a studio (...). Now, there are all these amazing companies and venues".¹⁵¹

Beyond the Warehouse, the digital streaming platform (DSP) Anghami also launched a small venue in Riyadh that caters to emerging local artists. The GEA, the Music Commission, and MDLBEAST also provide young musicians with music education, vocational training, recording material, financial support, and professional networks that allow them to collaborate with other Arab artists.

145. MDLBEAST, "Baloo Interview | BEAST TV | #Soundstorm21", op. cit.

146. MDLBEAST, "Vinyl Mode Interview | BEAST TV | #Soundstorm21", YouTube, May 5, 2022, available at: www.youtube.com.

147. See Hamza al-Attas' LinkedIn page, available at: www.linkedin.com.

148. "XP Conversations Saudi Spotlight: Mohammed Al-Attas", op. cit.

149. "Saudi Singer Fulana On Her Creative Process, Vulnerability in Music & the Riyadh International Jazz Festival", *Grazia*, February 8, 2024, available at: www.graziomagazine.com.

150. XP Music Futures, "Balad Conversations | Cosmicat", YouTube, September 1, 2024, available at: www.youtube.com.

151. Statement by Nora, the lead singer of the Saudi all-woman psychedelic rock band Seera, "ATM23: Sport and Music Matters in Saudi Arabia", op. cit.

Admittedly, the preeminence of the state in the music sector likely means that artists who do not fit the requisites of its public relations campaigns do not have access to such resources. Nevertheless, at the very least, the lift of the ban on music in public spaces and the newfound demand for live and recorded music have created opportunities for artists who do not challenge state hegemony to make a living.

Feasting on authoritarian futures: Transnational clientelism and hegemonic ambitions

“The ecosystem is changing. You can simply see that by what Riyadh is doing, what XP in the Middle East is doing. I mean, who would have ever thought one of the biggest music festivals would happen here in Riyadh, the capital of Saudi? I’m honored to be here.”

—Rawan Al Dabbas, Regional Director, the International Federation of the Phonographic Industry.¹⁵²

It seems almost too obvious to state that what is happening in the Saudi music industry is not only an internal affair. The introduction of Western entertainment in Saudi Arabia served to “remove the entire legacy of the Sahwa” and attract foreign investments, an imperative that responded to the country’s weakened international standing.¹⁵³ Entertainment plans became more and more grandiose and outward-oriented in 2019, as Saudi officials grappled with the fallout from journalist Kamal Khashoggi’s assassination on the direct orders of the crown prince.¹⁵⁴ Since the beginning of the Ukraine War (2022), ties between Riyadh and Western capitals have, in turn, improved, and public investments in the sector have decreased.

Soundstorm epitomizes how music is instrumentalized in public relations stunts. Statements by organizers show how the festival is designed for Western audiences,¹⁵⁵ something that is also reflected in aggressive marketing campaigns using international social media influencers.¹⁵⁶ This has led to the festival being labeled as a form of “culture washing”.¹⁵⁷

152. “XP 2022 Outcomes Report”, op. cit., p. 2.

153. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 7.

154. *Ibid.*, p. 142.

155. “Our target for the festival is a global community, a global mindset, people who travel and enjoy attending festivals around the world”. See FestivalAdvisor, “Q&A with Baloo of MDLBEAST”, YouTube, December 16, 2020, available at: www.youtube.com.

156. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 112.

157. M. Hann, “What’s Behind Saudi Arabia’s Answer to Glastonbury? The Power of Popwashing”, *The Guardian*, June 28, 2023, available at: www.theguardian.com.

American and European artists who participate are often castigated for helping Riyadh cover up its human rights record.¹⁵⁸ While that might indeed be the main motivation behind state investments in culture, it is far from certain whether Saudi spectacles succeed in embellishing the regime's image. More importantly, the notion of "culture-washing" only pays attention to how these spectacles are received by Western audiences. Saudi entertainment plans appear as a mirage that fools the ill-informed outsider. The latter would then be more likely to travel to the kingdom, or at least less inclined to lend their support to activists pressuring elected officials to reconsider ties with Riyadh.

But Saudi Arabia's investments in music are not a mirage.¹⁵⁹ Just as entertainment infrastructure projects are changing the country's urban landscape, creative migrations are transforming the cultural landscape of the MENA. While the prospect of finally tapping into a previously elusive source of "substantial wealth" is luring in global music executives,¹⁶⁰ artists and creative professionals from across the region are also flocking to the kingdom in an attempt to make a living amidst worsening socioeconomic conditions. Saudi Arabia's dreams of cultural hegemony might well fail to materialize, but their reappropriation by various actors is already producing lasting changes.

Doing business: Brokers, musicians, and technocrats

Saudi Arabia's efforts to attract foreign business have been successful because the country "combines size with affluence".¹⁶¹ For the music industry particularly, Saudi entertainment plans are a lucrative opportunity amidst a broader strategic pivot toward the MENA.

After the end of the CD boom, American and European music sectors saw their revenues plummet as the Internet upended their economic model based on record sales and intellectual copyright royalties. In the 2010s, the emergence of digital streaming platforms (DSPs) like Spotify, Deezer, or Anghami and an increased crackdown on online piracy have allowed music labels and distributors to be profitable again. However, profit margins remained razor-thin in the recorded music industry. Revenues never recovered to their pre-2000s level and were split between a larger pool of participants. As artists increasingly relied on concerts and merchandise sales, the power balance increasingly shifted in favor of bookers, promoters, and venue owners, such as the American-based corporation Live Nation.

158. V. Thorpe, "Alicia Keys Criticised for Women's Day Event in 'Misogynist' Saudi Arabia", *The Guardian*, March 9, 2024, available at: www.theguardian.com.

159. Statement by P. Pacifico, "ATM23: Sport and Music Matters in Saudi Arabia", op. cit.

160. P. Nichols, "PRS in the Middle-East", PRS, April 8, 2019, available at: www.prsformusic.com.

161. N. Sakr, "Saudi Arabian Television: The Challenge of Connecting with Reality", op. cit., p. 45.

XP Music Futures and trade fair diplomacy



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Description: XP Music Futures is an annual conference organized by MDLBEAST. The event has been taking place in Riyadh since 2021. It seeks to become a leading music trade fair like the Dubai-based International Music Summit and the Cairo-based Creative Summit. The list of speakers and performers features prominent musicians; Arab promoters, independent labels, and talent management firms; regional executives of major labels, distributors, and digital streaming platforms; as well as representatives from international trade associations. The conference has become a platform for musicians and music professionals who seek to gain visibility, demonstrating how the lasting impact of Saudi cultural initiatives is their reappropriation by various actors.

Consequently, Western businesses have been itching to expand to the MENA ever since local underground music scenes erupted into the forefront during the Arab Uprisings, unsettling existing production and distribution networks, and creating opportunities for newcomers.¹⁶² During the 2010s, higher internet penetration rates due to the spread of 4G and 5G technologies, and partnerships between telephone providers, DSPs, and social media platforms have made streaming more accessible in the region.¹⁶³ The rise of a new transnational Arab pop scene (rap, indie, and electronic dance music) has provided major labels and distributors with a lucrative talent pool.¹⁶⁴ Young Arab artists often lend their faces to campaigns by Western music businesses that seek to carve out a market share for

162. D. Sprengel, "Neoliberal Expansion and Aesthetic Innovation: The Egyptian Independent Music Scene Ten Years After", *International Journal of Middle East Studies*, No. 52, 2020, pp. 545-551.

163. P. France, "Why Streaming Hasn't Overtu(r)ned Music in the Arab World. Not Yet", *OrientXXI*, June 22, 2020, available at: www.orientxxi.info.

164. P. France, "Towards a New Arabic Pop?", *OrientXXI*, September 2, 2020, available at: www.orientxxi.info.

themselves in the region.¹⁶⁵ DSPs have been leading the charge, with streaming advertisements and subscriptions making the MENA the fastest-growing market in 2021 (35%), and the third-fastest-growing one in 2022 (23.8%).¹⁶⁶

Saudi Arabia stands out from other MENA countries because of its wealth and demographic weight.¹⁶⁷ Riyadh became an “El Dorado” for music professionals after the introduction of state-sanctioned entertainment in 2016.¹⁶⁸ Opportunities were manifold. Important “supply chain gaps” in state-led entertainment projects provided individuals with employment opportunities and businesses with lucrative deals that placed them in monopolistic positions.¹⁶⁹ Above all, cooperation with the Saudi state also allowed the music industry to monetize the consumption of Western Pop music in the country.

On an individual level, Western music professionals have found ample opportunities in the GEA, the Ministry of Culture, and MDLBEAST. The ranks of these organizations are filled with technocrats, who not only camouflage the centralization of ownership and control of entertainment under MBS but also provide necessary social and cultural capital.¹⁷⁰ Paul Pacifico, the CEO of the Music Commission, exemplifies the trajectories of music professionals who make a living within the Saudi cultural apparatus. He is a British professional musician who launched a music consultancy after working in banking and went on to chair several trade associations.¹⁷¹ As a well-integrated music professional who worked with musicians, executives, and policymakers across the United Kingdom and the European Union, it is not surprising that he was appointed as the head of the Music Commission in 2022.¹⁷² His social and cultural capital, as well as his experience as a public spokesperson, make him ideally suited as a broker between Saudi Arabia and Western music businesses. Consultancies specializing in the music industry have also benefitted from the demand for foreign technocrats. For instance,

165. “Egyptian Rapper Wegz Featured in Banner at New York Times Square”, *Egypt Independent*, December 17, 2022, available at: www.egyptindependent.com.

166. International Federation of the Phonographic Industry, “State of the Industry”, *Global Music Report*, 2023, available at: www.ifpi.org.

167. “It has a population of 40 million. 70% of the population is under 35 years old and there is 98% internet connectivity. A very young, very connected, and highly educated market with a high GDP.” Statement by P. Pacifico, “Sound Governance: Crafting the Future of Music Policy”, op. cit.

168. P. Nichols, “PRS in the Middle East”, op. cit.

169. “There are huge gaps in the supply chain. For physical equipment, for technology, for access to markets, for knowledge. There is a huge knowledge gap in terms of the technical aspects of the music industry. We have to build vocational training, not just for artists but for the people who support artists, people running music management companies, records labels, publishers, bookers, music lawyers, royalty accountants, data analysts.” Statement by P. Pacifico, “ATM23: Sport and Music Matters in Saudi Arabia”, op. cit.

170. A. M. Alahmed, *The Struggle of Entertainment and Neoliberal Postcolonial Capitalist Politics in “New” Saudi Arabia*, op. cit., p. 95.

171. Paul Pacifico’s LinkedIn page: www.linkedin.com; “Paul Pacifico”, Music Business Worldwide, available at: www.musicbusinessworldwide.com.

172. Ibid.

the Berlin-based company Vibelab has been associated with XP Music Futures for several years.¹⁷³

Building an industry out of thin air also meant that foreign music businesses could position themselves as crucial intermediaries in entertainment projects. This is particularly the case in live music, where the massive scale of state-sponsored spectacles created a significant demand for event promotion and production. For instance, Live Nation has obtained the exclusive rights over the al-Maraya music hall in Al-Ula,¹⁷⁴ after the PIF became its third biggest shareholder with a \$500 million investment.¹⁷⁵

For DSPs, Saudi Arabia is a more lucrative market than other MENA countries. Higher purchasing power means that they can roll out more expensive subscription plans.¹⁷⁶ They also earn more revenue from advertisement since rates of clicking in the Gulf are higher than in poorer cash-based economies like Egypt.¹⁷⁷ Consequently, Spotify, Deezer, and YouTube have all sought to court the Saudi crown. Anghami, their leading Middle East rival, plays an even more important role in Saudi entertainment plans. It launched a local label and a small venue in central Riyadh.¹⁷⁸ In turn, the company was able to gain an advantage over its competitors after obtaining access to the Rotana Group's extensive catalog of Arab music¹⁷⁹ and signing partnerships with the national telecom company, making its subscriptions more accessible and appealing to Saudi users.¹⁸⁰ Anghami also received a \$5 million investment from the Salman clan-controlled Saudi Research and Media Group (SRMG).¹⁸¹

The Saudi market is also attractive for music labels and distributors. The three major labels that control 70% of the global market (Warner Music, Sony Music, and the Universal Music Group) have had regional headquarters in Beirut and Dubai for a while. However, they were unable to break into MENA markets. "The intransigence of the local licensees" and "indifference, and even hostility, to copyright by the ruling monarchs" meant that they were unable to extract royalty fees from the region.¹⁸² It is not surprising that major labels and their affiliated distribution companies could not do much

173. "Maintaining a Thriving Grassroots Culture", op. cit.

174. J. Combes, "Alula Development Company Partners with Live Nation Arabia to Operate Maraya Venue", *Caterer*, August 2, 2024, available at: www.caterermiddleeast.com.

175. D. Smith, "Saudi Arabia's \$500 Million Live Nation Investment Is Now Worth Over \$1 Billion", *Digital Music News*, February 17, 2021, available at: www.digitalmusicnews.com.

176. "The Past, Present, and Future of Music Distribution", XP Music Futures 2023, panel discussion attended by the author, December 7, 2023.

177. Interview with a music executive in Riyadh, December 8, 2023.

178. "Maintaining a Thriving Grassroots Culture", op. cit.

179. N. Sawli, "Anghami and Rotana Renew Partnership and Expand Scope of Collaborations", *Anghami Talks*, March 12, 2024, available at: www.talks.anghami.com.

180. C. Habib, "Anghami Launches 6 New Telco Partnerships Across MENA in the First Half of the Year", *Anghami Talks*, July 13, 2021, available at: www.talks.anghami.com.

181. "Saudi Arabia's SRMG Invests in Music Streamer Anghami, Spotify's Middle East Rival", *Al-Monitor*, August 22, 2023, available at: www.al-monitor.com.

182. P. Nichols, "PRS in the Middle East", op. cit.

more than sign licensing deals with Gulf airlines and tourist destinations, as the music sector holds a very limited bargaining power (1% of the GDP in developed economies). Vision 2030 came as a game-changer. It not only promised massive licensing deals for new mega venues – MDLBEAST signed licensing deals for Saudi mega venues with several big distributors.¹⁸³ The Saudi government's newfound interest in music also meant that labels and distributors were able to push more effectively for stricter intellectual copyright regulation and enforcement. With state regulation creating the necessary conditions for capitalist expansion, Western music executives are hoping to extract “money that [could otherwise] happily stay in the local economy”.¹⁸⁴ The Saudi Crown has already started to move toward accommodating such requests, creating the Saudi Authority for Intellectual Property (SAIP) in 2017.¹⁸⁵ The music commission is also working to establish a local collective management organization (CMO), which would be charged with collecting royalty fees.¹⁸⁶ This policy shift seems to be bearing fruit. Warner Music invested in the Rotana Group and signed an exclusive distribution deal with the Saudi company.¹⁸⁷ It has also purchased a small Dubai-based distribution company to be better poised to sign local musicians and collect royalties from international artists.¹⁸⁸

The lasting regional influence of Saudi entertainment

Saudi officials claim that they want to export Saudi music to the world. Since the first edition of MDLBEAST Soundstorm, there has been an accent on promoting Saudi acts. In the past four years, half of the showcases at XP Music Futures have been allocated to Saudi brands, labels, and event production companies that heavily feature homegrown acts.¹⁸⁹ Saudi artists are also pushed to the forefront as opening acts for foreign headliners at Soundstorm.

However, whether a state-dominated music sector can produce such soft power is uncertain. Naomi Sakr draws on analyses of the “conundrum” facing Chinese cultural policies to analyze Saudi ambitions in television.¹⁹⁰ Saudi Arabia is “building an industry out of thin air” in both film and music. While this effort is drawing on the experience of independent creatives who rose to prominence during the 2000s,¹⁹¹ Sakr questions whether such an

183. “MDL Beast Signs Music Licensing Deal with Esmaa”, Broadcast Pro Middle East, January 20, 2022, available at: www.broadcastprome.com.

184. P. Nichols, “PRS in the Middle East”, op. cit.

185. “XP 2022 Outcomes Report”, op. cit., p. 10.

186. Ibid.

187. “Warner Music Group Invests in Rotana Music, Arab World's Leading Independent Label, Part of Rotana Group”, Warner Music Group, February 16, 2021, available at: www.wmg.com.

188. Interview with a music executive in Riyadh, December 8, 2023.

189. “XP 2022 Outcomes Report”, op. cit.; “XP 2023 Outcomes Report”, Vibelab, 2024.

190. N. Sakr, “Saudi Arabian Television: The Challenge of Connecting with Reality”, op. cit., p. 30.

191. Ibid.

“attempt to co-opt popular media risk is undermined by constraints on content as well as privileges for state enterprises, because of the way these factors inhibit [the production of popular culture] that resonates with ordinary people”.¹⁹² The preeminence of the state in the entertainment sector, the unprecedented degree of centralization of ownership and control under MBS, and the censorship and arrest of musicians cast doubt on the Saudi cultural apparatus’ ability to produce music that resonates with global audiences and contributes to the country’s soft power.

However, even if the Saudi music industry should “whither in the shadow of official ambitions”,¹⁹³ it is already transforming the cultural landscape of the MENA. In the past, the Saudi media empire was a mere “outreach network [that] deployed Saudi money but remained nervous of Saudi creativity”.¹⁹⁴ Its deterritorialization meant that musicians and music businesses in Cairo, Beirut, and Dubai became dependent on Saudi princes and politically connected businessmen. In the wake of the 2008 crisis, the withdrawal of Saudi money plunged the regional music industry into a crisis.¹⁹⁵

Today, Saudi officials’ ambition to bring the music industry “back home”¹⁹⁶ is again sending ripples of change across the region. Professional opportunities in the kingdom’s entertainment plans are resulting in new forms of mobility. Concerts by big musical acts from across the region are the most obvious example. Established Egyptian artists, whose main revenue stream are live performances, frequently participated in GEA and MDLBEAST events. The 2024 editions of XP Music Futures and Soundstorm are set to feature concerts by pop star Ahmed Kamal, as well as rappers Tul8te and Marwan Moussa.¹⁹⁷ These gigs reportedly pay so well that they have driven up the price of performances in the Egyptian market.¹⁹⁸

Smaller artists are also increasingly drawn to Saudi Arabia. The securitization and privatization of public spaces in the wake of the Arab Spring have limited the number of available music venues in Egyptian cities. In Cairo, access to these spaces is difficult since it is vied for by many artists, making the “venue ladder” very steep.¹⁹⁹ Moreover, an artist only earns between \$200 and \$1,000 per concert, depending on the size of the venue and their following.²⁰⁰ Consequently, the live music scene is not a sufficient source of income for smaller artists who cannot rely on private performances at weddings or other celebrations.

192. Ibid.

193. Ibid.

194. Ibid.

195. M. Kraidy, “Saudi Arabia, Lebanon and the Changing Arab Information Order”, op. cit., pp. 139-156.

196. Ibid., p. 36.

197. MDLBEAST Soundstorm 2024 lineup, available at: www.mdlbeast.com.

198. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

199. Interview with an Egyptian singer/songwriter, October 9, 2024.

200. Interview with an Egyptian label executive, October 19, 2024.

In Saudi Arabia, they have found opportunities in concerts and parties organized by companies, hotels, and restaurants, a practice that is especially common during Saudi National Day. Electronic music producers and DJs are solicited particularly often because they are less expensive than live music bands. They reportedly can make thousands of dollars in one gig in the Gulf.²⁰¹

However, the main opportunities for Egyptian musicians are still state-organized events. XP Music Futures is a good example. The conference's "Nite Program" features showcases by different labels, collectives, and event production companies seeking to advertise their talent to local or international bookers.²⁰² MDLBEAST sponsored these showcases during the first edition of the event, but they no longer do so, meaning that they are attractive enough for companies from across the region to apply through an increasingly competitive selection process and cover their own travel and accommodation costs if selected.²⁰³

While the number of Egyptian companies holding a showcase at XP has not changed much in recent years (one in 2022, two in 2023, and one in 2024, compared to fifteen Saudi and four Emirati ones each year), there are more and more performances by Egyptian musical acts (three in 2022, six in 2023, twelve in 2024).²⁰⁴ Egyptian producers and sound engineers have also been recruited to teach music production classes offered by the Music Commission.²⁰⁵ Admittedly, many musicians do not enjoy these gigs but choose to take them because they are well-paid or because they provide them with opportunities for professional advancement: "It is a great networking and photo-op event".²⁰⁶

Saudi Arabia's venture into the recorded music industry has also affected the careers of Egyptian artists. MDLBEAST Records is signing on musicians from across the region. Its official roster includes five Egyptian artists such as rapper Tul8te and singer/songwriter Mai Waleed, but the company has signed distribution deals with many more.²⁰⁷ MDLBEAST is not the only entity that is increasingly active in the Egyptian recorded music market. The Big Three major labels are also increasingly present in the country through local affiliates.²⁰⁸ Such deals are an enticing prospect for struggling musicians, as advances of a few thousand dollars are a game changer. For some, MDLBEAST might have an edge over other record

201. Ibid.

202. Interview with an Egyptian booker working in the Saudi market.

203. Interview with an Egyptian electronic music producer, October 22, 2024.

204. "XP 2022 Outcomes Report", op. cit.; "XP 2023 Outcomes Report", op. cit.

205. Interview with an Egyptian booker working in the Saudi market.

206. Interviews with Egyptian DJs in Riyadh, December 6, 2023.

207. Interview with an Egyptian label executive, October 19, 2024.

208. M. Stassen, "Universal Music Middle East & North Africa Strikes Partnership in Egypt with Harb Management Talent Agency", *Music Business Worldwide*, October 3, 2023, available at: www.musicbusinessworldwide.com.

labels/distribution companies since they offer easier access to the Saudi live music scene.²⁰⁹

Saudi Arabia's nascent state-sanctioned party scene has drawn in promoters from across the region. Egyptian venue managers and event production companies like Nacelle and Cairo Jazz Club have consistently held showcases at XP Music Futures. The third edition of the conference featured a panel on nightlife that featured event brands from Egypt, Jordan, and Lebanon. After decades of marginalization, the Saudi underground dance scene is unable to meet the novel demand for large-scale high-production value events.²¹⁰ For Egyptian promoters and event producers, gigs in Saudi Arabia are "better paid and more appreciated" than in their home country, where obtaining permits is difficult, and proceeds are shared with various state bodies.²¹¹ Higher budgets also mean that they can experiment with better equipment than they can afford in Egypt.²¹² Some music professionals from the region have even found employment opportunities in Saudi Arabia. The increased demand for foreign artists has led Saudi companies to hire local bookers.²¹³

209. Interview with an Egyptian label executive, October 19, 2024.

210. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

211. Ibid.

212. Interview with an Egyptian promoter in Riyadh, December 6, 2023.

213. Interview with an Egyptian booker working in the Saudi market, August 21, 2024.

Conclusion

Saudi Arabia's state-sponsored spectacles and its ambition to build a local music industry hinge on the active participation of various domestic and international actors. Some Saudi creatives like Ahmed Alamari (DJ Baloo), the CCO of MDLBEAST, have benefitted from the change in Saudi leadership to find employment, business opportunities, or greater visibility for their art. Western music executives view Saudi Arabia as an "untapped" source of licensing and streaming revenue. Musicians and music professionals from across the MENA increasingly flock to the country to alleviate their financial distress. Egypt is a particularly salient example. Since 2022, a rapidly deteriorating economic crisis has eroded the purchasing power of even the wealthier strata of Egyptian society. Consequently, musicians are increasingly drawn to state-sponsored and private Saudi events, and local bookers and promoters hope to carve out a piece of this new market for themselves. Many musicians and music executives from across the region have also found employment in private and para-public entities in Saudi Arabia.

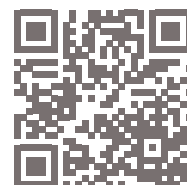
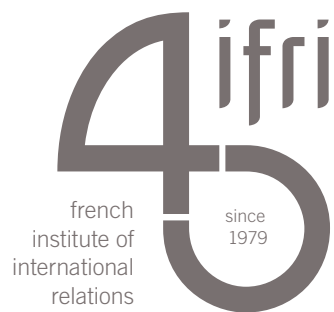
In pursuing their individual aspirations, these actors have become entangled in an increasingly state-dominated cultural apparatus; State and state-affiliated actors are the main clients of the Saudi music sector. Since they are investing massive amounts of capital into this sector with little to no return, they are redistributing oil rent for the moment (oil represented 62% of state revenues in 2023),²¹⁴ which means that the Saudi music industry resembles other kinds of clientelist networks in rentier economies.

Whether the Saudi music industry is sustainable or not is an open question. Its dependency on the state makes it vulnerable. Should the Saudi government withdraw its financial support, the domestic music economy would likely suffer, as it would no longer be as attractive on a global level. On a domestic level, Vision 2030 will have a lasting impact as the musical acts and small music businesses developing in and on the margins of state-sanctioned spaces will likely outlast the current spending spree. On a regional level, the impact of Saudi Arabia's renewed interest in music will depend on the timeline. While some Egyptian creatives have found employment in the Saudi cultural sector, many are still reticent to put all their eggs in one basket. Music executives from the region are also aware of the precarity of the Saudi music industry. While movement between Egypt and Saudi Arabia has thus been limited to short-term mobilities (for concerts), long-term migrations could become more common as the kingdom continues to recruit creative personnel for its entertainment plans. In this case, a sudden decrease in Saudi interest in

214. D. Abou Tine, "Saudi Arabia's Tax revenue Surge Fuels 2023 Budget Growth", *Arab News*, February 18, 2024, available at: www.arabnews.com.

music could have devastating repercussions on the MENA cultural scene, similar to those produced by the economic difficulties of Rotana in the wake of the 2008 crisis.

Consequently, whether the nascent Saudi music industry will become profitable and contribute to the overall goal of diversifying the domestic economy does not matter as much as the relationships of dependency that it is producing. It resembles a speculative bubble in that the continued participation of various domestic and international actors keeps the overall project going regardless of its ability to generate profit, which is hindered by heavy state involvement. While the music industry might not amount to much in the big picture (1-2% of the GDP in developed economies), it is a paragon for other economic sectors in the “New” Saudi Arabia. Evaluating Vision 2030 solely on the basis of economic indicators fails to capture its political dimension, namely regime consolidation through the concentration of ownership and control over economic assets, and the cultivation of new clientelist networks.



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