

Spatial Planning · KSA Giga-projects · Riyadh

KSA's Urban Planning & it's Emerging Opportunities _

Saudi Arabia is restructuring its spatial planning system at unprecedented speed — under intense pressures, and capturing rare opportunities. A perspective on the reforms reshaping how the Kingdom plans, and the consultancy landscape they open.



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Restructuring a Kingdom's Planning System, at Speed —

The KSA is restructuring and renewing its spatial planning system — under multiple pressures, and capturing multiple opportunities. The Kingdom is doing in years what others achieved over decades, with a new planning vision emerging, principally pioneered by Riyadh.

97.6%	1.5M	9.6M	5
Urban Population Share by 2030	Homes Possibly Needed by 2030	Riyadh Population by 2030	New Municipal Sectors in Riyadh

This article traces the pressures bearing down on the system, the reforms now underway, and the vision taking shape — to outline the landscape of future consultancy potential in the country. Two forces frame the story:

Pressures

What's straining the system

Acute housing need, economic-development primacy, runaway urban growth and sprawl, climate and resilience risk, weak control of urban form, and rising mobility congestion.

Restructuring

How the system is responding

Participatory policy, a national cultural-identity framework, climate-adapted design, transit-oriented development, white-land infill, and decentralized administrative reform.

The Opportunity

For planners and consultancies, this is a rare moment: a major economy rebuilding its planning apparatus in real time. Engaging now — upstream in policy and structure, downstream in design and delivery — is how Egis turns the KSA's paradigm shift into shared advantage.

Sources cited inline include the World Bank, Knight Frank, ISOCARP, UN-Habitat / UNDP, and Saudi ministerial and municipal communications, 2024–2025.

The Pressures Bearing Down —

A growing, diversifying economy, a young and still-growing population, and an expected influx of expatriates all converge on the system at once.

1. Housing need

Estimates vary, but between 800,000 and 1,500,000 housing units will be needed by 2030 — while, without significant added investment, capacity does not exceed 800,000. Closing the gap demands new construction capacity and adapted planning governance and permitting to deliver housing, infrastructure and services fast.

0.8M
Current Capacity

1.5M
Upper Need · 2030

2. Economic-development primacy

Under Vision 2030 and the National Industrial Strategy (2024), the KSA is driving non-petroleum growth — spinning up major industrial cities around Riyadh, Jeddah and Dammam and many secondary towns. Planning must absorb the zoning, sustainability and mobility externalities of these new employment, activity and logistics hubs.

3. Urban growth & sprawl

KSA cities are growing faster than almost any international precedent — and much of that growth has been lowdensity, consuming land and leaving vacant "white" plots inside the newly urbanized fabric.

+106%

Riyadh Urbanized Area · 2000–2022

+4.8%

Riyadh Population CAGR · 2025–30

7.95 → 9.6M

Riyadh Population · 2025 → 2030

+20%

Jeddah Urbanized Area Growth

Jeddah is projected to grow ~3.4% and Dammam ~1.7% year-on-year to 2030; both have also seen explosive geographic sprawl. The core challenge: controlling sprawl under conditions of very rapid growth.

Climate, Form, and the Cost of Congestion

4. Sustainability & resilience

Poorly controlled expansion has interfered with natural drainage, wadi-bed agriculture, and older oasis irrigation — colliding with a regional pattern of intense rainfall and flooding alongside drought and extreme heat. Cities must adapt both metropolitan structure and the fine grain of design to climate risk.

5. Weak control of urban form

Land-use-based, mono-functional zoning — with weak enforcement and only summary form-based guidelines — has produced an urban image of low cohesion that reflects little of local cultural identity.

6. Mobility & congestion

Despite major transit investment — Riyadh's new Metro and bus network — the car still dominates, and congestion keeps rising, carrying real costs in fuel, lost productivity, wasted time and health.

Riyadh commuters using private cars	92 – 93%
Commuters using buses	1%
Avg. speed · Riyadh 2024	22.4mph
Evening peak speed	15.4mph

In 2024, the average 6-mile Riyadh trip took 19 seconds longer than in 2023; peak speeds fell to 20.6 mph in the morning and 15.4 mph in the evening. A 2025 study of Jeddah using real-time mapping data flagged persistent congestion on narrow corridors and specific peak-hour bottlenecks. Car ownership continues to climb.

The Through-line

Six pressures, one demand: a planning system that can steer rapid growth rather than merely permit it — across land, climate, identity and movement.

A More Participatory, Identity-led System —

The response is already taking shape — beginning with who gets a voice in planning, and how the Kingdom's cultural identity is written into urban form.

1. Planning, participation & community

July 2025

National Urban Policy workshop

The Ministry of Municipalities & Housing, UNDP and UN-Habitat convened 50+ stakeholders in Riyadh — public and private sectors, civil society and academia — around six pillars: spatial integration, livability, inclusion, circularity, economic vibrancy and crosssector cooperation. The aim: embed inclusivity into a formalized National Urban Policy Framework.

December 2025

ISOCARP 61st Congress

The World Planning Congress in Riyadh — "Cities & Regions in Action: Planning Pathways to Resilience and Quality of Life" — foregrounded inclusive governance across five thematic tracks, including cultural identity, inclusive transformation and the governance of agile cities.

2. Cultural identity & regulation

Planners face a double challenge: adapt a heritage strategy to the Kingdom's richly varied regions, and strengthen visual identity without lapsing into simple imitation of traditional forms. The KSA's answer launched in March 2025.

Saudi Architecture Characters Map · March 2025

Nineteen regionally-inspired architectural styles — each with traditional, transitional and contemporary typologies — preserve cultural identity while allowing modern materials and a contemporary architectural language. Rollout is underway in Taif, Al-Ahsa, Asir and Makkah, with training workshops and the "Balady" digital platform for developers and municipalities.

19
Regional
Styles

Climate Design, Transit, Infill & Reform

Riyadh is pioneering the operational layer of the new system — where strategy meets the city's GIS, its transit lines, and its administrative map.

3. Climate-adapted design

The Royal Commission for Riyadh City (RCRC) is actively examining new tools and rules for climate adapted design — and communicated this work at the ISOCARP Congress.

4. TOD, mobility & utilities

Riyadh is developing a Transit-Oriented Design strategy alongside a new Structure Plan — both tied to a comprehensive, city-wide GIS and programming basis for utilities and infrastructure.

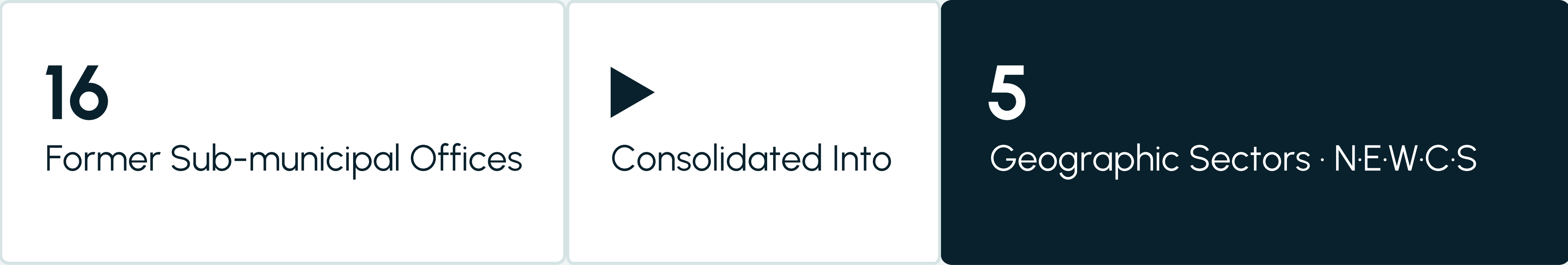
5. Filling the gaps · white lands

Outward, fast growth left numerous vacant plots inside the fabric. Riyadh is addressing these "white lands" through new regulations — and made them the focus of a dedicated congress panel.

6. Administrative reform

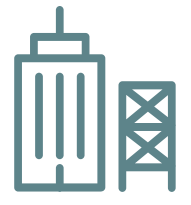
In October 2025 Riyadh abolished its 16 submunicipal offices and replaced them with five geographic sectors — each led by a chief executive — to decentralize, sharpen responsiveness and align management with Vision 2030.

Riyadh Administrative Reform · October 2025

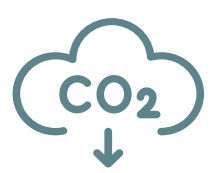


A New Planning Vision, Pioneered by Riyadh —

Pulling the threads together, a distinct planning vision is emerging from Saudi Arabia — characterized by five reinforcing orientations.



Coordinated programming. Pragmatic adaptation to rapid growth through utilities- and infrastructure-coordinated programming on a unitary GIS basis.



Polycentric & transit-led. A multi-tiered, polycentric planning concept coupled with transit-oriented development and associated local zoning.



Identity with coherence. A nationally coherent yet locally particular affirmation of cultural identity and urban-image coherence.



Decentralized management. A devolution of executive urban-management tasks — but within larger, consolidated local subdivisions.



Sustainability at fabric scale. A strong emphasis on climate-adapted design applied across most of the urban fabric — at the scale of expected housing growth.

Why it Matters

These orientations are not unique to the KSA — but the speed of adaptation is unprecedented. The Kingdom is doing in years what other cities achieved over decades, with a clear engagement toward further innovation.

For Egis, the implication is direct: a paradigm shift of this scale and pace creates an opening to shape policy, structure and design upstream — and to deliver climate-adapted, transit-oriented, identity-rich urban fabric downstream — in the KSA and, by extension, worldwide.

Sources

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- Saudi Architecture Characters Map (Mar 2025). 19 regional styles; rollout in Taif, Al-Ahsa, Asir, Makkah; "Balady" platform.
- Royal Commission for Riyadh City (RCRC). Climate-adapted design tools; Transit-Oriented Design strategy & Structure Plan; city-wide GIS programming.
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- Jeddah congestion study (2025). Real-time mapping analysis of corridor bottlenecks.
- Riyadh administrative reform (Oct 2025). Consolidation of 16 sub-municipal offices into five geographic sectors.

About this Perspective

An Egis internal article by Ion Besteliu, Senior Urban Planner — on the rapid, far-reaching and innovative changes in the KSA's urban planning system, and the opportunities they present for a paradigm shift toward greater sustainability, regionally and worldwide. His mission: to help the region's expanding cities grow ever closer to deep sustainability through the gainful application of emerging innovation systems.



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