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Branding at the Frontier: Testing the Limits of Entrepreneurial Urbanism in the Gulf

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Abstract
In 2019, the Kingdom of Saudi Arabia unveiled an ambitious new city called Qiddiya. This 334km2 entertainment city, situated on the outskirts of Riyadh, is positioned as the kingdom's future capital of leisure, sport, and culture. And like many projects in the Gulf, the announcement came with sweeping renders: roller coasters cutting through desert canyons, a Six Flags theme park, and an e-sports arena of regional scale. A few years earlier, Abu Dhabi inaugurated the Louvre Abu Dhabi. Designed by Jean Nouvel, the museum rises from the coastline of Saadiyat Island, making it the centerpiece of a cultural district anchored by five Pritzker Prize-winning buildings and framed as the UAE's gift to universal civilization. Both projects claim to be more than real estate. Both are instruments of post-oil economic diversification. And both are examples of city branding operating at a scale and ambition that raises an urgent question about whether branding mechanisms still function as structure, or break down, when the institutional conditions are strikingly different.

Introduction

My graduate thesis on flagship urban development, which analyzes London's Canary Wharf and New York's Hudson Yards, argues that city branding is not a communicative supplement to urban development, but a structural organizing logic. Through an integrated analytical framework that treats narrative positioning, spatial form, and governance arrangements as mutually constitutive and recursively related dimensions, the study demonstrates how branding shapes what is built, how it is financed, and how outcomes are represented to the world. The mechanism held consistently across two of the world's most financially mature cities.

During my thesis defense, my reader, Dr. Ebru Gencer, said it would be interesting if I test my framework on other global contexts. The Gulf poses a harder test. Here, governance is state-led rather than structured through public-private partnerships (PPPs) with market-driven developers. Additionally, post-oil diversification is the explicitly political mandate rather than a competitive response to capital mobility. And lastly, projects in the Gulf exist across radically different stages of realization. This paper applies the same framework to Qiddiya and Al Saadiyat Island to ask: where does the branding mechanism hold, where does it break down, and what does the breakdown reveal about the Gulf and the framework itself?

The Framework

The argument developed in my prior study begins with a foundational reorientation, in which city branding is a structural mechanism that organizes urban development from the outset. It also argues that treating branding as logos and slogans obscures the political and economic logic it actively performs (Kavaratzis, 2004).

The framework operationalizes this argument through three analytically distinct but mutually constitutive dimensions. The first is narrative positioning. This dimension explains the discursive framing through which flagship projects are embedded within broader visions of urban transformation. Narratives precede descriptions of development, they coordinate actors around a shared understanding of what the project is and why it is necessary, and absorb contradiction across time. The second dimension is spatial form. This dimension includes the architectural language, masterplan organization, and programmatic choices through which governance decisions are translated into built environments. Spatial form performs the brand in two registers simultaneously. It signals legibility to global capital and produces the visual spectacle through which the city claims global relevance. In Harvey's terms, the production of spectacle and the economic space collapse into a single spatial act (Harvey, 1989). The third dimension is governance arrangements. This can be seen from the institutional structures, financing mechanisms, and regulatory instruments through which the material conditions for development are established. Governance is the enabling infrastructure of the brand, and without it, narrative remains an aspiration and spatial form remains a diagram.

The analytical power of the model lies not in each dimension individually, but in their recursive interaction. Governance creates the conditions under which particular spatial forms become possible. Those spatial forms, once materialized, validate the governance decisions that produced them by demonstrating legibility to capital. Narrative precedes both and follows them, using built outcomes as evidence for claims made in advance. And evidently, this recursive circuit produces closure, it produces a self-reinforcing system that makes the entire assemblage appear as the natural expression of competitive necessity rather than a set of contestable political choices (Olesen, 2014). It is precisely this naturalization that makes city branding effective as a mode of governance, and dangerous as an object of planning critique. The Gulf cases that follow test whether this circuit holds when its institutional and material conditions are substantially different.

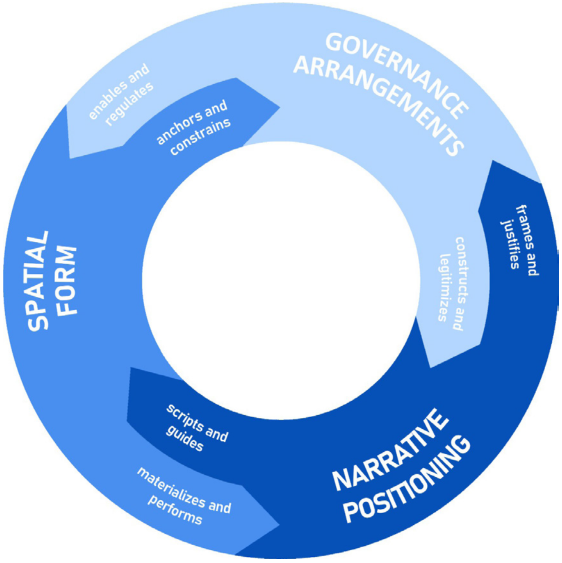

Figure 1: Integrated Framework of Flagship Urban Development

The Gulf Context

The Gulf is not an anomalous exception to the global urbanization story. As Boodrookas and Keshavarzian argue, Gulf cities are too often framed as illogical or unreal, when in fact even their most spectacular spaces reflect global patterns of capital and sovereign power manifesting in particular local and historical circumstances (Boodrookas & Keshavarzian, 2019). The same logics of spectacle, economic positioning, and image-making that animate Canary Wharf and Hudson Yards therefore are legible here, just operating at different speeds, under different political conditions, and with different institutional arrangements.

What makes the Gulf cities analytically productive as a test case is precisely where it diverges from the contexts in which the framework was developed. The most significant difference is the role of the state. In Canary Wharf and Hudson Yards, public authority and private capital were almost structurally distinct, even when deeply intertwined through PPP arrangements. In the Gulf, that separation largely collapses. The state is simultaneously the developer, the financier, the narrator, and the regulator. This can be seen from the Public Investment Fund (PIF) which deploys sovereign capital to build Qiddiya, and the Tourism Development and Investment Company (TDIC) which structures both the cultural programming and the real estate program on Saadiyat Island. When the entity bearing risk and the entity constructing the narrative are one and the same, the recursive circuit the framework describes takes on a different character, and different vulnerabilities.

A second divergence concerns the relationship between branding and political legitimacy. In London and New York, branding was deployed in the service of competitive positioning within a global urban hierarchy. In the Gulf, it is also an instrument of sovereign legitimacy-building. In other words, it serves as a means by which the state narrates economic transformation to its own population, not just the foreign investors. Vision 2030, for example, is as much a social contract with young Saudis as it is a pitch to global capital. This fusion of city branding with nation-building considerably raises the political stakes of what Olesen identifies as the depoliticization of development through the normalization of competitive necessity (Olesen, 2014).

A third difference is temporal. Both Gulf cases operate in conditions of deep uncertainty about spatial realization. The Al Saadiyat Island is largely built, while Qiddiya is still largely building. The framework developed through Canary Wharf and Hudson Yards assumed a baseline of material existence. The Gulf forces the question of what happens to the recursive circuit before it is anchored in steel and glass, and whether narrative alone can sustain branding as a structural mechanism or whether it collapses into speculation without the built form.

Al Saadiyat Island: Where the Framework Holds

Of the two cases, the Al Saadiyat Island most clearly confirms the framework's portability. Applied across all the three dimensions, the recursive circuit is legible. Narrative is materially anchored, spatial form performs the brand, and governance structures the conditions for both. What Saadiyat reveals, however, is that the mechanism travels with its contradictions intact.

The narrative Abu Dhabi has built around Saadiyat is one of universal culture and post-oil transformation. TDIC and Abu Dhabi authorities frame the island as a national museum complex with a universal vision. The island positions the emirate as a knowledge society and cosmopolitan civilization-builder rather than a petro-state (Ponzini, 2019). The Louvre Abu Dhabi is the narrative's keystone, representing a partnership with France that lends the project the cultural authority of one of the world's most recognized institutional brands. This move of borrowing Western institutional prestige to construct a claim to global cultural relevance is analytically significant. It is a deliberate strategy of narrative legitimation through institutional franchise, a mechanism with no direct parallel in Canary Wharf or Hudson Yards.

The spatial form of Saadiyat materializes this narrative with unusual precision. Aforementioned, five Pritzker Prize architects, which includes Jean Nouvel, Frank Gehry, Zaha Hadid, Tadao Ando, and Norman Foster, have been commissioned to line the island's seafront with cultural institutions. In this case, it is clear that capitalizing on the fame of these architects is itself part of the branding strategy. The buildings are both infrastructure and advertisement, performing Abu Dhabi's global ambition in the same spatial act The Vessel did for Hudson Yards (The Cultural Imperative, 2012). In Harvey's terms, the production of spectacle and the production of economic space collapse into a single gesture (Harvey, 1989). Yet the masterplan also reveals the programmatic logic beneath the cultural imagery. The Saadiyat Cultural District itself occupies approximately 10 percent of the island's total area, while the remaining 90 percent is composed of luxury residential developments, five-star beach resorts, a golf course marketed as a nature reserve, and high-end retail. This exemplifies the same real estate subsidy model that underwrites Hudson Yards behind the language of innovation and connectivity (The Cultural Imperative, 2012). To simplify, "starchitecture" is the brand's face, and luxury retail is its financial engine.

At the governance level, TDIC functions as the master developer, a state-backed institution that simultaneously structures the cultural programming and the surrounding real estate program. This arrangement parallels the case of Canary Wharf and Hudson Yards, in which public institutions like London Docklands Development Corporation (LDDC) or Hudson Yards Infrastructure Corporation (HYIC) absorb coordination risk, managing investment frameworks, and translating branding ambitions into buildable environments. The island, however, does so without the private capital co-driver London or New York required. The state is both the risk-bearer and the reward-caputurer, which concentrates the mechanism's power while also concentrating its exposure.

Where the framework strains, it does so in revealing ways. This is most evident in the construction delays which pushed back museum openings by years beyond initial announcements. The Guggenheim Abu Dhabi by Frank Gehry remains unbuilt over a decade after its projected opening. Documented controversies over migrant labor conditions on the island expose the gap between the project's declared universalism and the segregated social reality it rests on (Crafting Urban Landscapes, 2024 ; Boodrookas & Keshavarzian, 2019). And the question of who actually visits the Louvre Abu Dhabi, which draws primarily global art enthusiasts and cultural elites, exposes that the cosmopolitan audience the narrative constructs is as selective as the built environments of Canary Wharf and Hudson Yards (Crafting Urban Landscapes, 2024). The mechanism holds. The contradictions it produces are not incidental, they are structural, and they are the same contradictions my graduate thesis identified in London and New York.

Qiddiya: Where the Framework Breaks Down

If Al Saadiyat demonstrates the framework's portability, Qiddiya tests its limits. Aforementioned, Qiddiya is positioned as the capital of entertainment, sports, and the arts under Saudi Arabia's Vision 2030, a project on a scale with no precedent in the region. Applying the three-dimensional framework to Qiddiya does not produce the coherent recursive circuit that emerged in the Saadiyat analysis. However, it reveals a structural incompleteness where one leg of the circuit is missing, and its absence exposes what the mechanism actually depends on.

The narrative dimension is, in isolation, elaborately constructed. Qiddiya is framed by the state discourse and Qiddiya Investment Company (QIC) promotional materials as a wholly new kind of city, one that offers the world experiences integrated on a scale never seen before (Qiddiya Investment Company, 2020). Crucially, nonetheless, the narrative audience is not the same as Saadiyat and from both London and New York. Rather than targeting the global investor class or an international cultural elite, the primary orientation of this entertainment capital is domestic. It speaks directly to young Saudis, a demographic for whom entertainment, public leisure, and mixed-gender social space have historically been legally constrained. Among other things, Saudi Arabia's Vision 2030 is a social contract with this generation, and Qiddiya is one of its most visible promises. This domestically curated narrative serves a legitimacy function of the Saudi state that has no equivalent in Canary Wharf or Hudson Yards. In the two cases, branding was always understood as global capital, and not a national citizenry.

The spatial dimension is where the framework breaks down. Unlike Saadiyat, where the Louvre Abu Dhabi physically anchors the cultural narrative in an internationally recognizable built form, Qiddiya remains largely a project of renders, masterplans, and perpetual construction. There are not yet completed buildings that perform the brand, no material form that validates governance decisions by demonstrating legibility, no skyline that converts narrative aspiration into spatial evidence. The framework, as developed through Canary Wharf and Hudson Yards, assumed that branding structures developments from the outside, but both cases had tangible construction to show for it. In Qiddiya, the brand precedes not just development, but any reasonable prospect of completion. The branding is almost entirely discursive, which means the recursive circuit cannot close. In other words, narrative cannot use built outcomes as evidence for claims made in advance because no built outcomes yet exist.

This condition requires conceptual refinement. When narrative cannot be anchored in spatial form, city branding does not disappear, it instead shifts register. It no longer operates as a structural mechanism organizing development, but as what might be called speculative branding. In the absence of built form, the renders and promotional materials are the development. Qiddiya's brand exists primarily as image, not as space, which means it is exposed as ideological in a way that Saadiyat is not (Harvey, 1989 ; Kavaratzis, 2004).

The governance dimension compounds this exposure. The QIC functions as the institutional vehicle for the project. However, unlike Saadiyat's TDIC, whose governance decisions were validated by the material existence of the Louvre Abu Dhabi and a partially realized island, QIC structures development for a project whose spatial anchor does not yet exist. More significantly, because the state is simultaneously the developer, the financier, the branding authority, and the political guarantor of the social contract Qiddiya carries, there is no external actor like private developers or international institutional partners whose involvement would validate its credibility. The self-referential quality of this arrangement means that when spatial realization stalls, nothing corrects the narrative, and the brand simply continues, sustained by sovereign authority rather than material evidence. This is precisely the condition under which branding ceases to be a structural mechanism and becomes an ideology without any built alibi.

Comparative Analysis

Placed in conversation, Al Saadityat and Qiddiya do not simply illustrate a binary of success and failure. They produce a more nuanced finding, which is that the recursive branding mechanism is not uniformly portable across contexts, and its breakdown is not random either. The framework breaks down at the spatial dimension, and the conditions that precipitate that breakdown are analytically legible.

Figures 2 and 3 visualize the recursive circuit for Canary Wharf and Hudson Yards as established in my graduate thesis. Figures 4 and 5 apply the same structure to Al Saadiyat and Qiddiya, where the cross marks in the Qiddiya diagram mark the precise points at which the circuit fails to close.

The first thing the comparison establishes is a threshold condition for the mechanism's structural operation. Al Saadiyat highlights how the recursive circuit can function outside the Western contexts in which it was developed. State-led governance, borrowed institutional prestige, and authoritarian political conditions do not prevent the circuit from closing, provided that spatial form is sufficiently materialized to serve as evidence for narrative claims and validation for governance decisions. The Louvre Abu Dhabi is doing exactly what One Canada Square did for Canary Wharf and The Vessel did for Hudson Yards. Architecture converts ambition into a legible fact. Qiddiya demonstrates the inverse. When that spatial anchor is absent, the circuit cannot close regardless of how elaborately the narrative is constructed or how powerful the governing institution behind it is. The branding mechanism this comparison suggests requires a minimum threshold of material realization to function as structure rather than speculation.

The second finding concerns what distinguishes the Gulf variant of the mechanism from its Western predecessors. This is where the two cases converge more than they diverge. Both Saadiyat and Qiddiya operate in a context where branding serves a dual function that Canary Wharf and Hudson Yards did not. In London and New York, the primary audience for branding was global capital. In the Gulf, branding simultaneously addresses that external audience and an internal one. This fusion of city branding with sovereign legitimacy-building is a Gulf-specific variant that the original framework did not account for, raising the political stakes of the mechanism's depoliticizing effects considerably (Olesen, 2014). Hence, when the development that branding naturalizes is a promise made to an entire generation, the consequences of its failure are political in a direct and immediate sense.

Together, the two cases confirm the thesis's central prediction where the branding mechanism may be less structurally durable in financially immature, state-led contexts. This, however, is not because the logic is alien to them, but because the material conditions that make the recursive circuit self-sustaining are harder to assemble and easier to defer. The Gulf is not where entrepreneurial urbanism ends. It is where its dependencies become visible.

Figure 2: Branding Dynamics in Canary Wharf (Top Left)
Figure 3: Branding Dynamics in Hudson Yards (Top Right)
Figure 4: Branding Dynamics in Al Saadiyat Island (Bottom Left)
Figure 5: Branding Dynamics in Qiddiya (Bottom Right)

Conclusion

The Gulf cases do not disprove the framework, but actually refine it. The central argument developed through Canary Wharf and Hudson Yards that city branding is a structural mechanism organizing narrative, space, and governance recursively survives the stress test. Al Saadiyat confirms that the mechanism is portable across institutional contexts that differ substantially from the ones in which it was developed. State-led governance, authoritarian political conditions, and borrowed institutional prestige do not prevent the recursive institutional arrangement. Instead, it is a specific material condition where spatial form is sufficient to anchor narrative and validate governance. Where that condition is met, the mechanism holds. And where it is absent, the circuit cannot close and branding reverts from structure to speculation.

This is where the framework's first refinement lies. The recursive mechanism has a threshold dependency on spatial materialization that the original formulation did not make explicit, because Canary Wharf and Hudson Yards never tested it. Both were already substantially built. By presenting one with a building and one that is still building, the Gulf makes visible a condition of possibility that the cases in my graduate thesis took for granted.

The second refinement concerns the political function of branding in authoritarian, resource-dependent contexts. In London and New York, the normalization of competitive necessity as common sense operated primarily in relation to global capital and domestic political opposition (Olesen, 2014). In the Gulf, branding also performs sovereign legitimacy, managing a state's relationship with its own citizenry through the promise of development. This raises the stakes of the mechanism's failures considerably. When a branded development stalls or becomes inaccessible, it is not only a planning failure, but a breach of a social contract with political consequences that have no equivalent in the Western cases. Seeing how The Line project in Saudi Arabia unfolds as construction pauses may further validate this point.

For planners and architects working in rapidly urbanizing, state-led contexts, these refinements are practically significant. They suggest that evaluating whether branding-led development can deliver on its promises requires asking not just whether the narrative is coherent or the governance is sound, but whether the spatial form is real, who it is actually built for, and whether the promise it embodies is one the political economy of the project is actually structured to keep.

Link to the diagrams: https://drive.google.com/drive/folders/1iK4X6Yjn6sbB8bWV8mOZU0T31Bfi4QGQ-?usp=sharing

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