

# SAUDI ARABIA

## Enabling the Investment Ecosystem

Insights and Opportunities







**SAUDI MORE THAN YOU CAN IMAGINE**



# A TRANSFORMATIONAL JOURNEY WITH A CLEAR VISION AND AMBITIOUS GOALS



## ...ACHIEVED THROUGH VISION REALIZATION PROGRAMS (VRPS) AND SECTORIAL STRATEGIES



**VRPs are supported by national strategies**, strengthening the impact of transformation; such as:

**National Investment  
Strategy**

**National Transport and  
Logistics Strategy**

**National Industrial  
Strategy**

**National Gaming and  
Esports Strategy**

**National Intellectual  
Property Strategy**



# The National Investment Strategy (NIS) plays a pivotal role in the economic transformation plan supporting investors through four pillars

*Aims to increase investments in the Kingdom in line with Saudi Vision 2030, reaching a cumulative total of investments of more than **3.2 trillion USD** by 2030*

## Investment Opportunities

Developing strong and diverse investment opportunities



## Investors

Growing the contribution of diverse investors



## Funding

Removing financial barriers to investment



## Competitiveness & enablers

Creating an attractive and Competitive investment environment for global and domestic investors





An aerial photograph of a tropical island, likely in the Maldives, featuring a dense cluster of colorful umbrellas in shades of red, orange, yellow, and purple. The umbrellas are arranged in a grid-like pattern, creating a vibrant mosaic. The island is surrounded by turquoise water and white sand beaches. In the background, there are more islands and a clear blue sky.

# OUR INVESTMENT ECOSYSTEM



# A Resilient and Robust Economy



## Proven Resilience

1<sup>st</sup>

Population growth rate among the G20 in 2022 (YOY)

2<sup>nd</sup>

lowest debt/GDP ratio among the G20 in 2023

1<sup>st</sup>

Fastest growing economy among G20 in 2022

2<sup>nd</sup>

Lowest inflation rate among G20 in 2023



## Robust Economy

19<sup>th</sup>

Largest economy globally in 2023

6<sup>th</sup>

Largest GDP per capita (PPP) among The G20 in 2023

11<sup>th</sup>

Saudi Arabia ranked in the growth of FDI net inflow in 2023

7<sup>th</sup>

Largest foreign assets reserves Globally in Feb 2023



# Saudi Arabia a hub at global crossroads



**32.2mn** Population



**<60%** Under the age of 35



**29**  
Airports Connecting to  
45+ countries



**10**  
Seaports



**4 Hours**  
Within more than 50 fast-  
growing economies

**7 Hours**  
To over 80% of the world's  
population



International  
Airports



Seaport



Industrial City



## With a clear commitment towards a more sustainable future



A long-term action plan was developed to achieve global climate targets through the Saudi Green Initiative (SGI)



Ambitious national initiative that is focused on combating climate change, improving quality of life, and protecting the environment for future generations.



Identify and support opportunities for collaboration and innovation



Grow the green economy – through 80 initiatives corresponding to the three targets have been activated, representing an investment of more than \$187bn and helping to drive sustainable growth.



Accelerate the green transition, and be a global leader in the implementation of the Circular Carbon Economy approach



Improve quality of life and protect the environment

Saudi Arabia Aims to Achieve **Net-Zero Emissions by 2060**





# HOW WE SUPPORT INVESTORS



# IN ALIGNMENT WITH THE NATIONAL INVESTMENT STRATEGY (NIS) AND TO ACCELERATE ECONOMIC DIVERSIFICATION, SAUDI ARABIA HAS LAUNCHED FIVE SPECIAL ECONOMIC ZONES (SEZ) SUPPORTING VARIOUS SECTORS

## KAEC

- Automobile supply chain and assembly
- ICT (Electronic light manufacturing)
- Pharmaceuticals
- MedTech
- Logistics Consumer goods



هيئة الاتصالات والفضاء والتقنية  
Communications, Space & Technology Commission

## Cloud Computing SEZ

- Cloud Computing Services

## Ras Al-Khair (RAK)

- Rig platforms and MRO
- Shipbuilding and MRO



Special Integrated Logistics Zone  
المنطقة الخاصة اللوجستية المتكاملة

## Special Integrated Logistics Zone (SILZ)

- Consumer products
- Computer parts
- Pharmaceuticals
- Nutritional and medical supplies
- Aerospace spare parts
- Luxury goods, jewelry and precious metals

## Jazan Special Economic Zone

- Food Processing
- Metal conversion
- Logistics





# Launched the Global Supply Chain Resilience Initiative (GSCRI) offering investors competitive advantages and strengthening their supply chains

**Helping** to overcome challenges in global supply chains



**Supporting** the growth of key sectors and value chains

**Enabling** investors from all sectors to benefit from the Kingdom's resources and capabilities

**Attracting** foreign direct investments in export-oriented products and services

## Four investment themes underpin GSCRI



**Sustainability and Climate Change**



**Global Supply Diversification**



**Future Industry Enablement**



**Advanced Manufacturing**



# THE GOVERNMENT SUPPORTS MULTIPLE SECTORS DRIVING ECONOMIC DIVERSIFICATION



**Agriculture &  
Food Processing**



**Energy**



**Healthcare &  
Life Sciences**



**Environment  
Services**



**Industrial &  
Manufacturing**



**Pharma & Biotech**



**Chemicals**



**Real Estate**



**Financial Services**



**Transport &  
Logistics**



**Mining & Metals**



**Tourism & Quality  
of Life**



**ICT**



**Human Capital  
Innovation**



**Aerospace &  
Defense**



## GOVERNMENT REFORMS SUPPORTING INVESTORS IN DOING BUSINESS



### BUSINESS SETUP

**24 hours**  
to issue a business visa



### EASE OF REGULATION

**100%**  
foreign ownership  
of investments allowed in most sectors

**24 hours**  
customs clearance period



### ACCESS TO FINANCING

**Export credit financing, guarantee, and insurance**  
provided by Saudi Industrial Development Fund,  
International Islamic Trade Finance Corporation,  
and Saudi Export-Import Bank



# Offering different types of incentives dependent on the opportunities



Tax Holidays /  
reductions



Loans / interest  
incentives



Equity  
investment



Export/ Import  
Incentives



Subsidies/  
grants



Custom Duty  
Exemption



R&D  
Incentives

## CASH INCENTIVES

- CAPEX grants
- OPEX Support (e.g., salary, training, benefits)



## EXPORT INCENTIVES

- Incentives for export credit financing



## CAPITAL SUBSIDIES

- Low-cost financing for industrial sectors
- Access to grants, loans, credit guarantees



## TAX INCENTIVES

- Reduced Corporate Income Tax Rates in specific sectors and activities
- Customs Duty Exemptions or Reduction
- VAT refunds on certain expenses



## SPECIAL ECONOMIC ZONES

- No restriction on capital repatriation



## SPONSORED SERVICES

- Utilities
- Reduced rentals
- Feedstock (e.g., raw material)



## R&D INCENTIVES

- Deductions or credits for eligible R&D expenses



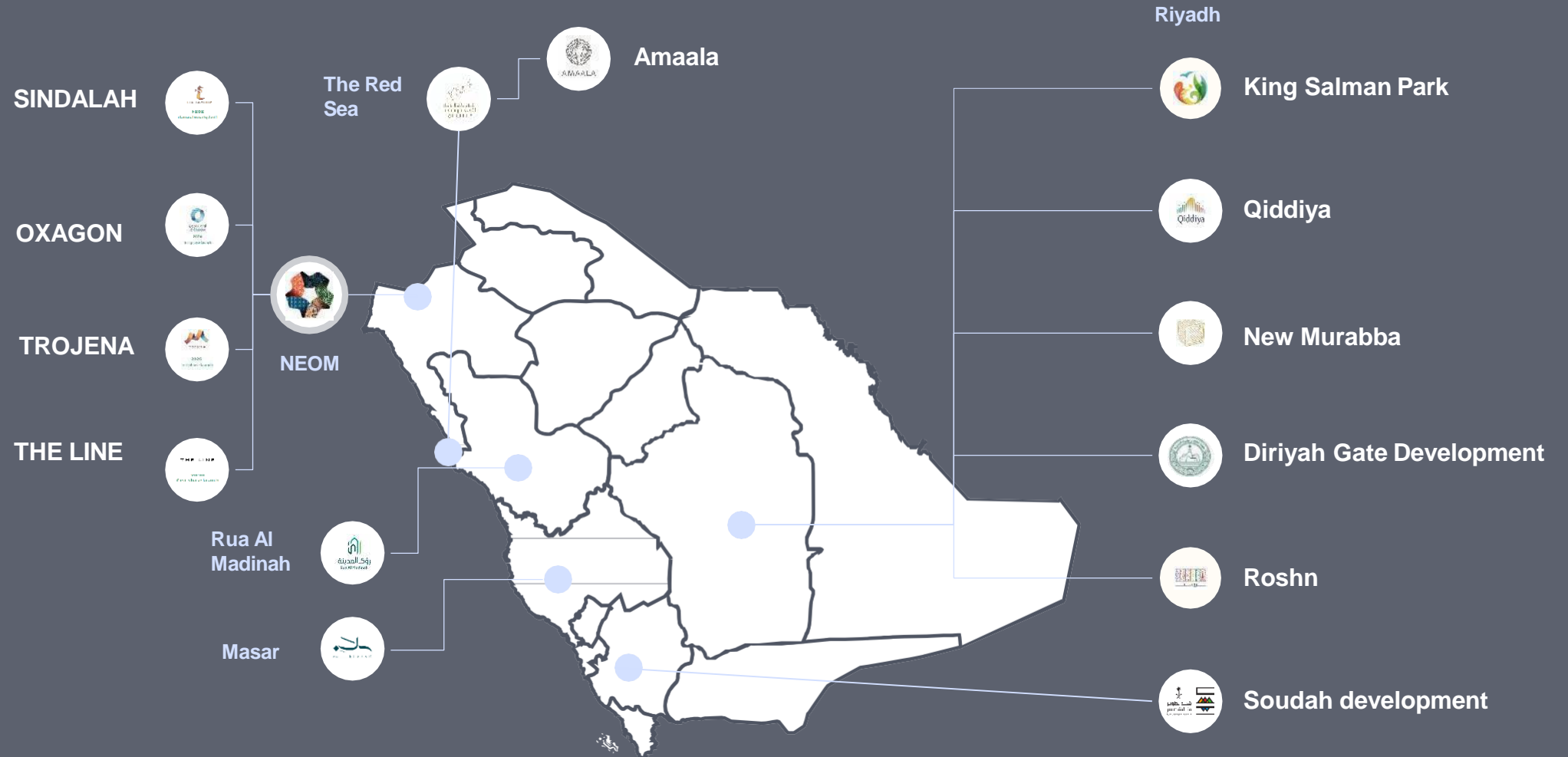


An architectural rendering of a modern building complex with several large, white, angular structures. In the foreground, a landscaped hillside with stone steps and greenery is populated with people. The sky is blue with some clouds and birds. A teal diagonal graphic element is in the bottom right corner.

# INSIGHTS ON OPPORTUNITIES



# ONGOING PROJECTS IN SAUDI ARABIA ARE ABUNDANT WITH INVESTMENT OPPORTUNITIES, DRIVING THE KINGDOM'S DEVELOPMENT







NEOM:  
Future mega city

**\$500Bn**  
investment



Red Sea project:  
Luxury tourism

**90+**  
islands



Qiddiya: Sports and  
Entertainment destination

**\$40Bn**  
investment



Diriyah: Culture-led  
tourism destination

**\$60Bn**  
investment



New Murabba:  
400m cube shaped skyscraper

**\$50Bn**  
investment



## SELECT EXAMPLES OF ANNOUNCED VISION 2030 PROJECTS



ROSHN:  
Sustainable communities

**400,000**  
homes



King Salman Airport

**185M**  
Travelers annually



Jeddah Central:  
Modern residences and hotels

**\$20Bn**  
investment



Saudi Downtown:  
Modern downtowns in 12 cities

**10Mn m<sup>2</sup>**  
construction area



AlUla: Historic  
site tourism

**\$20Bn**  
investment

الهيئة الملكية لمحافظة العلا  
Royal Commission for AlUla





# PROUDLY MARKING SAUDI ARABIA'S HISTORIC ACHIEVEMENTS HOSTING EXPO 2030 and FIFA WORLD CUP 2034

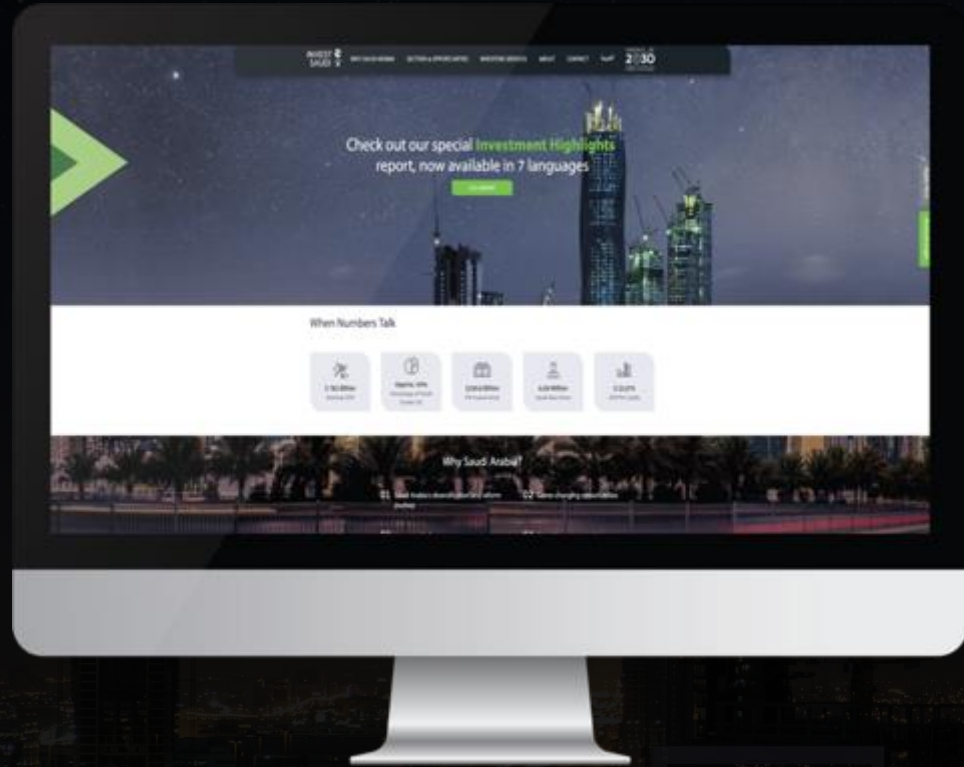


A LANDMARK EVENTS FOR GLOBAL  
INNOVATION AND CULTURE



# INVEST SAUDI ONLINE PORTAL

WE HAVE DEVELOPED AN ONLINE PORTAL TO ASSIST YOU ON YOUR JOURNEY



Enables investors to dive into an ocean of untapped potential



Investment opportunities



Facts & figures



Investor services



Connection with Sector Heads



## VISIT INVEST SAUDI PORTAL



INVESTOR SERVICES  
MANUAL



INVESTMENT LICENSE  
CHECK



INVESTOR JOURNEY  
GUIDELINES

MISA



INVEST SAUDI





A wide-angle photograph of a desert landscape at sunset. The sun is low on the horizon, creating a bright starburst effect. Several large, dark rock formations are scattered across the sandy dunes. The sky is filled with colorful clouds in shades of orange, yellow, and blue. The overall mood is serene and majestic.

I THANK YOU