



Overview Of The KSA ICT & Cyber Sector.

Contents

Executive Summary	04
1. Key Insights	05
1.1. Digital Infrastructure Development	05
1.2. Government Initiatives and Policies	05
1.3. Cybersecurity Measures	05
1.4. Emerging Technologies	06
1.5. Economic Impact of the ICT Sector	06
2. Conclusion & Future Outlook	07
2.1. Key Takeaways	07
Saudi Arabia's ICT & Cybersecurity Sectors	08
1. Introduction	08
1.1. Vision 2030 – An Overview	09
1.1.1. Vision Realisation Programs (VRP's)	09
1.1.2. Giga Projects	09
1.1.3. Special Economic Zones	09
1.2. Saudi Arabia 2034 and Beyond	10
1.2.1. 2027 AFC Asian Cup	10
1.2.2. Asian Winter Games 2029	11
1.2.3. Riyadh World Expo 2030	11
1.2.4. 2034 FIFA World Cup	12
1.2.5. Vision 2040	12
1.3. Doing business and market access in KSA	13
1.3.1. Business Setup Models	13
1.3.2. Post-Incorporation & Compliance	14
1.3.3. Government Liaison	14
1.3.4. Expatriate Personnel Requirements	14
1.4. Saudi Arabia's National Digital Transformation Strategy	15
1.5. The Economic Impact of ICT & Cybersecurity	16
1.6. Government Leadership in Technology & Cybersecurity	17
1.7. The Rise of AI & Emerging Technologies	18
1.8. Cybersecurity as a National Priority	19
1.9. Public-Private Partnerships & Market Growth	20
1.10. Future Outlook	21

Contents

2. Economic & Digital Market Landscape	22
2.1. Saudi Arabia's Economic Strength and Growth Trajectory	22
2.2. The Rapid Growth of Saudi Arabia's Digital Economy	23
2.3. Key Government Institutions Supporting ICT & Cybersecurity	23
2.3.1 Saudi Data & AI Authority (SDAIA)	24
2.3.2 National Cybersecurity Authority (NCA)	24
2.3.3 Communications, Space & Technology Commission (CST)	24
2.3.4 Ministry of Investment for Saudi Arabia (MISA)	25
2.3.5 Ministry of Communication & Information Technology (MCIT)	25
2.3.6 National Technology Development Program (NTDP)	26
2.3.7 Saudi Venture Capital (SVC)	26
2.4. Government Policies Driving Digital Growth	27
2.5. The Role of the Private Sector and Foreign Investment	27
2.6. Addressing the Cybersecurity & ICT Talent Gap	28
2.7. Digital Infrastructure & Smart Cities	28
2.8. Financial Performance and Market Projections	29
2.9. Conclusion: A Thriving Digital Future	29
3. Emerging Technologies Shaping Saudi Arabia's ICT & Cybersecurity Landscape	30
3.1. The Role of Artificial Intelligence (AI) in Digital Transformation	30
3.2. The Expanding Role of Cloud Computing & Edge Technologies	30
3.3. Blockchain & Cybersecurity Innovations	31
3.4. Conclusion: Saudi Arabia's Digital Future	31
4. Cybersecurity Landscape & National Resilience	32
4.1. National Cybersecurity Strategy & Governance Framework	33
4.2. Cyber Threat Landscape & Risk Mitigation	33
4.3. Data Protection, Privacy Laws & Regulatory Compliance	34
4.4. Cybersecurity Investment & Public-Private Partnerships (PPP's)	34
4.5. Conclusion: Saudi Arabia's Cybersecurity Future	34
5. Digital Infrastructure & Smart Cities Development	35
5.1. National Digital Infrastructure & 5G Expansion	36
5.2. Smart City Development: AI, IoT & Sustainable Urban Planning	36
5.3. Cloud Computing, Data Centres & Digital Services	37
5.4. National Digital Identity & E-Government Services	37
5.5. Digital Infrastructure for AI, Blockchain & Fintech Innovation	38
5.6. Conclusion: Saudi Arabia's Digital Future	38

Executive Summary

Saudi Arabia's Information and Communications Technology (ICT) and Cybersecurity sectors are undergoing a **transformational shift**, driven by **Vision 2030**, economic diversification, and rapid digital adoption. The Kingdom's commitment to ICT and Cybersecurity is **unwavering**, with substantial strategic investments and forward-thinking policies setting the stage for a **digitally resilient, innovative, and secure future**, while positioning itself as a global technology and cybersecurity hub, reinforcing national security, economic competitiveness, and digital resilience.

Saudi Arabia's Information and Communication Technology (ICT) sector has emerged as the largest in the MENA region, contributing significantly to the country's economic diversification under **Vision 2030**. With an estimated ICT market value of **\$44 billion (SR166 billion)** and annual growth rate of **8% CAGR**, combined with projected **double-digit growth** in cybersecurity spending, Saudi Arabia is at the **forefront of digital transformation in the Middle East**.

This transformation is fuelled by robust **government initiatives**, including the **Digital Government Strategy 2023-2030**, the **National Cybersecurity Authority (NCA) frameworks**, the **Cloud First Policy**, along with large-scale investments in digital infrastructure such as **5G expansion and smart cities**. This transformation, which includes Saudi Arabia's proactive regulatory policies and commitment to emerging technologies, such as **Artificial Intelligence (AI), Internet of Things (IoT), and cloud computing**, position the Kingdom as a regional hub for technology and innovation while laying the foundations for a secure, innovative, and digitally advanced economy.

Saudi Arabia's Vision 2030 is a transformational roadmap designed to shift the country's economic reliance away from oil. The ICT sector plays a pivotal role in achieving this objective by **enhancing digital infrastructure, attracting foreign investment, and fostering innovation** in both the public and private sectors. The Kingdom has launched various initiatives to accelerate the adoption of digital technologies, making it an attractive market for global technology firms and investors.



This white paper explores the key developments, economic contributions, and strategic initiatives shaping Saudi Arabia's ICT and Cybersecurity landscape and is intended to serve as a **reference** for investors, government agencies, and industry stakeholders looking to understand the **emerging trends and economic outlook** of Saudi Arabia's ICT & Cybersecurity sectors.



1. Key Insights

1.1. Digital Infrastructure Development

- **Saudi Arabia has built the largest ICT market in the MENA region, valued at \$44 billion.**
- **5G adoption is accelerating**, with Saudi Telecom Company (STC) and Mobily leading deployments.
- **Smart city projects** such as NEOM and The Line integrate advanced ICT solutions for urban development.
- **Cloud computing investments** are increasing, with global players such as **Google, Microsoft, and Oracle establishing data centres** in the Kingdom.



Saudi Arabia aims for 92% digitalization of key government services by 2025, enhancing public sector efficiency.

1.2. Government Initiatives and Policies

- **Digital Government Strategy 2023-2030:** Aims to enhance digital services, improve interoperability, and drive innovation in public sector IT.
- **Cloud First Policy:** Encourages government agencies and businesses to adopt cloud services, reducing costs and improving efficiency.
- **Saudi Data and Artificial Intelligence Authority (SDAIA):** Oversees national AI and big data initiatives, positioning the Kingdom as a leader in AI regulation and adoption.
- **National Transformation Program (NTP):** Supports the expansion of digital infrastructure and the development of ICT-based services.



Saudi Arabia ranked **first in MENA** in the 2023 **Government Electronic and Mobile Services Maturity Index** by the UN Economic and Social Commission for Western Asia (ESCWA).

1.3. Cybersecurity Measures

- **The National Cybersecurity Authority (NCA)** oversees regulatory frameworks to enhance cybersecurity resilience.
- In **July 2024**, Saudi Arabia launched the **Cybersecurity Research and Innovation Pioneers Grants Initiative**, focusing on AI-driven cyber defence.
- The Kingdom ranked **2nd globally** in the **2024 IMD World Competitiveness Yearbook** for cybersecurity preparedness.
- Government policies emphasize **data sovereignty**, with strict regulations on data residency and transfer for cloud providers.



Investor Takeaway: Growing **cybersecurity regulations create a demand** for advanced security solutions, AI-driven risk management, and compliance services.

1.4. Emerging Technologies

- **AI Market Growth:** AI spending in Saudi Arabia is expected to **reach \$1.9 billion by 2027**, growing at a **40% CAGR**.
- **IoT Market Expansion:** The IoT market is projected to reach **\$2.9 billion by 2025**, driven by demand for industrial automation.
- **Cloud Computing Leadership:** A **\$15 billion investment** in data centres by 2030 is expected to support **1300 MW of installed capacity**, with global players partnering in local projects.
- **Smart Cities and Digital Governance:** NEOM and Riyadh Digital City are pioneering **AI-driven governance, mobility, and smart infrastructure**.



AI is expected to contribute **\$135 billion to Saudi GDP** by 2030, accounting for **12.4% of total GDP growth**.

1.5. Economic Impact of the ICT Sector

- **Saudi ICT sector contributes ~4% to GDP**, expected to grow significantly with digital transformation investments.
- **Foreign Direct Investment (FDI) inflows reached \$25.6 billion in 2023**, reflecting growing investor confidence in digital industries.
- **Government ICT spending surged by 20% in 2023**, reaching **\$11 billion**.
- **Private sector ICT revenue grew at a CAGR of 6.5% (2018-2023)**, hitting **\$26.7 billion (SR100 billion)** in 2023.



Investor Opportunity: Saudi Arabia's focus on **technology-driven economic diversification** creates an attractive market for ICT firms, digital service providers, and venture capital investments.

Other Key ICT & Cybersecurity Market Factors include ...

Key Growth Drivers

- **Economic Diversification & Vision 2030:** ICT is a core pillar in reducing oil dependency.
- **Digital Infrastructure & Smart Cities:** Investments in 5G, AI, IoT, and data centres.
- **Regulatory & Compliance Enhancements:** Stronger cybersecurity frameworks and enforcement.
- **Public-Private Partnerships (PPP's):** Collaborations between global tech giants and Saudi enterprises.
- **Rising Cyber Threats & Digital Risks:** Increased cybersecurity spending to protect national infrastructure.



ICT & Cybersecurity Market Size & Growth

- Saudi Arabia's ICT market is estimated to surpass **\$50 billion by 2025**, making it the largest in the region.
- Cybersecurity spending is expected to reach **\$7 billion+ by 2025**, driven by increasing cyber threats. Cloud adoption is accelerating, with SaaS, IaaS, and PaaS expected to grow by 25% annually.
- AI, blockchain, and big data analytics investments are expected to double within the next five years.



Investment Opportunities

Saudi Arabia presents lucrative opportunities for global tech firms, startups, and investors, including:

- **Cloud & Data Centres:** Expanding demand for local and hybrid cloud solutions.
- **Cybersecurity Solutions & AI-driven**
- **Security:** High demand for Zero Trust security and threat intelligence.
- **Digital Payments & Fintech:** Growth in open banking, blockchain, and secure digital transactions.
- **Smart City & IoT Deployments:** Investments in NEOM, Red Sea Project, and Riyadh Digital City.



Cybersecurity Challenges & Risks

Despite rapid advancements, key challenges persist:

- **Cyber Threats & Attacks:** Growing ransomware, phishing, and supply chain vulnerabilities.
- **Regulatory Complexity:** Compliance with NCA, PDPL (Personal Data Protection Law), and international standards.
- **Skills Gap & Workforce Development:** Shortage of local cybersecurity professionals.
- **Data Sovereignty & Cloud Regulations:** Strict data residency laws affecting cloud adoption.



KSA ICT/Cybersecurity Strategic Focus

- **Enhancing Cyber Resilience:** Implementing AI-driven security, Zero Trust, and cloud-native security frameworks.
- **Encouraging Foreign Investments:** Attracting global ICT firms through incentives, SEZs (Special Economic Zones), and policy reforms.
- **Developing Local Talent:** Strengthening cybersecurity education and professional training programs.
- **Expanding Regulatory Clarity:** Aligning compliance frameworks with global cybersecurity best practices.
- **Fostering Public-Private Partnerships:** Accelerating innovation through cross-industry collaboration.



2. Conclusion & Future Outlook

Saudi Arabia's ICT & Cybersecurity sectors are on a **high-growth trajectory**, with Saudi Arabia poised to become a regional powerhouse in digital innovation. The sectors are at the forefront of the country's economic transformation, and are supported by **strong government backing, a strong regulatory foundation, rising investor confidence and significant foreign investments, along with a commitment to digital transformation and rapid digital adoption**. This, combined with the continued expansion of **5G, cloud computing, AI, and cybersecurity measures** will reinforce the Kingdom's position as a leading technology hub and support its emergence as a **global leader in ICT and Cybersecurity**.

As the Kingdom continues its journey towards a digitally empowered economy and cements its leadership in ICT and Cybersecurity, key focus areas will include critical growth enablers such as:

- Strategic investments in cybersecurity, AI, and cloud infrastructure.
- Advancing AI, cloud computing, and cybersecurity capabilities.
- Establishing Saudi Arabia as a **regional tech hub** in MENA.
- Strengthening partnerships with **global tech firms** and fostering local innovation.
- Aligning regulations with **international cybersecurity and data protection best practices**.

Investors, multinational corporations, and digital service providers have a unique opportunity to **tap into a rapidly expanding ICT market**, supported by **pro-business policies, high-growth infrastructure, and strong government incentives**.

2.1. Key Takeaways



Saudi Arabia's **ICT market is valued at \$44 billion**, the largest in MENA, with **8% CAGR growth**.



AI, IoT, and cloud computing investments are driving digital transformation, with a **\$15 billion investment in data centres**.



92% of government services to be digitalized by 2025, improving **ease of doing business and investment climate**.



Cybersecurity leadership places Saudi Arabia among the most **digitally resilient economies globally**.



Significant investor opportunities exist in **cloud computing, AI, cybersecurity solutions, and digital infrastructure**.





Saudi Arabia's ICT & Cybersecurity Sectors

1. Introduction

Saudi Arabia is undergoing a **transformative digital revolution**, driven by **Vision 2030** and ambitious national policies aimed at diversifying the economy and establishing the Kingdom as a **global leader in technology, cybersecurity, and artificial intelligence (AI)**. With a current **ICT Market value of \$44 billion**, rapidly expanding AI capabilities, and a robust cybersecurity framework, the Kingdom is positioning itself as a **strategic technology hub** in the MENA region and beyond.

The integration of **cutting-edge digital infrastructure**, substantial **public-private investments**, and a regulatory landscape that fosters innovation underscores Saudi Arabia's commitment to **becoming a premier destination for ICT and cybersecurity enterprises**. Additionally, government-led initiatives such as the **Saudi Data & AI Authority (SDAIA)**, the **National Cybersecurity Authority (NCA)**, and the **Communications, Space and Technology Commission (CST)** are spearheading efforts to create a **secure, digitally resilient, and innovation-driven economy**.

This white paper provides an in-depth analysis of Saudi Arabia's **ICT and cybersecurity landscape**, highlighting **investment opportunities, regulatory frameworks, emerging technologies, cybersecurity advancements, and strategic government initiatives**. It also explores how the Kingdom's **digital transformation agenda** is creating a **globally competitive technology ecosystem**, accelerating economic diversification, and strengthening national resilience against cyber threats.

With a vision to **transform into a knowledge-based, innovation-led economy**, Saudi Arabia is not just **digitizing its infrastructure**—it is shaping the **future of AI, cybersecurity, and digital governance in the region**. The following sections will outline how Saudi Arabia is leveraging its **strategic investments, regulatory reforms, and cutting-edge technologies** to solidify its role as a **global technology powerhouse**.

1.1 Vision 2030 – An Overview

Saudi Arabia's Vision 2030 is a blueprint for diversifying the economy, empowering citizens, creating a vibrant environment for both local and international investors, and establishing Saudi Arabia as a global leader. It is built on three pillars representing the country's unique competitive advantages and with the intention of building on Saudi's leading role at the heart of the Arab and Islamic worlds.

Key focus areas include leveraging the country's significant investment power to create a more diverse and sustainable economy and to become an integral driver of international trade connecting three continents, Africa, Asia and Europe.

Vision 2030 is built around **three Themes** with six **Overarching Objectives**, **27 Branch Objectives** and **96 Strategic Objectives**.

Vision 2030			
Themes	A Vibrant Society	A Thriving Economy	An Ambitious Nation
Overarching Objectives	Strengthen Islamic values & national identity Offer a fulfilling & healthy life	Grow & diversify the economy Increase employment	Enhance government effectiveness Enable social responsibility
Branch Objectives	9 x Branch Objectives	11 x Branch Objectives	7 x Branch Objectives
Strategic Objectives	96 x Strategic Objectives		



Theme: A Vibrant Society

In which all citizens can thrive and pursue their passions, underpinned by a society that values cultural traditions, national pride, and modern amenities all while embodying the spirit of modern Islam and providing effective social services.



... with Strong Roots

- a** Living by Islamic Values
- b** Focusing our Efforts to Serve Umrah Visitors
- c** Taking Pride in Our National Identity

Key Goals include:

- To increase our capacity to welcome Umrah visitors from 8 million to 30 million every year
- To more than double the number of Saudi heritage sites registered with UNESCO

... with Fulfilling Lives

- a Promote Culture and Entertainment
- b Living Healthy, Being Healthy
- c Developing Our Cities
- d Achieving Environmental Sustainability

Key Goals include:

- To have three Saudi cities be recognized in the top-ranked 100 cities in the world
- To increase household spending on cultural and entertainment activities inside the Kingdom from the current level of 2.9% to 6%
- To increase the ratio of individuals exercising at least once a week from 13% of population to 40%



... with Strong Foundations

- a Caring for our Families
- b Developing our Children's Character
- c Empowering our Society
- d Caring for our Health

Key Goals include:

- To raise our position from 26 to 10 in the Social Capital index
- To increase the average life expectancy from 74 years to 80 years

Theme: A Thriving Economy

Where everyone has the opportunity to succeed. By providing a supportive business environment for businesses of all sizes and investing in education to prepare for the jobs of the future, Saudi Arabia is creating an exciting and prosperous future for all.



... Rewarding Opportunities

- a Learning for Working
- b Boosting our Small Businesses and Productive Families
- c Providing Equal Opportunities
- d Attracting the Talents we need

Key Goals include:

- To lower the rate of unemployment from 11.6% to 7%
- To increase SME contribution to GDP from 20% to 35%
- To increase women's participation in the workforce from 22% to 30%

... Investing for the Long-term

- a Maximising our Investment Capabilities
- b Launching our Promising Sectors
- c Privatising our Government Services

Key Goals include:

- To move from our current position as the 19th largest economy in the world into the top 15
- To increase the localization of oil and gas sectors from 40% to 75%
- To increase the Public Investment Fund's assets, from SAR 600 billion to over 7 trillion

... Open for Business

- a Improving the Business Environment
- b Rehabilitating Economic Cities
- c Establishing Special Zones
- d Increasing the Competitiveness of our Energy Sector

Key Goals include:

- To rise from our current position of 25 to the top 10 countries on the Global Competitiveness Index
- To increase foreign direct investment from 3.8% to the international level of 5.7% of GDP
- To increase the private sector's contribution from 40% to 65% of GDP

... Leveraging its Unique Position

- a Building a Unique Regional Logistical Hub
- b Integrating Regionally and Internationally
- c Supporting our National Companies

Key Goals include:

- To raise our global ranking in the Logistics Performance Index from 49 to 25 and ensure the Kingdom is a regional leader
- To raise the share of non-oil exports in non-oil GDP from 16% to 50%



Theme: An Ambitious Nation

Committed to efficiency and accountability at all levels, including building a government that is effective, transparent, accountable, empowering, and high-performing.



... Effectively Governed

- a Embracing Transparency
- b Protecting our Vital Resources
- c Engaging Everyone

Key Goals include:

- To increase non-oil government revenue from SAR 163 billion to SAR 1 trillion
- To raise our ranking in the Government Effectiveness Index, from 80 to 20
- To raise our ranking on the E-Government Survey Index from our current position of 36 to be among the top five nations

... Responsibly Enabled

- a Being Responsible for our Lives
- b Being Responsible in Business
- c Being Responsible to Society

Key Goals include:

- To increase household savings from 6% to 10% of total household income
- To raise the non-profit sector's contribution to GDP from less than 1% to 5%
- To rally one million volunteers per year (compared to 11,000 now)

1.1.1. Vision Realisation Programs (VRP's)

The VRP's are the driving force of the implementation of Vision 2030, focused individually and as a whole on bringing the Vision to life. Each VRP has a specific roadmap with approved delivery plans, focused on meeting specific objectives and key performance indicators. The VRP's are designed to adapt and align with the evolving needs of the Kingdom throughout implementation to best ensure that the Vision is successfully realised.

Vision 2030 VRP's ...

Financial Sector Development Program (FSDP)

The FSDP plays a crucial role in delivering a world-leading financial sector by driving economic growth and diversification in the Kingdom and by reshaping the Kingdom's financial sector. Focus areas include promoting income diversification, boosting savings, offering financing and investment opportunities, strengthening financial sector institutions, advancing the financial market, encouraging savings, and fostering the growth of fintech startups.

Strategic Objectives

- Ensure the formation of an advanced capital market
- Enable financial institutions to support private sector growth
- Promote and enable financial planning
- FinTech Strategy

Targets

- **\$935bn+** in banking assets
- **80%+** increase in the market value of Tadawul as a percentage of GDP
- **230** emerging FinTech companies
- **11%** increase in the share of financing SME's from banks
- **2.4%** increase in the contribution of gross written premiums to non-oil GDP
- **70%** increase in the growth rate of digital payments



Housing Program

The program focuses on providing instant access to housing support for families in Saudi Arabia who, before Vision 2030 could wait up to 15 years to receive such support. By easing access to such financial support, streamlining processes and digitizing documentation, homeownership in KSA has increased from 47% to more than 60% in the end of 2022.

Strategic Objectives

- Enable suitable home ownership among Saudi families

Targets

- **40,000** Saudi families in need provided with housing (2021-2025)
- **80%** satisfaction rate of housing services provided to Saudi families
- **355,000** new real estate financing contracts by 2025
- **70%** home ownership by 2030
- **\$41.8bn+** contribution to GDP



National Transformation Program

The Program is designed to create a diversified, innovative, and world-leading nation, reshaping what it means to live in Saudi Arabia, with key initiatives such as digitizing government services to save time and effort, digitizing government services to save time and effort, developing economic partnerships, and promoting inclusivity, as evidenced by Saudi women joining the workforce at an unprecedented pace, and employment rates for disabled people achieving record highs.

Strategic Objectives

- Improve quality of services provided in Saudi cities
- Foster values of equity and transparency
- Reduce all types of pollution (e.g. air, sound, water, soil)
- Safeguard the environment from natural threats
- Protect and rehabilitate natural landscapes
- Empower citizens through the welfare system
- Improve effectiveness and efficiency of the welfare system
- Enhance ease of doing business
- Attract foreign direct investment
- Develop the digital economy
- Enable the development of the retail sector
- Push forward the GCC integration agenda
- Develop economic ties with the region beyond the GCC
- Develop economic ties with global partners
- Support national companies to consolidate their leadership globally
- Develop promising local companies into regional and global leaders
- Increase women's participation in the labour market
- Enable integration of people with disabilities in the labour market
- Grow SME's contribution to the economy
- Grow productive families contribution to the economy
- Improve working conditions for expats
- Source relevant foreign talent effectively
- Improve productivity of government employees
- Develop the e-Government
- Enhance transparency across government roles
- Enhance business's focus on the sustainability of the economy
- Strengthen communication channels with citizens and the business community
- Ensure responsiveness of government entities to stakeholder feedback
- Ensure development and food security
- Ensure sustainable use of water resources
- Encourage volunteering
- Enhance business's focus on their social responsibilities
- Support growth of the non-profit sector
- Empower non-profit organisations to create a deeper impact

2025 Targets

- **86,000+** hectares of rehabilitated natural vegetation
- **600,000** volunteers
- **19.2%** of GDP from the digital economy
- **92%** digital transformation maturity for key government services
- **\$25bn** in Foreign Direct Investment (FDI)



Public Investment Fund Program (PIF)

Launched in 2017, the PIF is the engine that drives the diversification of Saudi Arabia's economy, driving the acceleration of innovation, reinventing industries, creating jobs, growing the Kingdom's economy and unlocking sectors that pioneer new ways of living and thereby enabling the Kingdom to be more ambitious, exciting, and prosperous than ever before.

Strategic Objectives

- Grow assets of the PIF
- Unlock new sectors through the PIF
- Localise edge technology and knowledge through the PIF
- Build strategic economic partnerships through the PIF

Targets

- **\$1.0trn+** assets under management
- **\$39bn+** invested annually in new local partnerships
- **\$319bn+** non-oil GDP contribution by 2025
- **60%** contribution to local content
- **1.8m** direct and indirect jobs



Fiscal Sustainability Program (FSP)

Launched in 2016, the FSP (formerly named the Fiscal Balance Program) is a medium-term fiscal planning mechanism tasked with creating a strong and adaptable financial system and implementing the necessary structural fiscal reforms to ensure the Kingdom's long-term economic sustainability and credibility of public finances.

Through building on the success of the Fiscal Balance Program and introducing new fiscal policies to ensure long-term fiscal sustainability, the FSP is implementing measures to ensure that the annual budget is developed in a thoughtful and comprehensive approach, taking into account the economic and fiscal landscape for the next few years.

Key Focus Areas Include

- Achieving and maintaining sustainable public finances
- Delivering a balanced budget for Saudi Arabia
- Contributing to strengthening financial discipline
- Developing public finances through the establishment of several entities, including:
 - a. The Government Expenditure & Projects Efficiency Authority
 - b. The National Debt Management Centre
 - c. The Non-Oil Revenue Development Centre.

Key Achievements Include

- Successfully reduced the Kingdom's deficit ratio of GDP from 15.8% in 2015 to 2.3% in 2021
- Implemented structural reforms that improve the budget and its implementation



Human Capability Development Program (HCDP)

Launched in 2021, the HCDP is designed to empower Saudi citizens and enabling their success at every stage of life. The HCDP focuses sharply on matching educational outcomes to the needs of the labour market, fostering innovation, and developing and upgrading skills, to both meet the Kingdom's needs for an appropriately skilled and educated labour force and support individuals in reaching their full potential.

The Kingdom has made great strides to empower its citizens and ensure they have the skills they need to thrive at every stage of life and keep pace with the changes of the future, and now, with Saudi Arabia leading the world in digital skills, the Kingdom is becoming a place where everyone can find new chances to grow and succeed every day.

Strategic Objectives

- Foster values of moderation and tolerance
- Foster values of excellence and discipline
- Foster values of determination and perseverance
- Instil national values and strengthen the sense of national belonging
- Uphold the Arabic Language
- Enhance family involvement in preparing for their children's future
- Develop a positive attitude, resilience and hard-work culture among our children
- Build a lifelong learning journey
- Improve equity of access to education (esp. in rural areas)
- Improve fundamental learning outcomes
- Improve ranking of educational institutions (e.g. Universities)
- Develop our brightest minds in priority fields
- Ensure alignment of educational outputs with labour market needs
- Improve the readiness of youth to enter the labour market
- Nurture and support the innovation and entrepreneurship culture

Targets

- **40%** of children enrolled in kindergarten by 2025
- **6** Saudi universities ranked in the top 200 globally by 2025
- **45th** ranking in the World Human Capital Index by 2025
- **40%** increase in the Saudisation of highly skilled jobs by 2025

Pilgrim Experience Program (PEP)

Launched in 2019, the Program has digitized and streamlined services along the entire pilgrimage, from e-visas made available to foreign pilgrims to the launch of the Haramain high-speed train between Jeddah Airport and the Holy Sites. The PEP is designed to ensure seamless logistics, safeguard Pilgrims against any threats and provide an immersive cultural experience with initiatives that restore and develop historic Islamic sites playing an important role in the pilgrim's spiritual journey.

The Program believes that private sector support is essential in elevating the Kingdom's status as a modern Islamic and cultural destination for pilgrims.

Strategic Objectives

- Facilitate hosting more Umrah visitors and provide easier access to the Holy Mosques
- Improve quality of services to Hajj and Umrah visitors
- Enrich the spiritual and cultural experience of Hajj and Umrah visitors

Targets

- **15 million** international Umrah pilgrims hosted annually
- **15** historically and culturally significant Islamic sites revitalised
- **85% satisfaction rate** of services provided to Hajj and Umrah pilgrims



Health Sector Transformation Program (HSTP)

The primary focus of the HSTP is to transform the Kingdom's healthcare system to best meet the needs of the Saudi population through initiatives designed to improve access to a leading comprehensive, effective, and integrated healthcare system, equipped with modern facilities and equipment and supported by enhanced private sector investment. In addition, the HTSP also focuses on expanding e-health services and digital solutions, improving the quality of care, prioritising innovation, financial sustainability, and disease prevention, and adhering to international standards, to support the overall objectives.

From remote surgeries guided by top physicians to virtual consultations resulting in seamless prescriptions, the Kingdom is leading the charge in utilizing technology to revolutionize the delivery of healthcare services with ease and efficiency. Launched in 2022, the SEHA Virtual Hospital is the largest of its kind globally, connecting over 150 hospitals with more than 30 specialized health services. Improving public health and preventing diseases is another crucial area of investment for the health and productivity of individuals and communities, as prevention is often more cost effective than illness and injury treatment.

Strategic Objectives

- Ease access to healthcare services
- Improve the value of healthcare services
- Strengthen prevention against health threats
- Enhance traffic safety



Targets

- Increase the beneficiary satisfaction rate with health service experiences during hospitalisation to **85.76%**
- Ensure the dissemination of the unified digital medical record to include **100%** of the population
- Enhance the readiness of health areas to effectively respond to health risks, aiming for a readiness rate of **90%**
- Reduce the average number of deaths from road accidents to **5 per 100,000 people**
- Achieve a target of **88%** coverage of health services across the Kingdom, including peripheral areas, by 2023



Privatisation Program (PP)

Launched in 2019, the Privatisation Program focuses on the growth of the economy and enhancing the role of the private sector in the economy by providing access to government assets and boosting service delivery and innovation, resulting in better quality of services, improves economic diversity and increased competitiveness.

The Program includes the National Centre for Privatisation and Public Private Partnerships (NCP) which creates privatization frameworks, maintains a pipeline of government assets identified as appropriate for privatisation and prepares assets for privatisation.

Strategic Objectives

- Unlock state owned assets for the private sector
- Privatised selected government services

Targets

- \$38bn+ of total non-oil government revenue
- \$16.5bn+ of total value of investments from public-private partnerships
- \$3.7bn+ of total financial value for efficient government spending through partnership operations



National Industrial Development & Logistics Program (NIDL P)

Launched in 2019, the NIDL P is designed to transform the Saudi Arabia into a global industrial powerhouse in the high-growth energy, mining, industry sectors, and a global logistics hub. This initiative represents a core element of the transformation and diversification of the Saudi economy, while creating quality jobs and securing sustainable growth for future generations.

Saudi Arabia is committed to a goal of achieving net zero emissions by 2060, as the Kingdom enters a new green era, and is investing heavily in renewable energy solutions such as wind and solar, helping to realise a clean energy and low carbon future. Saudi Arabia has vast and highly sort after mineral resources, with an estimated value of \$2.5+ trillion and the NIDL P's careful management of the management of this resource is increasingly positioning Saudi Arabia as a leading nation in the mining industry. In addition, the newly launched Strategy for Industry is enabling the Kingdom to secure global supply chains and export high-tech products to the world, supported by programs such as Made in Saudi which enhance local content in oil and non-oil sectors.

Strategic Objectives

- Develop Oil & Gas adjacent industries
- Localise promising manufacturing industries
- Localise the military industry
- Create special zones and rehabilitate economic cities
- Grow and capture the maximum value from the mining sector
- Increase the localization of the Oil & Gas sector
- Increase gas production and distribution capacity
- Grow contribution of renewables in the national energy mix
- Enhance competitiveness of the energy market
- Create and improve performance of logistic hubs
- Improve local, regional and international connectivity of trade and transport networks
- Increase localisation of non-oil sectors

Targets

- 60 days to issue a mining licence by 2025
- 50% completion of the geological survey of the Arabian Shield by 2025
- Increase of 70% of Oil & Gas sector to be localised by 2025
- 8 Special Economic Zones (SEZ's) to support NIDL P sectors by 2025
- -3.38/5 score in the World Bank Logistics Performance Index by 2025
- 70% operational utilisation rate for port capacity by 2025
- 30% of the pharmaceutical industry to be localised by 2025
- 300,000 tons of aquaculture produced annually by 2025
- 20% of the defence and military industry to be localised by 2025
- 5 Fourth Industrial Revolution (4IR) Centres launched by 2025
- Increase of 40.8% electricity generation efficiency by 2025

Quality of Life Program (QoLP)

Launched in 2018, the QoLP is responsible for the transformation of the Kingdom into a world-renowned sports and entertainment location and increasingly, a global tourism hotspot supporting the diversification of the Saudi economy. In achieving this, the QoLP focuses on the empowerment of arts and culture, promotion of sports and leading a healthy life, and the development of more liveable urban areas and creating employment opportunities.

Strategic Objectives

- Increase public participation in sports and athletic activities
- Reach regional and global excellence in selected professional sports
- Boosting Saudi Arabia's contribution to arts and culture
- Develop and diversify entertainment opportunities to meet the population's needs
- Conserve and promote Islamic, Arab and the national heritage of the Kingdom
- Improve the urban landscape in Saudi cities
- Improve the quality of services provided in Saudi cities
- Improve living conditions for expats
- Enable the development of the tourism sector
- Enhance the nation's immunity towards drug abuse

Targets

- 3 cities in Saudi Arabia ranked in the Top 100 Lovable Cities by 2030
- 143,000+ employees in the Saudi Cultural Sector by 2030
- 600+ new entertainment attractions by 2030
- 6,700+ days of cultural events by 2030



1.1.2. Giga Projects

A core part of Vision 2030 are the five Giga Projects.



boasting the world's smartest technology and unparalleled support for entrepreneurship



promoting modern societies and lifestyles



introducing a new era of tourism in the Kingdom and beyond



the hub of entertainment, sports, and the arts in the Kingdom



a one-of-a-kind project showcasing rich cultural heritage and tourist attractions



a). NEOM

Launched in 2017 by His Royal Highness Prince Mohammed bin Salman bin Abdulaziz, Crown Prince and Prime Minister, NEOM is a visionary project powered by 100% renewable energy that will transform the Red Sea coast of northwest Saudi Arabia

Sub-Projects

The Line

Launched in 2021 by His Royal Highness Prince Mohammed bin Salman bin Abdulaziz, Crown Prince and Prime Minister, THE LINE is a revolutionary concept in urban living that prioritizes people and nature and is entirely powered by renewable energy and conserves 95% of its land as a nature reserve.

The Line Key Figures

- 17km of cognitive communities designed for human comfort and free of cars
- 20 minutes maximum commuting
- 5-minute walk to reach nature and all facilities
- 100% dependence on renewable energy
- 90% of available data analysed and used to enhance infrastructure capabilities
- 9 million people

Oxagon

Oxagon is a floating industrial city under development in the southwest corner of NEOM. Strategically located on the coast of the Red Sea, through which 13% of the world's trade passes, the city includes an integrated port, a logistics centre and advanced manufacturing facilities.

Oxagon Key Figures

- 100% clean energy
- 48km² of the project's core development
- 7km in width
- 90,000 inhabitants by 2030

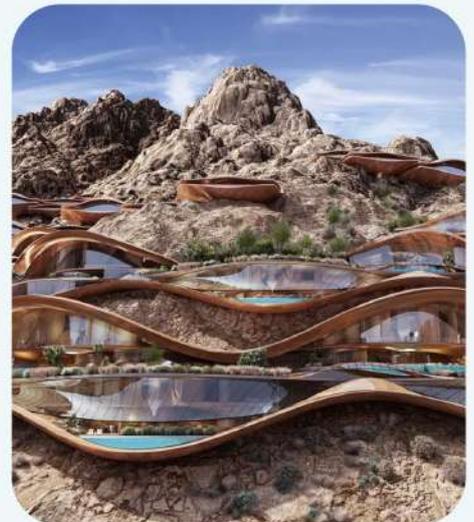


Trojena

Trojena is being developed as a year-round global mountain destination, offering outdoor skiing, adventure sports and sustainable mountain tourism. It is a place where nature, architecture and technology come together to offer world-class experiences and host unique festivals and events, such as the 2029 Asian Winter Games.

Trojena Key Figures

- 100% clean energy 1,413Km² of mountain region, 57Km² dedicated for construction and development
- 2.8Km² artificial lake for water sports
- Highest mountain at 2,600m
- 50Km from the Gulf of Aqaba coast
- 6 districts – Gateway, Discover, Valley, Explore, Relax & Fun
- Annual average of one month of sub-zero temperatures
- 30Km+ of planned ski slopes
- 3 months annually of winter skiing
- 3,600+ hotel rooms and apartments
- 700,000 annual tourists by 2030
- 700 residents



Sindalah

Sindalah has been designed as a premier luxury destination for island and yacht enthusiasts. An alluring tourism spot blends with sustainable design, advanced technology and captivating architecture, it serves as a gateway to the Red Sea, while preserving its diverse marine ecosystems.

Sindalah Key Figures

- 3 luxury hotels
- 86 berth marina
- 2,400 daily visitors by 2028
- 840,000m² of project area





b). ROSHN

Roshn Group is a subsidiary of the PIF responsible for developing integrated real estate and housing solutions supporting the Kingdom's goal to increase homeownership to 70% by 2030.

Roshn also plays a key role in economic diversification and growth by enabling the private sector, boosting local economies, and creating job and investment opportunities. Its portfolio includes mixed-use residential communities, commercial properties such as offices and hotels, and essential assets like schools, healthcare facilities, mosques, and logistics hubs.

As part of its strategy, Roshn is expanding into sectors like retail, with developments such as the **"Roshn Front"** commercial destination for shopping and entertainment. The group also supports sports, building **"Roshn Stadium"** in Riyadh and **"Aramco Stadium"** in Al Khobar, both set to host games during the 2034 FIFA World Cup.

Sub-Projects

SEDRA Community	WAREFA Community	ALAROUS Community
MARAFY Destination	ALMANAR Community	ALDANAH Community
ALFULWA Community	ROSHN Front	ROSHN Stadium

Project Objectives

- Become one of the most diverse developers of mixed-use projects globally
- Position the group as a leader in owning and managing assets
- Lead in delivering and managing projects
- Drive innovation and transformation in the real estate sector
- Offer high-quality investment opportunities
- Achieve regional leadership in ESG practices within real estate

ROSHN Key Figures

- 200m+ sqm total area of developed communities by 2030
- 400,000+ residential units built across communities by 2030
- 1,000 schools included within communities by 2030
- 700+ mosques included within communities by 2030





c). Red Sea

The Red Sea is designed to be a pioneering luxury regenerative tourism destination, which on completion in 2030, will include 8,000 rooms in 50 hotels, and 1,000 residential properties.

The 28,000 km² Red Sea Project is situated on the west coast of Saudi Arabia and includes an archipelago of over 90 islands and natural features such as beaches, dormant volcanoes, desert dunes, and mountain canyons and the world's fourth biggest barrier reef.

Sub-Projects

Turtle Bay	Ummahat Island	Shura Island
Southern Dunes	Desert Rock	Shebara Island
Red Sea International Airport	The Red Sea Nursery	

Project Objectives

- Diversify Saudi Arabia's economy away from oil dependence
- Create 70,000 direct, indirect and induced jobs by 2030
- Contribute \$5.3bn to the Saudi economy annually from 2030
- Lead in regenerative development for design, construction and operations
- Enhance the local environment and surrounding community livelihoods

The Red Sea Key Figures

- 28,000km² total project area
- 200km of coastline
- 90+ islands, with 20 developed
- 9 islands designated as special conservation zones
- 1m+ annual visitors
- 8,000 rooms in 50 hotels and 1,000 residences by 2030





d). Qiddiya

Qiddiya will be Saudi Arabia’s capital for entertainment, sports and culture, building destinations, programs and initiatives that will enhance the quality of life of visitors and residents. It will offer international sports arenas, concert and entertainment venues, academies for sports and the arts, racetracks, outdoor and adventure activities and family-friendly theme parks – including a Six Flags theme park and a water theme park.

Sub-Projects



Project Objectives

- Establish Qiddiya as the global capital of entertainment, sports and culture
- Make Saudi Arabia a top tourist destination by creating a world-class destination
- Offer exciting experiences for Saudi citizens, residents and visitors to enjoy
- Build a more prosperous and progressive society
- Empower Saudi youth to fulfil their ambitions and nurture their potential
- Contribute to employment in tourism, hospitality and entertainment
- Capture the interest of the international markets

Qiddiya Key Figures

- 360km² of total site area
- 48 million annual visits
- 600k residents once fully operational
- 325k new direct and indirect induced jobs
- \$36bn contribution to GDP once fully operational





e). Diriyah

Diriyah, the home of the At-Turaif UNESCO World Heritage Site, a beautifully preserved mud-brick city that was the birthplace of the Kingdom of Saudi Arabia, and the original home of House Al Saud. It is also a \$62.2bn development, one of the Kingdom's a giga-projects under the PIF, with a core focus on sustainability and including initiatives for water conservation, energy efficiency, wellness, culture and heritage preservation, and climate change resilience.

Sub-Projects

At-Turaif District

Wadi Hanifah

Bujairi Terrace

King Salman Square

King Salman University

House of Al Saud Museum

Project Objectives

- Create an iconic lifestyle destination that celebrates Saudi culture and heritage
- Improving employment opportunities and standards of living for the local communities
- Enhance the awareness of the Kingdom as a tourist, culture and leisure destination
- Ensuring financial sustainability without compromising on preservation of culture and heritage

Diriyah Key Figures

- 38+ hotels and resorts under construction
- 20,000+ residential units in the unique and traditional Najdi design
- 9 museums
- 10+ iconic landmarks
- 178,000 direct jobs
- 100,000+ projected residents
- 50m+ annual visitors by 2030
- 4 metro stations



1.1.3. Special Economic Zones (SEZ's)

Saudi Arabia has established five SEZ's that support a wide range of industries, driving economic growth across different sectors in line with Vision 2030 and attracting industry-specific foreign entities and investment by offering tax incentives, regulatory ease, and infrastructure support.

These SEZ's are a critical part of the National Investment Strategy, which aims to attract high-quality investments, and support vital and promising sectors, enhancing the Kingdom's competitiveness and industrial progress, boosting economic growth, and strengthening entrepreneurship capabilities, while developing local talent through job opportunities.

Project Objectives

- Economic diversification through strategic investments and incentives
- Creation of an investor friendly environment for growth, knowledge transfer and diversity
- Empower the Kingdom's supply chain sectors and support emerging industries
- Elevate the Kingdom's global business status as a logistics hub and key re-export market



Cloud Computing Special Economic Zone

Established as Saudi Arabia's own 'Silicon Valley' a thriving centre of emerging and disruptive digital technologies. The zone has a unique flexible model that allows Cloud Service Providers to provide various cloud computing services from the zone, with the ability to build and operate data centres from all over the Kingdom.



Key location information

This Virtual SEZ in part of King Abdulaziz City for Science and Technology (KACST) in Riyadh

Sectors of opportunity

- Cloud Computing



Special tax treatment in line with OECD principle that avoids double taxation and accommodates CSPS operating model.



Expat levy ensuring fees exemption for employees and their families in the zone.



Affordable network connectivity and electricity prices. Electricity available at a competitive rate of 0.05 USD/KWH for businesses.



Flexibility to provide cloud computing services from the zone, with the ability to build and operate data centers from all over the kingdom.

Economic Incentives

- Corporate income tax reductions
- A variety of withholding tax exemptions
- Deferred customs duties on goods entering the SEZ
- Expat levy ensuring fees for employees and their families in the zone
- VAT exemptions based on sector/activity criteria
- Flexible and supportive regulations around foreign talent



Ras Al-Khair Special Economic Zone

Ras Al-Khair SEZ is located at the centre of the Arabian Gulf, with an abundant supply of industrial talent and a quick and efficient multimodal transport system seamlessly connecting to global markets. The SEZ benefits from Saudi Arabia's thriving economy, favourable business climate, and key regulations that protect investors. Unique one-of-a-kind financial incentives include attractive corporate tax rates, 0% customs duties and VAT for goods exchanged between SEZs, and many other exemptions. The aim is to help investing businesses achieve accelerated growth as they access global markets.



Key location information

100km from the vibrant city of Jubail

Size of the zone: 20km²

Sectors of opportunity

- Shipbuilding and MRO
- Rig platforms and MRO



Access State-of-the-art technologies including AI, Biometrics and IOT



Enjoy green products and materials, as well as renewable energy services.



Benefits from green products, materials, and renewable energy services.



Access internationally competitive prices.



Take advantage of innovative lifecycle management offerings.

Economic Incentives

- 5% corporate income tax for up to 20 years
- 0% customs duties deferral for goods inside the SEZ
- 0% VAT for all intra-SEZ goods exchanged within the zone and between zones
- 0\$ withholding tax permanently for repatriation of profits from SEZ into foreign countries
- Innovative lifecycle management offerings
- Flexible and supportive regulations around foreign talent during first 5 years
- Expat levy ensuring fees exemption for employees and families in SEZs



Riyadh Integrated Special Logistics Zone

Saudi Arabia's first Special Integrated Logistics Zone, designed from the ground-up with industry leaders and tailored to meet the needs of the world's leading supply chain, logistics, and distribution companies.



Special Integrated Logistics Zone

المنطقة الخاصة اللوجستية المتكاملة

Riyadh Integrated

The first truly integrated logistics zone

Riyadh integrated is the first zone of its kind that combine best practices in regulation, technology, and structure from around the world. Providing an unmatched business environment through a strong regulatory backbone, optimized process, and best-in-class inbound and outbound inventory systems, Riyadh integrated enables multinational to expand their reach within the region and seamlessly tap into the largest consumer market in Middle East.

Economic Incentives

Taxation

- 50-year tax relief period
- 0% corporate income tax VAT
- VAT exemptions
- Withholding tax exemptions
- Remittance tax exemptions

Suspension of Customs Duties and Import Restrictions

- Customs suspension for all goods that remain in the zone, and for all goods transported from any port (including the airport) to the zone.
- Suspension of certification standards and restrictions for goods imported to the zone.

100% foreign business ownership

- No financial restrictions on international borrowing, capital recovery and repatriation, revenue and profit transfer, commission payments, etc.

One Stop Shop

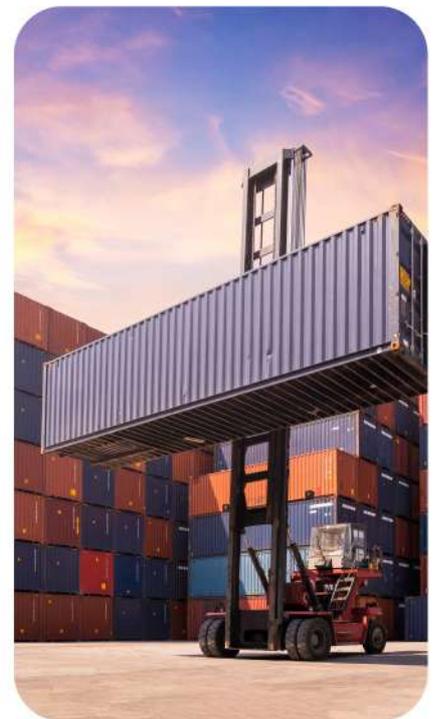
- All licenses, permits, and certifications that are needed to conduct activities within the zone are channelled through the governing body (GACA) for expedited processing.

Relaxed Labour Laws

- The zone offers a relaxed labour nationalization mandate.

Expedited Certifications

- The zone features access to expedited certification procedures for the export of goods to the mainland.



Jazan Special Economic Zone

The Jazan Special Economic Zone (SEZ) is one of the first economic zones launched in the Kingdom to serve as the South Gateway to the world's markets because of the importance of its geographical location, through which more than 13% of the volume of international trade passes to further increase this growth as it is selected to meet the objectives of Vision 2030 in terms of promoting economic growth and creating new job opportunities.



Key location information

Province: Jazan

Size of the zone: 24.6km²

Sectors of opportunity

- Food Processing
- Metals Conversion
- Logistics



Cost-effective energy, including 2.4GW in output from the Aramco Power Plant.



A large and highly skilled workforce



A range of cheap and efficient water supply options, across irrigation, potable water and sanitary wastewater.



Highly competitive industrial leases.

Financial Incentives

- Corporate Income Tax of 5% for a period of 20 years with the possibility of extension.
- Free transfer without fees of money and profits.
- Import and Export Tax Exemptions.
- VAT at 0%.
- Capital and profits transfer without tax deduction.
- Long-term contractual land lease for up to 50 years.
- Exemptions of labour levy for workers and their direct family.
- Land Lease starting from 4.5 SAR per square meter per year.

Operational Incentives

- The Unified Business Centre is a single window for all business related inquiries and services.
- Accelerated Customs Inspection and Clearance.
- World-class Multi-modal Infrastructure.

Regulatory Incentives

- Relaxation of Labor Laws on Saudization
- Exemption from Saudization for the first five years.
- From the sixth year to the tenth year, Saudization gradual increase to 15%.
- 100% direct foreign ownership of investment assets.
- No Restrictions on Trans-shipment of Goods

King Abdullah Economic City Special Economic Zone

King Abdullah Economic City SEZ is based on Saudi Arabia's Red Sea coast through which 15% of global trade passes, providing easy access to global supply routes utilising existing, world-class infrastructure and the world's most efficient port (as rated by the World Bank 2022).

مدينة
الملك عبد الله
الاقتصادية
KING ABDULLAH
ECONOMIC CITY



Key location information

Province:

Makkah 90 minutes from Jeddah Airport

Size of the zone: 24.6km²

Sectors of opportunity

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



Abundant electrical supply including over 29GWH of clean power annually.



Potable and process water supply, with distribution at a 1.5 bar minimum.



The gas zone will supply investors with natural gas at a significant cost advantage.



Wide portfolio of telecome services with a state-of-the-art fiber network.



Reliable sewage networks, including a membrane bio-reactor plant.



Economic Incentives

- 5% Corporate income tax for up to 20 years
- 0% customs duties deferral for goods inside the SEZ
- 0% withholding tax permanently for repatriation of profits from SEZ into foreign countries
- 0% VAT for all intra-SEZ goods exchanged within the zone and between zones
- Flexible and supportive regulations around foreign talent during the first 15 years
- Expat levy ensuring fees exemption for employees and their families in the zone

1.2. Saudi Arabia 2034 and Beyond

Evidence of the ongoing realisation of Saudi Arabia's ambitions can be seen in the some of the major events and initiatives planned for the coming decade and beyond, some key examples include.

1.2.1 2027 AFC Asian Cup



The graphic features a green background with a large orange diagonal shape. On the right, a soccer player in a green kit is shown in mid-air, kicking a ball. In the top right corner, there is a logo for the AFC Asian Cup Saudi Arabia 2027 Local Organising Committee, which includes a soccer ball and wings. The text 'Saudi 2027' is prominently displayed in white, followed by the tagline 'Elevating Asian Football to New Heights'. Below this, a short paragraph describes the significance of hosting the tournament in Saudi Arabia.

✕

Saudi 2027

Elevating Asian Football to New Heights

Asian football is on the rise, with the excitement sparked by 2022 FIFA World Cup and the 2023 AFC Asian Cup setting the stage for a new era. Hosting the AFC Asian Cup 2027™ in Saudi Arabia for the first time marks a pivotal moment—a moment where dreams can turn into legacies and momentum into transformation.

اللجنة المحلية المنظمة
للعالم آسيا 2027 السعودية
AFC Asian Cup Saudi Arabia 2027
Local Organising Committee

The tournament will be hosted in Saudi Arabia for the first time, supporting the establishment of Saudi Arabia as a premier destination for international sporting events, in line with Vision 2030.

The tournament of 24 nations will be hosted in three cities, Riyadh, Jeddah and Al Khobar.

Riyadh

Home to the iconic King Fahd International Stadium and several additional world-class venues, Riyadh will be the hub of the 2027 Asian Cup and will showcase its ability to host large-scale international events while embodying the Kingdom's transformation through Vision 2030.

The tournament will utilize five existing stadia in Riyadh.

- King Fahd Sports City Stadium, Capacity 70,000
- Kingdom Arena, Capacity 26,000
- King Saud University Stadium, Capacity 25,000
- Imam Mohammed Ibn Saud University Stadium, Capacity 21,000
- Al Shabab Stadium, Capacity 14,000



Jeddah

Jeddah, on the Red Sea coast of Saudi Arabia will also be a major focal point of the 2027 Asian Cup, hosting matches at two existing stadia, these venues will demonstrate Jeddah's capability to deliver world-class footballing experiences, building on its recent success hosting the 2023 FIFA Club World Cup Final.

The tournament will utilize two existing stadia in Jeddah.

- **King Abdullah Sports City Stadium, Capacity 60,000**
- **King Abdullah Al Faisal Sports City Stadium, Capacity 25,000**



Al Khobar

The city of Al Khobar on the Persian Gulf is the third host city for the 2027 Asian Cup. The modern infrastructure and the newly constructed ARAMCO Stadium, which serves as the city's centrepiece, will clearly demonstrate the Kingdom's investment in world-class facilities and commitment to expanding football's reach across the nation.

The tournament will utilize the newly constructed ARAMCO Stadium with a capacity of 45,000.

1.2.2. Asian Winter Games 2029

Saudi Arabia has recently been awarded the 10th Asian Winter Games to be held in NEOM in 2029. According to reports, the TROJENA development, which is scheduled to be finished in 2026, will have a nature reserve, a man-made freshwater lake, and outdoor skiing.

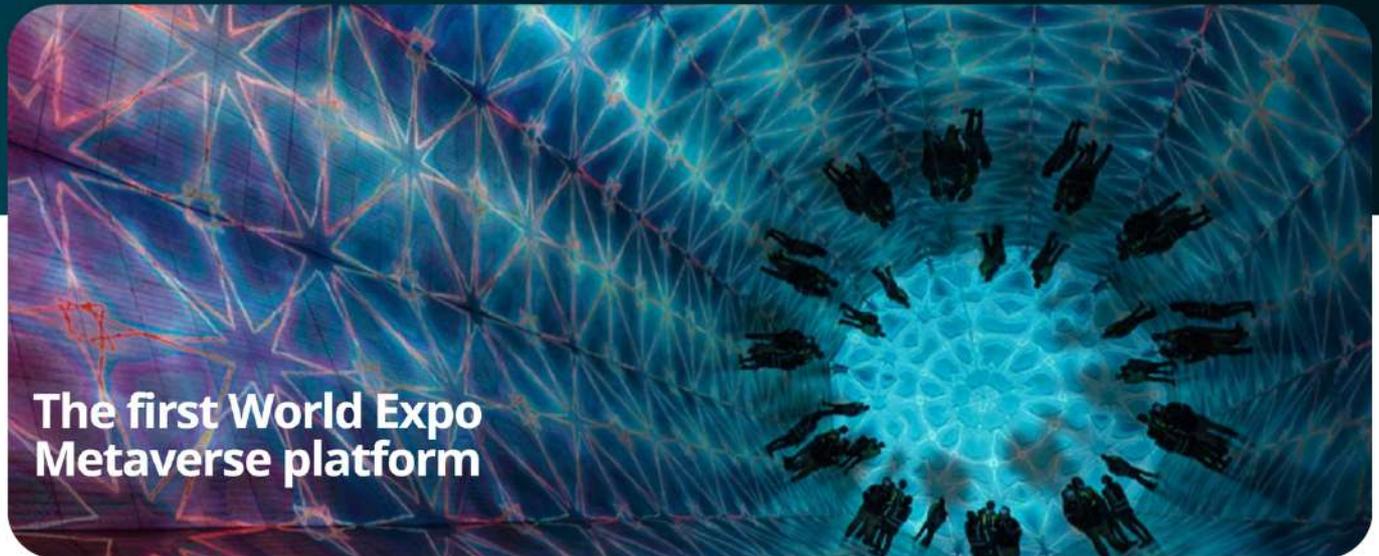
Saudi Arabia as the first country in West Asia to host this prestigious continental sporting event, further underlining the Kingdom's growing importance and influence in the global sports arena.

Saudi Arabia's successful bid to host the Asian Winter Games reflects its ambitious commitment to developing world-class sports infrastructure and fostering international athletic excellence.



1.2.3. Riyadh World Expo 2030

The Saudi Arabia won its bid to host World Expo 2030 in Riyadh, under the theme, “**The Era of Change: Together for a Foresighted Tomorrow**”, inviting the world to share how we all imagine a different future and what actions we can take today to shape a prosperous and sustainable tomorrow. Riyadh is determined to deliver an unparalleled Expo edition that will etch an indelible mark on the hearts and minds of its global visitors.



1. A Different Tomorrow

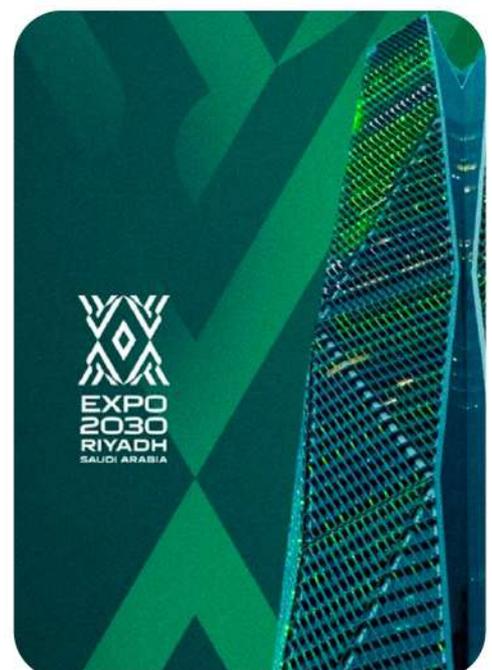
A tomorrow where science and technology transform our world, creating resilience and serving humanity in a responsible manner.

- The World in 2050
- Science and Technology for Humanity
- Disruption, Transformation and Resilience
- Ethics in Science and Technology

2. Climate Action

Accelerating innovations through global collaboration to preserve natural ecosystems and deliver sustainable solutions for all.

- Scaling Sustainable Solutions
- Preserving and Regenerating Natural Ecosystems
- Clean Energy For All



3. Prosperity For All

Addressing inequalities and imbalances in our world together, with every nation contributing through the prism of its culture, context and aspirations.

- Towards and Inclusive World
- Access, Equality and Opportunity
- Scaling Solutions for Human Needs



The largest gatherings of nation and organizations.

The most impactful global gathering in 2030

Reinforcing the aspirations and objectives of the Sustainable Development Goals, with the potential to engage the general public in their next evolution.

The largest gatherings of nation and organizations

Over 226 participants including nations and international organizations alongside companies, NGOs, universities entrepreneurs, artists, and innovators.

An experience where culture meets the future

Imagination, science, and technology will all be connected in an evocative cultural setting, where visitors will experience diverse ideas for the future and the actions taken to achieve a better tomorrow.



1.2.4. 2034 FIFA World Cup

Saudi Arabia is one of the fastest and most exciting growth stories in world football. Hosting the 2034 FIFA World Cup aligns perfectly with the main goal of the National Football Strategy, to grow the game for all, including more players, coaches and spectators. The 2034 FIFA World Cup supports the Kingdom's ambition to become a top-tier football nation as well as being a step forward for the sport across the region and for the global football ecosystem.

Football plays a very significant role in the ongoing transformation of Saudi Arabia and the Saudi Arabian Football Federation is investing in state-of-the-art stadia to stand aside existing stadia, and world-class academies, all with the long-term development of the game in mind. All of this is being prepared for the first ever 48-team World Cup tournament ever to be held in a single host country, a first for Saudi Arabia and an opportunity for fans to enjoy an enhanced experience.

With plenty of accommodation options and a vast transport network, fans will be able to catch multiple matches across five host cities in the Kingdom seamlessly.



Saudi Arabia FIFA World Cup 2034™ Vision & Legacy

A FIFA World Cup 2034™ in Saudi Arabia will see the first-ever 48-team tournament in a single host country. This will be a new story, for a new era.

05

Host Cities

10

Other Host Locations

15

Proposed Stadiums

16

International Airports

230K+

Room Keys Across Host Cities

134

Training Sites

Infrastructure Opportunities

World-Class Infrastructure

Saudi Arabia will showcase state-of-the-art new and upgraded stadiums across five cities for the 2034 World Cup, stadia designed for optimal functionality, comfort, and visitor experience. Strategically situated across the country, these world-class venues will fully comply with all local and international standards and be delivered with sustainability as one of the guiding principles. In addition there will be 134 training sites which will also provide support for players, teams and referees, ensuring their comfort and accessibility throughout the tournament.

Growing People. Together.

A young population transforming through rapid social change.

63%

of Saudis aged under 30

70K+

girls playing football in Schools League

149%

of women's participation in sport since 2015

834K

volunteers in 2023, up from 23k in 2015



Sports & Related Event Management Opportunities

Saudi Arabia is one of the safest countries in the world with significant experience in the management and delivery of major sporting and other events, having successfully hosted over 100 international events, including the Saudi Arabian F1 Grand Prix and the FIFA Club World Cup Saudi Arabia 2023. Of course, Saudi Arabia also organizes and manages the annual Hajj pilgrimage, which sees over 1.5 million pilgrims arrive in Saudi Arabia in a short space of time.

Security at events of this magnitude is always of the utmost importance and the Kingdom intends to ensure that security systems and operations will be among the best equipped and most successful globally.



A Vibrant Fifa Fan Festival

The Kingdom will implement fan sites in each host city to be based in two iconic locations in each city, within walking distance of accommodation or easily accessible by public transport. Fan sites are already planned for King Salman Park in Riyadh – the largest urban parkland in the world – to the spectacular oceanside Marina in NEOM, each site will integrate digital and physical experiences in public celebrations of football.

Hospitality Opportunities

Staying In Saudi Arabia

Fans and visitors will be able to choose from 230,000+ available room keys, at various price ranges from budget-friendly to ultra-luxury stays, and experience local cuisine including as Saudi coffee and dates, and explore Saudi Arabia's vast diverse landscapes, including impressive landmarks, UNESCO Heritage Sites and concert venues.

Transportation Opportunities

Seamless Transport

Teams, fans and the FIFA family will benefit from an integrated transport strategy that is enabled by, and optimised for, our compact tournament concept. The five host cities have been strategically chosen to provide fans with the best possible experience and efficient travel. Saudi Arabia's transportation network offers an extensive array of international, intercity, and intracity options, via air, sea, road, and rail. With 16 international airports, and extensive road, rail, and bus networks, navigation around the country will be quick and efficient.

1.2.5. Vision 2040

Saudi Arabia is currently working on Vision 2040, which will represent the next phase of the Kingdom's economic diversification and growth plan Vision 2030 with current plans to launch Vision 2040 as early as 2027.

Some highlights

- Vision 2040 could be announced in 2027
- Non-oil up to 46% of GDP
- Giga-project budget of \$1.25trn
- World leader in Biotech by 2040



1.3. Doing business and market access in KSA

Saudi Arabia offers a structured and investor-friendly business environment, with multiple market entry models, tax incentives, and compliance support. Companies must navigate regulatory requirements, workforce localization policies, and sector-specific approvals to successfully operate in the Kingdom.

Note that this document provides some introductory information with regard to the subject matter covered in this section “**Doing business and market access in KSA**” and is not intended as a comprehensive guide. Government regulations are subject to change over time and each company/individual should of course conduct their own due diligence accordingly.



1.3.1. Business Setup Models

Saudi Arabia has established a pro-business regulatory framework that enables foreign companies to establish a presence in various forms, each with specific incentives, tax structures, and compliance obligations, with four primary business setup models for foreign investors.

a. Standard Foreign-Owned Entity Setup

A Standard Foreign-Owned Entity is the most common and cost-effective method for foreign businesses to establish operations in Saudi Arabia. This structure allows companies to maintain 100% foreign ownership while conducting service, trading, or manufacturing activities.

Key Features:

- **100% Foreign Ownership** - Available across most non-strategic sectors, including ICT, professional services, and consultancy.
- **Limited Liability Company (LLC) Structure** – Most foreign companies register as an LLC, which provides flexibility in ownership, taxation, and operations.
- **No Minimum Capital Requirement** – Depending on the business activity, some sectors require no minimum capital, while others, such as contracting and financial services, may require minimum capital deposits.
- **Ministry of Investment of Saudi Arabia (MISA) Approval** – A mandatory investment license is required from MISA before incorporation.
- **Mandatory Saudisation** – Companies must meet the Saudization (Nitaqat) quotas, ensuring a certain percentage of Saudi employees in their workforce.

Advantages:

- Access to the largest economy in the MENA region.
- No restrictions on profit repatriation or capital transfers.
- Ability to bid for government contracts if registered as a Saudi entity.

Challenges:

- Complex licensing requirements for some sectors (e.g., healthcare, fintech, defence).
- Local hiring obligations to comply with national employment quotas.

a. Regional Headquarters (RHQ) Setup

The RHQ program is a strategic initiative launched by Saudi Arabia to attract multinational corporations (MNCs) to establish their regional headquarters in the Kingdom. The RHQ model provides substantial tax incentives, regulatory ease, and operational flexibility for companies managing regional operations.

Key Features:

- **Zero Corporate Tax for 30 Years** – RHQ entities enjoy a complete corporate income tax exemption.
- **No Withholding Tax on Regional Transactions** – Eliminates additional taxation on cross-border revenue transfers.
- **Saudization Relaxation** – Exemption from the Saudization quota for the first 10 years, allowing flexibility in hiring expatriate professionals.
- **Visa & Work Permit Privileges** – Ability to issue up to 250 work visas immediately upon registration.
- **Eligibility for Government Contracts** – Multinational companies that establish RHQs in Saudi Arabia gain preferential treatment in government and mega-project tenders.

Advantages:

- Exclusive access to government tenders that require companies to have a physical presence in KSA.
- Fast-track approvals for regulatory licensing and commercial operations.
- Ideal for companies managing operations in GCC, Africa, and South Asia from a central hub in Riyadh.

Challenges:

- Requires a long-term commitment with headquarters staff and operational presence in Saudi Arabia.
- Must comply with local corporate governance and reporting requirements.

c. Entrepreneurial License Setup (Startup & SME Model)

Saudi Arabia has developed a startup-friendly environment, encouraging international entrepreneurs and SME's to establish venture-backed startups or scale operations in the Kingdom.

Key Features:

- Issued by Monshaat (Small & Medium Enterprises Authority).
- No minimum capital requirement for startup licenses.
- 100% foreign ownership permitted in high-priority sectors such as fintech, technology, e-commerce, and sustainability.
- Accelerated licensing process (typically 2-3 weeks) under the Monshaat Startup Fast Track.
- Venture Capital & Angel Investment Eligibility – Startups can apply for government-backed VC funding through PIF and Monshaat investment programs.



Incentives:

- Tax exemptions and grants for high-impact startups in fintech, AI, and cloud computing.
- Access to incubators & accelerators such as Fintech Saudi, Misk Innovation Hub, and Monshaat Startup Hub.
- Government-backed funding and grants through the Saudi Venture Capital (SVC) Fund and the Public Investment Fund (PIF) entrepreneurship initiatives.

Challenges:

- Strict regulatory compliance for fintech and regulated startups.
- Limited access to government contracts without additional business registration as a full corporate entity.

d. Special Economic Zone (SEZ) Setup

Saudi Arabia has established Special Economic Zones (SEZs) to attract industry-specific foreign direct investment (FDI) by offering tax incentives, regulatory ease, and infrastructure support.

Key Features:

- 100% foreign ownership across permitted industries.
- Exemption from import duties on raw materials and equipment.
- Reduced corporate tax rates (as low as 5%) for SEZ-registered businesses.
- No VAT or withholding tax for cross-border transactions.
- Fast-track regulatory processing and simplified licensing.

Challenges:

- Restricted to specific industries, limiting applicability for service-based firms.
- Requires sector-specific approvals from relevant authorities.





1.3.2. Post-Incorporation & Compliance

Once a business is established, foreign companies must ensure regulatory compliance, licensing, renewals and personnel mobility.

- **MISA Investment License & Renewal** – Investment licenses must be renewed annually.
- **Commercial Registration (CR) & Renewal** – Issued by the Ministry of Commerce, CR must be renewed to maintain legal status.
- **Municipal Licenses (Baladiya)** – Businesses operating physical offices, warehouses, or stores must obtain municipal permits from the Ministry of Municipal, Rural Affairs & Housing.

Penalties for Non-Compliance:

- Failure to renew licenses may result in business suspension and financial penalties.
- Companies operating without a valid CR face fines up to SAR 100,000 (\$26,600).

1.3.4. Expatriate Personnel Requirements

Managing expatriate employees requires businesses to comply with visa, iqama, and workforce regulations.

Essential Work Visas & Iqamas:

- **Work Visas & Residency Permits (Iqama)** – Foreign employees must obtain a valid iqama within 90 days of arrival.
 - **Digital Identity Activation (Absher)** – Used for government transactions and workforce approvals.
- Saudization Compliance** – Companies must meet local hiring quotas or face restrictions on visa issuance.





1.4. Saudi Arabia's National Digital Transformation Strategy

Saudi Arabia's Vision 2030 is **at the core of its National Digital Transformation Strategy**, integrating **smart governance, economic digitalization, and industry 4.0** into its long-term vision, and aiming to develop a **diverse, knowledge-driven economy**. Digitalization has been identified as a key enabler of the Kingdom's economic diversification goals, leading to **massive public and private sector investments in ICT, cybersecurity, and AI**.

Key objectives include:

- **Positioning Saudi Arabia as a global technology leader.**
- **Creating a secure and resilient digital infrastructure.**
- **Enhancing AI capabilities** across multiple industries.
- **Accelerating digital transformation in government services.**
- **Attracting foreign investments into the ICT and cybersecurity sectors.**
- **Enhancing e-Government Services:** Streamlining public services through digital platforms.
- **AI & Big Data Adoption:** Expanding AI-powered solutions for government and business sectors.
- **Industry 4.0 & Smart Manufacturing:** Accelerating automation and IoT in industrial sectors.
- **Digital Inclusion & Connectivity:** Ensuring nationwide high-speed internet and bridging digital gaps.

1.5. The Economic Impact of ICT & Cybersecurity

Saudi Arabia's ICT sector is the **largest and fastest-growing in the MENA region**, valued at **\$44 billion**, with expectations to grow further driven by factors such as increasing digital adoption, strong government support, digital economy initiatives, and private sector investment. The country has successfully built **world-class digital infrastructure**, supporting and enabling the increased adoption of critical technologies including **5G, cloud computing, AI, and IoT** across the economy.

Compared to **UAE and Qatar**, Saudi Arabia boasts a **larger market size, stronger regulatory frameworks, and greater investment in AI-driven security solutions**. Strategic partnerships with **global ICT firms and cybersecurity agencies** are enhancing local capabilities and knowledge transfer.

Key economic contributions:

- The digital economy is projected to **contribute 19.2% of GDP by 2025**.
- AI is expected to add **\$135 billion to GDP by 2030**.
- FDI inflows have **surged 74% (2017-2023)**, surpassing **\$215 billion**.
- Cybersecurity investments are projected to **grow at a CAGR of 12%**, reinforcing national security efforts and corporate resilience.
- Smart city initiatives such as **NEOM, Red Sea Project, and Qiddiya** are integrating **AI-driven security solutions and IoT connectivity** to drive efficiency.

1.6. Government Leadership in Technology & Cybersecurity

Saudi Arabia's leadership has made **technology and cybersecurity national priorities**. Key government institutions driving the Kingdom's digital agenda include:



Saudi Data & AI Authority (SDAIA):

Oversees AI research, data policies, and AI talent development.



National Cybersecurity Authority (NCA):

Strengthens cyber resilience and security regulations.



Ministry of Investment (MISA):

Facilitates ICT sector growth through FDI initiatives.



Communications, Space & Technology Commission (CST):

Regulates ICT infrastructure and digital governance.



Ministry of Communication & Information Technology (MCIT):

Drives digital transformation initiatives.



National Technology Development Program (NTDP):

Transforming Saudi Arabia into a tech leader by fostering sustainable development and innovation.

1.7. The Rise of AI & Emerging Technologies

Artificial Intelligence (AI) is at the core of Saudi Arabia's digital revolution. Under Vision 2030, AI adoption is accelerating across various industries, including healthcare, finance, smart cities, and cybersecurity. The Kingdom aims to position itself as a global leader in AI-driven innovation through strategic investments and research initiatives and is rapidly integrating AI, blockchain, cloud computing, and IoT into its economic framework. The Saudi AI Strategy aims to:

- Develop **local AI talent** and invest in research and development.
- Integrate **AI across government, healthcare, finance, and defence**.
- Establish **AI-powered smart cities**, including NEOM and The Line.

Key AI Developments:

- **Saudi Data & AI Authority (SDAIA)** – Leading national AI strategies and policy frameworks.
- **AI in Cybersecurity** – Enhancing threat detection, automated response, and predictive analytics.
- **AI in Smart Cities** – Powering urban intelligence, traffic management, and resource optimization.
- **AI in Healthcare** – Driving telemedicine, diagnostics, and personalized treatment plans.

1.8. Cybersecurity as a National Priority

With the increasing adoption of digital technologies, cybersecurity is central to Saudi Arabia's national security and economic resilience.

- Over **7.1 million cyberattack attempts** recorded in **H1 2023**.
- The **Personal Data Protection Law (PDPL)** enhances data privacy regulations.
- The **National Cybersecurity Framework** mandates security measures for critical sectors.
- **Cybersecurity Research & Innovation Grants** allocate **\$1 billion for cybersecurity R&D**.

1.9. Public-Private Partnerships & Market Growth

Saudi Arabia is fostering a collaborative technology ecosystem by **incentivizing private sector participation**. Key developments include:

- Launch of **5 Special Economic Zones (SEZs)** with tax benefits for ICT firms.
- Partnerships with **Amazon, Google, Huawei, and Microsoft** for cloud computing and AI development.
- The **Public Investment Fund (PIF)** allocating **\$40 billion to AI and digital transformation**.



1.10. Future Outlook

Saudi Arabia's ICT and cybersecurity landscape is **undergoing rapid transformation**, underpinned by **strong government support, foreign investments, and AI-driven initiatives**. The Kingdom is setting new benchmarks in **digital infrastructure, cybersecurity, and innovation**, solidifying its position as a **leading global technology powerhouse**.

The following sections will explore in greater detail how Saudi Arabia is building a **future-proof digital ecosystem**, strengthening its **cybersecurity defences**, and fostering **technological innovation** through **Vision 2030**.





2. Economic & Digital Market Landscape

2.1. Saudi Arabia's Economic Strength and Growth Trajectory

Saudi Arabia, the **largest economy in the Middle East and North Africa (MENA) region**, continues to demonstrate **strong economic fundamentals**, backed by **robust government initiatives, strategic investments, and economic diversification policies**. With a **GDP exceeding \$1.1 trillion**, the Kingdom's economic strategy is increasingly focused on reducing its reliance on hydrocarbons and expanding its **non-oil sectors**, particularly **ICT, cybersecurity, AI, and fintech**.

Despite **fluctuations in global oil markets**, Saudi Arabia has successfully **diversified its economic base**, with **non-oil activities now contributing over 50% to GDP**. The **Vision 2030** agenda has accelerated investments into key sectors, including digital transformation, smart infrastructure, and high-tech industries.

Additionally, the Kingdom's **Public Investment Fund (PIF)**, which manages over **\$925 billion in assets**, plays a crucial role in funding **strategic digital and technology projects**, positioning Saudi Arabia as an emerging global leader in ICT and cybersecurity.

2.2. The Rapid Growth of Saudi Arabia's Digital Economy

Saudi Arabia's digital economy is one of the fastest-growing in the region, with the ICT sector valued at \$44 billion, making it the largest ICT market in MENA. The Kingdom's digital transformation strategy, combined with government-driven investment in infrastructure, AI, and cloud services, has enabled rapid expansion in:

- **E-Government & Digital Public Services:** Saudi Arabia ranked **first in MENA** in the **UN Digital Government Services Maturity Index (2023)**.
- **5G & Broadband Penetration:** The Kingdom has one of the highest **5G adoption rates, supporting smart city development, IoT integration, and cloud expansion.**
- **Cloud Computing & Data Centres:** Saudi Arabia is set to invest **\$15 billion in data centres** by 2030, with major players like **Amazon, Microsoft, Oracle, and Huawei** establishing operations in the country.
- **Artificial Intelligence (AI) and Emerging Technologies:** AI is expected to contribute **\$135 billion to Saudi GDP by 2030**, and the Kingdom aims to **train 2,000 AI specialists** as part of its AI national strategy.

2.3. Key Government Institutions Supporting ICT & Cybersecurity

The rapid development of the ICT and Cybersecurity sectors in Saudi Arabia is regarded as a national priority and this is evidenced by the key government institutions established to drive the Kingdom's digital agenda, these include:

2.3.1. Saudi Data & AI Authority (SDAIA)

SDAIA is tasked with positioning the Kingdom as a global leader in the elite league of data-driven economies and unlocking the value of data as a national asset to realize Vision 2030's aspirations. SDAIA sets the national data and AI strategic direction and oversees its implementation through data governance in addition to providing foresight and data-related capabilities and enhancing them through continuous innovation in the field of AI.

SDAIA Objectives

01

Establishing the governance of data and AI.

02

Providing foresight and data-related capabilities and enhancing them through continuous innovation in the field of AI.

03

Ensuring the positioning of the Kingdom as a global leader in the elite league of data-driven economies.

National Strategy for Data & AI

At SDAIA, we have developed the National Strategy for Data & AI (NSDAI) based on six dimensions and strategic objectives, which are:



Ambition

Position KSA as the global hub where the best of Data and AI is made reality.



Policies & Regulations

Enact the most welcoming legislation for Data and AI businesses and talents.



Investment

Attract efficient, stable funding for qualified Data and AI investment opportunities.



Skills

Transform KSA's workforce with a steady local supply of Data and AI-empowered talents.



Research & Innovation

Empower top Data & AI institutions to deliver top-notch services, spearhead innovation, and maximize the impact.



Ecosystem

Stimulating Data and AI adoption with the most collaborative, and forward-thinking ecosystem.



2.3.2. National Cybersecurity Authority (NCA)

The NCA aims at strengthening cybersecurity to safeguard the State's vital interests, national security, critical infrastructures, priority sectors, and government services and activities. The NCA is responsible for the **National Cybersecurity Strategy** which aims to ensure the establishment and maintenance of a resilient, secure, and trusted Saudi cyberspace that enables growth and prosperity, which it achieves by the implementation of three main tracks.



The National Cybersecurity Strategy

A resilient, secure, and trusted Saudi cyberspace that enables growth and prosperity.



Resilient

Underscores the need to recover quickly from cyber events and incidents



Secure

Emphasizes protection of the confidentiality, integrity, and availability of digital or digitally connected assets, networks, and systems



Trusted

Assures investors and citizens that the Saudi cyber ecosystem is a safe place to conduct business



Saudi Cyberspace

Provides a national point of emphasis on the Kingdom's cyber program designed for its need and priorities



Enables

Highlights that the digital world contributes to and facilitates greater ambitions and needs



Growth

Reflects the priority of economic growth to the Kingdom and indicates the growth opportunities provided through cyberspace



Prosperity

Emphasizes that this program is ultimately about the social and economic well-being of Saudis

Key Functions Include:

a Cyber Regulations & Operations

- Regulatory Documents
- Registration & Licensing

b Cyber Industry Development

- Educational Programs
- National Cybersecurity Academy
- Qualifying & Training Cyber Cadres
- Encouraging Innovation, Research & Investment

2.3.3. Communications, Space & Technology Commission (CST)

The CST is responsible for protecting consumers, promoting investment, and safeguarding competition in order to ensure reliable communications services and innovative digital technologies. The scope of the CST includes three industrial sectors Communications, Space and Technology and the CST is responsible for regulating ICT infrastructure and digital governance.



CST RISE Strategy





وزارة الاتصالات وتقنية المعلومات
MINISTRY OF COMMUNICATIONS AND INFORMATION TECHNOLOGY

ICT Strategy



هيئة الاتصالات والفضاء والتقنية
Communications, Space & Technology Commission

CST Strategy

<p>Protecting Users</p> <p>To ensure provision of high quality services across all sectors</p>	<p>Encouraging competition and investment</p> <p>In addition to enhancing the sustainability of ICT ecosystem</p>	<p>Enabling digitalization within Kingdom's society</p> <p>By enabling digital transformation across all digital economy sectors in the Kingdom</p>	<p>Organizational excellence</p> <p>Building CST's internal capacities and raising its efficiency to achieve its strategic priorities</p>
 <p>Strategic directions towards sustainability</p> <p>The Kingdom becomes a pioneer in economic growth that is based on environmental and social sustainability</p>	 <p>Strategic directions for digital content market</p> <p>Raising the level of regulatory maturity for digital content platforms by building a clear and transparent regulatory framework</p>	 <p>Strategic directions for IT and emerging technologies sector</p> <p>Enabling the sector by supporting the private sector, attracting investments and developing the innovation ecosystem</p>	 <p>Strategic directions for frequency spectrum sector</p> <p>Efficient and effective management of the frequency spectrum in cooperation with the concerned authorities</p>

2.3.4. Ministry of Investment for Saudi Arabia (MISA)

The ongoing transformation of Saudi Arabia under Vision 2030 is unlocking new opportunities in the Kingdom at an unprecedented pace. MISA is responsible for regulating, developing, and promoting domestic and foreign investment in the Kingdom and protecting the rights of investors. It facilitates access to investment opportunities by developing and maintaining a reliable, robust, business-friendly ecosystem, working across government to ensure investors and businesses are supported through their investment journey. Specifically with regard to the ICT and Cybersecurity sectors, this includes facilitating growth through KSA and FDI initiatives.

MISA is responsible for many critical national activities, including the following four key activities which are of particular interest here:

- The National Investment Strategy
- Investment Development, including **“Invest Saudi”**
- Laws & Regulations
- Vision Realisation Office



The National Investment Strategy (NIS)

By leveraging and building on Saudi Arabia's strengths, the NIS focuses on increasing investment in the Kingdom and the quality of that investment, to drive economic development across priority sectors, in line with Vision 2030 with a focus on increased domestic and international private sector investment.

Sectors of particular importance include green energy, **technology**, healthcare and biotechnology, and **advanced modes of mobility and logistics**, as well as cross-cutting themes such as **innovative startups** and **entrepreneurship**.

Key AI Developments:

- Triple the levels of investment between 2019 and 2030
- Increase FDI by more than 20x from SAR 17bn in 2019 to 388bn in 2030
- Increase investment* from 22% of GDP in 2019 to 30% in 2030 (*as measured by Gross Fixed Capital Formation)
- Catalyse new investment across existing and emerging sectors

Target Initiatives



Investment Opportunities



Investors



Funding



Competitiveness and enablers

How Will The NIS Be Delivered? Four objectives leading the way for sustainable growth and expansion

Develop strong and diverse investment opportunities

Grow contribution of various investors in the investment landscape

Diversify funding sources

Create an attractive and competitive investment environment for global and domestic investors



Investment Development, including “Invest Saudi”

MISA’s role is to facilitate access to the investment opportunities presented by Vision 2030, with a particular focus on 15 priority sectors, including the ICT sector. MISA retains a team of experts to provide advice and support to both domestic and international investors across these 15 priority sectors in various aspects, including:

- As partners connecting investors to the public and private investment ecosystem
- Providing insights relevant to the investors’ business plans and investment development in Saudi Arabia
- In supporting in the identification and development of investment opportunities published on Invest Saudi
- In enhancing and improving policy & regulation
- With enablement and entailments to foster investment in the Kingdom
- As the leading body for the international investor license



MISA 15 Priority Sectors



Agriculture & Food Processing



Energy



Healthcare & Life Sciences



Environment Services



Industrial and Manufacturing



Pharma & Biotech



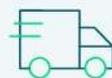
Chemicals



Real Estate



Financial Services



Transport & Logistics



Mining and Metals



Tourism & Quality of Life



Information and Communication Technology



Human Capital Innovation



Aerospace and Defense

Invest Saudi

Invest Saudi's role is to facilitate investments in Saudi Arabia that support the country's economic growth and position it at the forefront of the global business world. It is designed to provide a clear, unified, and effective message about the Kingdom's investment opportunities to both foreign and domestic investors, as well as private sector businesses. It is therefore the primary point of contact for foreign investors seeking assistance before, during, and after their entry into the Kingdom.

Invest Saudi offer a range of services to support investors, including the following which are summarised below:

- i. Business Visa for Visiting Investors
- ii. MIZA Value Added Services
- iii. Strategic Investor Program
- iv. Regional Headquarters (RHQ)
- v. Startup Saudi



Business Visa for Visiting Investors – An online service that allows foreign investors to apply for a digital visit visa for the purpose of exploring the investment opportunities in the Kingdom of Saudi Arabia.

MIZA Value Added Services – MIZA is a value-added service offering program, which supports the growth and expansion of our partners' business, including identifying their needs and facilitating access to business service providers from the private sector.

Key MIZA Services

Financial and Tax Consultancy Services

We provide the highest levels of financial services and consultancy to investors by following a professional approach to support them in their business growth and expansion.

- Zakat & VAT advisory.
- Issuance of zakat and income certificates.
- Zakat, Tax and Customs Authority facility registration.
- Facility financial accounting system compliance with VAT regulations.
- Facility billing and transactions.

Business Setup and Legal Services

We provide full support at the stage of business establishment, including models and tools that support investors to facilitate the practice of their business.

- Business Setup Consultancy
- Issuance of visit and work visa
- Trademark and logo registration
- Recruitment and talent headhunting
- Digital marketing and paid advertisement

Logistical Services

An exceptional range of services to support logistical needs and public relations; To facilitate the movement of investors and qualify the place of residence at the same time.

- Transportation of individuals
- Customs registration and clearance
- Furniture moving and Installation
- Accommodation booking
- Direct support from experts

Property Leasing

A group of real estate services that support investors needs for an exceptional business experience.

- Obtaining required permits
- Authenticating leasing contract and relevant documents
- Office design and furnishing
- Office spaces and residential spaces offering

Strategic Investor Program – An initiative to provide differentiated services and advantages to the large and strategic national and foreign investors.

CURRENT SERVICES ...



**Investment opportunities
development**



**Expert assistance on
business regulations**



**Personalized business
setup support**



**Personalized advocacy
and troubleshooting**



**Matchmaking and business
partnership development**



**Advisory on
investment incentives**

COMING SOON ...



**Customized KSA
market insights**



**Market intelligence
and insights in key
international markets**



**Location solutions
in industrial and
economic zones**



**Advisory on visa
requirements and
process**



Guidance on Saudization formula



Saudi talent identification solutions



Investment opportunity development in international markets



Support in R&D partnership development



Advocacy and troubleshooting in key international markets



Advisory on financing opportunities in KSA



Regional Headquarters (RHQ) – The RHQ Program is a joint initiative by the Ministry of Investment and the Royal Commission for Riyadh City, created as part of Saudi Arabia’s Vision 2030 and the National Investment Strategy. The program is designed to enable and facilitate the ambitious growth plans of participating organizations in the region.

RHQ Incentives

RHQ offers specially designed incentives such as human capital incentives, tax incentives, and special handholding support services.



10-year Saudization Exemption

Exemption from complying with Saudization percentage requirements for 10 years for the RHQ entity



Visa Limit Exemption

250 visas are allocated automatically from day 1 of the RHQ license being granted



Waiver of Professional Accreditation

The RHQ employees are exempted from professional accreditation requirements applicable in the Kingdom if they are duly accredited in the country of origin, except of Engineering and Medical certification



Expat Work Visas for Professions Restricted to Saudi Nationals

RHQ employees benefit from an accelerated issuance of work visas for professions normally restricted to Saudi nationals



Spouse work permit and Dependent age extension to 25 years old

The RHQ employees are exempted from professional accreditation requirements applicable in the Kingdom if they are duly accredited in the country of origin, except of Engineering and Medical certification



A 30-years 0% Withholding Tax

Withholding tax payments to non-resident related parties, Withholding tax (WHT) on dividend payments from RHQ to its foreign parent entity(ies), Withholding tax for payments to non-resident unrelated parties for services necessary to carry out RHQ activities



Eligibility for Premium Residency

Premium residency for RHQ's executives subject to the Eligibility Premium Residency Program



Handholding support through MIZA

Exceptional value-added services that support company's growth and expansion



A 30-years 0% Corporate Income Tax

0% corporate income tax for RHQ activities



Startup Saudi – A program to empower local, regional, and global entrepreneurs, startups, venture capitalists (VCs), and ecosystem enablers, to succeed and grow within the Kingdom. The program aims to streamline the startup journey, offering guidance, networking, and seamless access to resources. By collaborating with ecosystem enablers, it eliminates hurdles and fosters a conducive regulatory environment.





Market Studies

Gain Valuable insights with our comprehensive market studies, helping you understand industry trends and customer needs to optimize your strategy.



Advisory & Guidance

Benefit from expert advice and personalized guidance to navigate your business journey effectively and make informed decisions.



License & Set-up

Streamline your business establishment with our efficient licensing and setup services, ensuring a smooth start for your operations.



Strategic Partnerships

Unlock new growth opportunities by connecting with key industry enablers and forming strategic partnerships that drive mutual success.



Opportunity Matchmaking

Explore the opportunities available in the kingdom and get easy, direct access to key ecosystem partners.



Access to Financing & Incentive Programs

Explore a variety of financing options and incentive programs to support your financial needs and fuel your business growth.



Delegation Visits & Tours

Experience firsthand the business opportunities and local culture through our organized delegation visits and tours.



Events & Participation

Engage with the entrepreneurial community at our curated events, fostering learning, networking, and showcasing your business to the right audience.

Enrollment Requirements



Startup Requirements:

- Technology-enabled
- Innovative business model (product or services)
- Strategically aligned with national vision
- High potential for growth



Ecosystem Enablers & VC Requirements:

- Proven track record in supporting startups for scalability and enhancing the entrepreneurship ecosystem.
- Clear value added services provide for Startups & Entrepreneurs.
- Establish partnership with local key partners is a plus.

MISA Resources

Incentives

To facilitate investment in Saudi Arabia, the Kingdom offers appealing incentives designed to encourage investment with the potential to diversify and improve the Kingdom's competitiveness. Incentives include:

- Loan Programs – Provides supported access to a range of Loan Programs.
- Energy & Utility Enablement in Industrial Cities – Access to incentives through a range of service providers for energy and utilities in industrial cities.
- Employment Support Program – Support for the training and development of Saudi employees.
- Export Credit Financing, Guarantee and Insurance – Incentives for pre-export financing to Saudi exporters' buyers and post-shipment financing to international buyers of Saudi goods.
- Land Solutions – Attractive land solutions in Special Economic Zones (SEZ's), Industrial Cities, Economic Cities and more.
- Financial Solutions for R&D - Investment in local and international R&D projects with potential to boost the country's economic growth.
- Tax Credit & Exemption - Up to a 50% tax credit on Saudi national worker's payroll and training costs for 10 years.
- SME's Ecosystem Stimulus - The Indirect lending Initiative delivered through Monsha'at, is a program designed to provide financing solutions and loans with competitive advantages for SMEs through private sector financial institutions.

Reports and Publications

Regular economic reports and publications that will help better understanding the investment ecosystem in Saudi Arabia.

Laws and Regulations

Relevant laws and regulations that support investors throughout the investment journey in the Kingdom.



Updated Investment Law

The Investment Law was redesigned as an integrated Law to replace the foreign investment Law issued by Royal Decree No. (M/1) dated 5/1/1421H, and aims to develop and enhance the competitiveness of the investment environment in the Kingdom, contribute to economic development, and create job opportunities by providing an attractive investment climate.

Investment Data

Data intended to provide an overview of key investment topics such as FDI and Investment licenses statistics.



Vision Realisation

MISA contributes to the achievement of Vision 2030, specifically the Strategic Objectives listed here below, by managing the projects of the Vision Realisation Programs as well as projects of the Ministry, and contributes to overcoming difficulties, resolving problems, and coordinating with the concerned parties.



Attract foreign and local investments



Push forward the cooperation between the GCC countries



Develop regional economic relations



Develop economic relations with global partners



Support major national companies to consolidate their leadership globally



Develop the promising local companies into regional and global leaders

MISA Managed Vision 2030 VRP Projects

- National Industrial Development & Logistics Program
- Public Investment Fund Program
- National Transformation Program
- Pilgrim Experience Program
- Housing Program
- Human Capacity Development Program
- Quality of Life Program
- Privatisation Program
- Financial Sector Development Program
- Health Sector Transformation Program
- Fiscal Sustainability Program



2.3.5. Ministry of Communication & Information Technology (MCIT)

The MCIT is tasked with laying the foundations for the pillars of a digital strategy to enable a connected present and an innovative future. Building a digital infrastructure that enables innovative talents to seize the opportunities of the fourth industrial revolution, contributing towards economic sustainability, global leadership and quality of life.

The MCIT's strategy includes a focus on attracting leading international companies specialising in emerging technologies, increasing the local content share, improving the technical skills of the local workforce. Additional focus is on promoting knowledge as well as technical and digital awareness, driving technical innovation by promoting research and development, enabling the development of mega projects, as well as supporting coordination and concerted efforts between the ICT-related bodies in the public and private sectors.



Strategic Objectives

- Grow the ICT sector by 50%
- Increase the ICT sector's contribution to GDP by SAR 50 billion
- Support efforts to localise technology in the Kingdom by raising the percentage of workforce localization to reach 50%
- Attract foreign investment
- Contribute to supporting women's empowerment and participation

2.3.6. National Technology Development Program (NTDP)

Facilitates Saudi Arabia's transformation into a leading global Technology Hub and strengthen the Saudi tech-ecosystem with innovative financial solutions, offering 18 products to support tech entrepreneurs and enterprises.

Empowering Technological Advancement

NTDP contributes to strengthening Saudi Arabia's technology sector by offering innovative solutions and collaborative opportunities. We work hand-in-hand with stakeholders to create a vibrant ecosystem that supports your business's growth and sustainability.

797 +

Startups Created

7.8 SAR Billion

VC Funding

16

International Companies Relocated

MCIT Products & Partners

NeXTERA

Transform

LendTech™

Tamkeen

MVP Lab



Fuelling Entrepreneurial Growth

Stimulating the rise of tech entrepreneurs by offering incentives that boost the creation of innovative startups, paving the way for a vibrant tech industry.

Enable Potential Unicorns

Offering comprehensive support to potential unicorn companies, helping them scale and thrive, and positioning Saudi Arabia as a hub for high growth tech enterprises.

Key Achievements:

- SAR 11.2bn GDP impacted
- 17,000 new jobs created
- 797+ Startup Companies Founded
- SAR 11.2bn investment for supported companies
- 154+ international companies attracted

Strengthen Local Tech Companies

Providing access to financing and investment opportunities, enabling local tech firms to expand their competitive edge, grow domestically and reach global markets.

Cultivating Tech Talent

Ensuring a thriving environment for tech professionals by developing local talent, attracting global experts, and fostering innovation and knowledge localization.



2.3.7. Saudi Venture Capital (SVC)

SVC is a Government VC established in 2018 by Monshaat as part of the Financial Sector Development Program (FSDP) to stimulate venture investments by investing in funds as well as co-investing with angel groups for the primary goal of minimizing financing gaps for startups and SME's by investing SAR 2.8 billion (\$750 million).

SVC's Investment Programs

Investment in Funds

SVC invests in three fund types (Venture Capital, Private Equity and Venture/Private Debt) to catalyse venture investments and minimise fund-raising entry barriers for fund managers who are looking to invest in high-growth startups and SME's with growth potential.

Direct Investments

Direct investment in startups and SME's to catalyse investments for strategic or financially-driven objectives.

Investment Guidelines



Sector

Impact driven with focus on strategic sectors.



Stage

Pre-seed to pre-IPO.



Contribution

SVC may contribute up to 65% of the total fund size. The aggregate contribution of Saudi government affiliated entities is capped at 65% of the total fund size (including SVC's commitment).



Geography

Saudi based companies and companies expanding to Saudi Arabia.



Sector

Impact driven with focus on strategic sectors.



Stage

Early to late stages.



Minimum Ticket Size

SAR 1,000,000 (\$267K)



Contribution

SVC's contribution capped at 30% of each round.



2.4. Government Policies Driving Digital Growth

The Kingdom's digital economy is being propelled by **landmark government policies and regulatory frameworks**, including:

- **Vision 2030:**
A comprehensive national transformation strategy focusing on digital innovation, AI, and cybersecurity.
- **National Digital Transformation Strategy:**
A roadmap to achieving **92% digitalization of government services** by 2025.
- **Saudi Data & AI Authority (SDAIA) Strategy:**
Aims to position the Kingdom as a **global AI and big data hub**, with a focus on digital sovereignty.
- **Cloud First Policy:**
Encouraging widespread **adoption of cloud computing**, enhancing **data security and regulatory compliance**.
- **National Cybersecurity Strategy (NCS):**
Developed by the **National Cybersecurity Authority (NCA)** to strengthen **resilience against cyber threats**.
- **Personal Data Protection Law (PDPL):**
Regulates data privacy and mandates data localization.
- **Digital Government Strategy 2023-2030:**
Enhances e-government services and interoperability.



2.5. The Role of the Private Sector and Foreign Investment

The private sector plays a **pivotal role** in Saudi Arabia's ICT expansion, with international tech giants increasing their presence in the country. Saudi Arabia is actively attracting both **domestic and foreign investments** into its ICT and cybersecurity sectors, with **Foreign Direct Investment (FDI) inflows in ICT surging by 36% in 2023**, demonstrating investor confidence in Saudi.

Key drivers attracting global investors include:

- **Special Economic Zones (SEZs)** offering tax incentives for technology companies.
- **Investment-friendly regulations**, including a **30-year corporate tax exemption** for multinational companies setting up regional headquarters in Saudi Arabia.
- **Public-Private Partnerships (PPPs)** fostering collaboration between government and private tech firms and encouraging global companies to collaborate with Saudi enterprises.
- **Foreign Direct Investment (FDI) Reforms** – Full foreign ownership laws make it easier for international firms to establish operations.
- **Financial incentives**, such as government grants and venture capital funding for tech startups.
- **Government-led ICT Investment Funds** – Public sector-backed initiatives to foster startup ecosystems.



2.6. Addressing the Cybersecurity & ICT Talent Gap

To sustain long-term sectoral growth, Saudi Arabia is investing heavily in developing a skilled ICT and Cybersecurity workforce. Key workforce initiatives include:

- **Saudi Vision 2030's Human Capital Development Program:**
A focus on upskilling local talent in emerging technologies.
- **Scholarships & Training Programs:**
Government-funded initiatives for specialized cybersecurity certifications and ICT training.
- **University & Industry Collaboration:**
Academic institutions partnering with global tech firms for research and talent development.

Emerging Trends in the ICT & Cybersecurity Workforce include:

- **Increase in AI & Cybersecurity Certifications:** Growing demand for AI, machine learning, and cybersecurity professionals.
- **Remote & Hybrid Workforces:** Adoption of flexible work policies to attract international talent.
- **Incentivizing Local Talent:** Competitive salaries and benefits to retain top talent within the Kingdom.
- **Stronger Collaboration Between Academia & Industry** – Creating a robust talent pipeline through tech incubators.
- **International Recruitment & Knowledge Transfer** – Encouraging foreign professionals to train local talent.

2.7. Digital Infrastructure & Smart Cities

Saudi Arabia is heavily investing in **next-generation infrastructure**, including **smart cities, AI-powered governance, and digital healthcare**. Mega-projects include:



NEOM:

- A \$500 billion futuristic city integrating AI, robotics, and renewable energy.



The Line:

- A smart urban development prioritizing connectivity, automation, and sustainable technology.



Red Sea Global & Qiddiya:

- High-tech tourism and entertainment hubs incorporating advanced digital infrastructure.



Digital Twin Initiatives:

- Virtual city planning powered by AI and IoT to optimize urban management.

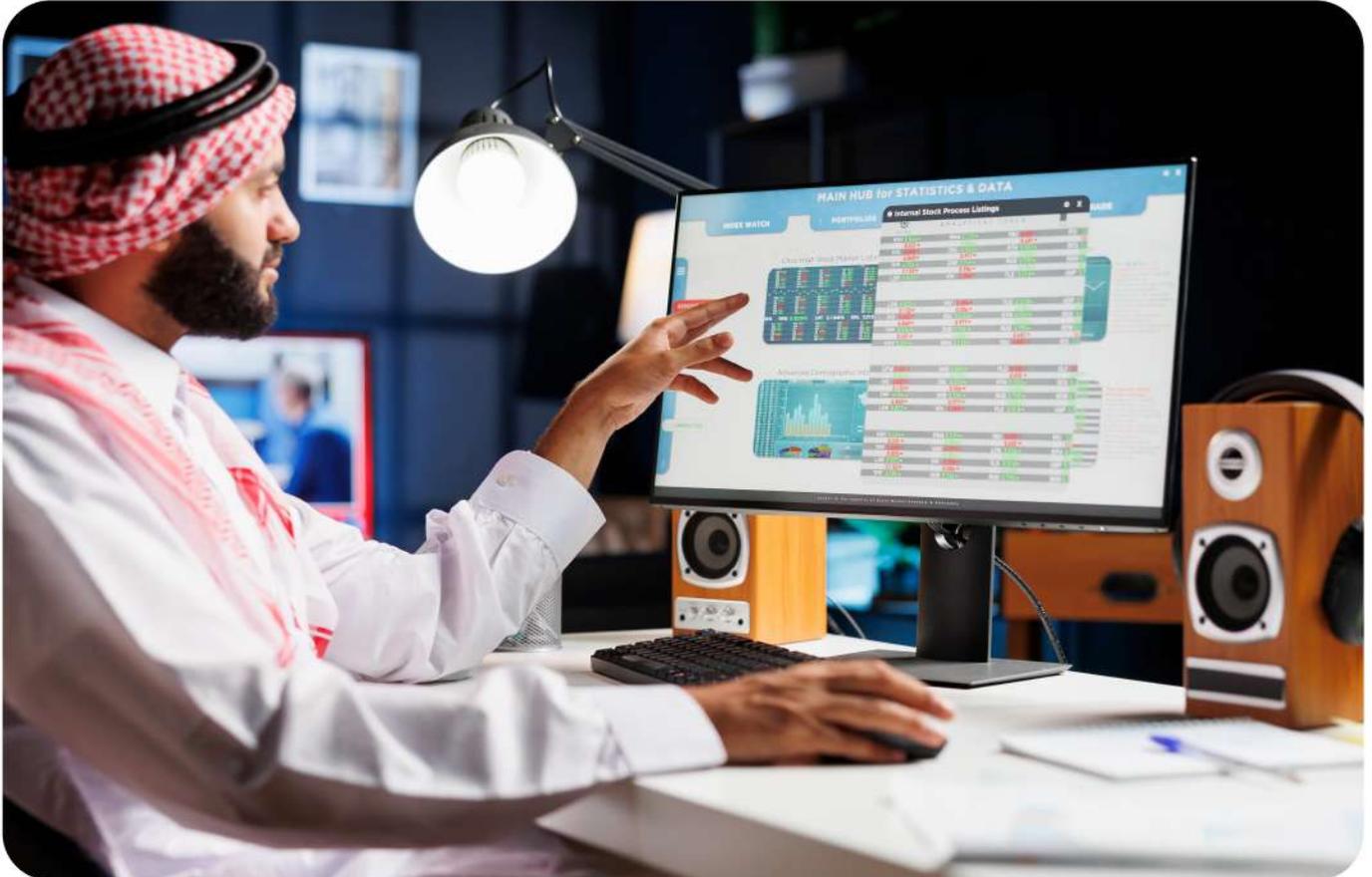


2.8. Financial Performance and Market Projections

Saudi Arabia's ICT sector is projected to **grow at a compound annual growth rate (CAGR) of 8%**, with key segments like **cloud computing, AI, cybersecurity, and IoT** expanding even faster. **AI spending alone is expected to reach \$1.9 billion by 2027.**

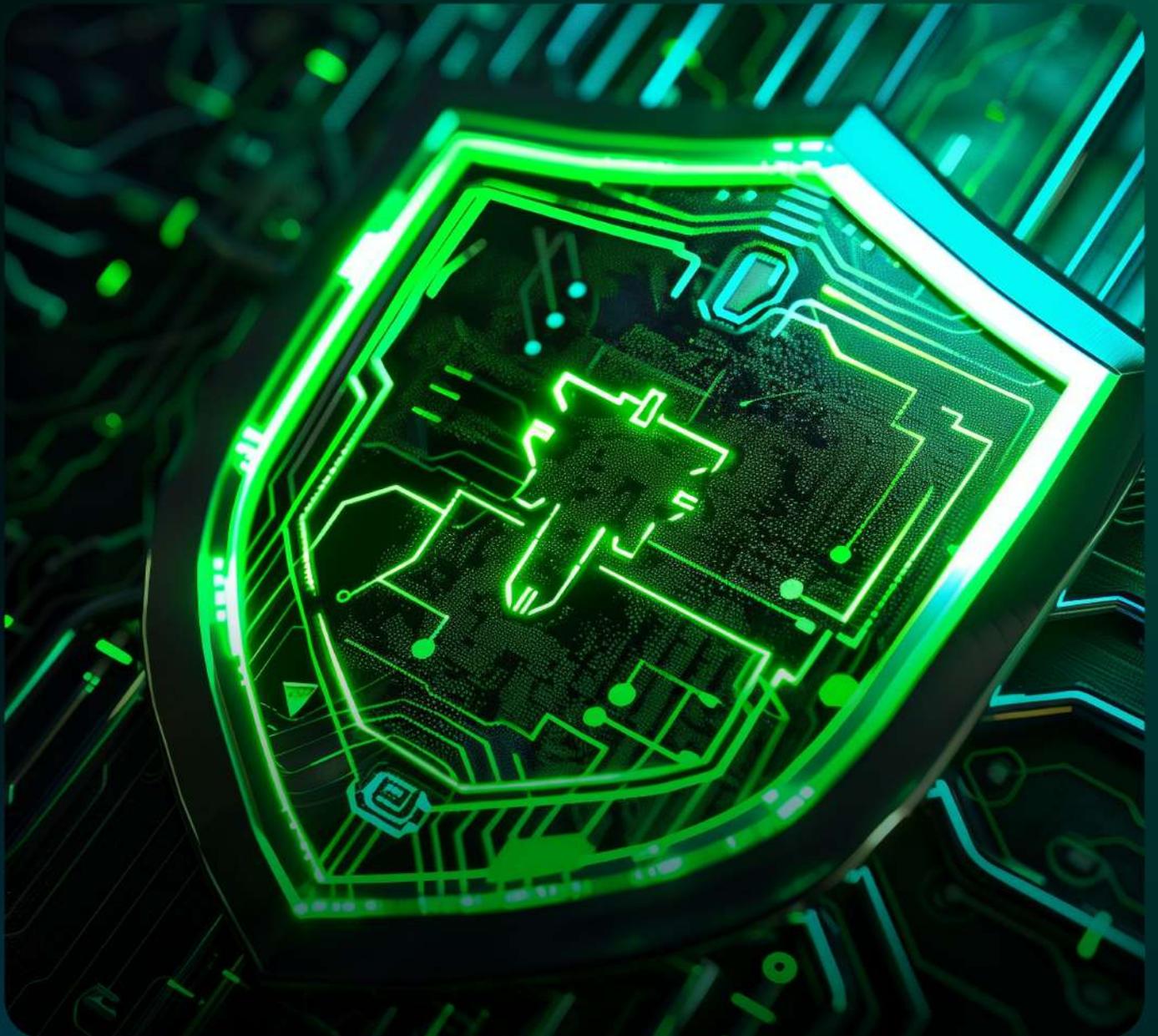
The **capital markets** are also witnessing **increased foreign investor participation**, driven by:

- **The inclusion of Saudi stocks in major global indices.**
- **Relaxed foreign ownership restrictions** for ICT firms.
- **Government-backed digital finance and fintech initiatives.**



2.9. Conclusion: A Thriving Digital Future

Saudi Arabia's **economic strength, digital transformation initiatives, and proactive policy frameworks** are setting the stage for a **thriving ICT and cybersecurity ecosystem**. With **continued investment, regulatory enhancements, and strategic international partnerships**, the Kingdom is well on its way to becoming a **leading global technology hub**.



3: Emerging Technologies Shaping Saudi Arabia's ICT & Cybersecurity Landscape

Saudi Arabia's **digital transformation** is heavily driven by **emerging technologies** such as **Artificial Intelligence (AI), Cloud Computing, Blockchain, and Cybersecurity Innovations**. These technologies are at the forefront of **Vision 2030**, shaping the Kingdom's journey toward becoming a **global leader in digital infrastructure, security, and AI-driven solutions**.

The government, led by **SDAIA, the National Cybersecurity Authority (NCA), and the Communications, Space & Technology Commission (CST)**, has positioned these technologies as **strategic enablers** for economic diversification and national security. The Kingdom is actively investing in **AI research, cloud infrastructure, blockchain implementation, and cybersecurity frameworks** to enhance digital resilience and global competitiveness.

3.1. The Role of Artificial Intelligence (AI) in Digital Transformation

AI is at the core of Saudi Arabia's **national digital strategy**, driving efficiencies in **smart cities, cybersecurity, financial services, healthcare, and industrial automation**. The national AI Strategy provides a roadmap for Saudi Arabia to become a global leader in AI-driven innovation through strategic investments and research initiatives, with key focus areas including the development and nurturing of **local AI talent**, investment in research and development, the application of AI across government, healthcare, finance, and defence and the establishment of AI-powered smart cities. With AI expected to contribute **\$135 billion to Saudi Arabia's GDP by 2030**, the Kingdom is pressing ahead with realization of these strategic goals in part by making aggressive strides in **AI-driven automation, data analytics, and security innovation**.

Key AI Developments in Saudi Arabia:



Saudi Data & AI Authority (SDAIA)

Leading AI policy, research, and implementation, ensuring **data sovereignty and AI governance**.



AI in Healthcare

AI is transforming **medical diagnostics, robotic surgeries, telemedicine and personalized treatment plans** expanding access to digital healthcare services and enhancing patient care.



AI in Smart Cities & Mobility

AI-driven **traffic control, autonomous vehicles, drones, resource optimization, and public safety initiatives** are key to Saudi's smart city vision.



AI-Powered Cybersecurity

AI enhances **threat detection, predictive analytics, and automated response mechanisms** against cyber threats.



Industrial AI & Automation

AI-driven **manufacturing, logistics, and energy sector automation** is streamlining operations and increasing efficiency.



National AI Strategy

Saudi Arabia aims to **train 2,000 AI specialists**, develop AI-driven solutions, and position itself as an **AI innovation hub**.

With these initiatives, the Kingdom is establishing itself as a regional leader in AI research, policy, and industry adoption.

3.2. The Expanding Role of Cloud Computing & Edge Technologies

Saudi Arabia's **cloud computing market** is experiencing **exponential growth**, driven by its **Cloud-First Policy**, which mandates cloud adoption across enterprises and government agencies. As a result, cloud adoption in Saudi Arabia is growing rapidly, driven by the Cloud First Policy and facilitated by **government initiatives, multinational investments, and the rising demand for scalable IT infrastructure**. This rapid scale adoption is evidenced by the projected investment of **\$15 billion in cloud data centres** by 2030, which is attracting major players like **Amazon, Microsoft, Oracle, and Huawei**.

Cloud & Edge Computing Market Highlights:



\$10 Billion Cloud Market by 2025

Saudi Arabia is on track to become a **regional leader in hybrid and multi-cloud solutions**.



Growth of Edge Computing

Edge technologies enable **low-latency AI applications, real-time IoT processing, and 5G-driven solutions**.



Cloud Data Sovereignty Regulations

Ensuring **localized data storage and regulatory compliance**, reducing dependency on foreign-hosted data.



AI & Cloud Convergence

AI workloads are increasingly being **optimized for cloud platforms, boosting efficiency in finance, healthcare, and smart cities**.



Public-Private Cloud Investments

Saudi's government is incentivizing **domestic cloud infrastructure investments** to reduce dependency on global providers.



With the rise of multi-cloud strategies, sovereign cloud frameworks, and AI-integrated cloud platforms, Saudi Arabia is building a future-proof digital infrastructure.

3.3. Blockchain & Cybersecurity Innovations

Blockchain is emerging as a key enabler of **secure, decentralized digital ecosystems** in Saudi Arabia and its application is **gaining traction in KSA**, and it is playing a **critical role in key processes within cybersecurity, fintech, digital identity management and supply chain transparency** amongst others. The adoption of AI and its integration into these key processes is driven by the **Saudi National Blockchain Strategy**, which is spearheaded by **SDAIA and CST**, and focuses on **regulating blockchain adoption across key industries**.

Key Blockchain & Cybersecurity Advancements:



National Blockchain Strategy

Establishing a **regulatory framework for blockchain** to enhance security and transparency.



Blockchain in Digital Identity

Secure **identity verification, fraud prevention, and cross-border authentication solutions**.



Smart Contracts & Fintech

Transforming **banking, trade finance, and supply chain logistics** through decentralized applications.



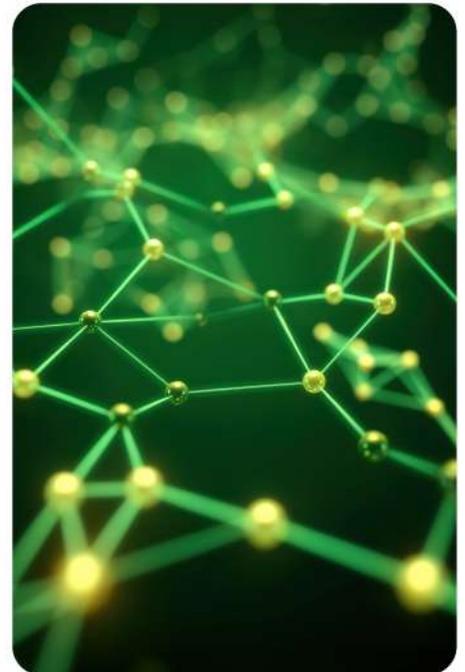
Blockchain for Cybersecurity

Improving **data integrity, securing transactions, and preventing cyber fraud** in financial services.



Saudi Central Bank's Digital Currency (CBDC) Exploration

Evaluating **blockchain-based digital riyal** to enhance financial stability and efficiency.



Saudi Arabia's **integration of blockchain with cybersecurity solutions** is reinforcing its **national resilience, securing financial systems, and enabling safer digital transactions**.

3.4. Conclusion: Saudi Arabia's Digital Future

The Kingdom's aggressive **investment in AI, cloud computing, and blockchain** is driving **unprecedented digital transformation**, reinforcing its ambition to **become a global technology leader in ICT and cybersecurity**. With its **strong regulatory frameworks, AI-driven cybersecurity strategies, and commitment to data sovereignty**, Saudi Arabia is setting new **benchmarks for digital innovation and national resilience**.

By aligning its digital transformation roadmap with **Vision 2030**, Saudi Arabia is **building a connected, intelligent, and secure digital ecosystem**, positioning itself at the forefront of **technological leadership in the Middle East and beyond**.





4: Cybersecurity Landscape & National Resilience

Saudi Arabia's rapid **digital transformation** has elevated **cybersecurity** as a **national priority**, reinforcing the Kingdom's **resilience against evolving cyber threats**. With **Vision 2030** driving the expansion of **smart cities, AI-powered infrastructure, and cloud-based government services**, Saudi Arabia is **strengthening its cybersecurity ecosystem** to protect **critical national infrastructure, financial systems, and sensitive citizen data**.

The **National Cybersecurity Authority (NCA)** leads Saudi Arabia's cybersecurity strategy, working closely with **public and private sector entities** to establish robust cyber defences, enforce data protection laws, and enhance **cyber resilience**. Additionally, the Kingdom ranks **first globally for cybersecurity** in the **2024 World Competitiveness Yearbook**, underscoring its **commitment to building a secure digital economy**.

4.1 National Cybersecurity Strategy & Governance Framework

Saudi Arabia's **National Cybersecurity Strategy** is designed to **mitigate cyber risks, enhance incident response capabilities, and enforce cyber resilience** across all sectors. The Kingdom has introduced **regulatory frameworks, national security programs, and cybersecurity research initiatives** to strengthen **national defence against cyber threats**.



The Kingdom has established a **comprehensive regulatory framework** to govern its ICT and cybersecurity landscape. These regulations are driven by national security imperatives, economic diversification, and alignment with global best practices.

Key National Regulatory Bodies & Cybersecurity Initiatives:

- ✓ **National Cybersecurity Authority (NCA)** – The Kingdom's primary cybersecurity agency, developing and issuing policy and enforcing **cyber governance, risk management, compliance and incident response protocols**.
- ✓ **Cybersecurity Compliance Regulations** – Mandating **strict cybersecurity standards** across financial services, government, and private enterprises.
- ✓ **Cybersecurity Research & Innovation Pioneers Grant Initiative** – Launched in **July 2024**, supporting cybersecurity R&D in next-gen cyber defence, AI-powered security, quantum cryptography, and IoT protection.
- ✓ **Cybersecurity Workforce Development** – Expanding **cyber training programs, university collaborations, and professional certifications** to cultivate a **highly skilled cybersecurity workforce**.
- ✓ **Cross-Border Cybersecurity Partnerships** – Strengthening **collaborations with global cybersecurity agencies, intelligence units, and tech alliances** to enhance cyber resilience.
- ✓ **Haseen Cybersecurity Platform** – A centralized national cybersecurity portal for **real-time threat intelligence sharing, incident response, and regulatory compliance monitoring**.

Saudi Arabia's **multi-layered cybersecurity defence strategy** integrates **AI, machine learning, behavioural analytics, and real-time cyber intelligence** to proactively **counter emerging cyber threats**.





4.2 Cyber Threat Landscape & Risk Mitigation

The Kingdom faces an evolving **cyber threat landscape**, with increasing attacks targeting **financial institutions, government entities, critical infrastructure, and multinational corporations**. Saudi Arabia experienced **over 7.1 million cyberattack attempts** in the first half of **2023**, necessitating **advanced cybersecurity measures and AI-driven threat detection**.

Key Cyber Threats & Mitigation Strategies:

- ✓ **Ransomware & Malware Attacks** – Expanding **threat detection systems, AI-based endpoint security, and threat intelligence platforms** to combat malware and ransomware.
- ✓ **Data Breaches & Identity Theft** – Enforcing **strict data privacy laws, multi-factor authentication (MFA), and blockchain-based digital identity solutions**.
- ✓ **Phishing & Social Engineering Attacks** – Nationwide **cyber awareness training programs and automated email filtering solutions** to reduce phishing risks.
- ✓ **Critical Infrastructure Cyber Risks** – Strengthening **industrial control system (ICS) security, operational technology (OT) protections, and cyber-physical security protocols**.
- ✓ **Nation-State Cyber Threats** – Enhancing **cyber intelligence capabilities, geopolitical cyber defence strategies, and cross-sector cyber threat monitoring**.
- ✓ **Supply Chain Cybersecurity** – Implementing **Third-Party Risk Management (TPRM) protocols**, ensuring that suppliers adhere to **strict cybersecurity standards**.



Saudi Arabia's **multi-layered cybersecurity defence strategy** integrates **AI, machine learning, behavioural analytics, and real-time cyber intelligence** to proactively **counter emerging cyber threats**.

4.3 Data Protection, Privacy Laws & Regulatory Compliance

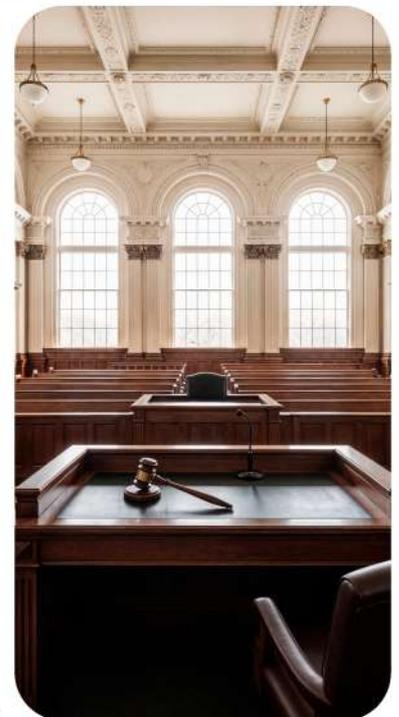
To maintain **data integrity, regulatory compliance, and digital trust**, Saudi Arabia has introduced **comprehensive data protection and cybersecurity laws** governing key business activities and interests including **cloud services, financial transactions, personal data, and cross-border information sharing**.

The evolving regulatory landscape in Saudi Arabia has both opportunities and challenges for businesses, including:

- **Increased Compliance Requirements:** Enterprises must align with stringent cybersecurity and data privacy laws.
- **Investor Confidence Boost:** Clear regulatory frameworks attract foreign investment and foster trust.
- **Market Entry & Expansion:** Understanding compliance obligations is critical for ICT firms entering the Saudi market.

Looking ahead, regulatory frameworks in Saudi Arabia will likely evolve to:

- Strengthen **cross-border data transfer policies**.
- Enhance **public-private collaboration** on cybersecurity.
- Introduce **AI ethics and governance** frameworks.



Key Data Protection & Cybersecurity Regulations:

- ✓ **Personal Data Protection Law (PDPL)** – Mandating **strict regulations for handling personal data, cross-border data transfers, and consumer privacy rights**.
- ✓ **Cybersecurity Compliance Standards** – Enforcing **ISO 27001-based cybersecurity requirements** for all public and private sector organizations.
- ✓ **Cloud Cybersecurity Regulations** – Ensuring that **cloud service providers adhere to data sovereignty policies and local security standards**.
- ✓ **Managed Security Operations Centre (MSOC) Policy** – Requiring **government and private entities managing critical infrastructure to maintain secure, compliant security operations centres**.
- ✓ **Financial Sector Cybersecurity Regulations** – Enforcing **cyber risk management standards for fintech companies, banks, and digital payment platforms**.
- ✓ **National Cyber Incident Response Framework** – Defining **incident management protocols, security breach reporting procedures, and compliance penalties**.

Saudi Arabia's **strict regulatory landscape** ensures **compliance, resilience, and data security** across all digital platforms, fostering **global investor confidence** in the Kingdom's ICT and cybersecurity sector.

4.4 Cybersecurity Investment & Public-Private Partnerships (PPP's)

Saudi Arabia's cybersecurity sector is attracting **significant investment**, with the government prioritizing **cybersecurity research, AI-powered security solutions, and international collaborations**. The Kingdom is leveraging **public-private partnerships (PPPs)** to drive **cybersecurity innovation** and **enhance national cyber resilience**.



Key Data Protection & Cybersecurity Regulations:

- ✔ **\$11 Billion Cybersecurity Market by 2032** – Saudi Arabia's cybersecurity sector is experiencing **rapid growth, driven by AI, cloud security, and cyber threat intelligence solutions**.
- ✔ **Public-Private Cybersecurity Collaborations** – Partnering with **global cybersecurity firms, AI research labs, and cyber defence agencies** to **enhance digital security**.
- ✔ **Cybersecurity Innovation Hubs** – Establishing **cybersecurity research centres, accelerators, and incubators** for emerging cybersecurity startups.
- ✔ **Investment in AI-Driven Security Solutions** – Funding **AI-based security platforms, real-time cyber analytics, and advanced cyber threat intelligence solutions**.
- ✔ **Government Grants for Cybersecurity Startups** – Providing **financial incentives, tax breaks, and regulatory support** for cybersecurity innovators.
- ✔ **Global Cybersecurity Forum (GCF) Initiative** – Hosting international cybersecurity forums, strengthening **cross-border cyber intelligence partnerships**.

Saudi Arabia's **proactive approach to cybersecurity investment** and **strategic alliances with international tech firms** solidify its **position as a global leader in cybersecurity excellence**.

4.5. Conclusion: Saudi Arabia's Cybersecurity Future

As **Saudi Arabia accelerates its digital transformation**, the Kingdom's cybersecurity landscape is evolving **to meet the demands of AI-powered infrastructure, smart city expansion, and cloud-driven ecosystems**. By enforcing **strict cybersecurity regulations, investing in next-generation cyber defence, and fostering public-private partnerships**, Saudi Arabia is ensuring a **secure and resilient digital economy**.

With **Vision 2030 prioritizing cybersecurity innovation, cyber threat intelligence, and global cyber collaborations**, Saudi Arabia is emerging as a **regional powerhouse in cybersecurity leadership and national cyber resilience**.



5: Digital Infrastructure & Smart Cities Development

Saudi Arabia's **digital infrastructure** is undergoing a **massive transformation**, positioning the Kingdom as a **global leader in smart city innovation, AI-driven urban planning, and 5G-powered digital ecosystems**. The government's ambitious **Vision 2030 strategy** is driving large-scale investments in **next-generation telecommunications, IoT integration, AI-powered mobility solutions, and cloud computing** to enhance **connectivity, efficiency, and sustainability** in urban development.

From **NEOM's futuristic smart city vision** to **Riyadh's AI-powered transport systems**, Saudi Arabia is leveraging **cutting-edge digital infrastructure** to build a **technology-driven, globally competitive economy**. The rapid expansion of **fibre-optic networks, 5G penetration, and smart public services** underscores the Kingdom's commitment to creating **intelligent, data-driven cities** that enhance **citizen experiences and economic growth**.

5.1. National Digital Infrastructure & 5G Expansion

Saudi Arabia's **ICT infrastructure is the largest in MENA**, valued at **\$44 billion**, with rapid investments in **cloud computing, AI, and digital connectivity**. The Kingdom ranks among the **top 10 countries globally in 5G deployment**, supporting **smart city development, AI-powered services, and industrial automation**.



Key Developments in National Digital Infrastructure:



5G & Fiber-Optic Network Expansion – Saudi Arabia is rolling out nationwide 5G coverage, supporting smart mobility, IoT, and cloud-based solutions.



Cloud-First Policy & Data Centre Growth – The Kingdom is investing \$15 billion in data centres, enabling secure cloud storage, AI applications, and digital government services.



AI & IoT Integration in Digital Infrastructure – AI-powered analytics are optimizing smart grid management, predictive maintenance, and urban planning.



Public-Private Partnerships (PPPs) in ICT Development – Collaborations with Amazon, Microsoft, Google, Oracle, and Huawei are driving technology innovation.



Government-Led Digital Transformation Programs – The National Digital Transformation Strategy aims for 92% digitalization of public services by 2025.

Saudi Arabia's **advanced ICT backbone** is enabling **seamless connectivity, digital inclusivity, and real-time data intelligence**, making the Kingdom a **global digital hub**.

5.2. Smart City Development: AI, IoT & Sustainable Urban Planning

The development of **smart cities** is a core element of Saudi Arabia's future digital initiatives and Saudi Arabia is pioneering **smart city innovation**, integrating **AI, IoT, and big data analytics** into urban planning. The Kingdom's flagship **giga-projects**, including **NEOM, The Line, Qiddiya, the Red Sea and Diriyah Gate**, are setting new global benchmarks for **intelligent, sustainable city design**, showcasing how digital infrastructure is transforming urban living.



Major Smart City Initiatives:



NEOM: The World's Most Ambitious Smart City: A **\$500 billion AI-powered mega-city**, integrating **autonomous transport, AI-driven infrastructure, and digital twins** for urban planning.



Riyadh Metro & Smart Mobility Solutions: AI-powered and IoT enables smart traffic management and **automated metro systems**, reducing congestion and optimizing urban mobility.



The Line: Carbon-Neutral Smart City – A **170-km long, AI-powered linear city** with **zero emissions, energy efficient smart energy grids, and vertical urbanization**.



Qiddiya: Entertainment & Smart Tourism Hub – AI-driven visitor experiences, **IoT-enabled theme parks, and digital payment solutions**.



Diriyah Gate: Heritage Meets Smart Infrastructure – Combining **historical preservation with smart tourism, AI-assisted city monitoring, and cloud-based security**.

Saudi Arabia's smart cities will be **powered by AI, blockchain, IoT, and sustainable energy solutions**, transforming **urban living, mobility, and public services**.

5.3. Cloud Computing, Data Centres & Digital Services

Saudi Arabia is **expanding its cloud computing ecosystem**, investing in **large-scale data centres**, **AI-driven cloud platforms**, and **digital government services**.



Cloud & Data Centre Growth in Saudi Arabia:



\$10 Billion Cloud Market by 2025 – Government policies driving **hybrid, multi-cloud, and SaaS adoption**.



Data Centre Investments: Amazon, Microsoft & Google – Expanding **hyperscale cloud facilities** to support **AI, fintech, and smart industries**.



Cloud-Based Government Services – Enhancing **cybersecurity, digital identity management, and automated e-government systems**.



AI & Big Data in Cloud Services – AI-driven analytics are **enhancing decision-making, predictive security, and enterprise cloud solutions**.



Cross-Border Cloud Regulations & Data Sovereignty – Strict **cloud cybersecurity policies** to protect national data and critical infrastructure.

Saudi Arabia's **cloud-first strategy** is **driving enterprise digitalization, fostering cybersecurity resilience, and enabling AI-driven innovation**.

5.4. National Digital Identity & E-Government Services

Saudi Arabia's e-government initiatives are setting global benchmarks for digital governance, ensuring seamless public services, AI-driven decision-making, and data security.



E-Government & Digital Identity Programs:

-  **Unified Digital Identity (Nafath)** – Secure **AI-powered national identity verification**, enabling **seamless citizen access to digital services**.
-  **Saudi Payments & Cashless Economy** – Digital payments account for **57% of transactions**, driving a **cashless society by 2030**.
-  **AI in Public Sector Operations** – **Automated governance, real-time data insights, and cloud-based decision-making** optimizing public services.
-  **Legal & Regulatory Frameworks for Digital Services** – Strong **cybersecurity laws, personal data protection (PDPL), and cloud compliance standards**.

Saudi Arabia's **cloud-first strategy** is **driving enterprise digitalization, fostering cybersecurity resilience, and enabling AI-driven innovation**.

5.5. Digital Infrastructure for AI, Blockchain & Fintech Innovation

Saudi Arabia's **digital backbone** is enabling **AI innovation, blockchain development, and fintech transformation**, supporting **new-age enterprises and global investors**.



AI, Blockchain & Fintech Infrastructure:



AI Research & Development – SDAIA leading national AI strategy, AI-driven cybersecurity, and automated regulatory compliance.



Blockchain in Finance & Digital Identity – National Blockchain Strategy securing financial transactions, supply chains, and smart contracts.



Fintech Growth: Digital Banking & Payments – AI-powered digital banking, mobile wallets, and real-time financial analytics.



IoT-Powered Industrial Automation – AI-driven smart factories, predictive maintenance, and 5G-powered logistics.



Digital Health Infrastructure – AI-enhanced telemedicine, smart hospitals, and predictive healthcare analytics.

Saudi Arabia's **digital innovation ecosystem** is fostering fintech startups, AI-driven enterprises, and blockchain-based business models.

5.6. Conclusion: Saudi Arabia's Digital Future

Saudi Arabia is at the **forefront of global digital infrastructure development**, integrating **5G, AI, IoT, and cloud computing** to build a **technology-driven, sustainable future**. By **investing in smart cities, digital identity systems, cybersecurity, and AI-powered governance**, the Kingdom is creating a **globally competitive, future-ready economy**.

With **Vision 2030 driving innovation, investment, and regulatory transformation**, Saudi Arabia is emerging as a **regional and global leader in digital connectivity, AI-powered services, and smart urban ecosystems**.





6: The Future of Saudi Arabia's ICT & Cybersecurity Sector

Saudi Arabia's **ICT and cybersecurity sector** is poised for **unprecedented growth**, with **Vision 2030** acting as a **catalyst for digital transformation, AI-driven security, and smart governance**. The Kingdom's **strategic investments, regulatory advancements, and global partnerships** are shaping a **secure, innovation-driven digital future**.

With an emphasis on **AI, quantum computing, blockchain security, and cyber resilience**, Saudi Arabia is **solidifying its role as a global technology hub** while **safeguarding critical digital assets**. The future of **Saudi Arabia's ICT and cybersecurity sector** is defined by **four key pillars: digital sovereignty, AI-powered security, fintech & digital banking growth, and a next-gen cybersecurity framework**.

6.1. AI-Driven Cybersecurity & Next-Generation Threat Intelligence

The future of cybersecurity in Saudi Arabia is **AI-powered, data-driven, and proactive**, shifting from **reactive defences to predictive threat intelligence**.



Key AI & Cybersecurity Innovations:



AI-Enhanced Threat Detection – AI models predicting and mitigating cyber risks in **real time**.



National Cybersecurity Strategy 2.0 – Strengthening **resilience against cyber warfare, data breaches, and digital espionage**.



Quantum-Safe Cryptography – Future-proofing data protection with **post-quantum encryption**.



Autonomous SOC (Security Operations Centre) – AI-driven **automated cyber defence and incident response**.



Cybersecurity Research & Innovation – Investments in **ethical hacking, penetration testing, and AI-based cyber forensics**.



AI-Powered Security Orchestration – Automated **cyber threat intelligence, phishing detection, and fraud prevention**.

With **Saudi Arabia ranking 1st globally in cybersecurity readiness (IMD 2024)**, the Kingdom is building **one of the most resilient cyber defence ecosystems worldwide**.

6.2. Cyber Resilience, Digital Sovereignty & Data Protection

Saudi Arabia is leading the **global conversation on digital sovereignty**, ensuring **national control over data, cloud services, and critical infrastructure security**.



Strategic Cyber Resilience & Data Sovereignty Measures:



Personal Data Protection Law (PDPL) – Enhancing privacy, **data localization**, and compliance with global security standards.



Cloud Sovereignty & National Data Centres – Developing **hyperscale, in-country cloud infrastructure** for critical government and enterprise data.



Blockchain for Data Integrity & Security – Deploying **decentralized identity management & fraud-resistant transactions**.



Cyber Risk Insurance & Regulatory Compliance – Strengthening **risk mitigation** for enterprises and public sector organizations.

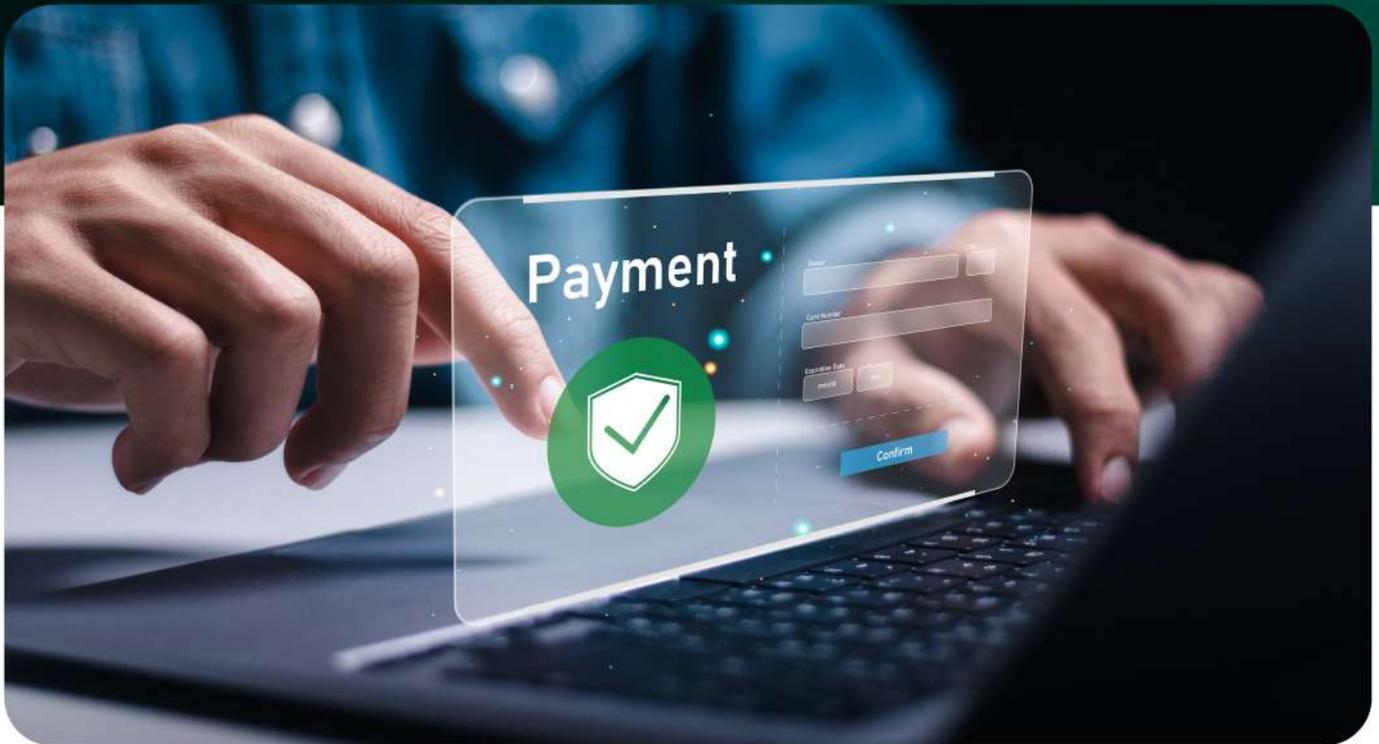


Cross-Border Cybersecurity Collaboration – Establishing **international partnerships** for cyber threat intelligence sharing and regulatory harmonization.

Saudi Arabia's **cyber resilience strategy** is ensuring that **national security, digital infrastructure, and citizen data** remain **protected against evolving cyber threats**.

6.3. The Rise of Fintech, Digital Payments & Open Banking

Saudi Arabia's **fintech revolution** is transforming financial services through **AI-driven banking**, **blockchain-enabled transactions**, and **cybersecurity-enhanced digital payments**.



Future Fintech & Digital Banking Trends:



Cashless Economy Vision 2030 – 70% of all payments to be **digital by 2025**.



AI-Powered Digital Banking – Intelligent fraud detection, **predictive analytics**, and **automated KYC (Know Your Customer)** verification.



Open Banking API Framework – Secure **banking data sharing** to foster **fintech innovation & financial inclusion**.



Biometric & AI-Based Authentication – Enhancing **transaction security** through **voice, facial, and behavioural biometrics**.

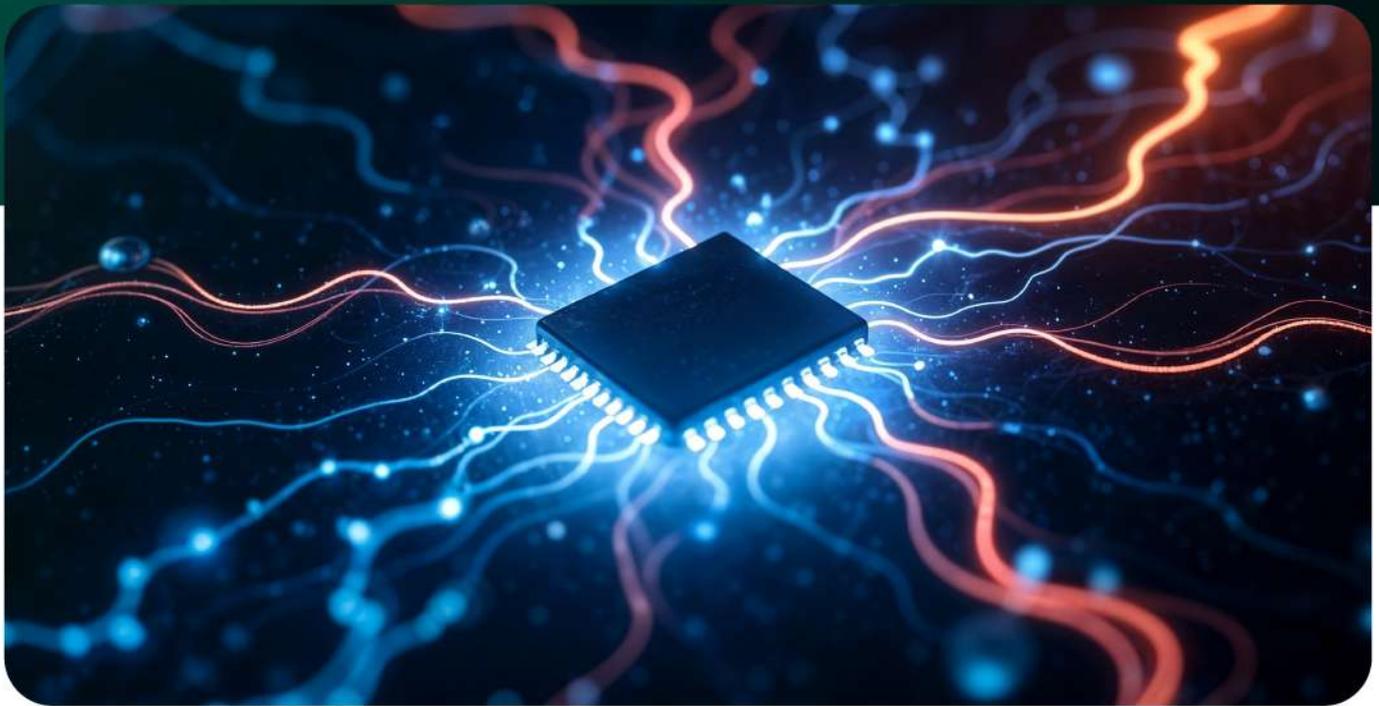


Regulatory Sandboxes for Fintech Growth – **Government-backed initiatives** fostering **startup-driven financial technology disruption**.

Saudi Arabia's fintech sector is set to **surpass \$50 billion in digital transactions by 2030**, reinforcing the Kingdom's position as a **financial technology powerhouse**.

6.4. The Role of Quantum Computing & Blockchain in National Security

The convergence of **quantum computing, blockchain, and cybersecurity** is reshaping Saudi Arabia's **digital security and encryption landscape**.



Future-Proofing Digital Security with Quantum & Blockchain:



Quantum-Safe Cryptography – Developing advanced encryption standards to protect against quantum cyber threats.



Blockchain-Enabled Digital Trust Ecosystems – Securing national digital identity, government records, and financial transactions.



Quantum AI for Cybersecurity – Accelerating cyber threat detection with quantum-enhanced AI models.



Decentralized Security Models – Blockchain-powered secure communications, data privacy, and fraud prevention.



Next-Generation Data Storage – Exploring quantum-based cloud security solutions for tamper-proof government data storage.

Saudi Arabia's investments in quantum research and blockchain security are reinforcing its position as a leader in national cybersecurity.

6.5. The Future of Smart Cities: AI, IoT & Cybersecurity Integration

Saudi Arabia's **smart city revolution** will be defined by **AI-powered security, interconnected IoT ecosystems, and next-gen urban resilience frameworks.**



Key Trends in Smart City Cybersecurity:



AI-Driven Surveillance & Threat Detection – Enhancing **urban security** with **AI-based monitoring systems.**



Connected & Secure Mobility Solutions – Cybersecurity-optimized **autonomous vehicles** and **smart traffic systems.**



IoT-Enabled Critical Infrastructure Protection – AI-driven **power grids, water systems, and telecom networks security.**



Cyber-Resilient Smart City Architecture – Ensuring **real-time threat detection & automated response capabilities.**



Public-Private Partnerships for Digital Security – Driving **global collaborations** to **secure urban digital infrastructure.**

Saudi Arabia's smart cities will **seamlessly integrate AI, IoT, and cybersecurity**, positioning the Kingdom as a **global leader in intelligent urban development.**

6.6. Strategic Investments & Future Regulatory Frameworks

Saudi Arabia's **ICT & cybersecurity investments** are driving the **next wave of global technology innovation and digital economy expansion.**



Major Future ICT & Cybersecurity Investments:



\$50 Billion Digital Economy Fund – Supporting **AI startups, blockchain enterprises, and cybersecurity firms.**



Saudi Cybersecurity Academy & Future Talent Pipeline – Training **100,000+ cybersecurity professionals** by 2030.



AI & Digital Ethics Regulations – Establishing **legal frameworks for responsible AI, digital privacy, and ethical governance.**



Expansion of Regional ICT & Fintech Hubs – Making Saudi Arabia the **MENA region's primary digital business hub.**



Global Cybersecurity Partnerships & Alliances – Strengthening **international cooperation on cyber resilience.**

Saudi Arabia's **long-term regulatory roadmap** will ensure **robust cybersecurity, ethical AI governance, and sustainable digital transformation.**

6.7. Conclusion: Saudi Arabia's Next Digital Leap

Saudi Arabia is setting the global standard for ICT innovation, AI-driven security, and next-gen cybersecurity. With record-breaking investments, visionary government policies, and cutting-edge technology adoption, the Kingdom is building a secure, intelligent, and resilient digital economy.

As **Vision 2030** advances, Saudi Arabia will continue to **lead in AI, quantum security, fintech innovation, and smart city cybersecurity**, reinforcing its status as **the Middle East's premier technology powerhouse**.





For more information on Overview of the
KSA ICT & Cyber Sector 2025, visit:

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