

استثمر في السعودية

INVEST
SAUDI



SAUDI ARABIA

THE KINGDOM OF OPPORTUNITIES



Feb 2023



Launched in 2016, Vision 2030 is Saudi Arabia's blueprint for the future – the very heart of Saudi Arabia's ambitious social, cultural, and economic transformation.

رؤية
VISION
2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

A PARADIGM SHIFT IN ECONOMIC GROWTH

AIMING TO BE THE 15TH LARGEST GLOBAL ECONOMY BY 2030.

To support this growth, initiatives aimed at diversifying the economy and improving productivity are already underway.



AMBITIOUS 2030 TARGETS BASED ON 3 PILLARS

A VIBRANT SOCIETY

7%

Unemployment rate decrease
from 12%

5.7%

FDI as % of GDP
up from 1.3%

70%

Home ownership target by
2030 from a baseline of 47%

A THRIVING ECONOMY

\$267BN

Non-oil government
revenue up from \$43bn

30%

To increase women's participation
in the workforce from 22%

AN AMBITIOUS NATION

\$2TRN

Public Investment Fund's assets
under management up from
\$160bn

1 Million

Volunteers annually from a
baseline of 11,000

WHAT WE HAVE ACHIEVED SO FAR

A VIBRANT SOCIETY

9.7%

Unemployment rate in Q2 2022
decreased from 12%

2.3%

FDI as % of GDP in 2021
up from 1.3%

60%

Home ownership achieved in
2020 from a baseline of 47%

A THRIVING ECONOMY

\$76.6BN

non-oil government
revenue in 2022 up to Q3, and
\$107.5 Bn in 2021 up from \$43bn

35.6%

Saudi women's participation in the
workforce in Q2 2022 up from 22%

AN AMBITIOUS NATION

\$620BN~

Public Investment Fund's assets
under management by the end of
Q1 2022 up from \$160bn

484K

The number of volunteers in
2021 from a baseline of 11,000

THE NATIONAL INVESTMENT STRATEGY (NIS)

The National Investment Strategy relies on four pillars; Each of the strategy pillars has an overarching objective and links to initiatives and programs that help deliver that objective.

Investment opportunities

Develop strong and diverse investment opportunities

- Unlock key opportunities by **facilitating deal conclusion and effective governance**
- Leverage opportunities available through **government demand (PPP&P)**
- Identify investment opportunities for all sectors using the **value chain approach**

Investors

Grow the contribution of various investors in the investment landscape

- Enhance **domestic private sector and foreign investor** contribution as a dual engine of investment in parallel with semi-government entities (e.g., PIF)
- Provide **transparency to the private sector regarding the methodology and principles of partnership**

Funding

Remove financial barriers to investment

- Provide **innovative mechanisms and introduce new financing products to diversify and bolster the financing environment** (e.g., capital markets, mezzanine financing)

Competitiveness and enablers

Create an attractive and competitive investment environment for investors globally and domestically

- Increase investment environment **competitiveness** (including regulations, organizational framework, and financial incentives) **across all SEZs and the base economy** through continuous collaboration with NIS and systematic updating of legislations

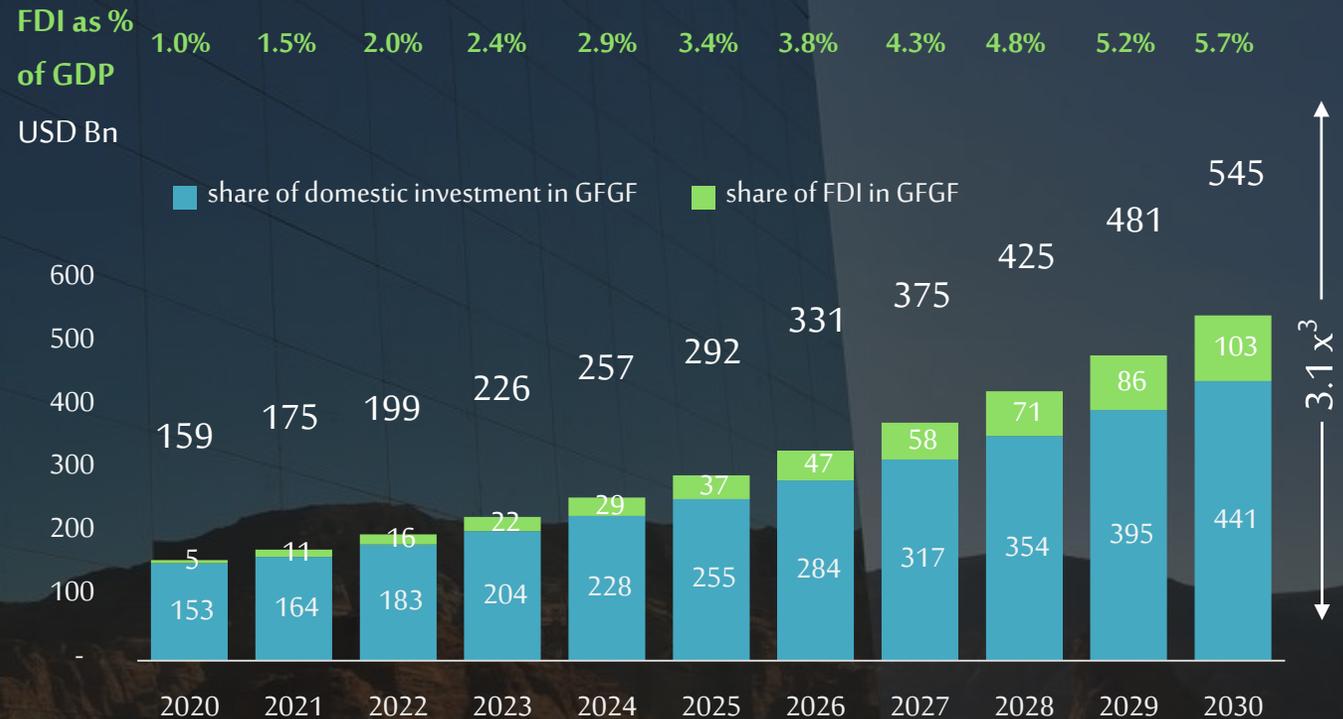
NIS TARGETS

The National Investment Strategy (NIS) aims to increase investments in the Kingdom in line with Saudi Vision 2030, reaching a cumulative total of investments of more than 3.2 trillion USD from 2021 to 2030

3X investment volume to USD 545 Bn by 2030 (equivalent to 30% of GDP).

2X overall domestic investment component of GFCF USD 441 Bn.

20X Increase FDI (to 5.7% of GDP by 2030).





WHY BUSINESSES ARE CHOOSING SAUDI ARABIA

GAME CHANGING OPPORTUNITIES



PRIVATIZATION
PROGRAM



LOCALIZATION OF
VALUE-CHAINS



GIGA & MEGA
PROJECTS

WORLD-CLASS INVESTMENT PROJECTS

Saudi Arabia's mega and giga projects represent some of the most ambitious developments under construction around the world today.



MEGA PROJECT

A large-scale, complex venture that typically costs around \$1bn or more

GIGA PROJECT

The most extreme, challenging work constructions that cost \$10bn or more

-  MEGA PROJECTS
-  GIGA PROJECTS

SAUDI ARABIA IS THE 18TH LARGEST ECONOMY IN THE WORLD AND THE LARGEST IN THE MENA REGION

14TH

Among G20 countries in FDI in 2021

2ND

Lowest debt/GDP ratio among G20 countries in 2021

77.6%

Of the Saudi workforce is concentrated among individuals aged 15-44 in Q2 2022

10.3%

GDP average growth rate recorded, up to Q3 2022

5TH

Largest foreign assets reserves globally, Aug 2022

8.7%

Saudi economy is the world's **fastest growing economy** globally in 2022 with growth rate of 8.7%

16TH/18TH

The Kingdom's economy ranked 16th among G20 countries and 18th globally, with a GDP of \$1.01 trillion in 2022 according to IMF estimation

2ND

Among G20 in Digital Competitiveness index in 2021

STRATEGIC LOCATION



4 HOURS

MORE THAN 50 FAST GROWING MARKETS ARE WITHIN 4 HOURS

6 HOURS

OVER 40% OF THE WORLD'S GDP IS WITHIN 6 HOURS

7 HOURS

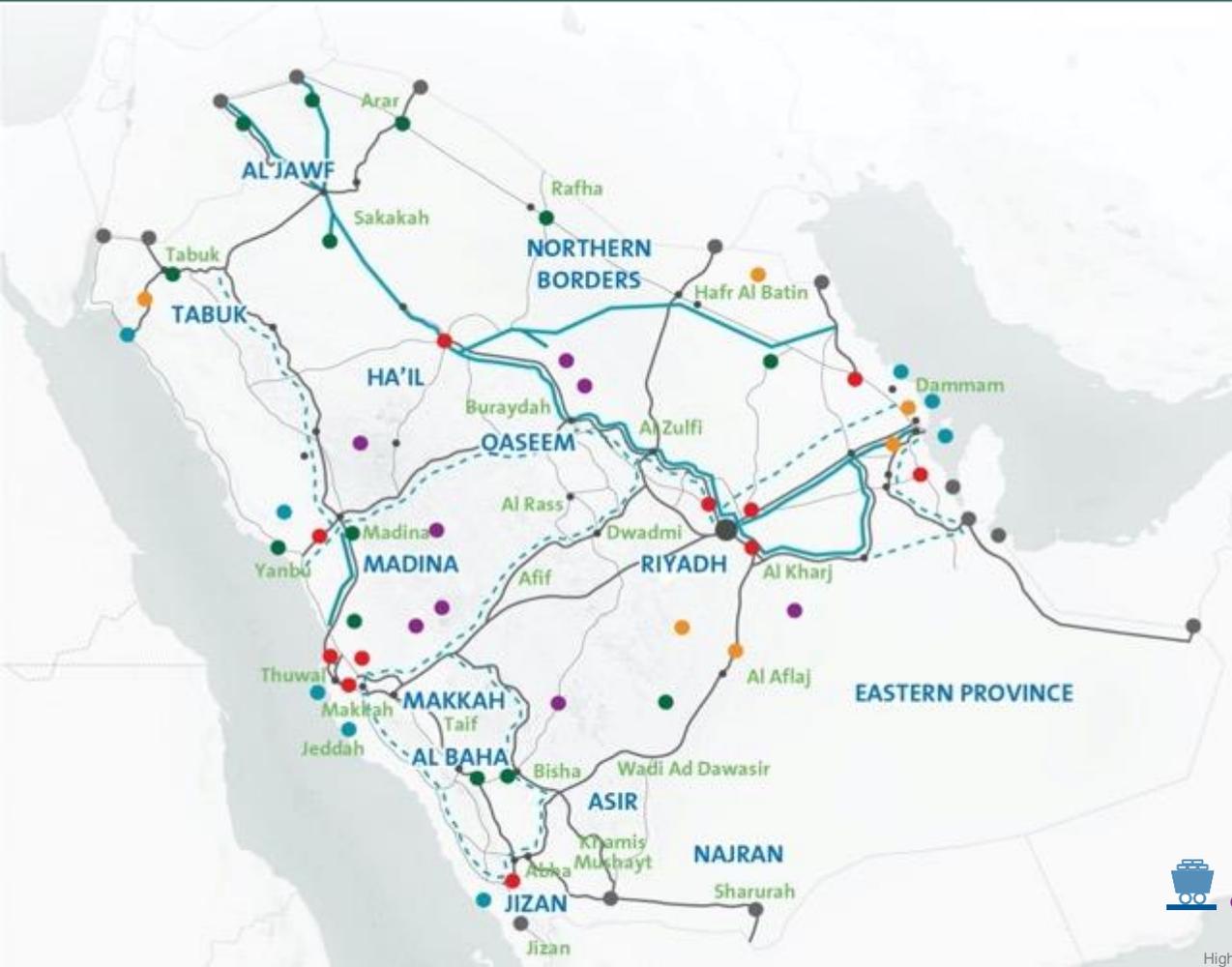
OVER 80% OF THE WORLD'S POPULATION IS WITHIN 7 HOURS

EASY ACCESS TO **3** CONTINENTS WITHIN A FEW HOURS

14 INTERNATIONAL AIRPORTS ACROSS THE COUNTRY

13% OF GLOBAL TRADE COMES THROUGH THE RED SEA

AN INTERCONNECTED LOGISTICS NETWORK



8,080
km of railways
 transporting over 50 million tons Yearly



10 ports
 processing over 13 million containers per year, making up the largest maritime network in the Middle East



29 airports
 handling more than 90 million passengers per year and connecting to over 45 countries



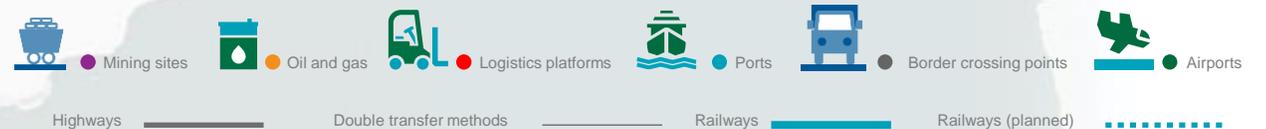
232,000+
km of roads
 making the world's 23rd largest network



13%
 of world trade goes over the Red Sea



40+ industrial cities and zones
 with some of the lowest rates worldwide



MODERN DIGITAL INFRASTRUCTURE

3rd

Saudi Arabia ranked the third among highest 5G network speed globally

97%

of Saudi regions are covered with 4G

95%

Internet usage penetration

3rd

Riyadh ranked as the third smartest city among the capitals of the G20 and ranked 30 globally

7th

Globally out of 135 in speed test by Ookla, a global leader in internet testing

SAUDI GREEN INITIATIVE

10BN

Trees to be planted
within the Kingdom

40M

Hectares of degraded land to
be restored in Saudi Arabia

30%

of total land area are targeted
to be protected areas

+60

initiatives, powered by a first
wave of investment of \$ 186bn

50%

share of renewables in the
national energy mix by 2030

20%

Saudi Arabia's land and sea
under protection by 2030

278mtpa

Reduce carbon emissions
by 2030

Net-Zero

Emissions by 2060

BUSINESS ENVIRONMENT

600

REFORM INITIATIVES AND
STREAMLINING REGULATIONS
ENACTED SINCE INCEPTION
OF SAUDI VISION 2030

80%

OF PRO-BUSINESS IDENTIFIED
REFORMS HAVE IMPLEMENTED

AMONG WORLD BANK'S **TOP
BUSINESS CLIMATE REFORMER
AND IMPROVERS GLOBALLY**

SOME OF THE LATEST BUSINESS REFORMS

24 HOURS

TIME TO ISSUE
BUSINESS VISAS, AND
NO LOCAL INVITATION
REQUIRED

2 → **24**
WEEKS HOURS

CUSTOMS CLEARANCE
PERIOD

EXPORTS **9** → **2**

IMPORTS **12** → **2**

REQUIRED CUSTOMS
DOCUMENTS

100%

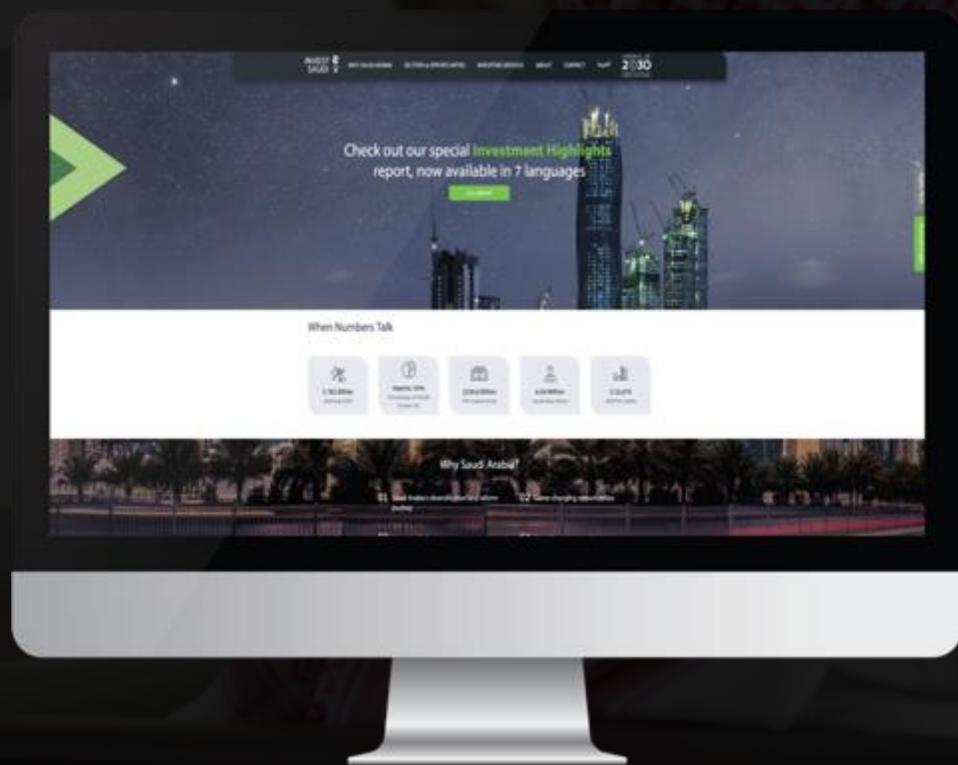
FOREIGN OWNERSHIP
OF INVESTMENTS
ALLOWED IN MOST
SECTORS



HOW INVESTORS CAN ACCESS THE OPPORTUNITIES

INVEST SAUDI ONLINE PORTAL

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



Enables investors to dive into an ocean of untapped potential



Investment opportunities



Facts & figures



Investor services



Connection with Sector Heads

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THANK YOU