

VISION 2030 ANNUAL REPORT 2025





Our country continues its journey toward a brighter future, building on a decade of remarkable progress achieved under Vision 2030. The Kingdom has emerged as a leading example of how to effectively harness its capabilities and resources to drive comprehensive development, with impact clearly reflected in the enhanced quality of life for its people.

Custodian of the Two Holy Mosques

King Salman bin Abdulaziz Al Saud



After a decade of progress under Vision 2030, our nation has shown how ambition can be turned into real results through the determination of its people and the strength of its institutions. The progress achieved in recent years means we must now build on this momentum, step up our efforts, and strengthen our plans to sustain this progress and continue improving the lives of our people.

His Royal Highness

Prince Mohammed bin Salman Al Saud

Crown Prince and Prime Minister

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Introduction

Since 2016, Vision 2030 has guided a broad and sustained transformation across the Kingdom. Reforms have been introduced, institutions have evolved, and new opportunities have emerged across the economy and society, and the results are increasingly visible in how people live, how the economy is growing, and how institutions deliver. This has been driven by a shared national effort that aligns the work of government, the private sector, and wider society. Supported by transparent measurement and sustained delivery, this approach has strengthened confidence and accountability across the system.

The progress achieved to date hasn't been driven by isolated initiatives, but by a delivery system built over time. Reforms were designed and implemented, institutional capabilities were strengthened, and performance management became more embedded across government. This supported stronger coordinated, clearer accountability, and more consistent execution across sectors and programs.

In 2025, progress continued across society, the economy, and government performance, enabled by Vision 2030's core delivery architecture. Vision Realization Programs continued to serve as the primary implementation vehicles,

translating priorities into coordinated plans and measurable results. In parallel, national strategies accelerated execution across sectors and regions, turning long-term ambitions into practical initiatives, investments, and programs.

For citizens, the impact is clear. Opportunities have expanded, services have advanced, and quality of life has improved. Culture, sport, and entertainment are now part of everyday life. New pathways have opened for talent, and more people can build careers in growing industries that were once unimaginable and contribute to the future being created. For international partners, the Kingdom presents a

clear long-term direction, broader areas of opportunity, and a more mature operating environment.

As the Kingdom moves into the third phase of Vision 2030 in 2026, the focus is clear: sustain momentum and delivery against national priorities.

This report provides an integrated view of Vision 2030 progress in 2025 across its three pillars: a Vibrant Society, a Thriving Economy, and an Ambitious Nation.

From ambition to lived reality, Vision 2030 stands as both progress delivered and a journey still unfolding.



Vision Realization Programs

Vision Realization Programs (VRPs) were established in the first phase of Vision 2030 (2016-20), as primary implementation tools. These medium-term entities have strengthened coordination across the ecosystem, accelerated progress and contributed to the achievement of several ambitious targets.

VRPs play a crucial role in building institutional capabilities, equipping entities with the necessary tools and frameworks to support sustainable growth and development. As the VRPs have evolved over time, some have merged, others have concluded following the achievement of their objectives and new programs have been established. Most recently, the

Fiscal Sustainability and the Privatization Program concluded after fulfilling their objectives.

VRPs have also supported the shift towards a more sustainable development model, including the launch of a number of National Strategies (see next section), which will guide transformation and delivery over the longer-term.



Health Sector Transformation Program



Financial Sector Development Program



National Transformation Program



Human Capability Development Program



Quality of Life Program



Privatization Program



Housing Program



National Industrial Development & Logistics Program



Pilgrim Experience Program



Public Investment Fund Program



National Strategies

Building on the foundations established by the VRPs, specialized national, sectoral and regional strategies were introduced to advance the second phase of Vision 2030 and support longer-term development. These strategies have contributed significantly to economic diversification efforts and delivered both economic and social benefits to the Kingdom, supported by strong government coordination and private sector participation. They have helped sectors such as tourism, culture, renewable energy, and mining grow at a pace that would have been difficult to imagine a decade ago.

The third phase of Vision 2030 will see these strategies play an even greater role, enabling Saudi Arabia to respond to emerging opportunities and sustain progress across sectors.

Further details on the strategies listed below can be found in the Appendix.



Executive Summary of Vision 2030 Performance

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Overview

Vision 2030 continues to build on stronger institutions, a more diversified economic base, and improved resilience to external shocks. Progress is translating into measurable results, supported by a delivery model structured through Vision Realization Programs (VRP) and reinforced by sectoral and regional strategies, with ongoing monitoring and adjustment.

Despite global economic and geopolitical challenges, the Kingdom maintained steady progress. Growth continued, supported by rising non-oil revenues, while inflation remained stable compared to global peers. Credit ratings improved, and international competitiveness strengthened.

This is reflected across key indicators. Non-oil activity now accounts for more than half of GDP. Private sector participation has expanded, supported by continued investment, the development of new sectors, and the role of the Public Investment Fund in attracting capital. Non-oil exports have reached record levels, and job creation has strengthened.

Institutional reforms have improved service delivery and strengthened fiscal management. The expansion of digital government has enhanced accessibility, efficiency, and transparency, contributing to a more predictable and resilient ecosystem for businesses, investors, and citizens. At the same time, growth in non-oil revenues has supported a more sustainable fiscal position.

Global conditions and shifts in capital flows continue to evolve. Investment is sequenced in line with long-term sustainability and strategic return, with programs adjusted where needed within a disciplined fiscal framework.

Vision 2030 has unfolded across three five-year phases, each building on the last. The third phase begins in 2026, focusing on sustaining delivery, strengthening returns, and reinforcing resilience.



The Economic Landscape

The Saudi economy continues to strengthen, supported by sustained growth in non-oil sectors and a more diversified economic base. Reforms and investment have expanded the role of the private sector and reduced exposure to external shocks.

In 2025, growth exceeded expectations, led by non-oil activities, which now account for more than half of GDP. Private sector contribution has increased, supporting job creation and contributing to a decline in unemployment

to the lowest levels yet. Continued investment, including through the Public Investment Fund, has helped develop new sectors and attract capital.

Fiscal and economic management has supported this progress, with a stronger financial position and improved resilience. Continued investment across sectors has reinforced growth and expanded economic activity beyond oil, while progress is increasingly reflected in improved credit ratings and recognition by international institutions.

Highest Economic Growth in Three Years

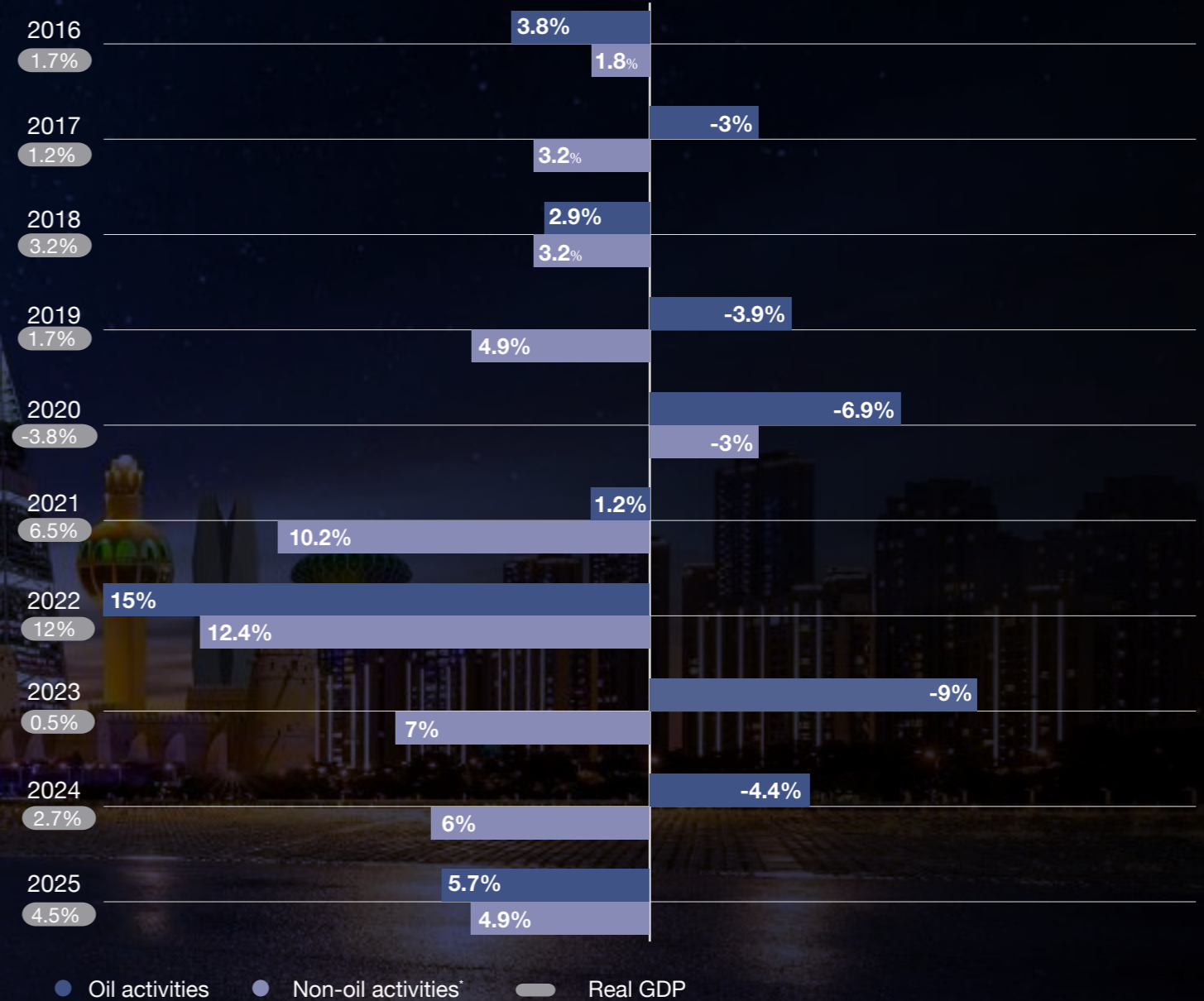
%
4.5%
Real GDP growth

Non-Oil Economy Continues to Expand

%
4.9%
Non-oil growth

Steady Inflation Levels

%
2.0%
Stable Inflation



Low Saudi Unemployment Rate

%
7.2%
from 12.3% in 2016

* Excludes government activities

Strong Credit Ratings

Aa3

Moody's - Stable

A+

Fitch - Stable

A+/A-1

S&P - Stable



Progress Overview: Vision 2030 Implementation

Performance of VRPs and National Strategies

Vision 2030 is implemented through Vision Realization Programs and national strategies, supported by a structured and robust performance management system.

Progress is measured through defined indicators and initiatives, aligned with phased targets extending to 2030. This enables continuous performance tracking and supports timely adjustments where needed.

The system ensures that implementation remains aligned with priorities and that delivery stays on track.



Progress Across Vision 2030 Pillars

Vision 2030 is structured around three interlinked pillars that guide the Kingdom's transformation:

A Vibrant Society focuses on quality of life, grounded in values, culture, and national identity, with continued improvements in healthcare, education, and opportunities for participation and community engagement.

A Thriving Economy focuses on diversification and competitiveness, expanding non-oil sectors, strengthening private sector participation, and increasing integration with global markets.

An Ambitious Nation focuses on governance and institutional performance, strengthening public sector effectiveness, transparency, and accountability.

As implementation progresses, a growing share of indicators across the three pillars are meeting, nearing, or exceeding targets, reflecting more consistent delivery and stronger performance management.

Overall, progress across the three pillars is reflected in continued improvements in quality of life, a more diversified and resilient economy, and stronger institutional performance.

A Vibrant Society

Umrah Pilgrims from Outside the Kingdom

Milion

2025	Target
18.03	15

Saudi Homeownership Rate

%

2025	Target
66.24%	65%

Adult Physical Activity

%

2025	Target
59.1%	55%

A Thriving Economy

Number of Employees in SMEs

Milion

2025	Target
8.88	7.55

Non-Oil Exports

Million

2025	2016
\$166	\$64.6

IMD World Competitiveness Ranking

Rank

2025	Target
17 th	39 th

An Ambitious Nation

Non-Profit Sector Contribution to GDP

%

2025	Target
0.2%	1.4%

Volunteers

Milion/Thousand

2025	2016
17.5M	22.9K

E-Participation

Rank

2025	Target
7 th	39 th

Vision 2030 Performance Indicators

Vision 2030 delivery is supported by institutional reform and structured program management, with performance tracking showing steady progress across indicators.

Performance indicators are defined across three levels. The first and second levels measure progress toward strategic objectives, while the third level tracks the implementation of initiatives under Vision Realization Programs and national strategies. This structure supports consistent performance assessment and early identification of gaps.

As Vision 2030 enters its third phase in 2026, measurement approaches will continue to be refined in line with international best practices.

Vibrant Society

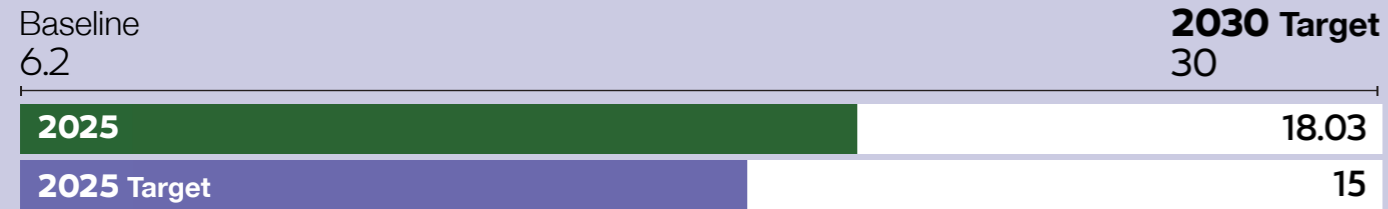
Strengthen Islamic values and national identity



- ◆ Exceeded target
- ◆ Achieved target
- ◆ Approaching target (85-99%)
- ◆ Below required level

Umrah Pilgrims from Outside the Kingdom

Million Pilgrims

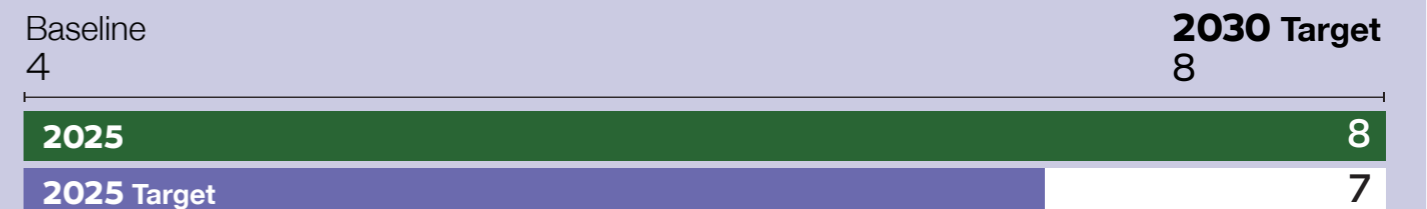


The number of Umrah performers from outside the Kingdom exceeded the 2025 target for the second consecutive year. Growth reflects expanded capacity and improvements in the overall visitor journey.

Digital platforms have simplified application and booking processes, visa procedures have been streamlined, and entry channels expanded. Infrastructure in Makkah and Al-Madinah has also been upgraded to accommodate higher numbers while maintaining service standards.

Number of Saudi Sites Listed on UNESCO World Heritage List

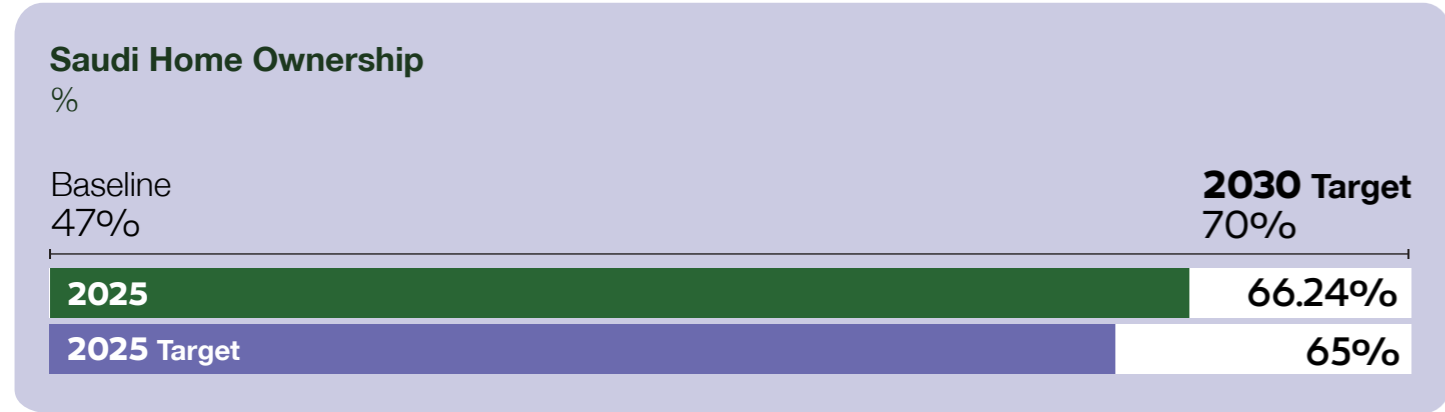
Sites



Saudi Arabia maintained eight UNESCO World Heritage Sites in 2025, having already met its 2030 target ahead of schedule. The most recent addition, the Cultural Landscape of Al-Faw Archaeological Area, was inscribed in 2024.

Preparation of sites on the Tentative List continued through conservation, restoration, and infrastructure upgrades aligned with UNESCO standards.

◆ Offer a fulfilling and healthy life



Homeownership has increased steadily over the past decade, supported by expanded mortgage access, targeted financing, and continued growth in housing supply under the Housing Program. In 2025, the Saudi family homeownership rate reached 66.24%, exceeding its annual target of 65% and continuing its upward trend since 2017.

As demand has grown, housing costs have risen in some high-demand areas. In response, measures have been introduced to support affordability, alongside new projects to expand supply and incentives to attract local and international developers.

Financial Aid Beneficiaries Capable of Working Who Have Been Empowered %

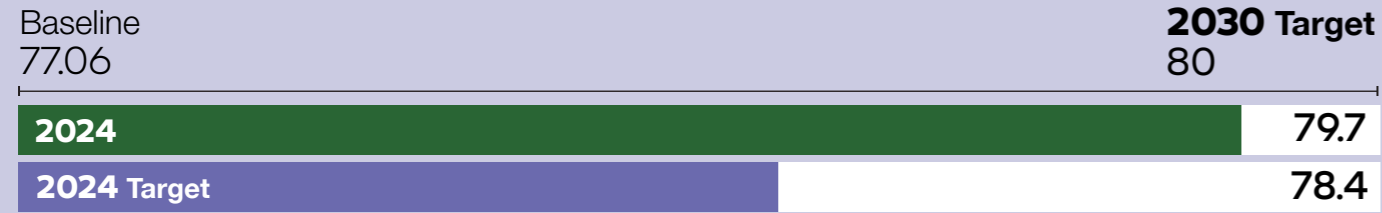


The share of work-capable social security beneficiaries remained above the annual benchmark in 2025, reflecting continued integration into the labor market. While slightly lower than in 2024, the overall trend remains within the expected range.

The Enhanced Social Security System continues to support this shift, with expanded training, qualification, and employment pathways. By Q3 2025, more than 77,000 beneficiaries had progressed through these programs.

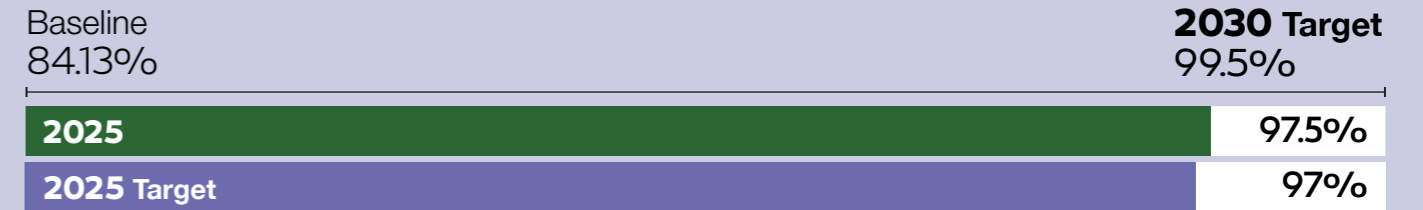
Average Life Expectancy

Years



Population Clusters Covered by Healthcare Services Across the Kingdom

%



Health outcomes continued to improve, with life expectancy increasing to 79.7 years in 2024, exceeding targets set through 2029 based on the latest reading. Improvements in road safety outcomes have also contributed to this progress.

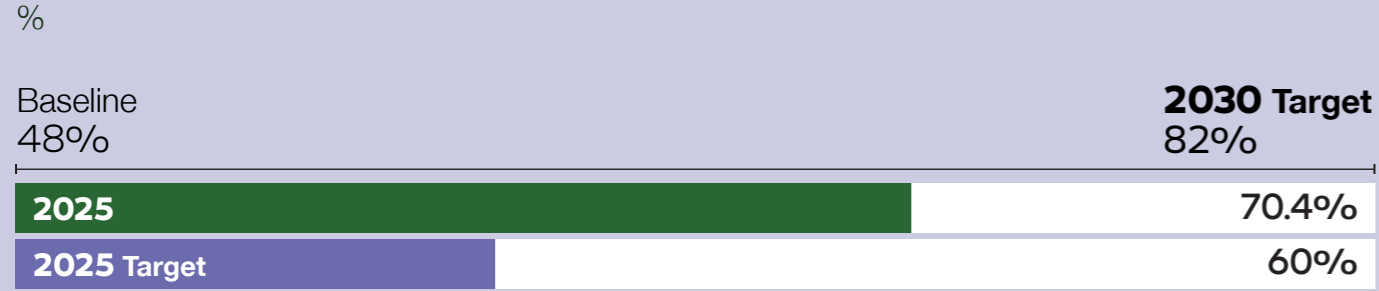
This reflects continued investment in specialized care, expanded access to high-quality services, and improvements in preventive and primary healthcare. Non-communicable diseases have declined gradually in line with 2030 targets, although they remain a leading cause of mortality.



Access to primary care has expanded significantly, with coverage reaching nearly the entire population by 2025. This exceeded the annual target and met the 2026 target ahead of schedule.

Progress reflects improvements in service delivery, including expanded primary care networks, better geographic coverage, and the use of mobile and integrated care models to reach underserved areas.

Healthcare Quality Index



The Healthcare Quality Index reached 70.4% in 2025, exceeding the 60% target. Improvements reflect gains in care effectiveness, mortality outcomes, service timeliness, and reduced waiting

times for initial assessments. The Health Sector Transformation Program continues to support these improvements and sustain quality over time.

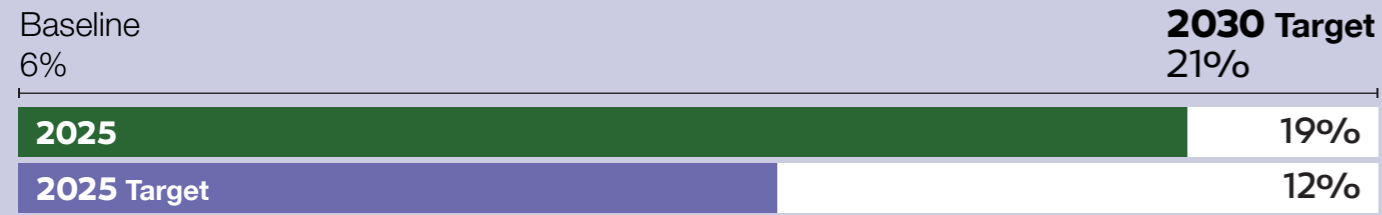
Adults (18+) Engaging in Physical Activity (150 minutes/week)



In 2025, 59.1% of adults met the recommended level of weekly physical activity, exceeding the 2027 target two years ahead of schedule. Participation is higher among men than women (66.5% compared to 43.1%), and strongest among younger adults, reaching 71.2% among those aged 18-29.

This reflects wider access to sports and recreation, including expanded community programs, increased use of public spaces and green areas, and the integration of sport into education and local initiatives. National platforms such as the Sports for All Federation, along with new infrastructure including Sports Boulevard, have also contributed.

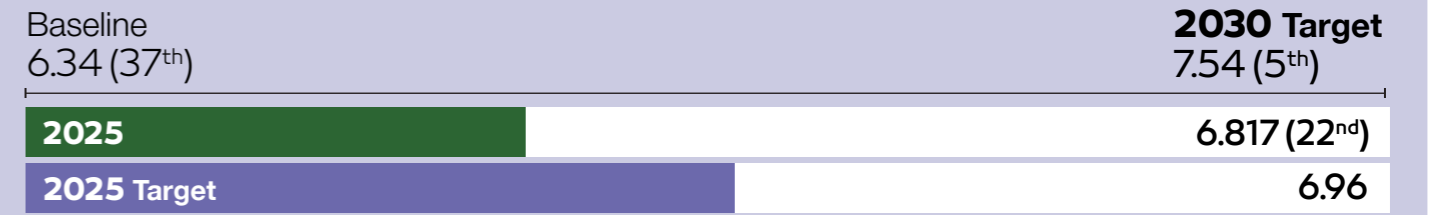
Youth (5-17) Engaging in Daily Physical Activity (60 minutes)



In 2025, 19% of youth met the recommended level of daily physical activity, reaching the 2029 target four years ahead of schedule. Participation was higher among males than females, at 23% compared to 14%.

This reflects expanded school sports, community programs, and greater access to public spaces and parks.

World Happiness Index Score and Rank



Between 2016 and 2025, Saudi Arabia advanced 15 places in the World Happiness Index, reaching 22nd out of 147 countries.

This reflects expanded opportunities across entertainment, culture, tourism, and sports, contributing to overall quality of life.

Environmental Performance Index*
Rank

Baseline	2030 Target
95 th	20 th
2024	108 th
2024 Target	70 th

*The index results are published every two years.



Saudi Arabia ranked 108th in the Environmental Performance Index in 2024, compared to 109th in 2022, indicating gradual improvement, though still below the annual target based on the latest reading.

Work is underway to strengthen environmental governance and measurement, including the development of a national environmental performance index in cooperation with relevant authorities and the United Nations Environment Programme.

Student Performance in Reading, Science, and Mathematics (PISA)*
Points

Baseline	2030 Target
386	500
2022	387
2022 Target	394

*The index results are published every four years.



In the latest PISA assessment, student performance improved in science and mathematics, while reading declined slightly. Overall results remain below the 2022 target.

Efforts are underway to strengthen outcomes, including improving teaching quality and supporting professional development through national platforms such as the National Institute for Educational Professional Development.

Number of Saudi Cities Ranked Among the 100 Most Livable Cities Globally



Rankings of Saudi cities continued to improve in 2024 and 2025, with Riyadh at 124th, Jeddah at 127th, and Al Khobar at 135th.

This reflects progress in transport, connectivity, and urban services. Efforts are underway to further

improve city performance, including initiatives to enhance quality of life.

A Thriving Economy

Grow and diversify the economy

- ◆ Exceeded target
- ◆ Achieved target
- ◆ Approaching target (85-99%)
- ◆ Below required level

Public Investment Fund's (PIF) Assets Under Management
USD Trillion



*Preliminary estimate

Real GDP
USD Billion



The PIF continues to expand its role as a driver of investment across sectors. In 2025, assets under management stood at approximately \$909 billion, broadly stable year-on-year following a period of rapid growth.

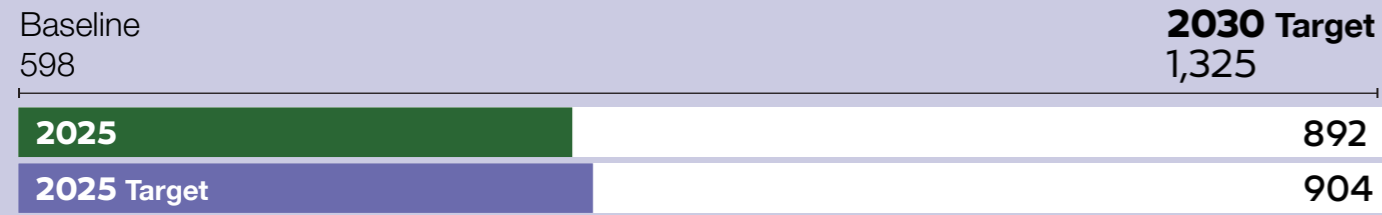
Changes in asset value reflect normal market movements. Over time, PIF's balance sheet has expanded significantly, supported by a diversified global investment portfolio.



Economic growth strengthened in 2025, supported by continued expansion in non-oil sectors, alongside higher oil production as OPEC+ supply constraints eased.

Real GDP grew by 4.5% in 2025, reflecting broad-based growth across the economy, while growth is projected to moderate in 2026, with international estimates ranging between 3.1% and 4.5%, below domestic projections of 5.6%.

Real Non-Oil GDP
USD Billion



Private Sector Contribution to GDP
%



A moving base year methodology for GDP measurement was adopted at the beginning of 2024 to improve data accuracy and consistency. Historical data has been updated accordingly. Real non-oil GDP has grown steadily since 2016. This reflects continued expansion across non-oil sectors, supported by the PIF and the private sector.

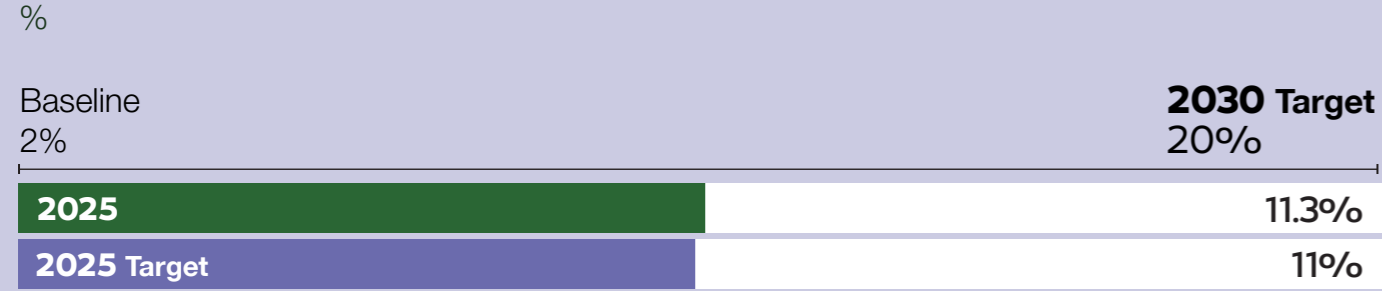
Investment has supported growth in sectors such as sports, culture, tourism, entertainment, and technology. The development of special economic zones, logistics centers, and industrial cities has also contributed to increased re-export activity.



Growth has been supported by the expansion of non-oil sectors, creating investment opportunities across industries, alongside increased tourism and global events activity and investment activity, including through the Public Investment Fund. Digital transformation has also opened

new opportunities for entrepreneurs and SMEs, particularly in the digital economy and fintech, while initiatives such as the Regional Headquarters (RHQ) Program have strengthened the Kingdom's position as a base for international companies.

Loans to SMEs as a Percentage of Total Bank Loans



Financing to SMEs reached 11.3%, exceeding the annual target.

Growth reflects expanded lending capacity,

supported by institutions such as the SME Bank, as well as wider use of fintech solutions and risk-sharing programs.

Share of Non-Oil Exports in Non-Oil GDP



Non-oil exports continue to grow, with their share of non-oil GDP increasing gradually over time. Progress remains steady, supported by continued expansion in non-oil sectors.

Further growth will depend on strengthening export performance, including expanding market access, and increasing the range and value of goods and services exported.

Cumulative Value of Exports from Oil and Gas-Related Industries

USD Billion

Baseline	2030 Target
34.4	563.7
(H1) 2025	223.0
(H1) 2025 Target	223.6



Over the past five years, exports from oil- and gas-related downstream industries have scaled rapidly, placing performance broadly in line with the first-half 2025 target and close to the full-year objective. The expansion reflects a shift from isolated export transactions to a more organized export system: stronger export support and financing

mechanisms, wider participation of Saudi firms in global markets, and deeper domestic supply chains in targeted industries. Growth has been most visible in chemicals, plastics and rubber products, where scale, supply-chain readiness and market access have all improved.

Foreign Direct Investment (FDI) Share of GDP

%

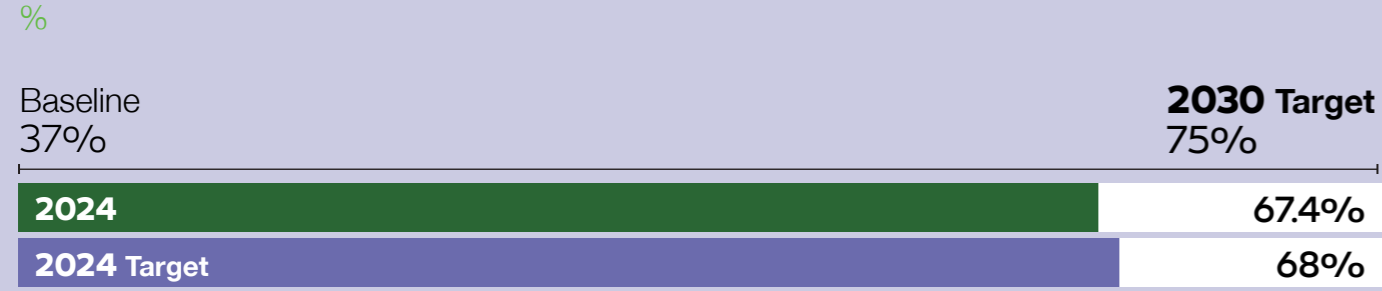
Baseline	2030 Target
1.0%	5.7%
2025	2.8%
2025 Target	3.4%



Based on the latest estimates, FDI reached 2.8% of GDP in 2025, remaining below the target despite higher inflows, as global investment conditions and the pace of GDP growth weighed on the indicator's performance.

Inflows were spread across sectors, reflecting continued investor interest, though a more cautious environment for cross-border investment limited their scale relative to overall economic expansion.

Share of Local Content in the Oil and Gas Sector



Local content in the oil and gas supply chain increased to 67.4% in 2024, based on the latest reading, just below the annual target.

The increase reflects greater use of local services and manufacturing, along with stronger workforce

participation. Progress remains steady, supported by continued development of supplier capability and domestic industry.

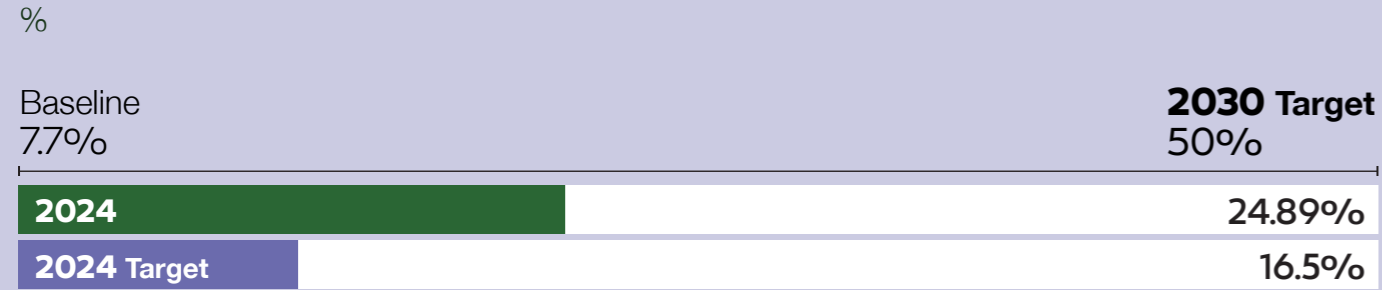
Local Content Share in Non-Oil Sector Expenditure



Local content share increased to 54.5% in 2024, up from 52% at baseline, though remaining below the annual target, based on the latest reading. This reflects continued growth in domestic participation, alongside higher spending on

imports and outward remittances as economic activity expanded. Continued efforts to strengthen governance, reporting, and oversight are expected to support more consistent outcomes.

Localization Rate of Military Industries



Defense sector localization increased to 24.89% in 2024, exceeding the target of 16.5%, based on the latest reading. Progress reflects clearer regulatory frameworks, expanded licensing, and procurement that integrates local suppliers into defense value chains.

The number of licensed entities has expanded

significantly, from 5 to 311 establishments, alongside a total of 572 military licenses and permits issued across manufacturing, services, and supply activities by the end of 2024. This has broadened market participation and strengthened production capacity, supported by industrial facilities and targeted workforce development.

Logistics Performance Index*



*The index results are published every four years.



Saudi Arabia's logistics performance has improved in the World Bank Logistics Performance Index.

Gains have been most visible in infrastructure quality, shipment reliability, and tracking systems.

This reflects continued investment in transport and the digitization of logistics platforms, improving connectivity, efficiency, and supply chain visibility.

◆ Increase employment

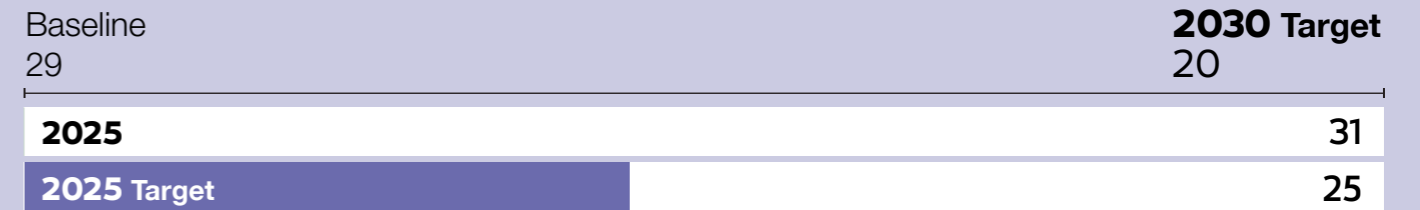
Unemployment Rate Among Saudis



Unemployment among Saudis continued to decline in 2025, reflecting steady job creation and a closer match between skills and labor market needs, supported by initiatives under the Labor Market Strategy and Human Capability Development Program. Female unemployment fell to a historic

low of 10.3%, as participation increased and opportunities expanded across sectors. The slight deviation from the interim target reflects a growing labor force, including new entrants to the market, as well as normal movement between jobs.

Ranking in the World Talent Competitiveness Index Rank



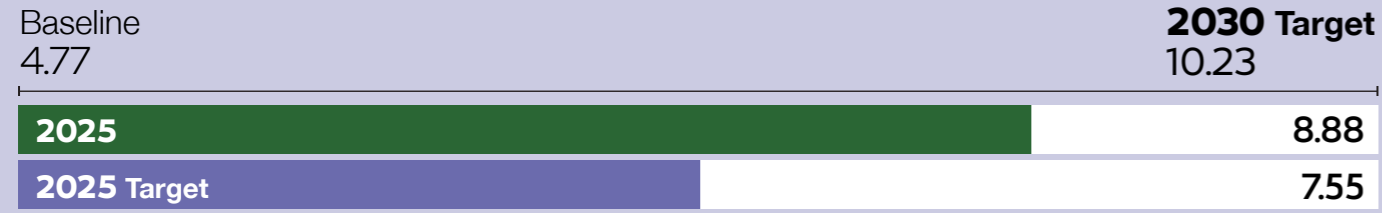
Saudi Arabia improved its position in the IMD World Talent Ranking in 2025, rising from 32nd to 31st, though remaining below its target.

Cost of living, particularly housing in major cities, continues to affect competitiveness. Efforts are

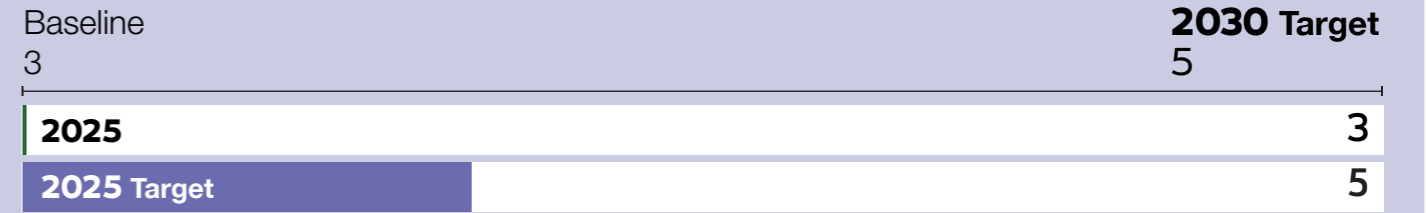
underway to strengthen talent attraction and development, with a focus on better coordination across policies and closer alignment with the factors measured by the index.

Number of Employees in SMEs

Million



Number of Saudi Universities Ranked Among the Top 200 Globally



SME employment reached over 8 million, exceeding the 2027 target. Growth reflects expansion in non-oil activity and an increasing number of SMEs. This has been supported by improvements in the SME ecosystem and access to finance, including

expanded incubators and accelerators, increased support for entrepreneurs, and stronger financing channels through institutions such as the SME Bank.



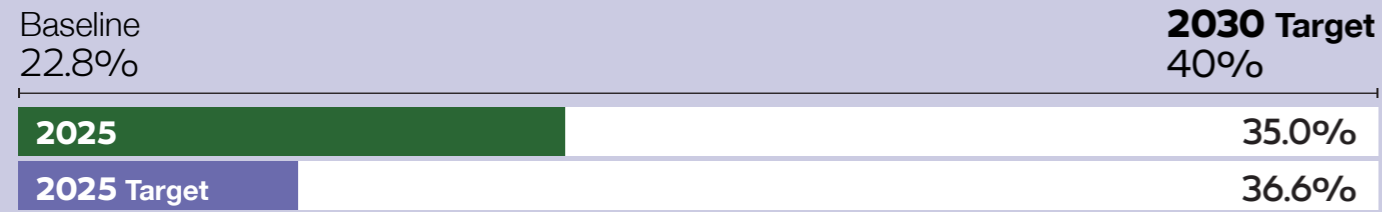
The target of five Saudi universities in the global top 200 was not met in 2025, with three universities maintaining their position in this group since 2019, representing 60% of the target.

At the same time, broader progress has been achieved, including four universities entering the global top 500 and King Saud University is

now ranked among the top 100 globally. Further progress will depend on strengthening research impact, expanding industry collaboration, and increasing international visibility, and attracting distinguished academic talent.

Female Labor Force Participation Rate

%

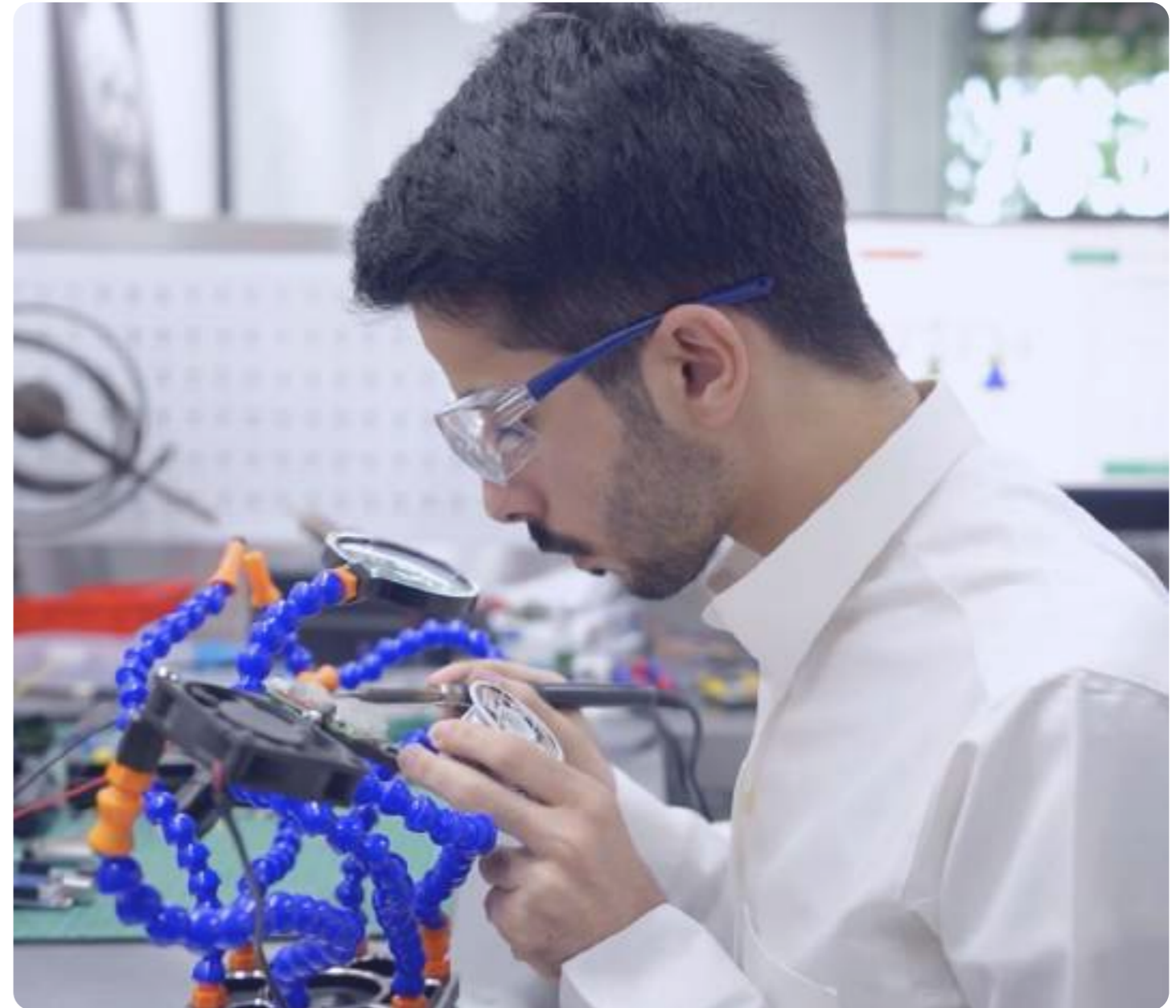
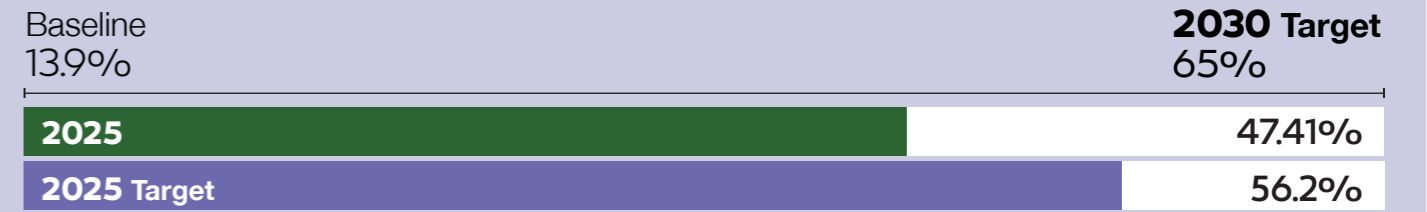


Female labor force participation increased significantly between 2016 and 2021, followed by a period of stabilization through 2025. The Vision 2030 target has since been raised from 30% to 40%. In 2025, participation was just below the

annual target, reflecting a maturing labor market following the rapid expansion in previous years, alongside softer demand after the peak in hiring in 2023 and normal seasonal variations.

Percentage of Technical and Vocational Education Graduates Employed Within Six Months of Graduation

%



The transition from technical education to employment remains above baseline levels, though progress in 2025 was below the annual target and slightly lower than the previous year.

The main challenge is alignment between training and employer needs. Skills do not always match

available roles, and outcomes vary across regions, between men and women, and between different types of institutions. Improving this alignment will be key to strengthening the speed and consistency of graduate employment

Sub-Index for Economic Participation and Opportunity
Rank and Score

Baseline
142nd (0.328)

2030 Target
Among the top five G20 countries
(0.736)

2025	129th (0.544)
2025 Target	0.649



The Economic Participation and Opportunity sub-index, published by the World Bank, declined in 2025, with both score and ranking below target.

The change reflects a moderation in hiring following the peak in 2023, rather than a reversal in progress. At the same time, women’s participation

remains concentrated in a limited number of sectors and regions, with lower representation in higher-value roles. Expanding participation across a broader range of sectors and improving access to higher-productivity opportunities will be key to improving performance over time.

Employment Rate of Persons with Disabilities Who Are Able to Work
%

Baseline
7.7%

2030 Target
15%

2025	14.7%
2025 Target	13.4%

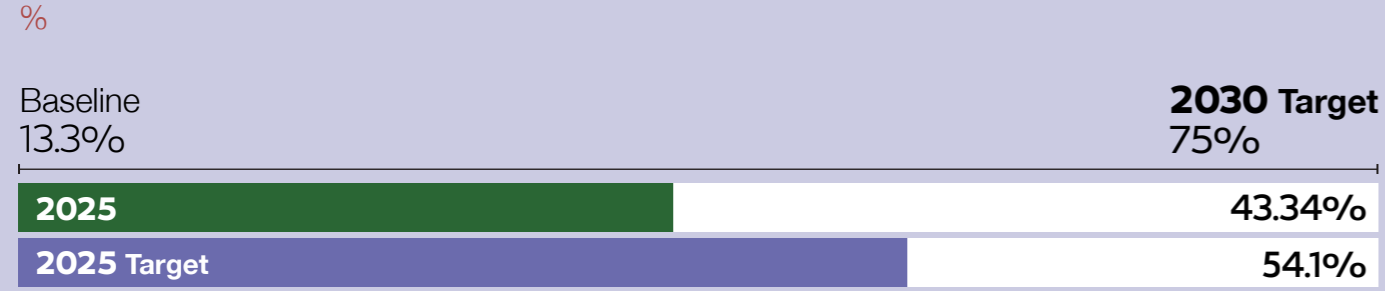


Employment among people with disabilities who are able to work continued to increase in 2025, reaching 14.7% and exceeding the interim benchmark.

This reflects a stronger focus on employability, including skills development, workplace integration, and better coordination of support

services. Targeted initiatives, particularly for deaf and hard-of-hearing individuals, have also expanded access to training and employment opportunities, supported by institutions such as the Authority for the Care of People with Disabilities and programs like Mowaamah.

Percentage of University Graduates Employed Within Six Months of Graduation



Graduate employment within six months remained below the 2025 target, with continued improvement in recent years.

As the labor market expands, opportunities

remain concentrated in major economic centers, and entry into employment varies across groups of graduates. Ongoing efforts are focused on strengthening alignment between education and labor market needs.

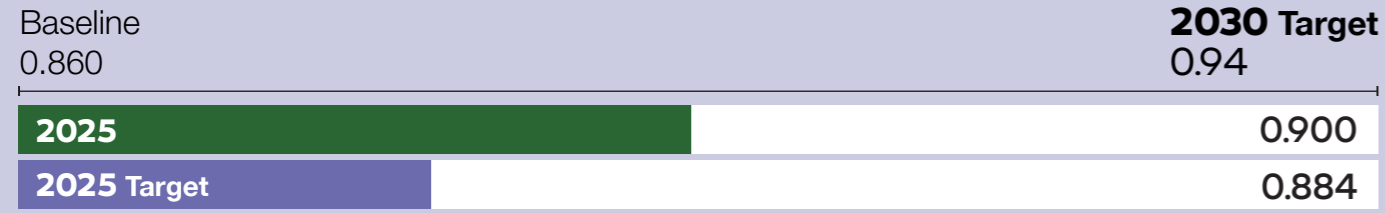
SMEs Contribution to GDP



SMEs increased their contribution to the economy in 2024, supported by continued expansion in non-oil activity and firm domestic demand. SME value added grew by 8%, driven primarily by wholesale and retail trade, construction, and manufacturing, which together accounted for around 70% of total value-added growth in 2024. This is based on the

latest reading. This reflects deeper integration of smaller firms into supply chains, particularly in construction and related services. Progress continued in 2025, with expanded support for entrepreneurs through accelerators, incubators, and coworking spaces.

Human Development Index Score



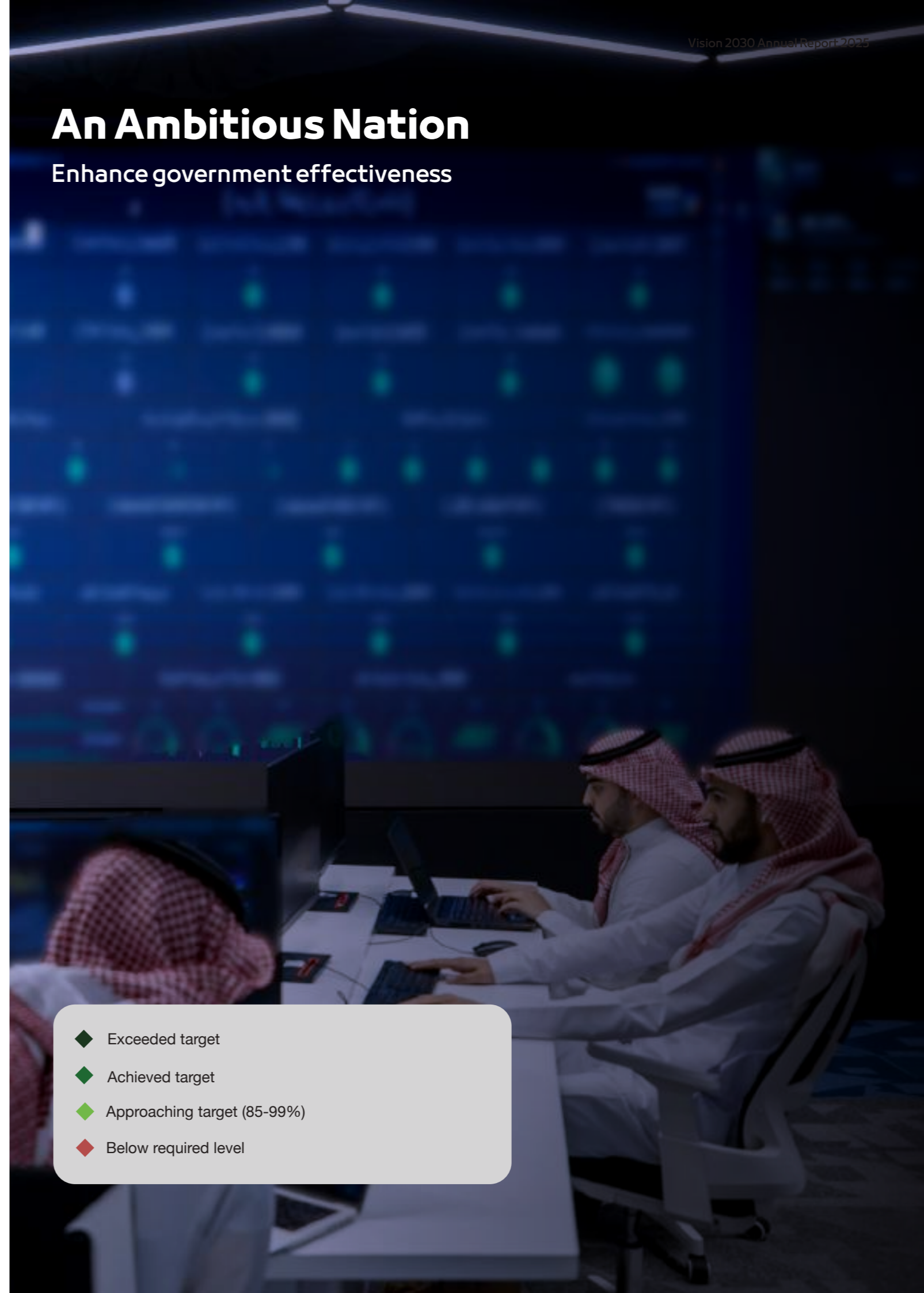
In the United Nations Development Programme’s Human Development Index, Saudi Arabia’s score rose to 0.900 in 2023 in the latest reading, exceeding both interim and 2025 targets and ranking 37th globally. The Kingdom is now classified among countries with very high human development.

Gains were strongest in health, with rising life expectancy reflecting continued investment in healthcare. Education indicators remained stable, maintaining progress in years of schooling. The standard-of-living component eased slightly after a period of stronger income growth, while overall formance remained above target levels.

An Ambitious Nation

Enhance government effectiveness

- ◆ Exceeded target
- ◆ Achieved target
- ◆ Approaching target (85-99%)
- ◆ Below required level



E-Participation Index

Score

Baseline
0.71

2030 Target
0.94
(in the top ten)

2024 0.96

2024 Target 0.82

United Nations E-Government Development Index

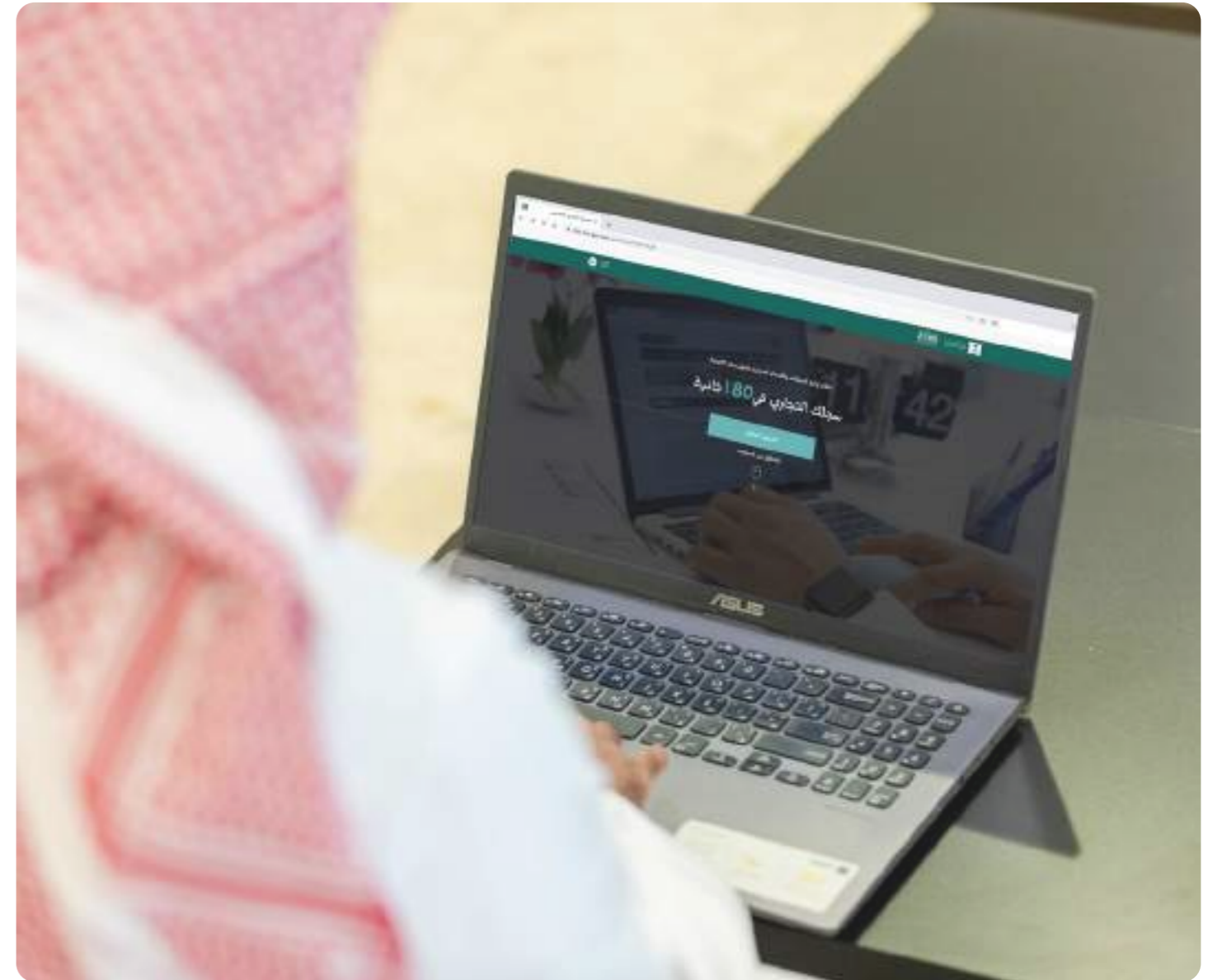
Rank

Baseline
36th

2030 Target
5th

2024 6th

2024 Target 26th



Saudi Arabia's ranking in the UN E-Participation Index rose significantly between 2022 and 2024, reaching its 2030 target ahead of schedule based on the latest reading.

This reflects expanded digital access to government information and greater public

participation in policymaking. Platforms such as DataSaudi and the Public Consultation Platform have improved access to data and enabled public consultation on draft laws and regulations before adoption.

Based on the latest reading, Saudi Arabia improved its position in the UN E-Government Development Index between 2022 and 2024, rising 25 places and exceeding its interim target. This progress supports the ambition to rank among the top five globally by 2030.

Gains reflect improvements in digital public

services, infrastructure readiness, and human capital, supported by stronger coordination across government and clearer standards for service delivery. Reforms under the National Transformation Program have also contributed to higher digital maturity and better system integration.

Government Effectiveness Index
Score and Rank

Baseline 61.9 (81 st)	2030 Target 91.5 (20 th)
2023	78.8 (46 th)
2023 Target	91.5 (20 th)

Global Food Security Index*
Score

Baseline 71.1	2030 Target 79
Actual Result 2022	69.9
2022 Target	69.9

* No index readings for 2023, 2024, 2025



Saudi Arabia's score in the World Bank's Government Effectiveness Index exceeded the 2023 target based on the latest reading. Improvements were most visible in areas that shape the private sector experience, including utilities, transport, tax administration, and the reduction of administrative barriers. Data availability and accessibility continue to influence how performance is reflected externally.

In late 2025, the World Bank updated the methodology for the Worldwide Governance Indicators. Preliminary estimates under the revised methodology indicate further improvement in 2024, with a score of 66.57%, and results will be presented on this basis going forward.

Saudi Arabia's performance in the Global Food Security Index (published by the Economist Intelligence Unit) improved between 2016 and 2019, with the score rising from 71.1 to 73.5. The pandemic period led to a decline to 68.1 in 2021, reflecting global supply chain disruptions. While the index has not been updated since

2022 following its discontinuation, progress has continued. Food security has shifted toward a more structured approach, with stronger emergency response capabilities, managed strategic reserves, and improved governance. Efforts have also focused on reducing food loss and strengthening supply chains.

◆ Enable social responsibility

Number of Volunteers

Thousand



Volunteer participation has grown rapidly since 2015, reaching approximately 1.75 million volunteers in 2025, exceeding both annual and 2030 targets. Growth has been supported by stronger organization of the sector. The National Volunteer Platform has expanded access to opportunities, improved tracking and certification,

and better matched volunteers to roles aligned with their skills. Governance frameworks and capacity-building across non-profit organizations have also strengthened coordination and credibility. Going forward, the focus is on developing more skill-based volunteering and aligning efforts with social and economic priorities.

World Giving Index

%



The World Giving Index, published by the Charities Aid Foundation, was updated in 2025 to focus on three measures: helping a stranger, donating money, and volunteering, with the overall ranking removed.

Under the previous methodology, Saudi Arabia recorded strong improvement, rising in global rankings between 2023 and 2024 and exceeding

its interim target, improving from rank 69 in 2023 to rank 33 in 2024 and exceeding its 2024 and 2025 targets. On the updated basis, performance remains strong, with participation in donating and volunteering above the global average, with 79% donating compared to a global average of 64%, and volunteering participation at 26%, in line with the global average. Average volunteer hours reached 8.7 hours, compared to 8.9 hours globally

Volunteering Time Index (Subcomponent of World Giving Index)



Percentage of Large Companies Offering Corporate Social Responsibility Programs



Based on the latest reading, volunteer participation exceeded the annual target and all targets set through 2027.

In 2024, participation was 26% above the global average, with average volunteering time reaching 8.7 hours per person annually, close to the global benchmark of 8.9 hours. This reflects expanded

access to volunteering opportunities and stronger organization of the sector, supported by initiatives under the National Transformation Program and the National Center for Non-Profit Sector Development, as well as the rollout of volunteer units in line with the Saudi National Standard of Voluntary Work (EDAMA).

The share of large companies implementing corporate social responsibility (CSR) programs more than doubled between 2018 and 2024, exceeding the interim target.

Growth reflects stronger coordination, improved digital reporting, and clearer channels for engagement, which have increased transparency

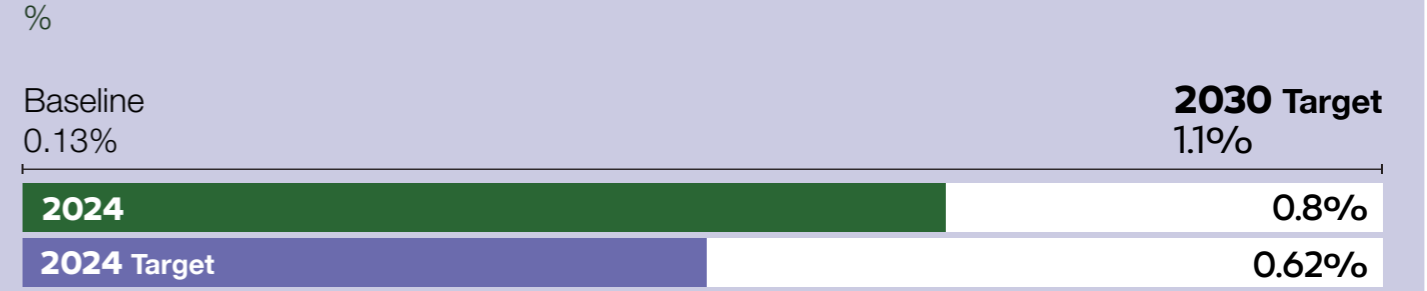
and participation. Incentives and dedicated forums have also helped embed CSR within corporate practices.

On current trends, large companies remain on track to meet upcoming targets.

Non-Profit Sector Contribution to GDP



Percentage of Non-Profit Sector Employees as a Share of Total Workforce



The non-profit sector's contribution to GDP rose to 1.4% in 2024, exceeding interim targets and continuing its steady expansion based on the latest reading. Growth has been supported by clearer governance and oversight, following the establishment of a dedicated national regulator,

as well as improved regulation and incentives, particularly for endowments, which have expanded funding and supported organizational growth. Since 2018, the sector has grown steadily, reflecting its increasing role in the economy alongside its social impact.

Employment in the non-profit sector increased to 0.8% of the total workforce in 2024, up from 0.64% in 2023 and exceeding interim targets based on the latest reading.

Growth reflects clearer governance following the establishment of a dedicated regulator,

alongside efforts to formalize and scale social and development activities. Improved coordination and targeted support have enabled more organizations to expand and strengthen their workforce.

This points to a growing role for the non-profit sector and increased demand for its services.

A Fast Growing Economy

Economic Reform and Diversification	78
Public Investment Fund	84
Investment and the Private Sector	90
Mining	102
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Logistics	116
The Financial Sector	128
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◆ What is the story of transformation?

Saudi Arabia's development journey has evolved from institution-building and economic expansion into a more diversified model of growth. As oil revenues increased, the economy

expanded and new sectors emerged, and the population grew to more than 18 million citizens. Over time, however, structural challenges became more apparent, particularly reliance on oil

revenues and government spending, highlighting the need for a broader transformation.

◆ Why was transformation needed?

Saudi Arabia entered the last decade from a position of strength, but with a clear structural constraint. While fiscal management supported resilience, dependence on oil revenues exposed the economy to volatility. Vision 2030 was launched to address this by

broadening sources of growth and creating a more sustainable economic model.

The Kingdom's strengths provided a strong foundation for this shift: its strategic location, investment capacity, and regional and global significance

at the heart of the Arab and Islamic worlds. Vision 2030 brought these together within a unified transformation agenda focused on expanding opportunity, improving quality of life, and strengthening global positioning.

◆ How was the transformation implemented?

The transformation focused on activating these strengths through regulatory, legislative, and structural reforms. Institutions were strengthened, new policies introduced, and key enablers brought into effect to

support non-oil sector growth, attract investment, and increase local content.

The Public Investment Fund (PIF) played a central role, supporting the development of new sectors and

expanding investment opportunities. At the same time, fiscal management became more transparent and disciplined, balancing growth with sustainability and supporting long-term investment.

◆ What has been the impact of transformation?

Over the past decade, the structure of the economy has shifted. Since the launch of Vision 2030, the economy has surpassed \$1 trillion, with non-oil activities now accounting for more than half of total output.

This has been accompanied by broader participation across the economy. The role of the private sector and SMEs has increased, supporting job creation and contributing to a decline in unemployment among Saudis to historically low levels.

The economy now stands on a more diversified and resilient foundation, with greater capacity to sustain growth over time.



surpassing

\$1 trillion

economy

Economic Reform and Diversification

Driving Growth with Greater Resilience

Saudi Arabia's economic reform agenda is built around two priorities: driving growth and strengthening resilience. Recent assessments point to continued expansion, supported by sustained momentum in non-oil sectors and a fiscal framework that is more transparent, flexible, and forward-looking.

This framework translates ambition into measurable discipline. This is further evidenced by the rise in nominal gross fixed capital formation, driven in part by government expenditure, surpassed approximately \$384 billion by the end of 2025. Within this structure, fiscal policy remains expansionary but controlled, allowing the government to diversify funding sources and direct spending toward high-growth sectors.

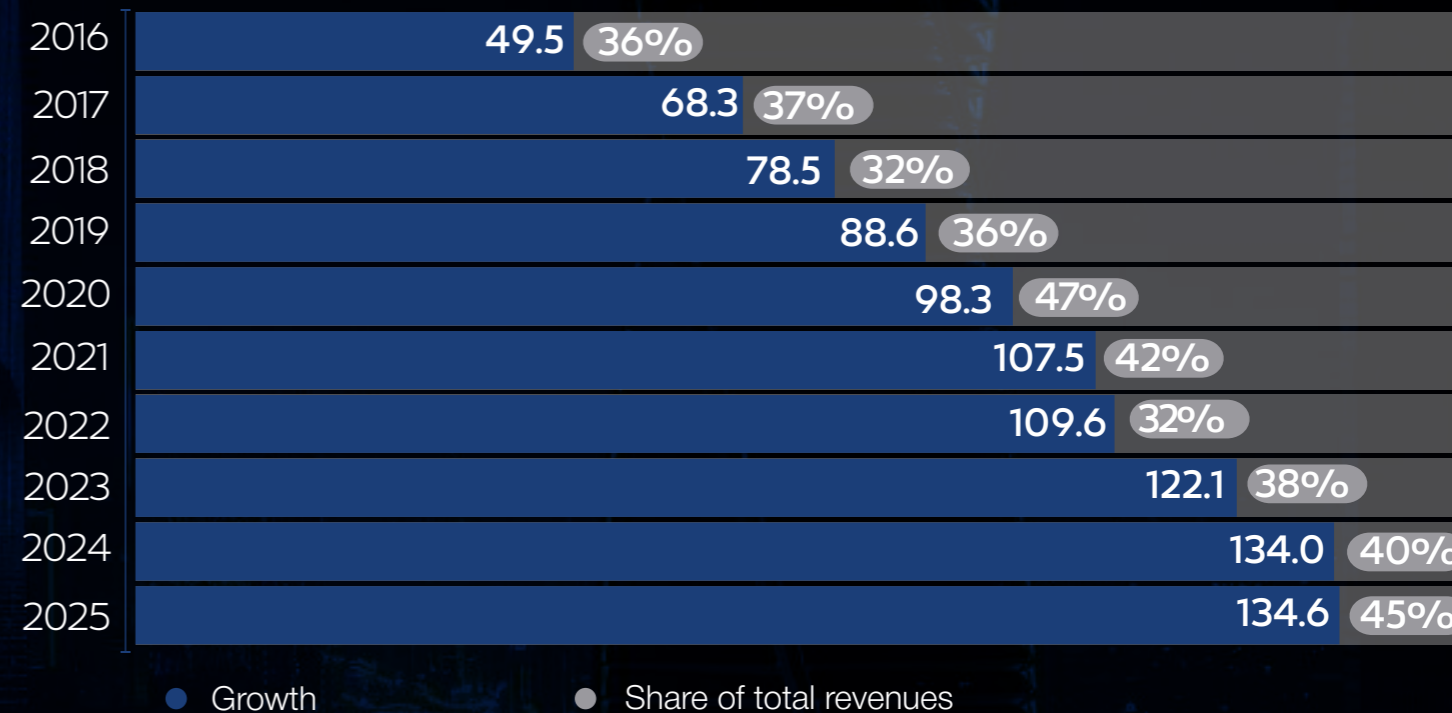
At the same time, sustainability remains central. Public debt is low by global standards and among the lowest in the G20, with a clear approach to maintaining debt below 50% of GDP while continuing to invest. In parallel, the Kingdom maintains strong reserves, which reached their highest level in five years in 2025, totaling approximately \$453.3 billion.

The impact is reflected not only in growth, but in its composition. Non-oil activities now account for 55% of real GDP, while non-oil government revenues have increased by 170% since 2016, indicating a broader and more diversified economic base.

Saudi Arabia's role in the global economy has also become more prominent. The establishment of the World Bank's regional office in Riyadh, alongside the IMF's regional presence and the Kingdom's designation as a World Bank knowledge hub, reflects its growing role in economic policy and reform.

Growth of Non-Oil Government Revenues

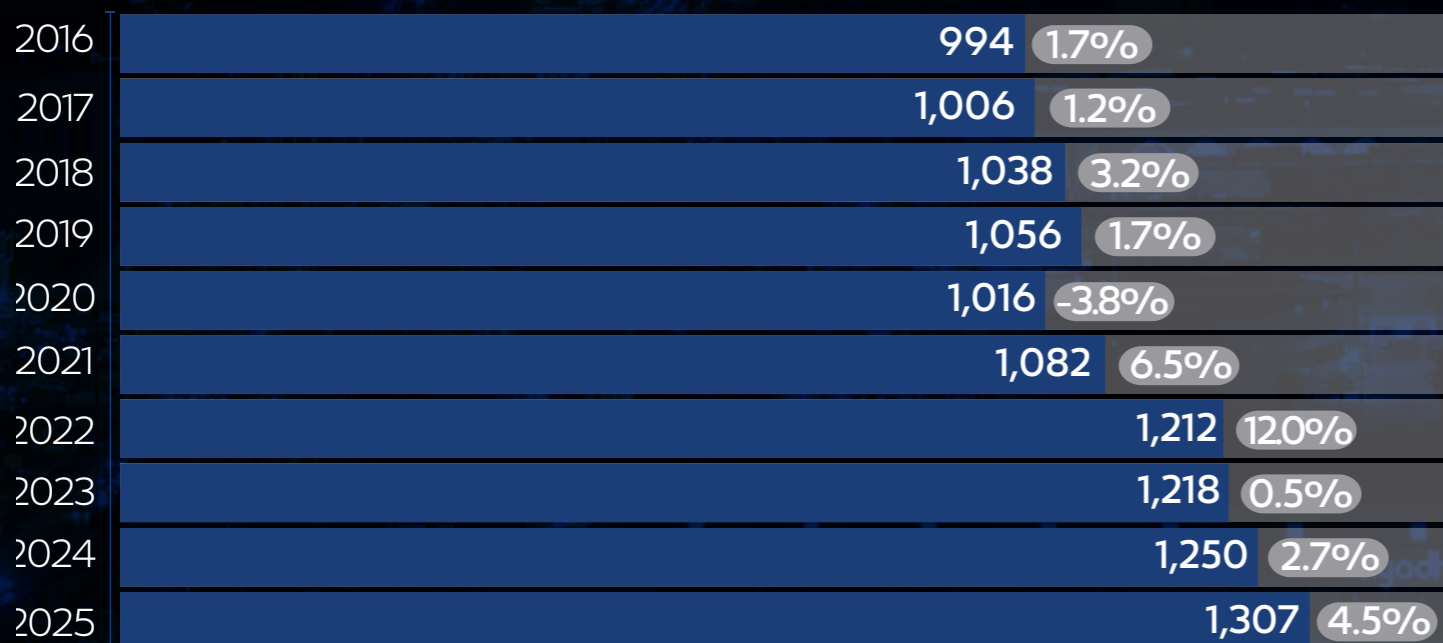
(USD Billion)



● Growth ● Share of total revenues

Real GDP Growth

(USD Billion)



● GDP ● Growth

Record Level of Non-Oil Activities

55% ↑

share of real GDP



Historic Level of Liquidity in the Saudi Economy

(USD Million)

2016	479,922
2017	481,378
2018	494,305
2019	529,370
2020	573,137
2021	615,685
2022	665,432
2023	716,051
2024	779,059
2025	844,741

(USD Billion)

2016	451.4	45%
2017	466.1	46%
2018	481.0	46%
2019	504.5	48%
2020	489.3	48%
2021	539.5	50%
2022	606.1	50%
2023	648.5	53%
2024	687.5	55%
2025	721.1	55%

● GDP ● Contribution

KAFD KAFD

Reforms Driving Competitiveness

Reforms have strengthened Saudi Arabia's competitiveness, supporting a more transparent and investable business environment.

More than 1,000 reforms and 1,200 measures have been implemented, alongside the introduction of key institutions and updated laws, including allowing 100% foreign

ownership in most sectors. Together, these changes have strengthened the regulatory and institutional foundations of the business environment.

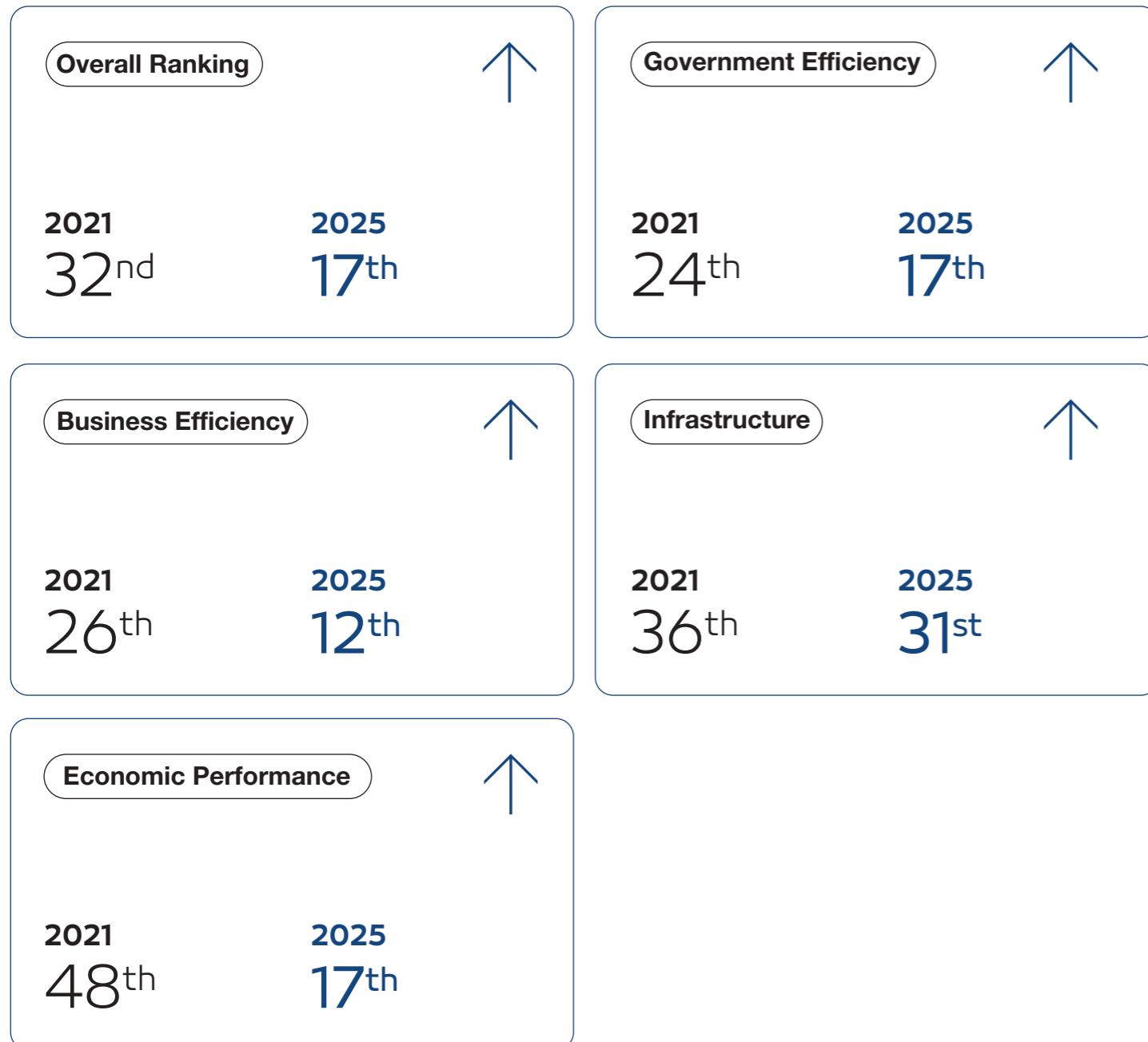
Efforts have also simplified the investor journey. Digital platforms have reduced requirements for investment licenses by 54%, while property transfers can now be completed within

60 minutes and container clearance within 24 hours.

Reforms have further supported entrepreneurs and SMEs through expanded access to finance, contributing to broader participation in economic activity.

Improvement in Global Competitiveness Rankings

World Competitiveness Yearbook 2025



Public Investment Fund

Scaling Investment to Drive Growth

Since its establishment in 1971, the Public Investment Fund (PIF) has played a central role in national development. Under Vision 2030, its mandate expanded from financing projects to driving economic transformation, with a stronger focus on developing non-oil sectors and unlocking investment opportunities.

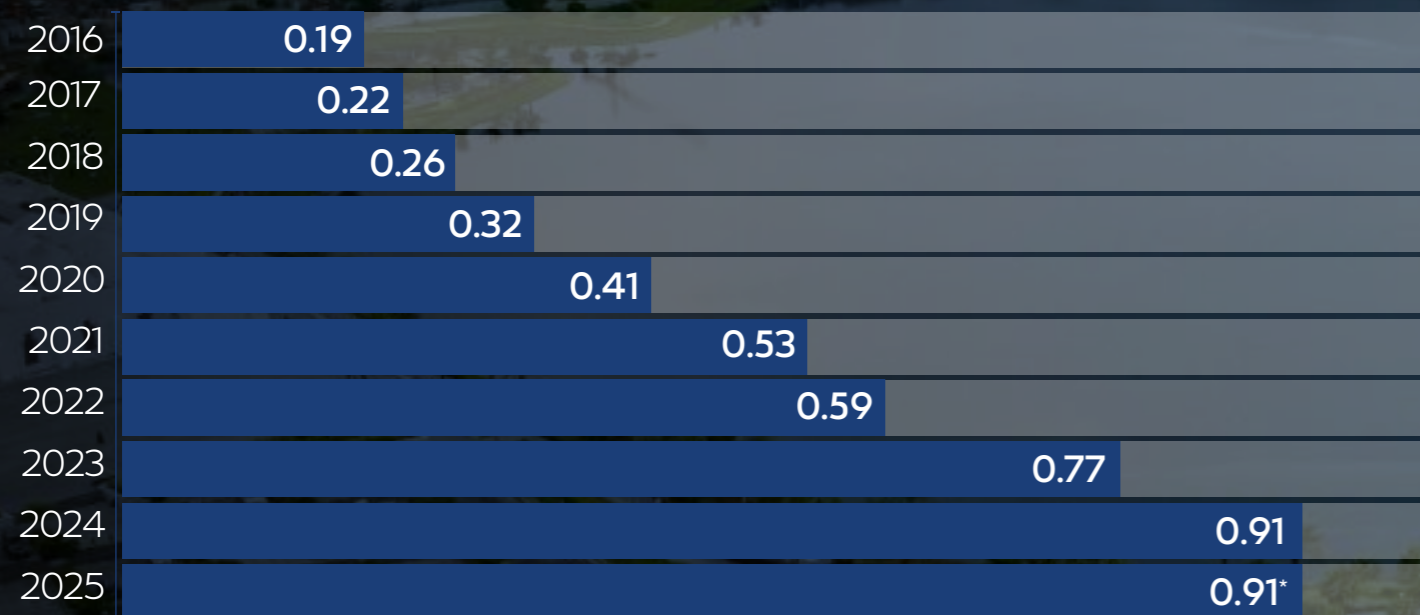
This evolution has been delivered in phases. The initial phase focused on strengthening foundations through restructuring and strategy development. This was followed by a period of accelerated delivery, including the expansion into strategic

sectors and the advancement of major projects such as Diriyah, the Red Sea, and Qiddiya.

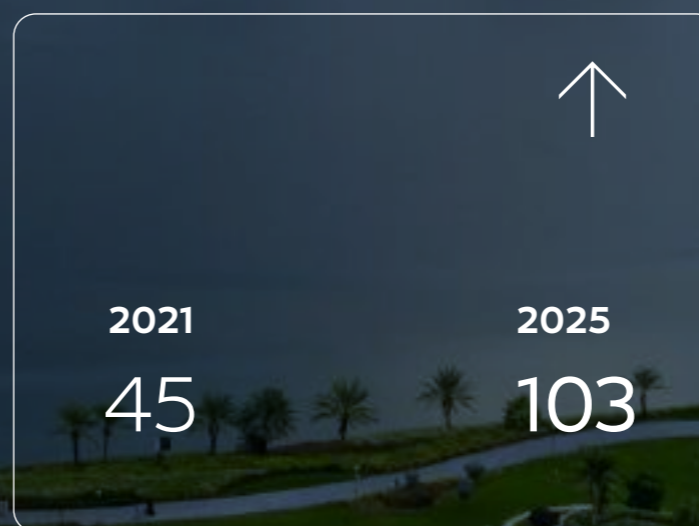
More recently, the focus has shifted toward greater prioritization and private sector participation, with increased opportunities for investors across PIF's portfolio.

The impact is reflected in both scale and contribution. PIF has expanded its assets, launched new companies, and contributed around 10% of non-oil GDP, supporting job creation and enabling broader private sector involvement.

Growth in Assets Under Management (USD Trillion)



Number of Companies



* Preliminary estimates

Global Leadership and Impact

PIF has strengthened its global standing by leveraging its scale and partnerships to build strategic relationships, attract investment, and connect Saudi Arabia to international markets.

Nine years after its launch by PIF, the Future Investment Initiative has become a leading event on the global investment calendar. It brings together world leaders, experts, and investors

to discuss priorities, explore emerging trends, and address challenges shaping the future of capital flows.

PIF has also emerged as the most valuable and fastest-growing brand among sovereign wealth funds. This reflects growing international recognition, not only of its investment performance, but also for governance, sustainability standards, and its role in developing strategic sectors through

its portfolio. Together, these factors have strengthened the Kingdom's presence and influence across the global investment landscape.

Nine Years of the Future Investment Initiative
A Platform Shaping the Future of Global Investment

\$250B+ in agreements signed

31K+ participants

3K+ speakers, including global leaders and decision-makers

100+ specialized studies and research publications

Unlocking PIF Real Estate Opportunities

Leading Sovereign Wealth Fund Brand Globally
Brand Finance 2025

\$1.2B brand value

11% growth year-on-year

Top Ranked in Governance, Sustainability, and Resilience
Global SWF 2025

100% compliance

ranked among **200** sovereign investors globally

Embedding Sustainability Across Investment

Sustainability is now embedded across PIF's investment approach, shaping how projects are selected, financed, and delivered. This reflects a shift toward long-term value creation and alignment with global environmental priorities.

PIF has also emerged as a key player in sustainable finance. As a founding member of the One Planet Sovereign Wealth Fund Working Group, it has helped shape global frameworks while expanding its own financing tools through green bond issuances.

Proceeds are directed toward renewable energy, green buildings, energy efficiency, and sustainable water management. To date, around \$9 billion has been allocated across 91 projects, expected to avoid approximately 10.1 million tons of CO₂ emissions.

Transition to the Green Economy

Key Milestones

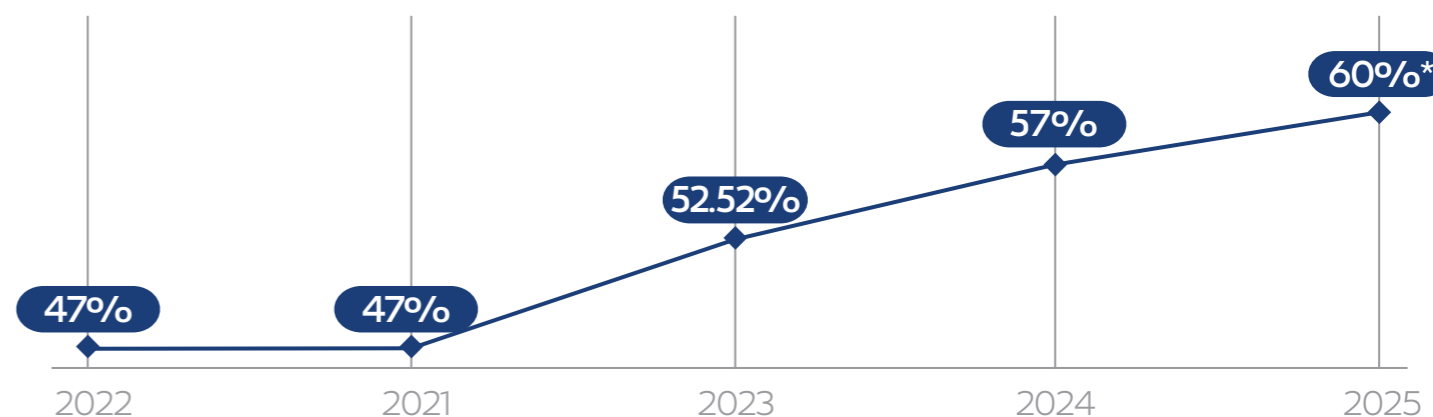
- 2017** ◆ Founding of the One Planet Sovereign Wealth Fund Working Group
- 2022** ◆ Issuance of a Green Finance Framework
 - ◆ First green bond (\$3B)
- 2023** ◆ Second green bond (\$5.5B)
- 2025** ◆ First euro-denominated green bond

Enabling Private Sector Growth

PIF has expanded opportunities for the private sector across its projects, with a focus on increasing local content and enabling the participation of companies, including SMEs and startups. This has supported a steady rise in private sector participation in the economy.

This partnership has been strengthened through platforms that connect businesses to opportunities, alongside targeted programs that build capability and support participation across PIF projects.

Local Content in Projects



* Preliminary estimate

Expanding Opportunities for the Private Sector

\$10B+ Opportunity value generated through PIF platforms

185+ Opportunities offered to the private sector

300+ Saudi companies qualified to work across PIF portfolio companies

200+ SMEs supported and integrated into PIF projects



Investment and the Private Sector

A Stronger Role in Economic Growth

The private sector is playing an increasingly central role in economic growth, supported by a more competitive business environment and stronger investment activity.

This shift has translated into measurable outcomes. The number of international investors has increased more than

tenfold since 2016, and investment in non-oil sectors has reached \$213 billion. The share of investment in GDP has also risen from 22% to 30%, supporting diversification and job creation.

The Evolution of Private Sector Growth

Reform

- ◆ Bankruptcy Law and Tayseer Program professionals trained
- ◆ **900+** regulatory reforms
- ◆ Key institutions established

Scale

- ◆ National Investment Strategy
- ◆ New investment and companies laws
- ◆ Growth across priority sectors

Lead

- ◆ Increased private sector participation
- ◆ Expansion across sectors
- ◆ Stronger role in driving growth

Growth in Nominal Gross Fixed Capital Formation *

(USD Billion)

2020	187.7
2021	231.2
2022	300.9
2023	339.8
2024	384.1
2025	384.5

Growth in Nominal Gross Fixed Capital Formation of the Non-Government Sector **

(USD Billion)

2020	146.6
2021	202.3
2022	260.5
2023	285.2
2024	328.1
2025	343

Growth in the Value of the Private Sector's Contribution to GDP

(USD Billion)

2016	416.6
2017	430.2
2018	443.7
2019	465.1
2020	452.0
2021	498.4
2022	555.5
2023	593.9
2024	629.3
2025	660.3

* Nominal gross fixed capital formation. This indicator is one of the key economic measures used to assess the development of the economy and its capacity to expand and produce in the future. It reflects the volume of investments injected into the economy in the form of fixed assets that are used in production over the long term.

** Nominal gross fixed capital formation of the non-government sector. This indicator measures the development of the non-government sectors of the economy by showing the volume of investments these sectors inject into the economy in the form of fixed assets.

Investment Flows into Saudi Arabia

Investment into Saudi Arabia has increased in recent years, supported by reforms that made the market more open and easier to access for both domestic and international investors.

A more coordinated investment framework has helped drive this shift. The Ministry of Investment, together with the National Investment Strategy and the Investment Law, has simplified entry into the market and supported business expansion. Targeted initiatives, including the Regional Headquarters Program and Invest Saudi, have further strengthened investor interest.

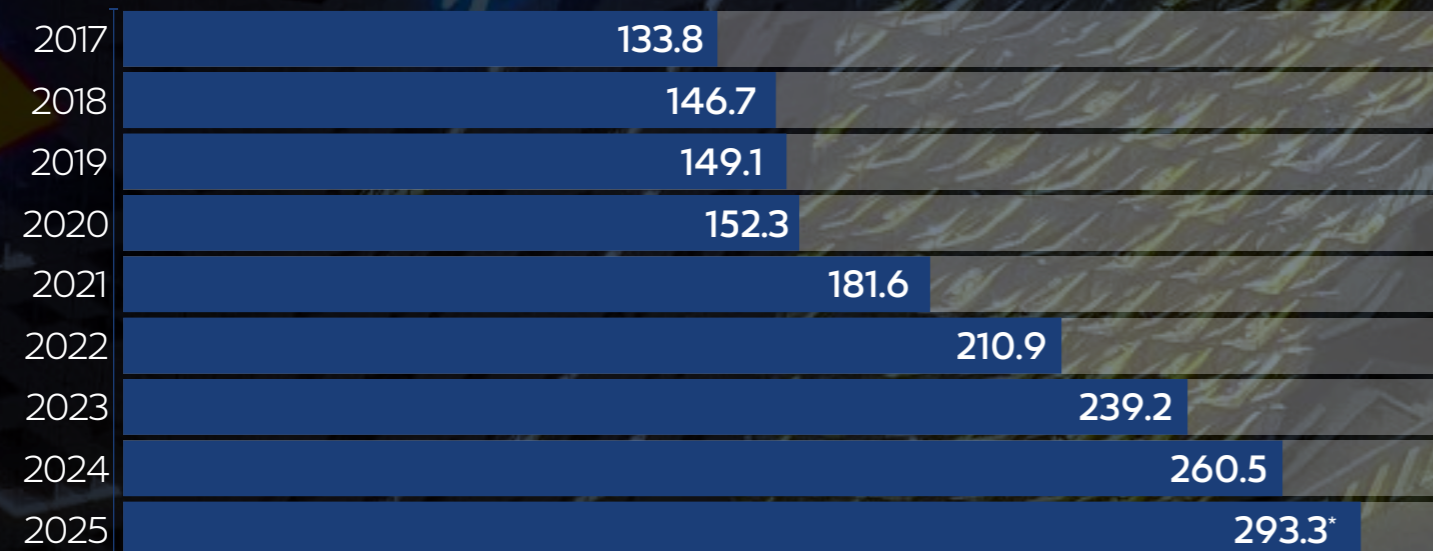
At the same time, opportunities are easier to identify. Development authorities and platforms such as Furas have improved visibility and made it simpler for investors to access projects across different regions.

This builds on a strong infrastructure base, with continued development of economic zones, industrial cities, and financial centers creating opportunities across sectors.

As a result, the private sector's share of total investment has increased from 60% to 76%, making it the main driver of investment growth in the Kingdom.

FDI Stock

(USD Billion)



FDI Inflows

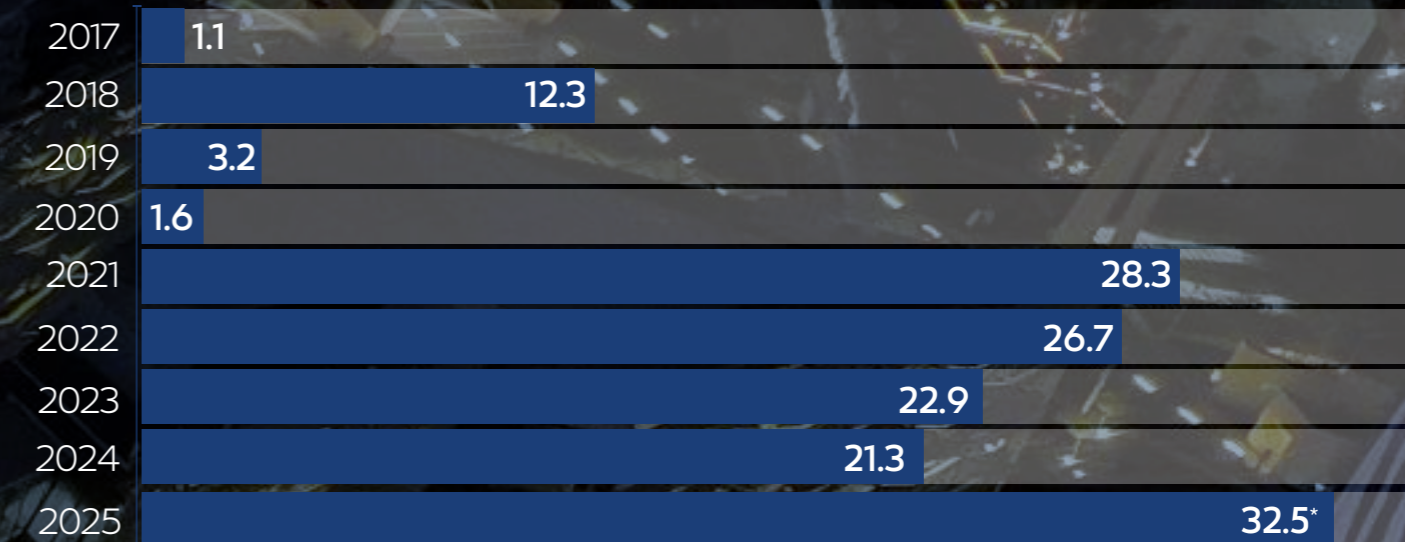
(USD Billion)



* Preliminary estimates

Net FDI Flows

(USD Billion)



Outward FDI

(USD Billion)



A Destination for Global Companies

Regional Headquarters Target Exceeded



2021
44

2025
700

Companies with Foreign Investment



2020
5K

2025
55K

* Preliminary estimates

King Abdullah Financial District (KAFD)

A Growing Financial Hub

580K+ m² of leased office space

28K+ employees

140+ local and international companies

19 regional headquarters

Integrated Urban Infrastructure

15.46 km total bridge length upon completion

3.5K passengershour capacity in the electric train

35K+ parking spaces for residents, visitors, and employees

A More Competitive Business Environment

Commercial activity has expanded alongside a significant shift in the Kingdom's regulatory environment. Modernized laws and simplified procedures have reduced friction and created more enabling conditions for businesses to start, operate, and grow.

Reforms have focused on the investor and entrepreneur journey, combining legal modernization with practical improvements to the business environment. Key measures included

the introduction of the Companies Law, Commercial Register Law, Bankruptcy Law, E-Commerce Law, Competition Law, and Franchise Law. These were supported by ongoing efforts to identify barriers to growth and introduce targeted solutions that enable businesses to expand and seize new opportunities.

Institutional changes reinforced these reforms. The Ministry of Commerce sharpened its focus on regulation and

oversight, while the Saudi Business Center streamlined business start-up procedures, delivering more than 10 million services. The Competition Council was also transformed into the General Authority for Competition, strengthening enforcement and oversight.

Together, these efforts have created a more transparent, competitive, and business-friendly environment.

Global Rankings in Business and Trade Environment

Economic Performance (Globally)

1st

absence of threats to business relocation

2nd

economic resilience

4th

long-term employment growth

Business Efficiency (Globally)

2nd

total early-stage entrepreneurial activity

3rd

availability of venture capital

4th

long-term labor market growth

Commercial Activity Expands

2024

1.6M

2025

1.8M

Women

41%

48%

Growing Business Presence and Activity

Franchise Registrations

2024

2,333

2025

2,637

Foreign Commercial Registrations

2023

12,176

2025

13,103

Simplifying Business Operations

◆ **108K** branch registers cancelled

◆ Unified commercial register introduced

Saudi Business Center

666

licenses converted to instant issuance

500K

electronic codes issued (Unified Electronic Code - Phase 2)

189

new services introduced (Business Platform)

Fastest-Growing Sectors

(Active commercial registrations)

Artificial Intelligence Technologies
(thousand)



2024	2025
14+	19+

Gaming Industry
(thousand)



2024	2025
661	841

Amusement and Entertainment Cities
(thousand)



2024	2025
7+	8.3+

E-commerce
(thousand)



2024	2025
40+	43.8+

Cybersecurity
(thousand)



2024	2025
7.6+	9.7+

Financial Activities and Insurance
(thousand)



2024	2025
13.2+	15.5+

Operation of Entertainment Facilities
(thousand)



2024	2025
8.6+	10.4+

Tourism Trip Organization
(thousand)



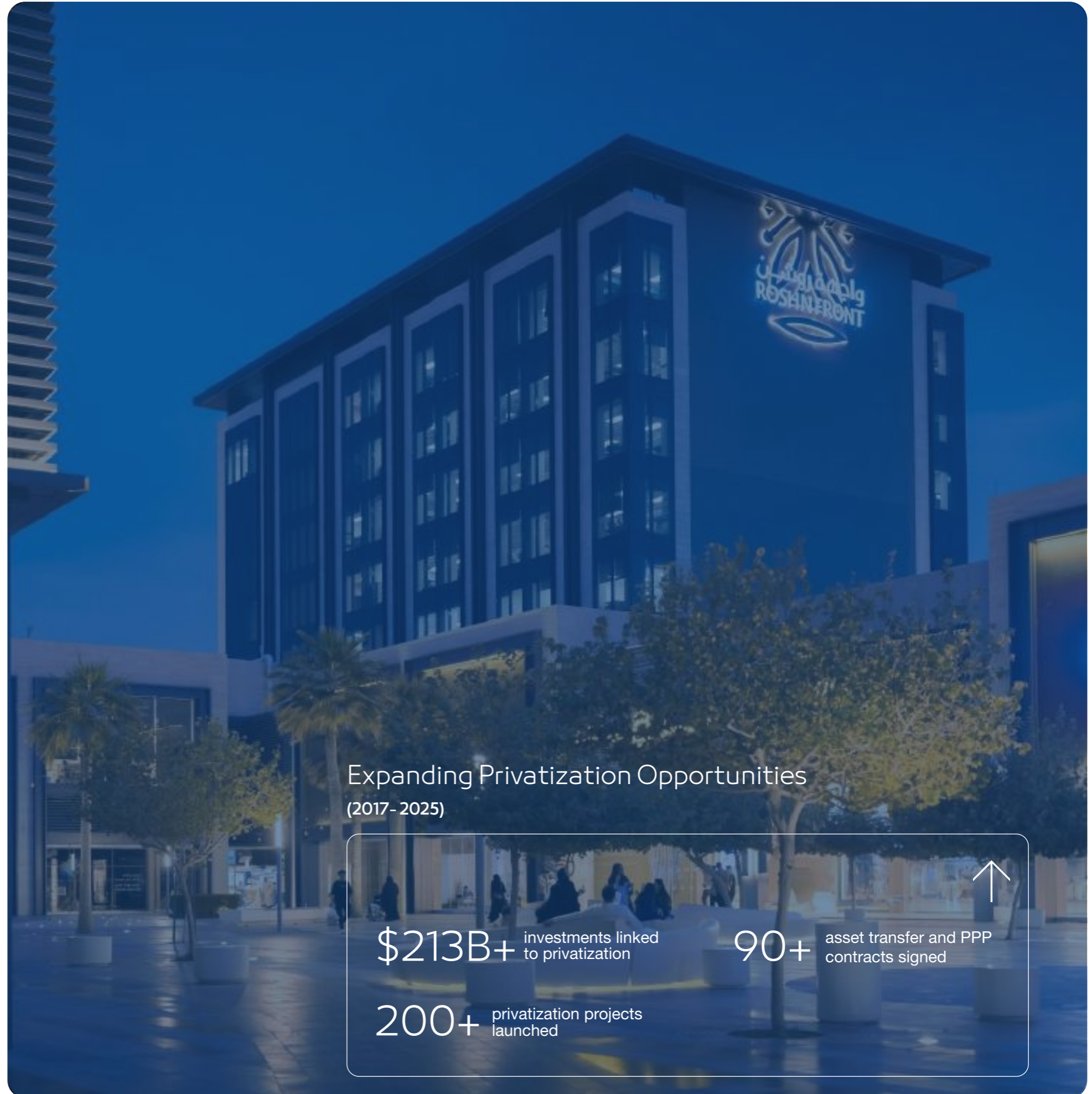
2024	2025
6.4+	10.6+

Public-Private Partnership

Public-Private partnerships (PPPs) and privatization have expanded, creating more opportunities for the private sector to take part in delivering services. This has been supported by the establishment of the National Center for Privatization, the issuance of the Privatization Law, and the launch of the National Privatization Strategy.

As this progressed, the role of government began to shift. It moved away from direct delivery toward regulation and oversight. This has helped projects move faster, improved transparency, and created a more competitive environment.

These changes are reflected in international rankings. In the World Bank's PPP Legal and Regulatory Frameworks Report, Saudi Arabia improved across key indicators. The Preparation Index increased from 41 to 56. The Contracting Index rose from 76 to 91. The Contract Management Index recorded the highest regional improvement, rising from 41 to 77. The PPP Tendering Index also increased from 83 to 92, ranking first regionally and second globally.



Expanding Privatization Opportunities (2017-2025)

\$213B+ investments linked to privatization

90+ asset transfer and PPP contracts signed

200+ privatization projects launched



Expanding the Role of SMEs

Small and medium enterprises (SMEs) have become a key driver of private sector growth, supported by a stronger and more accessible business ecosystem.

Efforts have focused on improving access to finance and enabling entrepreneurship through institutions such as Monsha'at, the SME Bank, and the Saudi Venture Capital Company, alongside initiatives that attract both local and international founders.

This has translated into significant growth. The number of SMEs has exceeded 1.7 million, employing around 8.8 million people, with their contribution to GDP reaching 22.9%. A new generation of business owners is also emerging, with more than 474,000 enterprises owned by Saudi youth.

8.8M

SME employees

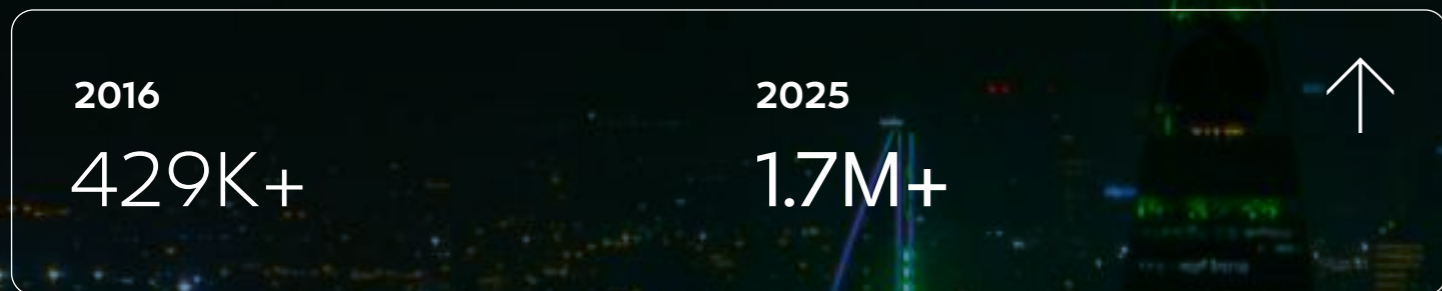
22.9%

SME contribution to GDP

474K

SMEs owned by Saudi youth

SME Growth



Rising Global Position



Startup Ecosystem Growth



SME Ecosystem Impact

\$34.8B+

Kafalah program support

\$24.8B+

Kafalah guarantees issued

27K+

supported through Kafalah

25.8%

growth in localization rate – micro enterprises

14.7%

growth in localization rate – small enterprises

10.6%

growth in localization rate – medium enterprises

\$10.7B+

revenues generated by Ta-moooh-supported companies

\$4.3B+

market capitalization of listed companies

\$2.0B+

investments generated

100K+

employees across participating companies

3.2K+

companies joined the program

39+

companies listed on the stock exchange

27K+

enterprises supported through Estrdad

89K+

jobs created by beneficiary enterprises

75%

enterprise survival rate



Mining

Unearthing Mineral Wealth and Opportunities Beneath the Surface

Saudi Arabia's mining sector has evolved from early exploration into a more integrated and strategic industry.

Initial development focused on establishing regulatory foundations and expanding exploration, supported by the creation of key institutions and the entry of international companies. Over time, this progressed into large-scale production and infrastructure development, enabling downstream industries such as aluminum and phosphate processing.

Since the launch of Vision 2030, mining has been repositioned as a strategic sector, with a focus on attracting investment, unlocking reserves, and strengthening links with industrial and high-tech industries.

This shift has been supported by a more structured ecosystem, including the Comprehensive Mining Strategy, the Mining Investment Law, and the establishment of the Ministry of Industry and Mineral Resources. Platforms such as Ta'adeen have simplified licensing, while initiatives like the Future Minerals Forum have strengthened the Kingdom's global position.

Today, the estimated value of mineral resources exceeds \$2.5 trillion, an increase of around 90% since 2016, positioning the Kingdom as a key hub for mining, processing, and global supply chains.

estimated
mineral wealth

\$2.5 trillion

Development of the Mining Sector

- 2016** ♦ Mineral resource valuation estimated at \$1.3T
- 2018-2020** ♦ Comprehensive Mining Strategy launched
- ♦ Ministry of Industry and Mineral Resources established
- ♦ Mining Investment Law issued
- ♦ Ta'adeen Platform and ESNAD launched
- 2021-2022** ♦ Geological Survey Program and National Geological Database launched
- ♦ First public exploration licensing round
- ♦ Future Minerals Forum launched
- 2023** ♦ Mining Fund and Manara Minerals established
- ♦ Exploration incentives introduced (\$181.9B)
- ♦ Nuthree Exploration Incubator launched
- 2024** ♦ Mineral resource value increased to \$2.5T
- ♦ Ta'adeen 2.0 and National Minerals Program launched
- ♦ Mining Innovation Studio launched
- 2025** ♦ Global Minerals Innovation Competition introduced
- ♦ Launch of the Saudi Geological Survey Academy and its digital platform
- ♦ Licensing responsibilities streamlined

Regulatory Maturity Driving Investment

Mining reforms over the past decade have strengthened regulation and improved the investment environment, making the sector more competitive and easier to access.

This shift is reflected in international

indicators, with Saudi Arabia advancing significantly across key mining indices. It is also visible in rising exploration activity and increased participation by mining companies, supported by clearer regulations and expanded investment opportunities.

Large-scale geological survey programs have further reinforced this momentum, helping to unlock new resources and expand the sector's long-term potential.

Global Competitiveness in Mining

Fraser Institute Annual Survey of Mining Companies 2024, published in 2025

Top 10

Mining Investment Attractiveness Index

2013 **104** → 2025 **10**



1st

Mining tax regime
Regulatory consistency and non-overlap
Clarity of mining regulations and administrative efficiency

2nd

Environmental regulation stability and clarity

3rd

Land access and community development

4th

Policy and regulatory framework

Mining Activity

Exploitation Licenses



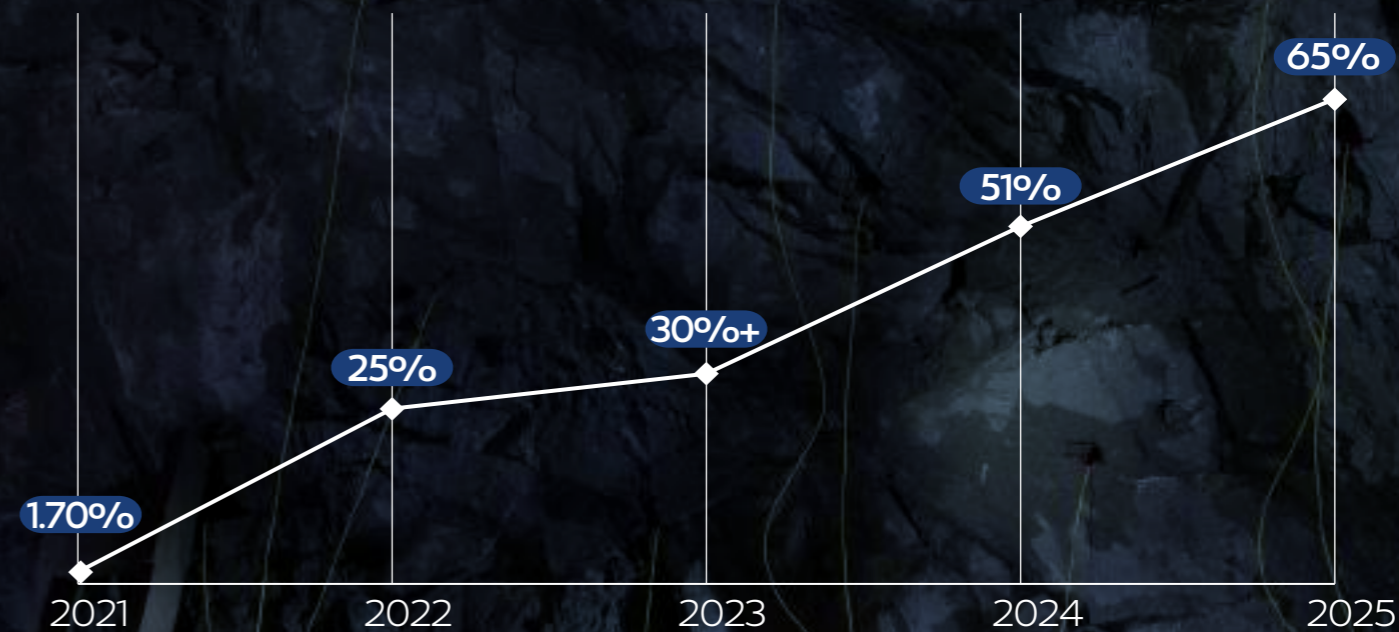
2021 **170** 2025 **275**

Exploration Licenses



2020 **499** 2025 **1,018**

Geological Survey Expansion



Major Discovery in Najran

11 million tons of minerals, including

- ◆ Gold
- ◆ Silver
- ◆ Zinc
- ◆ Copper

\$60.5B

Increase in the value of untapped mineral resources

Industry

A More Competitive Industrial base

Saudi Arabia's industrial sector has developed from an oil-based foundation into a more diversified and integrated system.

Early investments in infrastructure, industrial cities, and national companies established the sector's base. Under Vision 2030, the focus has shifted toward expanding industrial capacity, strengthening local content, and attracting investment into higher-value industries.

This has been supported by clearer regulation, stronger institutional coordination, and initiatives that improve access to finance and industrial infrastructure. Integration with the logistics sector has further strengthened the Kingdom's position as a manufacturing and export hub.

\$166M+
non-oil exports

Key Milestones in Industrial Development

- 2019-2020**
 - ◆ Ministry of Industry and Mineral Resources established
 - ◆ National Industrial Strategy launched
 - ◆ Saudi Export-Import Bank established
- 2021-2025**
 - ◆ "Made in Saudi" program launched
 - ◆ Shareek and Future Factories programs introduced
 - ◆ Launch of Ceer (first Saudi EV brand)
- 2023-2024**
 - ◆ Special Economic Zones launched
 - ◆ ALAT established
 - ◆ National Automotive Academy launched
 - ◆ World's largest food cluster inaugurated
- 2025**
 - ◆ 12.9K+ factories across the Kingdom
 - ◆ Non-oil exports reach \$166M+



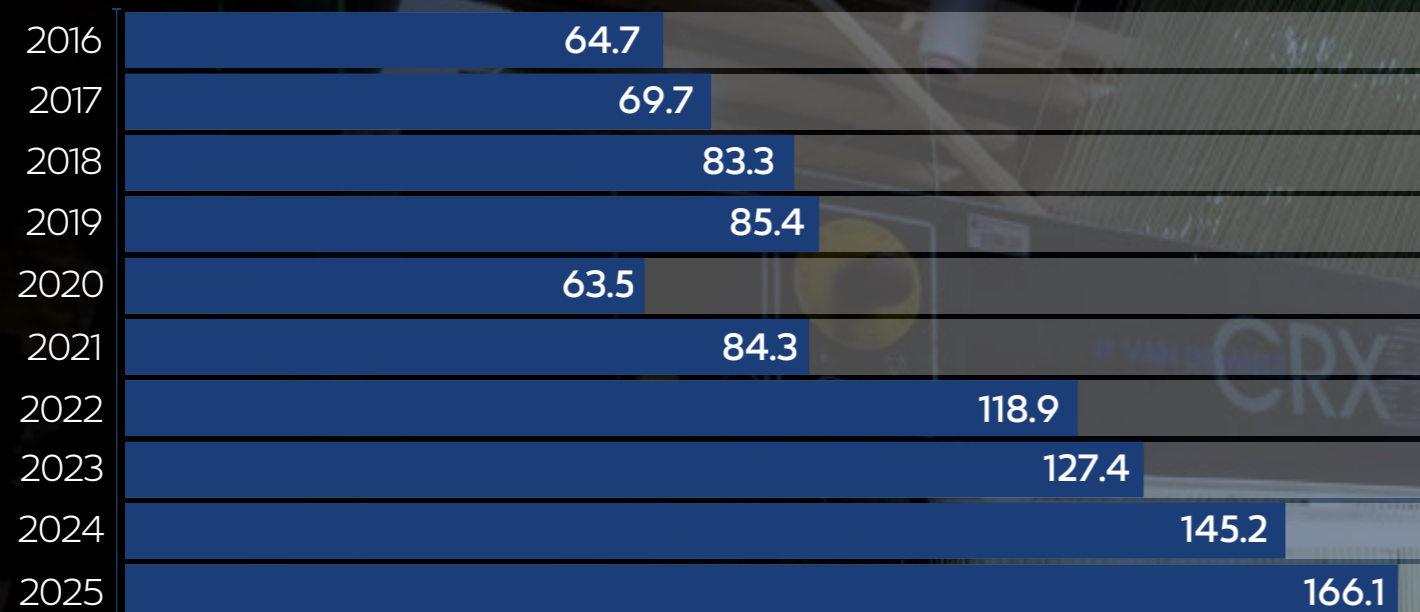
Accelerated Industrial Growth

Industrial expansion has accelerated, supported by improved access to finance, stronger infrastructure, and targeted investment programs.

This is reflected in rising exports, increased industrial capacity, and a significant expansion in investment.

Non-Oil Exports⁷

(USD Million)



Industrial Capacity



Enabling Industrial Growth

Investment and Financing

\$381B non-government investment (economic cities, industrial cities, and special zones)

\$3.4B government financing for emerging industries

Made in Saudi

3K+ export opportunities

74 countries network

Saudi Export-Import Bank

\$31B+ credit facilities

Industrial Cities

2.2K+ ready-built factories



Industrial Production Index

2024

104.3

2025

113.6
8.9%



⁷ Including re-export

Driving Localization in Industry

A key shift has been reducing reliance on imports by strengthening domestic manufacturing and building local value chains.

This has been supported by targeted policies and incentives that encourage production within the Kingdom, alongside efforts to localize strategic industries and associated technologies.

A central enabler has been the Local Content and Government Procurement Authority, which introduced a

mandatory list of locally manufactured products. Government entities and their contractors are required to procure from this list, creating sustained demand for domestic production.

Sector-specific initiatives have also supported localization in critical industries, including pharmaceuticals and medical manufacturing, strengthening national capabilities in both industry and healthcare, while enhancing supply chain resilience and long-term sustainability.

Growing Presence of Saudi Products

Mandatory Product List



2019

2025

100

1.6K+

Factories Benefiting



2020

2025

3.9K+

6.7K+



Industrial Infrastructure and Clusters

Investment in industrial infrastructure and connectivity has strengthened the environment for manufacturing, improving access to ports, transport networks, and industrial zones.

This has enabled the development of specialized industrial clusters that combine infrastructure, incentives, and proximity to markets, supporting production at scale and expanding export capacity.

Across sectors including automotive, renewable energy, pharmaceuticals, and advanced manufacturing, projects are being developed within integrated industrial and logistics ecosystems.

Together, these efforts are reinforcing the Kingdom's position as a competitive manufacturing hub.

King Abdullah Economic City

Automotive Manufacturing Hub

◆ King Salman Automotive Cluster

Hosting Ceer, Lucid, Hyundai, and Pirelli plants

◆ Hyundai Plant

50K
vehicles/year capacity

◆ Lucid Facility

65%
Saudi workforce

5K+
vehicles/year

◆ Renault Trucks

First Specialized Wind Energy Systems Plant

Yanbu Industrial City

50K
tons/year capacity

Vaccine Manufacturing

Sudair Industrial and Business City

- ◆ Largest vaccine plant in the Middle East
- ◆ First domestic vaccine manufacturing facility

Industrial Complexes

Machinery and Equipment Complex in Dammam

1,490 factories

Specialized and Inorganic Chemicals Complex in Jubail

1,025 factories

Steel Industry Opportunities

\$16B+ investment opportunities

150M tons total production capacity

- ◆ Strong cost advantage from energy access
- ◆ Growing focus on green steel

Largest Reverse Osmosis Membrane Manufacturing Plant

Eastern Region

Eastern Region

300K units/year production

72% local content in raw materials and production inputs

53% faster supply lead time

Supporting Strategic Sectors

- ◆ Water
- ◆ Oil and Gas
- ◆ Mining
- ◆ Agriculture

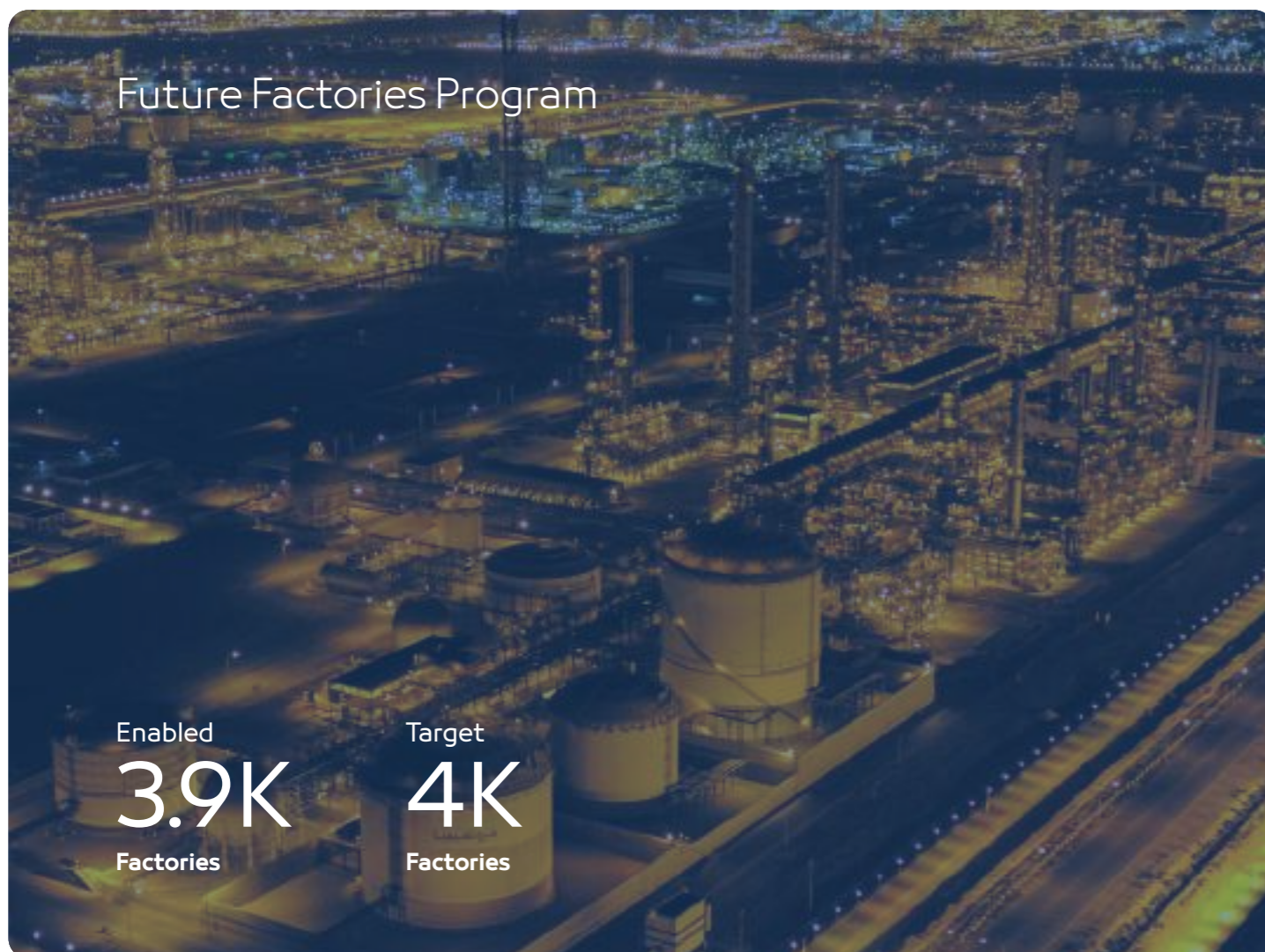
Hi-Tech Industries and Automation

Saudi industry is increasingly adopting advanced technologies, with a growing focus on automation and high-value manufacturing. This shift is improving productivity and strengthening competitiveness.

Programs such as the Future Factories Program are supporting this transition, enabling factories to adopt automation, AI, and advanced production systems. Leading facilities are also being prepared to join global networks of advanced manufacturing.

At the same time, efforts to localize high-tech industries are accelerating. The launch of ALAT marks a step toward building domestic capacity in areas such as semiconductors, smart devices, and AI infrastructure, across nine core business units.

This is reinforced by closer alignment between industry and research institutions, including KACST and KAUST, which are developing capabilities in semiconductors and advanced manufacturing and supporting the translation of research into commercial applications.



Building High-Tech Manufacturing Capacity ALAT

- 2024**
 - ◆ Established
 - ◆ Strategic agreement signed with SoftBank Group
 - \$150M joint investment
 - Development of a fully automated industrial robotics manufacturing center
- 2025**
 - ◆ First factory opened (Riyadh, SILZ)
 - ◆ Production launched: PCs, servers, and smartphones
 - ◆ 200,000 m² facility
- Next Phase**
 - ◆ Elevators and escalators
 - ◆ \$185M+ joint venture for manufacturing

Innovation in Practice

- ◆ **Titanium Powder Production**
 - First locally developed production method
 - Commercialized through a startup
 - Applications: aerospace, medical, and 3D printing

Logistics

A More Connected Logistics Network

Saudi Arabia's logistics sector has been shaped by its geography, linking the Arabian Gulf to the Red Sea and connecting three continents along some of the world's busiest trade routes. Under Vision 2030, this advantage has been developed into a more integrated and efficient system, supported by infrastructure investment, institutional reform, and national strategies.

The sector has since undergone broad reform to improve coordination and performance. This included restructuring key entities across transport, ports, aviation, and rail, alongside the establishment of new institutions and the expansion of national carriers and infrastructure projects.

Guided by the National Transport and Logistics Strategy, the sector has expanded infrastructure, strengthened connectivity, and developed logistics zones across the Kingdom. Since its launch, more than \$75 billion in investment contracts have been

signed across multiple transport modes. These efforts have improved efficiency and reduced friction across the system, supported by digitalized services, simplified procedures, and stronger integration between entities.

The impact is visible across the economy. Re-export activity has grown, supply chains have strengthened, and Saudi Arabia's connectivity to global markets has expanded. Airports are increasingly serving as international hubs, while the sector continues to support industry, trade, and tourism.

Key Developments in the Logistics Sector

Building the Network

Rail, ports, and infrastructure

- ◆ North-South Railway expanded (passenger and freight)
- ◆ Haramain High-Speed Railway launched
- ◆ Riyadh road network development initiated
- ◆ New shipping routes connecting Asia, Africa, and Europe

Strengthening the Ecosystem

Institutions and governance

- ◆ Ministry of Transport restructured into Transport and Logistics Services
- ◆ Saudi Air Navigation Services established
- ◆ Membership in the International Maritime Organization and ITF

Setting the Strategy

Long-term direction and planning

- ◆ National Transport and Logistics Strategy launched
- ◆ Air Connectivity Program launched
- ◆ Logistics zones and Smart Ports initiatives developed, including 59 logistics hubs across the Kingdom

Expanding Capacity and Connectivity

Airlines, ports, and global links

- ◆ Riyadh Air established
- ◆ **60+** new shipping services added across major ports
- ◆ Expansion of King Abdulaziz Port (Dammam)
 - Second container terminal inaugurated
 - Integrated logistics zone developed
- ◆ New logistics corridor linking Jeddah Islamic Port to Al-Khumrah
- ◆ Export service launched from Riyadh Dry Port
- ◆ Logistics zones launched at Jeddah Islamic Port
- ◆ India-Middle East-Europe Economic Corridor
- ◆ Logistics zones launched at Jeddah Islamic Port
- ◆ First container shipment from Jubail Commercial Port to Riyadh Dry Port
- ◆ Participation in the India-Middle East-Europe Economic Corridor

Improving Operations

Efficiency and market access

- ◆ Domestic aviation opened to foreign operators
- ◆ National Address system introduced for logistics efficiency
- ◆ Transport and Logistics Strategy 2.0 adopted
- ◆ Operational logistics centers expanded to 24

Logistics Performance and Global Position

Saudi Arabia has advanced across global logistics indicators, supported by sustained investment in infrastructure and operational performance. This progress reflects stronger supply chains, expanded logistics capacity,

and improved integration across transport systems, alongside greater regional connectivity and streamlined customs procedures, enhancing the flow of regional and international trade.

Global Logistics Performance

2nd in G20

Highest growth rate for cargo throughput growth 32% growth (2025 vs 2024)

Top 4 emerging markets

Agility Logistics Index, 2025

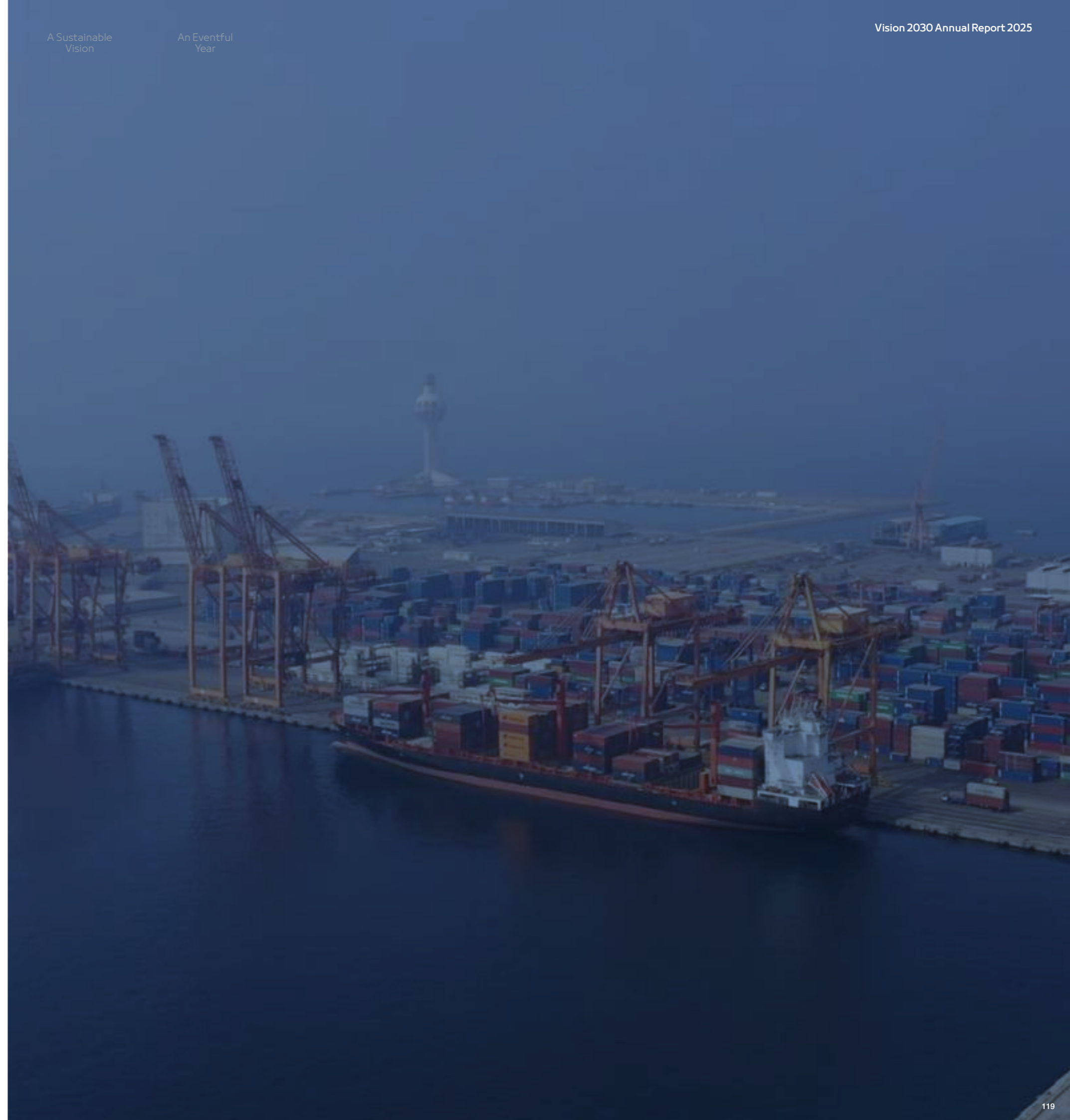
Facilitated Movement

Customs Clearance Time

9 hours 2021 → <2 hours 2025

Bonded Zones

6 → 21



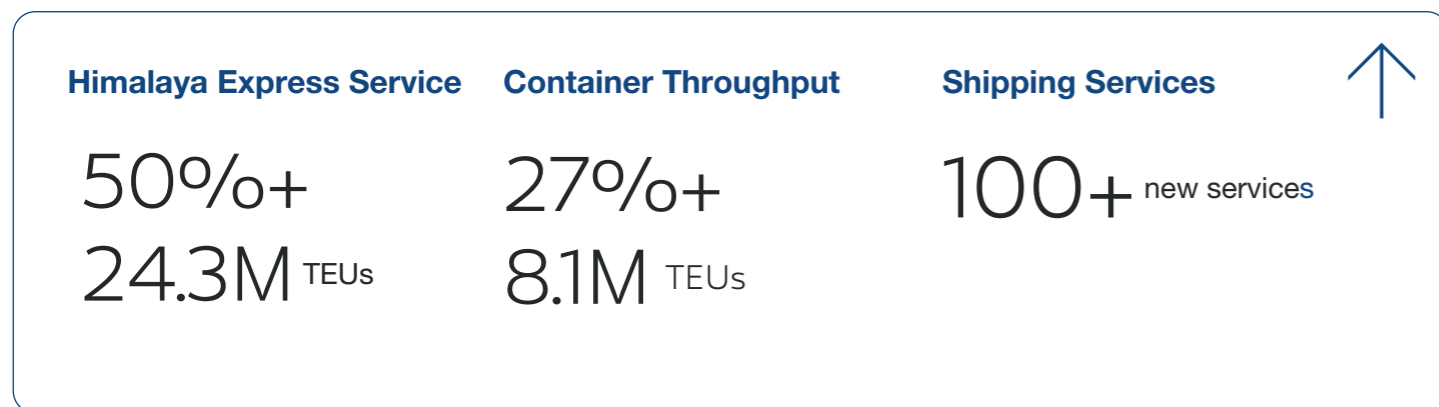
Ports: Connecting the Saudi Economy to Global Trade

Saudi Arabia's ports sit along two of the world's most important maritime corridors, The Arabian Gulf and the Red Sea, linking three continents and supporting global trade flows.

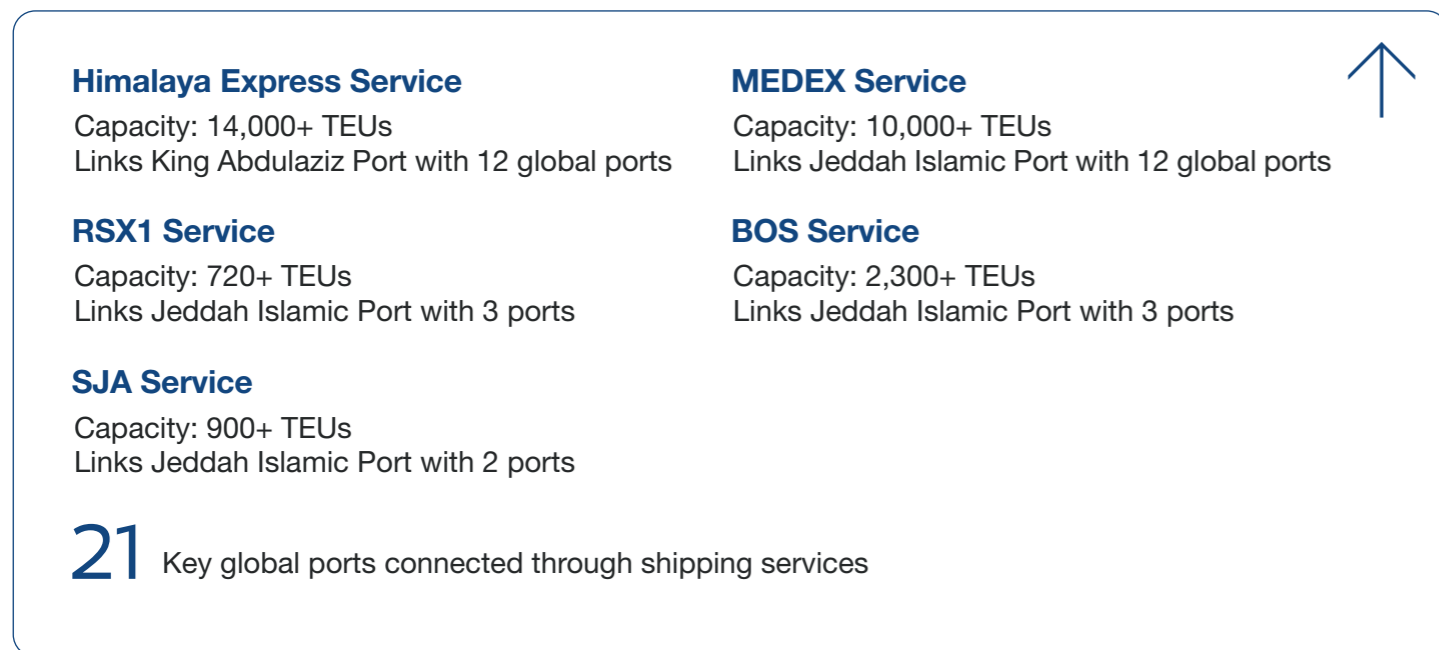
Recent investment has focused on expanding capacity, upgrading infrastructure, and increasing connectivity

through new shipping routes. Integrated logistics zones have further strengthened the role of ports as gateways for trade, supporting re-export activity and attracting investment.

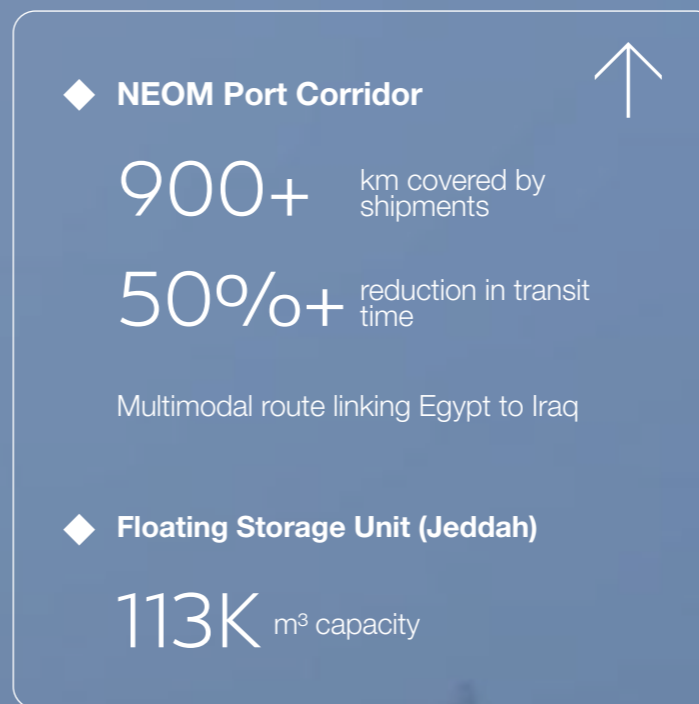
Port Capacity and Throughput



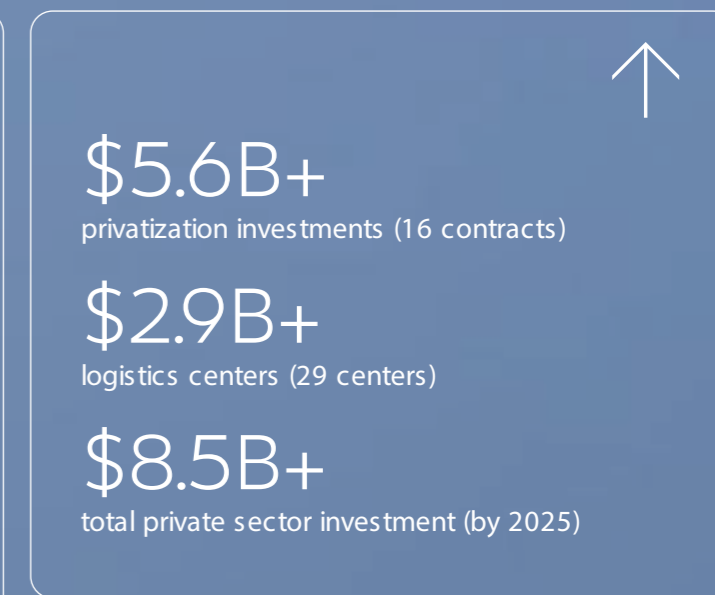
Launch and Addition of Shipping Services



Improving Efficiency and Scale



Private Sector Participation



Saudi Airports as Global Hubs

Saudi Arabia's aviation sector has evolved into a key enabler of connectivity, linking the Kingdom to global markets, facilitating pilgrimage travel, and supporting air cargo.

Under Vision 2030, the sector has been repositioned for growth through institutional reform, the National Aviation Strategy, and the Air Connectivity Program.

Airport infrastructure has expanded alongside increased private sector participation, improving efficiency and service quality. Today, Saudi airports operate as regional and global hubs, with rising passenger volumes, flight activity, and cargo capacity.

Expanding Global Connectivity

17

airlines

69

international routes

4.8M+

seats added



Growth in Air Traffic

Passengers



2016

85M

2025

140.9M

Flights



2016

709K

2025

980K+

Air Cargo

Tons



2016

929K

2025

1.18M

Expanding Airline Ecosystem



- ◆ Launch of Riyadh Air (new national carrier)
- ◆ Entry of new operators, including low-cost and cargo carriers

National Airlines

Saudia

147 aircraft

35M passengers
Jeddah as the main hub

Flyadeal

37 aircraft

7M+ passengers
Jeddah as the main hub

Air Arabia

45 aircraft

Dammam as the main hub

Won the tender to operate as a new national low-cost carrier in 2025

Flynas

61 aircraft

8M passengers
Riyadh as the main hub

Riyadh Air

182 aircraft*

Riyadh as the main hub

Officially commenced operations in 2025

* Delivered upon completion



Major Airport Developments

King Salman International Airport

km ²	runways	terminals
57	6	9

King Fahd Airport Expansion

7.7K	9.6K	8	15-second
passengers/ hour capacity	bags/ hour handling	departure halls	check-in processing time

Global Aviation Performance

◆ King Khalid International Airport

#1 most punctual airport globally for the third time

%90.1 on-time performance rate

◆ Saudia wins “Best Guest Experience” award (APEX World Class ranking)

◆ First Virtual Air Traffic Control Tower in the region

AIUla International Airport operated remotely from King Abdulaziz International Airport’s control tower in Jeddah

Rail: Connecting Cities and Moving Freight

Saudi Arabia’s rail network has expanded from a single corridor into a national system supporting both passenger mobility and freight movement.

Under Vision 2030, rail has taken on a more strategic role within the logistics

system, connecting industrial regions and strengthening the movement of goods across the Kingdom. Passenger connectivity has also improved, particularly along the western corridor through the Haramain High-Speed Railway linking Makkah, Madinah, and Jeddah.

The network continues to expand, supporting economic activity and future regional connectivity.

Public Transport Improving Daily Movement

Urban mobility across Saudi cities is becoming more efficient and accessible, supported by integrated public transport systems.

The Riyadh Metro is central to this shift, providing a high-capacity network that connects key destinations across the city. More broadly, metro, bus,

and road networks are increasingly integrated, improving movement within and between cities.

This approach has also created opportunities for private sector participation in transport development and operations.

The King Abdulaziz Project for Riyadh Public Transport brings these elements together, forming one of the world’s largest driverless metro systems.

Saudi Railway Company (SAR)

Passengers		Freight tons	
2024	2025	2024	2025
13M	14M+	28M	30M+

“SAR” First railway operator globally to win the Tourist Trains category

- ◆ International Union of Railways (UIC) Tourism Awards

Network Scale and Capability

- ◆ 5.5K+ km network
- ◆ ETCS Level 2 operations
- ◆ Connects mines, ports, and cities

Public Transport Usage

Urban Bus Services	96.8M+ passengers
Intercity Bus Services	2.7M+ passengers

Riyadh Metro

150M+ passengers
99.7% on-time performance
176 km – longest driverless metro network globally

The Financial Sector

Strengthening a Diversified Financial System

Saudi Arabia's financial sector has evolved into a more diversified and capable system, supporting investment, managing risk, and enabling growth at scale.

What was once centered on traditional banking now includes capital markets, insurance, and a rapidly growing fintech sector. This shift has been supported by stronger institutions and regulation, led by the Saudi Central Bank, the Insurance Authority, and the Capital Market Authority, alongside increased participation from global financial institutions.

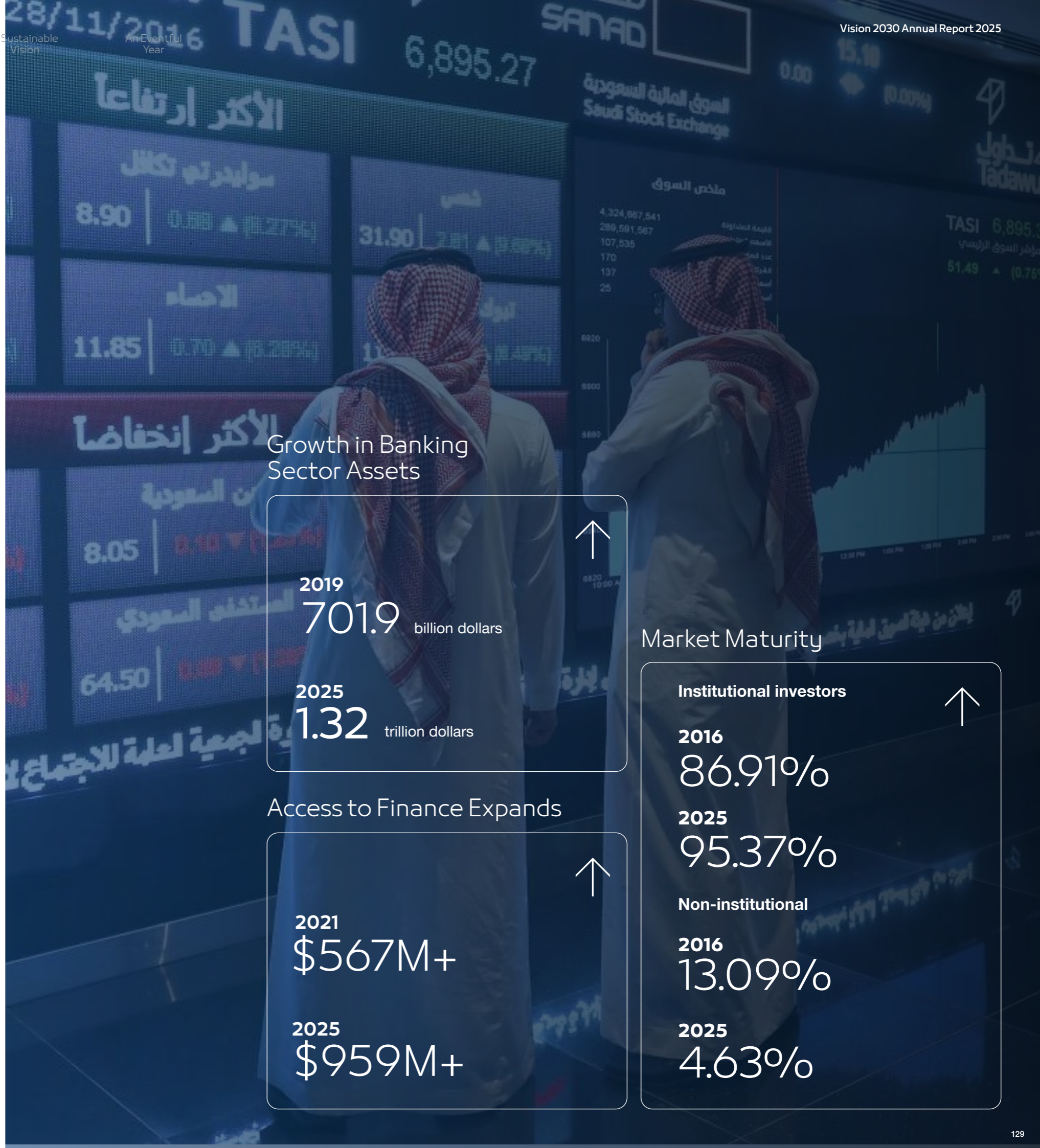
Under Vision 2030, the Financial Sector Development Program has guided this transformation, focusing on strengthening institutions, expanding access to financial services, and developing capital markets.

Reforms have been implemented gradually, maintaining stability while

expanding participation. The investor base has broadened, institutional investment has increased, and the range of financing options has expanded through the growth of sukuk and bond markets.

Together, these changes have strengthened the Kingdom's position as a regional financial center. This has also strengthened Saudi Arabia's attractiveness to leading global financial institutions, with many establishing regional headquarters in the Kingdom. The number of licensed banks has reached 39, of which around 61% are foreign banks, reflecting a more open and competitive financial sector.

A notable milestone has been the introduction of the Saudi riyal symbol, reinforcing the currency's global identity.



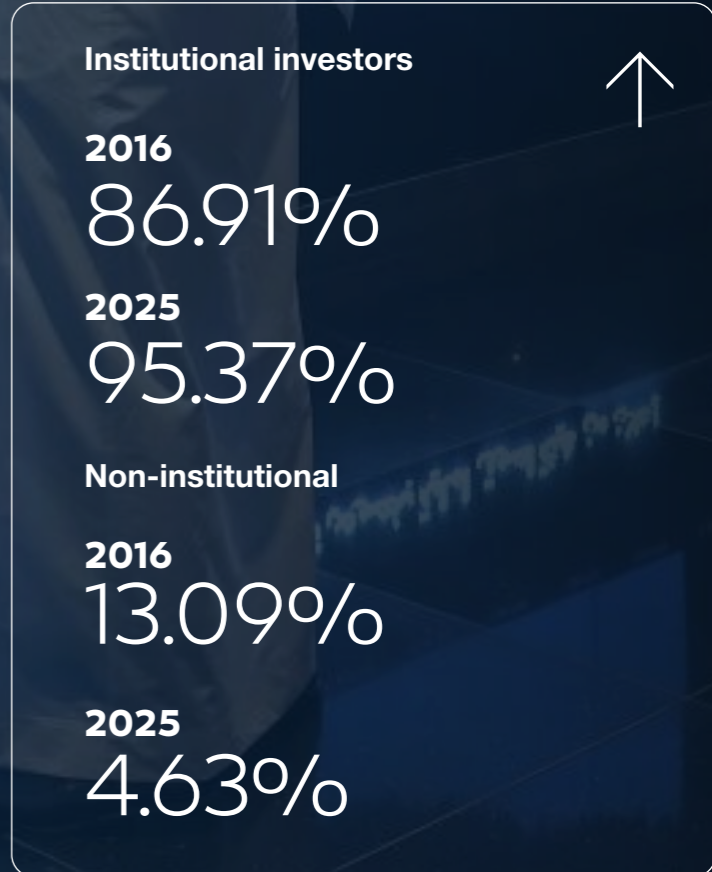
Growth in Banking Sector Assets



Access to Finance Expands



Market Maturity



Expanding Role of the Insurance Sector

The insurance sector has grown alongside broader economic activity, supported by regulatory reform and the expansion of digital services. The establishment of the

Insurance Authority marked a key step in strengthening oversight and developing the market.

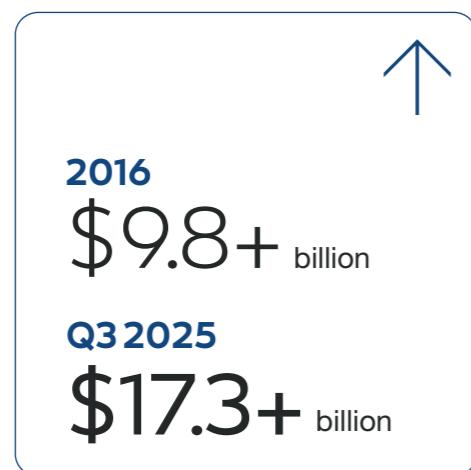
Insurance is now playing a wider role beyond health and motor coverage,

contributing to economic activity and providing greater protection across sectors.

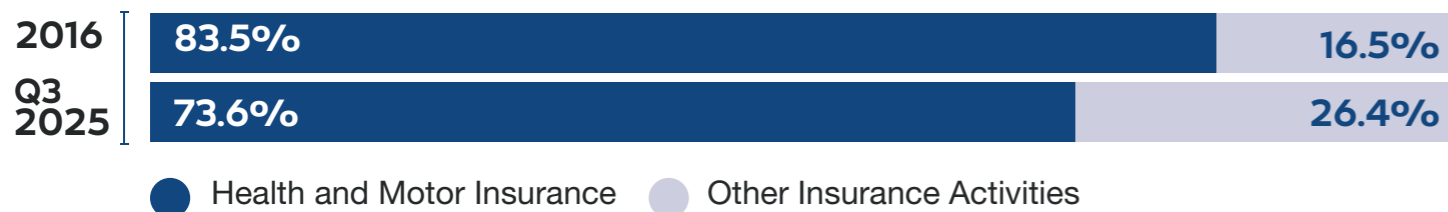
Contribution to Non-Oil GDP



Gross Written Premiums



Diversification of Insurance Premiums



A Growing Sukuk and Bond Market

Saudi Arabia's sukuk and bond market has grown significantly, supported by regulatory reform and the development of new financing channels.

Institutional development, including the establishment of the National Debt Management Center and the listing

of government debt instruments on Tadawul, has strengthened market infrastructure and liquidity.

New channels, including securities crowdfunding platforms, have further expanded access to financing.

Growth in Sukuk and Bond Issuances



Fintech Expanding Access and Innovation

Fintech has become one of the fastest-growing areas within the financial sector, expanding access to services and reshaping how individuals and businesses interact with finance.

Supported by a dedicated strategy and initiatives such as Fintech Saudi, the sector has seen rapid growth in companies, investment, and adoption.

Digital payments now dominate transactions, reflecting a shift toward a more accessible and technology-driven financial system.

Fintech Growth

Companies

20 —————> 301

Digital Payments (Retail transactions)

18% —————> 85%

E-commerce (Mada)

\$2.7B —————> \$86.7B



Digital Solutions in Banking and Payments

2021

Licensing of STC Digital Bank

Licensing of Vision Bank*

2024

Launch of Samsung Pay

2022

Licensing of D360 Digital Bank

2025

Launch of Google Pay

Launch of AliPay+

Licensing of EZ Bank

* Formerly Saudi Digital Bank

Building Financial Capabilities

Developing national talent has been a key part of strengthening the financial sector, ensuring it can operate and regulate an increasingly complex and digital system.

The establishment of the Financial Academy in 2020 marked a step toward building specialized financial skills at scale. The Academy supports professionals across banking,

capital markets, and insurance, helping the sector keep pace with evolving technologies and regulatory frameworks.

Financial Academy Impact:

120K+ professionals trained

700+ financial institutions supported

10+ cities covered

Venture Capital Scaling Growth

Venture capital has become a key driver of startup growth, supported by regulatory development and the role of the Saudi Venture Capital Company.

Investment has increased significantly, strengthening Saudi Arabia's position as a leading destination for startups.

Venture Capital Growth

25x increase since 018

\$1.7B



The Digital and Knowledge Economy

Scaling a Digital and Innovation-Driven Economy

Saudi Arabia's shift toward a digital and knowledge-based economy builds on strong foundations, including advanced infrastructure and sustained investment in education and technology.

Under Vision 2030, the focus has moved from building capabilities to scaling their economic impact, expanding digital activity, strengthening research and innovation, and creating

new opportunities for growth and employment.

This transition has been supported by stronger institutions and clearer governance, including entities focused on intellectual property, research and innovation, and space, alongside continued investment in digital infrastructure.

As a result, Saudi Arabia has advanced across global benchmarks in digital services, cybersecurity, artificial intelligence, and innovation, positioning the Kingdom among leading digital economies.

Digital Leadership

Performance

1st globally

- ◆ ICT Development Index
- ◆ Digital Readiness Index (International Telecommunication Union (ITU))
- ◆ Global Cybersecurity Index (second consecutive year, Global Competitiveness Report)
- ◆ Women's participation in AI (Stanford Index)

3rd globally

- ◆ Growth rate of AI jobs (Stanford Index)

7th globally

- ◆ Publishing leading AI models

1st regionally

- ◆ AI Safety Index, and 11th globally
- ◆ "Shaheen 3" supercomputer, and 18th globally
- ◆ Government readiness for artificial intelligence (Oxford Insights report)

4th globally

- ◆ Number of leading AI models (Stanford Index)

20th globally

- ◆ Quality Infrastructure for Sustainable Development Index

2nd globally

- ◆ Government Technology Maturity Index (GTMI)
- ◆ Digital Regulatory Maturity Index (ITU)

2nd among G20 countries

- ◆ ICT Regulatory Development Index

6th globally

- ◆ E-Government Development Index

Innovation and Intellectual Property

1st globally

IP awareness (WIPO Pulse report)

13th globally

IP Rights Enforcement Index (Global Competitiveness Report)

25th globally

International IP Index (US Chamber of Commerce)

Digital Opportunities

Saudi Arabia's digital economy has grown rapidly, supported by sustained investment in infrastructure and the adoption of advanced technologies, including 5G, fiber optics, and IoT.

This has positioned the Kingdom as one of the largest and fastest-growing digital markets in the region. Alongside

this, the technology ecosystem has developed, with more startups entering the market, stronger access to funding, and a growing pool of digital talent.

Today, the sector plays a central role in non-oil economic growth, attracting global technology companies and strengthening international

partnerships. Saudi Arabia is not only adopting technology but also developing and applying it across multiple sectors to generate economic value.

The Saudi Digital Economy

15.8%

digital economy contribution to GDP

\$53B

ICT market

500+

programs and initiatives supporting innovation and startups

23

listed technology companies

Enabling Technology Startups

National Information Technology Development Program

\$670M

allocated to support startups

1,050+

technology startups established over four years

\$2.4B

raised by venture-capital-backed startups

3K+

companies supported

3.5K+

entrepreneurs supported

20K+

jobs created through the program

The Garage

\$1B

in startup valuations over two years

7.5K+ jobs

generated by startups

600+ startups

graduated from the programs

Digital Entrepreneurship Center (CODE)

\$127M+

invested in startups across 60 investment rounds

16K+

beneficiaries

800+

startups supported

Cybersecurity Growth and Enablement

40+

companies established

\$16M+

invested in startups

\$2.7M+

in incentives

200%+

growth in accelerator startups

21.3K+

professionals

16

SOC operators licensed

Connectivity Infrastructure

51%

fiber-optic coverage growth (4.2M homes)

86%

5G coverage

70%

spectrum utilization (+%6 YoY)

A Global Hub for AI

AI is reshaping how value is created across economies, from productivity gains to new products and services. For Saudi Arabia, building strength in AI is about converting digital readiness into practical advantage, stronger performance across sectors, and a more resilient platform for future growth.

Today, the Kingdom stands at an advanced global position in the field of AI, benefiting from a strong foundation and the availability of key enablers, including reliable energy supply to power data centers. The Kingdom has invested in AI as a fully integrated national project.

In this context, “Humain” was launched as a step in localizing AI technologies and applications, focusing on the development of Arabic large language models. Efforts have also continued to strengthen the Kingdom’s role as a global data center hub, with Aramco’s digital centers in Dammam operating the “DeepSeek” AI application.

Building a full AI ecosystem requires more than technology deployment, it depends on data governance, trusted regulation, research capacity, and a talent pipeline that can sustain adoption over time. Through initiatives such as SDAIA’s National Strategy for Data & AI, the Kingdom is advancing

a data-driven government that uses AI to support informed policy decisions, while committing to ethical AI adoption and engagement in global discussions on AI ethics, data privacy, and regulatory frameworks aligned with international best practices.

Investment in human capital remains central to this approach, with expanding education, training, and partnerships supporting the development of a skilled workforce capable of driving and sustaining AI adoption.

Humain

Humain Chat

First Arabic AI assistant

5 markets served

Humain One

First fully AI-powered operating system
Integrated into locally developed device,
Humain Horizon Pro

Data Center

150+ countries served

Saudis in Space

Saudi Arabia's space sector is taking shape as a new frontier for science, innovation, and economic opportunity. With the establishment of the Saudi Space Agency, the focus has shifted toward building national capability and translating research into practical applications.

Space is now closer than ever to Saudi researchers, scientists, and talented individuals through a range of programs. The Astronaut Program was introduced to qualify Saudis to participate in space missions, as well as conduct scientific experiments and international space research.

This progress reflects a broader shift, positioning space not only as a field of exploration, but as a platform for knowledge creation, advanced research, and long-term economic value.

Earth Observation (EO) Platform Satellite Development

Launched by the New Space Group (NSG)

- ◆ **First marketplace for Earth observation data in the Kingdom**
- ◆ **Meets demand for Earth observation solutions and advanced space data**
- ◆ **Provides advanced space data for sectors including environment, energy, mining, and agriculture**

- ◆ **First satellite launched from the Kingdom in partnership with NASA**
- ◆ **Saudi university students launch two satellites**

2.2K+
students from 42 universities

A Historic Space Mission

- ◆ **Manufacturing nanomaterial to repair cartilage**
- ◆ **Advancing organ transplantation and cartilage regeneration**

Science, Research, and Innovation: From Discovery to Application

Saudi Arabia has strengthened its science, research, and innovation ecosystem by building the regulatory and institutional foundations needed to protect ideas, finance research, and translate discovery into real-world applications. The result is a more mature innovation environment, reflected in stronger global rankings and a more integrated ecosystem that supports scientific research and entrepreneurship.

The focus is increasingly on applied research. Leading universities and research centers are advancing

work in deep technologies, energy, communications, and advanced materials, aligning scientific effort with national priorities and future industries.

Progress is visible in outcomes. Patent registrations are growing, technology startups are flourishing, and integrated innovation districts are developing, supported by stronger global partnerships. Saudi Arabia has also strengthened its intellectual property ecosystem, providing international patent search and preliminary examination services as an accredited international office, alongside joining

the Hague System for the international registration of industrial designs, expanding protection and supporting the competitiveness of the creative economy globally.

Awareness of intellectual property's economic role is also high, with 70.7% national awareness of the impact of IP on economic growth and innovation, placing Saudi Arabia among leading countries globally on this indicator.

A Saudi Nobel Laureate in Chemistry

Professor Omar Yaghi

- ◆ **First Saudi scientist to receive the Nobel Prize in Chemistry**
- ◆ **Contributed to founding the field of reticular chemistry**
- ◆ **Pioneered developments in metal-organic frameworks**

KACST Ecosystem

Talent and Research

3K+
researchers, innovators, and specialists

450+ trainees
trainees in semiconductor technologies

30+ trainees
in the first hands-on program on a low-power research reactor

Startup Development

\$1.7B
in startup valuations

7.5K
direct and indirect jobs

290+
technology startups

45+
deep-tech startups

Global Presence

Member of the International Association of Science Parks and Areas of Innovation (IASP)

Patent Growth

Patents

2016
5K

2025
15K+



An Empowered Society



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An Empowered Society

Vision 2030 places people at the heart of its transformation, with a clear focus on building a more active and participatory society. A wide set of reforms across social, economic, cultural, educational, and

health sectors has opened up more opportunities for individuals to take part in the economy and in society.

These changes are visible in how people live and work. Learning has become more continuous, the labor

market more flexible and inclusive, and participation has increased. At the same time, more support is in place to help people develop their skills and pursue opportunities across different fields.

Access to services has also improved. Healthcare has advanced, digital platforms have made services easier to reach, and the housing ecosystem has expanded to support family stability. The non-profit sector has grown

alongside rising levels of volunteering and community engagement.

This progress is reflected in everyday life. Digital services are more widely used, cities are improving in quality of life, and sport has become more

accessible and inclusive. Overall, people are playing a more active role across economic and community life.



Human Capital: The Most Valuable Wealth

Investing in Capability

Reforms across the labor market, education, and public services have strengthened pathways for individuals to move between stages of life, from education into employment and beyond.

Social protection has also evolved. Support systems now extend beyond income security, enabling movement and participation rather than acting only as safety nets.

At the same time, investments in healthcare, housing, and digital government have focused on improving outcomes. Access has expanded, services have become easier to use, and administrative processes more efficient.

Participation is also growing across community life. Volunteering, non-profit engagement, and social initiatives are expanding opportunities for people to contribute across regions and age groups.

As delivery accelerates, the priority is to sustain this progress, ensuring that participation continues to expand and that individuals are able to shape their own outcomes over the long term.



From Reform to Results: Strengthening Labor Market Participation and Opportunity

- | | | | | |
|------|---|---|---|---|
| 2016 | ◆ | Launch of the Remote Work Initiative | ◆ | Issuance of 17 decisions to localize professions and activities |
| 2017 | ◆ | Launch of the Remote Work Initiative | ◆ | Update of procedures related to employee absence from work in private-sector establishments |
| | ◆ | Launch of the Working Women Transportation Program (Wusool) | ◆ | Issuance of nine decisions to localize professions and activities |
| | ◆ | Launch of the Childcare Support Program (Qurrah) to enable women's employment | ◆ | Launch of the Parallel Training Program to Empower Women |
| 2018 | ◆ | Launch of the On-the-Job Training Program (Tamheer) | ◆ | Announcement of the National Campaign "Waad" for training |
| | ◆ | Launch of training and mentorship for women in leadership | ◆ | Issuance of three decisions to localize professions and activities |
| | ◆ | Launch of training and mentorship for women in leadership | ◆ | 2024 |
| 2019 | ◆ | Commencement of the localization of 12 economic activities | ◆ | Issuance of two decisions to localize professions and activities |
| | ◆ | Issuance of six decisions to localize professions and activities | ◆ | Achievement of the Vision target for Saudi unemployment ahead of schedule at 7% |
| | ◆ | Launch of the Freelance Portal | ◆ | Launch of the National Employment Platform "Jadarat" |
| | ◆ | Launch of the Qiwa platform | ◆ | Exceeding the Vision 2030 target for Saudi women's participation in the labor market, reaching 36% |
| 2020 | ◆ | Launch of the "Doroob-In" Program for professional skills development | ◆ | Issuance of new amendments to the Labor Law to enhance job stability and expand employment opportunities for citizens |
| | ◆ | Launch of the Flexible Work Regulation Initiative | ◆ | Issuance of the Social Insurance Law |
| | ◆ | Issuance of the decision to localize the pharmacy profession | ◆ | 2025 |
| | ◆ | Adoption of the Labor Market Strategy | ◆ | Issuance of four decisions to localize professions and activities |
| | ◆ | Issuance of ten decisions to localize professions and activities | ◆ | Localization of 44 accounting professions at a rate of 40% |
| | ◆ | Amendment of the Labor Law | ◆ | Adoption of the wage clause in the documented employment contract as an enforceable instrument to expedite the resolution of labor disputes |
| 2021 | ◆ | Launch of the "Mudad" platform | ◆ | Issuance of a decision to classify work permits based on skill levels |
| | ◆ | Launch of the Human Capability Development Program | ◆ | Launch of the unified employment contract to enhance legal protection of workers |
| | ◆ | Launch of the Enhanced Nitaqat Program | | |

A Labor Market in Motion

Labor market reform has focused on expanding participation, improving mobility, and strengthening the role of the private sector in job creation.

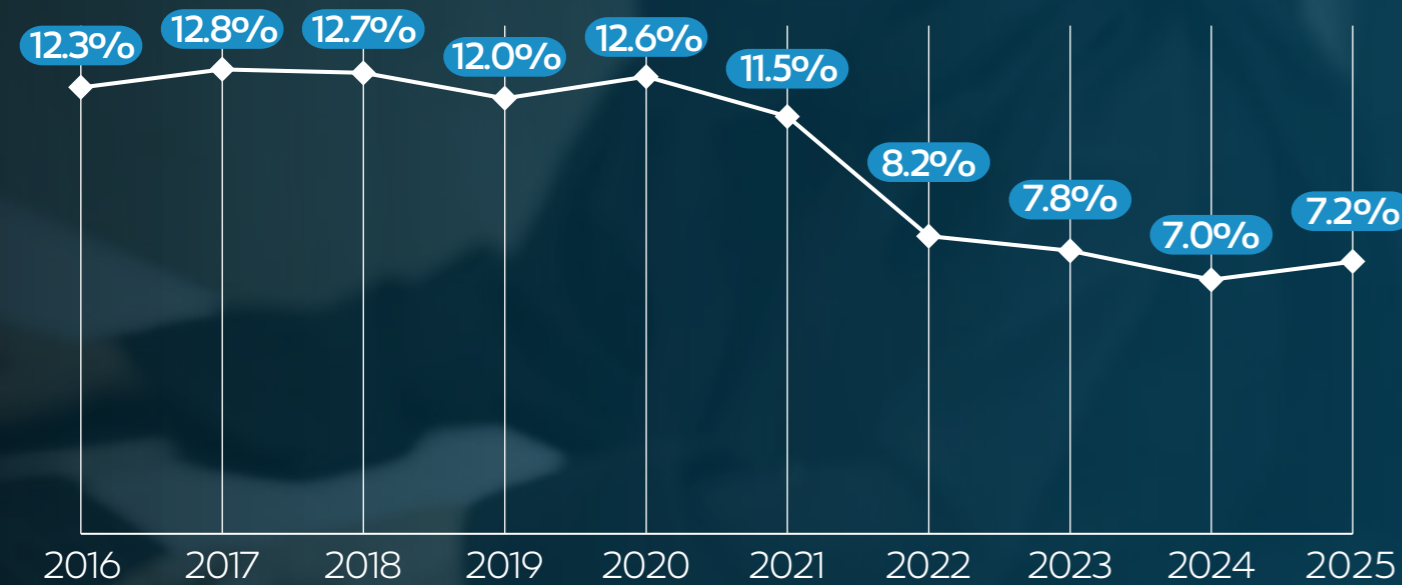
Reforms aligned education and training with market demand, expanded localization across sectors, and reduced barriers to entry, particularly

for women. At the same time, regulatory changes and increased investment have supported the growth of the private sector as the main driver of employment.

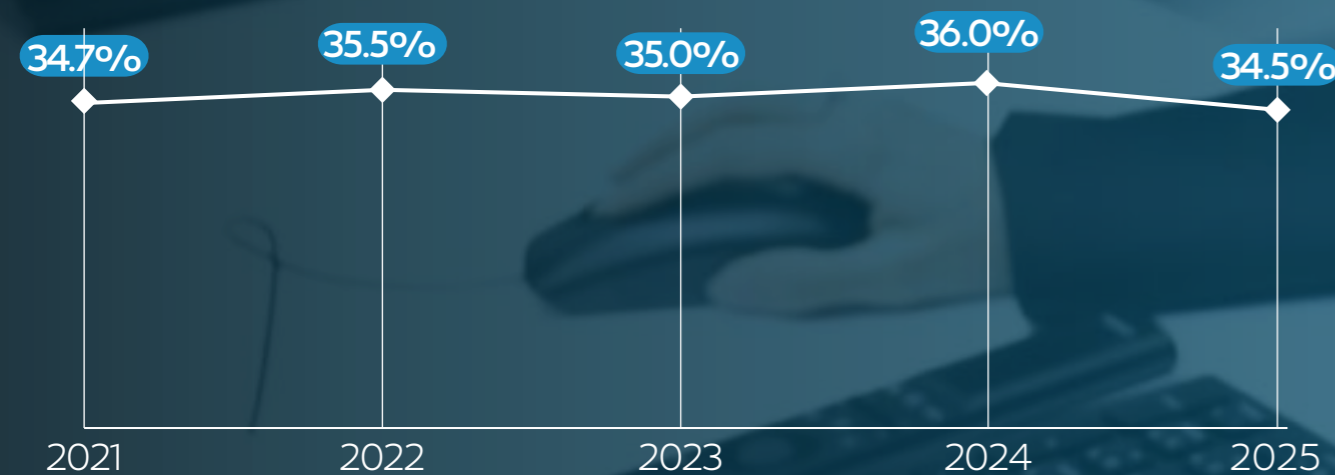
Digital platforms such as Qiwa and Mudad have modernized labor market operations, improving transparency,

contract documentation, and dispute resolution. More flexible work models, including remote, part-time, and freelance work, have also expanded access to employment, allowing participation across different life stages and circumstances.

Saudi Unemployment Rate



Saudi Women's Participation in the Labor Market



Saudis in the Private Sector



Support Systems

Human Resources Development Fund (HRDF - Hadaf)

\$2.18B+
training and career guidance programs

2.17M+
beneficiaries

222K+
Saudi citizens entered the job market

Empowering Saudi Women

43.9%
women in middle and senior management

52K+
women utilized the child care program (qurrah)

1.7K
trained and mentored in a designated leadership program

121K+
learned on job skills through the parallel training initiative

370K+
women benefited from commute support programs

Flexible Work Models



Developing Human Capital



Inclusive Opportunities

Access to economic participation has expanded across different segments of society, creating new pathways to employment and income generation.

Home-based businesses have grown into a meaningful part of the economy, supported by improved access to markets and regulatory enablement. At the same time, targeted programs are expanding employment opportunities for persons with disabilities, supporting greater participation in the workforce.



Persons with Disabilities Employment Rate



Home-Based Businesses Sales Growth



A Thriving Health System

From Treatment to Prevention

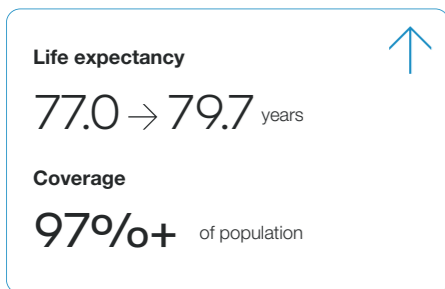
Healthcare reform has focused on improving outcomes, not only expanding access. The system is shifting toward prevention, early detection, and more integrated care, supported by stronger coordination across providers and wider use of digital tools.

Structural changes have strengthened how care is delivered, with services organized around patient needs and supported by a more connected network of providers. Digital platforms, including unified health records and the Virtual Health Hospital, have expanded access and improved service delivery across regions.

At the same time, the sector is building capabilities for the future. The National Biotechnology Strategy is strengthening research, innovation, and advanced medical services, supporting the development of a more knowledge-based health sector.

These changes are reflected in measurable outcomes. Life expectancy has increased, coverage has expanded, and earlier diagnosis is reducing the impact of chronic diseases. The focus now is on sustaining these gains and ensuring that improvements remain durable over the long term.

Health Outcomes



How Has Healthcare Improved in Saudi Arabia?

- 2016 ◆ Launch of the first phase of the early screening program for hearing and visual impairments and critical congenital heart defects in 30 referral hospitals
- 2017 ◆ Launch of the e-Health (Seha) application
- ◆ Establishment of the Saudi Safety Center
- 2018 ◆ Launch of the “Mawid” service, enabling electronic booking of primary healthcare appointments
- ◆ Launch of the “Wasfaty” service, linking hospitals and health centers with community pharmacies
- ◆ Launch of the Saudi Healthcare Model
- 2019 ◆ Expansion of specialized influenza surveillance centers to 50 facilities
- ◆ Establishing the health volunteering center
- 2020 ◆ The Kingdom’s successful management of the COVID-19 pandemic
- ◆ Establishment of the Health Sector Transformation Program, one of the VRPs
- 2021 ◆ Inclusion of health impact assessments as a mandatory component in the preparation and review of laws and regulations
- ◆ Establishment of the Saudi Public Health Authority (Weqaya)
- 2022 ◆ Establishment of the Health Holding Company
- ◆ Implementation of the Unified Health Insurance Policy
- ◆ Launch of the Virtual Health Hospital
- ◆ Launch of the Family Physician Program
- ◆ Establishment of the National Health Insurance Center
- 2023 ◆ Launch of the “NPHIES” platform

- 2023 ◆ Accession to the International Agency for Research on Cancer (IARC)
- ◆ Completion of the first phase of health sector transformation with the launch of 20 health clusters
- ◆ Establishment of the National Institute for Health Research
- 2024 ◆ Registration of the Virtual Health Hospital as the largest of its kind globally
- ◆ Accreditation of the Saudi Public Health Authority (Weqaya) as a WHO Collaborating Center for Nutrition in the Eastern Mediterranean Region
- ◆ Launch of the first Public Health Academy in the Middle East
- 2025 ◆ Highest number of internationally accredited healthy cities in the region, with 16 cities
- ◆ Amendment of the governance of the National Center for the Promotion of Mental Health, placing it under the Minister of Health
- ◆ Launch of the first clinical research unit in the private healthcare sector
- ◆ Adoption of the Occupational Fitness Examination for the public and private sectors
- ◆ Launch of a clinical trial for an AI-powered physician in partnership with “Humain” and “Lean”
- ◆ Launch of Diabetes Command and Control Center, the first of its kind globally.
- ◆ Full membership in the International Coalition of Medicines Regulatory Authorities, the first in the Middle East
- ◆ Launch of “Check Your Health” Centers
- ◆ Expansion of Virtual Health Hospital services and a 56% increase in the number of virtual consultations

A Comprehensive Modern Healthcare Model

Healthcare delivery is increasingly organized around integrated care and digital connectivity. Services are linked across providers, supported by unified health records that improve coordination and continuity of care.

Early screening and risk detection programs have expanded, enabling earlier diagnosis and more effective management of health conditions. These are supported by digital platforms that simplify access, reduce administrative steps, and improve service quality.

Virtual care has become a core component of the system. More than 200 hospitals are connected to the Virtual Health Hospital, enabling remote consultations and specialized services to reach patients across the

Kingdom, including in remote areas.

At the same time, capacity across the sector has expanded, supported by growing private sector participation and continued investment in healthcare infrastructure.

Capabilities in research, clinical trials, and advanced technologies are also strengthening. The use of artificial intelligence and digital tools is improving diagnostics and treatment pathways, while supporting the development of a more advanced and knowledge-based health sector.

Workforce development remains a priority, with continued investment in specialized medical and emergency capabilities to support service quality and system resilience.

Health Indicators



6M

couples benefited from pre marital genetic testing

85%

genetic counseling uptake

70%

cancer cases detected at early stages

60%+

reduction in traffic accident fatalities (exceeding who targets)

50%

reduction in deaths from infectious diseases

7K+

pharmacies integrated nationwide

40%

reduction in deaths from chronic diseases (surpassing un targets)

30%

decrease in drowning-related deaths

Digital Transformation in Healthcare



SEHA Virtual Hospital

241 hospitals linked

14 medical specialties provided virtually

220K+ follow-up cases managed

1.4K+ healthcare centers integrated

365K+ patients served

1.4 hours average turnaround for medical reports

Wasfaty

200M+ digital prescriptions processed

2K+ hospitals and care centers linked

Biotechnology and Advanced Research



King Faisal Specialist Hospital and Research Centre accelerates the application of biotechnology

200+ patients treated with genetically modified T-cell therapy since 00

First national facility for gene and cell therapies

First locally manufactured CA T-cell treatment

King Abdullah University of Science and Technology (KAUST), in international partnership

First genome maps for audi and apanese populations

Clinical Trials



50%+ increase in clinical trials

36%+ increase in sponsoring companies

13 designated locations across the Kingdom

Medical Innovation

Cervical spine surgical implant

2 U.S. patents

first successful clinical use

Fully robotic artificial heart pump implantation

first globally

AI-enabled brain implant to monitor abnormal neural activity

first regionally

Mobile Stroke Unit

first regionally

first globally in mass-gathering medicine

first deployed during the Hajj

Alzheimer's treatment

first approved biological therapy (biweekly IV)

Smart cochlear implant

first regionally

Corneal transplantation using Collagen Tissue Additive Keratoplasty (CTAK)

first regionally

Robotic brain tumor removal in a patient in their sixties

first globally

Global Recognition

19+ medals

Geneva International Exhibition of Inventions 2025

WHO accreditation

First to achieve Type 2 international medical team classification in the region

14th globally to achieve this standard

7 Saudi hospitals

Brand Finance Top 250 Hospitals Worldwide (2025)

1st regionally (King Faisal Specialist Hospital and Research Centre)

Healthy Cities

16 Saudi cities

WHO "Healthy Cities" program

Workforce and Infrastructure

Saudi Commission for Health Specialties (SCFHS)

registered practitioners

2016

426K

2025

804K

Saudi Board graduates (2025)

35K+

170+ specialties

22 countries

Professions Localized

3

Capacity & Quality of Care

per 100K population

ICU beds

2019

13.27

2025

15.84

per 100K population

Nursing staff

2019

581.6

2025

863.4

Health Security & Localization

Pharmaceutical localization

factories

176+

Standard incentive program

investors

50

Supply chain and storage capacity

logistics centers (NUPCO)

5

Housing and Real Estate

Supporting Stability and Ownership

Access to housing has expanded significantly, strengthening family stability and long-term financial security. Under Vision 2030, housing reform has focused on increasing supply, improving access to financing, and making the market more responsive to demand.

Before these reforms, supply constraints and limited financing options made homeownership difficult for many households. This has shifted through a combination of expanded housing options, improved mortgage access, and stronger regulation of the sector.

Homeownership among Saudi families increased from 47% in 2016 to over 60% in 2025, achieved ahead of schedule.

At the same time, the market has become more structured and transparent. Digital platforms have simplified access to housing and financing, while reforms have strengthened rental regulation and improved transaction security.

Recent measures have focused on increasing supply and stabilizing prices, particularly in major cities. This includes expanding housing projects, releasing land for development, and improving market oversight.

These changes reflect a shift toward a more mature housing market, one that expands access, improves choice, and supports long-term stability.



How Were Housing and Real Estate Solutions Enabled?

- | | | | | | |
|------|---|--|------|---|---|
| 2016 | ◆ | Launch of the Jood Eskan platform | 2024 | ◆ | Issuance of the Real Estate Transaction Tax Law |
| 2017 | ◆ | Establishment of the General Real Estate Authority | ◆ | ◆ | Launch of the Saudi PropTech Hub (SPH) |
| | ◆ | Establishment of the Saudi Real Estate Institute | 2025 | ◆ | Issuance of the Law on Non-Saudis' Ownership of Real Estate |
| | ◆ | Establishment of the Saudi Real Estate Refinance Company | ◆ | ◆ | Launch of the first issuance of residential mortgage-backed securities by the Saudi Real Estate Refinance Company |
| | ◆ | Launch of the Sakani Program | ◆ | ◆ | Directive to lift development restrictions on more than 81 km ² of land in northern Riyadh |
| | ◆ | Launch of the "Wafi" off-plan sales service | ◆ | ◆ | Directive to provide planned and developed residential land for citizens in Riyadh |
| 2018 | ◆ | Launch of the Housing Program, one of the VRPs | ◆ | ◆ | Approval of regulatory provisions governing the relationship between landlords and tenants in Riyadh |
| | ◆ | Launch of the "Ejar" platform to regulate the rental market and document contracts | ◆ | ◆ | Amendments to the White Land Tax system |
| 2019 | ◆ | Launch of the Sakani digital platform | ◆ | ◆ | Directive to monitor and report periodically on real estate prices in Riyadh |
| 2020 | ◆ | Launch of the Comprehensive Real Estate Sector Strategy | ◆ | ◆ | Adoption of the National Address numbering system for property identification |
| | ◆ | Issuance of the Law on Ownership, Subdivision, and Management of Real Estate Units | ◆ | ◆ | Issuance of the Law on Expropriation of Real Estate for Public Benefit and Temporary Seizure |
| 2021 | ◆ | Directive to double housing projects in northern Riyadh | ◆ | ◆ | Launch of the "Instant Licensing" service for off-plan sales projects, the first of its kind globally |
| | ◆ | Issuance of the new Real Estate Development Fund Law | ◆ | ◆ | Decision to transfer the Real Estate Exchange from the Ministry of Justice to the General Real Estate Authority |
| 2022 | ◆ | Approval of the Real Estate Brokerage Law | ◆ | ◆ | Amendments to certain articles of the Real Estate Registration Law |
| | ◆ | Establishment of the National Company for Real Estate Registration Services | ◆ | ◆ | Decision to extend the Subsidized Mortgage Program |
| 2023 | ◆ | Launch of the first edition of Cityscape Global | ◆ | ◆ | Launch of the Regulatory Sandbox, one of the initiatives of the Saudi PropTech Hub (SPH) |
| | ◆ | Issuance of the Real Estate Contributions Law | | | |
| 2024 | ◆ | 65.4% homeownership rate among Saudi families | | | |

More Pathways to Homeownership

Housing options have expanded significantly, giving families more flexibility in how they access homeownership. Choices now include serviced land, off-plan sales, ready-built units, and self-build pathways, allowing households to

select options that fit their financial position and life stage.

At the same time, digital platforms and improved mortgage access have simplified the process, making it faster and more predictable. What

once involved long waiting periods has shifted to a more streamlined and accessible housing journey. As a result, homeownership has scaled rapidly.

Housing Outcomes



Saudi Families Owning Homes

(Thousand households)



Mortgage Market Growth



Housing Products



Land Products



Off-Plan Sales



Ready-Built Units



Self-Build



Community Contribution to Housing

Housing support has expanded beyond government programs, with growing participation from the non-profit sector, private contributors, and individuals. This has extended support to families most in need and increased the overall reach of housing initiatives.

Digital platforms have made it easier to connect donors, volunteers, and organizations directly with eligible families, improving transparency and ensuring support is delivered more efficiently.

As a result, contributions from the private and non-profit sectors have increased significantly, alongside a sharp rise in volunteering. Together, these efforts are strengthening housing support and improving living conditions for more families.



Housing Units for Developmental Housing Beneficiaries

(Thousand units)



2024

98.7

2025

109+

Private and Non-Profit Contribution

(USD million)



2020

55.2

2025

1,000+

Volunteers in Housing

1M+ cumulative volunteers over time (Thousand)



2021

17.8

2025

342+

A Dynamic Real Estate Sector and Opportunities Driving Growth

The real estate sector is playing a growing role in the economy, supporting activity across construction, finance, tourism, and retail, while contributing to job creation and regional development.

Reforms have improved the structure of the market, expanding access to financing, enabling large-scale developments, and increasing investor confidence. As a result, supply has grown in both scale and diversity, supporting urban expansion and more balanced development across regions.

Recent measures have also focused on stabilizing the market. For the first time in four years, real estate inflation recorded a year-on-year decline in Q4 2025, reflecting improved supply and closer alignment between supply and demand.

At the same time, stronger data and governance are improving how the market operates. The rollout of a unified real estate registration system and the transfer of oversight of the Real Estate Exchange are strengthening transparency, data quality, and market confidence.

Together, these changes are shaping a more mature and investable real estate market, better positioned to support long-term growth.

Market Stabilization

Real estate inflation (Q4, YoY)

2022	2023
9.1	3.5
2024	2025
3.6	-0.7

Real Estate Registry

4M+
properties registered

1M+
title deeds issued

Key Performance Figures for the Real Estate Sector

3.2M+
rental contracts (Ejar platform)

106K+
licensed brokers (FAL)

470K+
brokerage contracts
(Real Estate Brokerage Platform)



Real Estate Innovation

Regulatory Sandbox

60+
entrepreneurs

Real Estate Accelerator

7
foreign companies localized within 4 months



ROSHN Group Destinations and Communities

- ◆ **Riyadh**
 - Sidra District
 - Warfa Project
 - ROSHN Stadium
- ◆ **Jeddah**
 - ALAROUS Project
 - Marafi Project
- ◆ **Makkah**
 - Al-Manar Project
- ◆ **Dhahran**
 - Al-Danah Project

Digital Government

Shorter, Paperless Procedures

Government services have become faster, more accessible, and easier to use. A shift toward fully digital, paperless processes has reduced complexity and enabled most services to be completed remotely.

Integration across platforms has allowed services to be delivered end-to-end, reducing the need for in-person visits and improving consistency across sectors. This applies across justice, health, logistics, housing, and investment, serving citizens, residents, and businesses alike.

Efforts have focused on simplifying the user journey and strengthening coordination across entities. The consolidation of platforms and adoption of shared digital standards have improved efficiency and reduced duplication.

As a result, service delivery is becoming more seamless and proactive, supported by a secure digital infrastructure that enables faster transactions and greater trust in government processes.

Platform Integration

327

government digital platforms merged and closed

490

digital platforms in operation



“Tawakkalna”: A More Comprehensive Platform

Broader Reach

35M+ users

7 languages

Expanded Services

1.3K+ digital services

300+ digital identities and documents accessible

350+ government and private entities integrated



Faster Access to Judicial Services

The digitization of judicial services has helped reduce the time spent by users

91%

services provided electronically, representing more than 140 services

100%

court notifications sent electronically

100%

judgments certified and approved electronically

100%

enforcement requests submitted electronically

96%

court hearings conducted electronically

5 minutes

average time to issue a power of attorney



1st Globally in Government Trust

Edelman Trust Barometer, 2025

87%

public trust in government performance



A Responsible Society

Participating in Growth and Nation-Building

Over the past decade, the non-profit sector has undergone a significant transformation, supported by a strengthened legislative and regulatory framework that has improved its effectiveness and expanded its role in economic and social development.

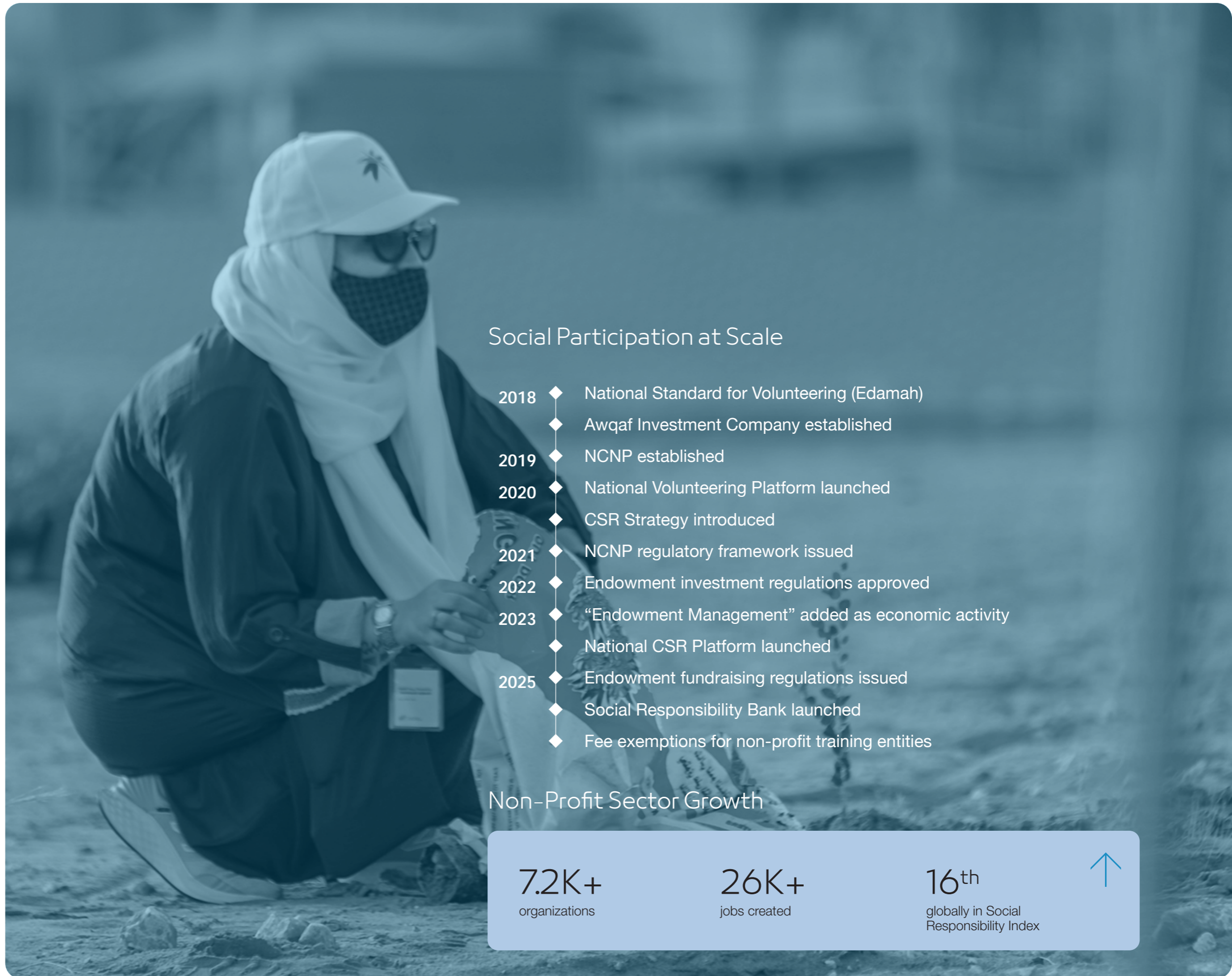
The establishment of the National Center for Non-Profit Sector Development (NCNP) marked a major step forward in empowering non-profit organizations and advancing volunteerism. This has created a more structured environment for non-profit organizations to operate and expand, while encouraging greater participation from individuals and institutions. At the same time, new regulations have made it easier to establish non-profit entities and diversify their activities, supporting broader engagement across society. At the same time, private sector engagement in corporate social responsibility has grown, reinforcing collaboration and integration among the non-profit, public, and private sectors.

341%+

Growth in the number of non-profit organizations

15M

Donors reached via official national platforms



Social Participation at Scale

- 2018 ◆ National Standard for Volunteering (Edamah)
- ◆ Awqaf Investment Company established
- 2019 ◆ NCNP established
- 2020 ◆ National Volunteering Platform launched
- ◆ CSR Strategy introduced
- 2021 ◆ NCNP regulatory framework issued
- 2022 ◆ Endowment investment regulations approved
- 2023 ◆ “Endowment Management” added as economic activity
- ◆ National CSR Platform launched
- 2025 ◆ Endowment fundraising regulations issued
- ◆ Social Responsibility Bank launched
- ◆ Fee exemptions for non-profit training entities

Non-Profit Sector Growth

7.2K+
organizations

26K+
jobs created

16th
globally in Social
Responsibility Index



A Surge in Volunteering

Volunteering has expanded significantly, becoming a more structured and visible part of community life. Participation now spans a wide range of sectors, reflecting a broader shift toward civic engagement.

Digital platforms have made it easier to take part. The National Volunteering Platform connects individuals to opportunities across sectors while enabling the tracking of contributions.

At the same time, volunteering is becoming more specialized, with professional skills increasingly integrated into service delivery across areas such as healthcare, social services, and community development.

Initiatives such as the Sakhaa Program are also expanding opportunities for contribution, enabling business leaders and philanthropists to support high-impact development projects.

Sustained Growth in Volunteering

2016
34K+

2025
1.7M+



National Volunteering Platform

189M+
volunteer hours recorded

552K+
volunteer opportunities

30+
volunteer fields



An Empowering Education System

Shaping Productive Minds

Education reform has focused on improving quality, strengthening outcomes, and aligning learning with future skills. Under Vision 2030, the system is evolving to place greater emphasis on science, innovation, and technology, preparing students to participate in a more competitive global environment.

Structural changes have improved how the system operates. Responsibilities for school operations have been separated from policy and oversight, allowing the Ministry of Education to focus more clearly on regulation and

long-term planning, while improving efficiency across the system.

Quality and accountability have also been strengthened. The Education and Training Evaluation Commission has advanced national standards and embedded a stronger culture of measurement and evaluation, supported by dedicated national centers. At the same time, curriculum development has expanded through partnerships across sectors and with international institutions, ensuring relevance to evolving global needs.

Digital learning is now a core part of the system. Platforms allow students and parents to track performance and access learning resources, while the National eLearning Center has strengthened the quality and reach of online education.

Together, these reforms are shaping a more integrated and outcome-focused education system, better aligned with future skills and global competitiveness.

Madrasati: A Leading Digital Learning Platform

Global Recognition

Awarded the Grand Prize at the World Summit on the Information Society (WSIS) Forum 2025

A Rich Digital Learning Ecosystem

6.3M+ students

8.9B+ assigned learning activities

11.1B+ assigned homework

477K+ teachers

75.1M+ questions in the question bank

900M+ virtual classes

22K+ school principals

4.7B+ assigned tests

14.7B+ enrichment resources

Curricula Building Competitive Capabilities

Continuous Development

6.7K+ digital content items updated

50 courses reviewed to support a digital learning environment

27 digital courses developed

19 interactive textbook courses redesigned

Future Skills

cybersecurity introduced (secondary education level)

artificial intelligence introduced across all levels of general education

20K public school students trained in artificial intelligence

Development of Educational Competencies

13K+ teachers benefited from training programs in artificial intelligence and its educational applications

100 master trainers trained in Singapore and certified 586 trainers and faculty members

52 master trainers trained in London to certify educational staff

Partnerships in Education

Public-Private Partnerships

120 new schools established

Specialized Schools

- ◆ A technology school for gifted students (with Tuwaiq Academy)
- ◆ Sports school (with Ministry of Sport and Mahd Academy)
- ◆ 2 cultural schools (Ministry of Culture)

Developing Globally Competitive Talent

Talent development has expanded significantly, with stronger systems to identify and support high-potential students. These efforts are creating clearer pathways for young people to develop advanced skills and compete internationally.

Programs now follow a more structured approach, beginning with early identification and continuing through mentorship and advanced training. This has strengthened the pipeline of talent across fields such as science, engineering, and innovation.

The impact is reflected in international performance, with Saudi students achieving strong results across global competitions and reinforcing the Kingdom's growing presence in advanced fields.

Investment Attracting Knowledge

Education is attracting increased investment, supported by reforms that have expanded institutional autonomy and opened the sector to new entrants.

The Kingdom is emerging as a destination for knowledge-based

investment, with leading international institutions establishing a presence across universities, schools, and training providers. This is expanding the range of educational offerings and strengthening overall quality and competitiveness.

Together, these developments are positioning Saudi Arabia as a regional hub for education and research, while attracting students and institutions from around the world.

Global Recognition

Nurturing Talent

National Program for Gifted Identification

95K+ registered talents

31K+ students benefiting from the program

National Olympiad for Scientific Creativity (Ibdaa 2026)

357K+ registered participants

22 scientific disciplines

26 International and Regional Olympiads

104+ international awards

Regeneron International Science and Engineering Fair (ISEF) 2025

2nd globally (second consecutive year) 25 awards

183 awards (cumulative)

Geneva International Exhibition of Inventions 2025

167 awards and medals

A Destination for Leading Educational Institutions

199 foreign investment licenses

2 global universities establishing branches in Saudi Arabia

Strengthening Higher Education

Higher education reform has focused on improving quality, strengthening governance, and increasing global competitiveness. Universities now operate with greater autonomy, enabling stronger academic performance, research output, and international partnerships.

Higher education has undergone structural change, with the former Ministry of Higher Education, previously responsible for universities, integrated into the Ministry of Education to strengthen policy alignment. This transition was followed by several measures aimed at improving university performance and governance. Among the most significant was the introduction of the New Universities Law, which established the Universities Affairs Council to oversee higher education while incorporating private sector participation in decision-making. In addition, Boards of Trustees were established at each university. The new framework grants universities greater autonomy, enabling them to enhance the quality of education and research while expanding strategic partnerships.

At the same time, the Custodian of the Two Holy Mosques Scholarship Program was restructured to better align with labor market needs and priority national sectors.

These changes are reflected in stronger international positioning, with Saudi universities advancing in global rankings and more students studying at top institutions worldwide.

Institutional Recognition

The Institute of Public Administration

1st globally
to receive ROI accreditation



Saudis in Top Global Universities

Top 30 universities

3.3K+
scholars

Top 200 universities and institutes

28.5K+
scholars



Saudis in the World's Top 30 Universities

2024

938
students

2025

3,388
students



Global Recognition of Saudi Universities

◆ Shanghai Ranking 2025

King Saud University
Top 150 globally

◆ Times Higher Education Ranking 2026

King Fahd University of Petroleum and Minerals
Top 200 globally



◆ QS World University Rankings 2025

King Fahd University of Petroleum and Minerals
Top 100 globally

University Partnerships

90+ programs
co-developed with employers (MicroX)

stackable digital diplomas launched
in partnership with SEU

8.5K+ beneficiaries
digital and stackable credentials



Sports

Toward a More Active and Vibrant Society

For decades, sport has been an integral part of Saudi society, rooted in cultural traditions and values, from horse riding, falconry, and camel racing to football, athletics, and a wide range of modern sports.

Today, physical activity has evolved from being limited to athletes into a broader lifestyle centered on health and quality of life. This shift has also opened wider opportunities for investment and entertainment, positioning sport as a contributor to economic growth and social wellbeing. At the same time, efforts have focused on developing and empowering athletes, providing them with the support needed to compete on the global stage.

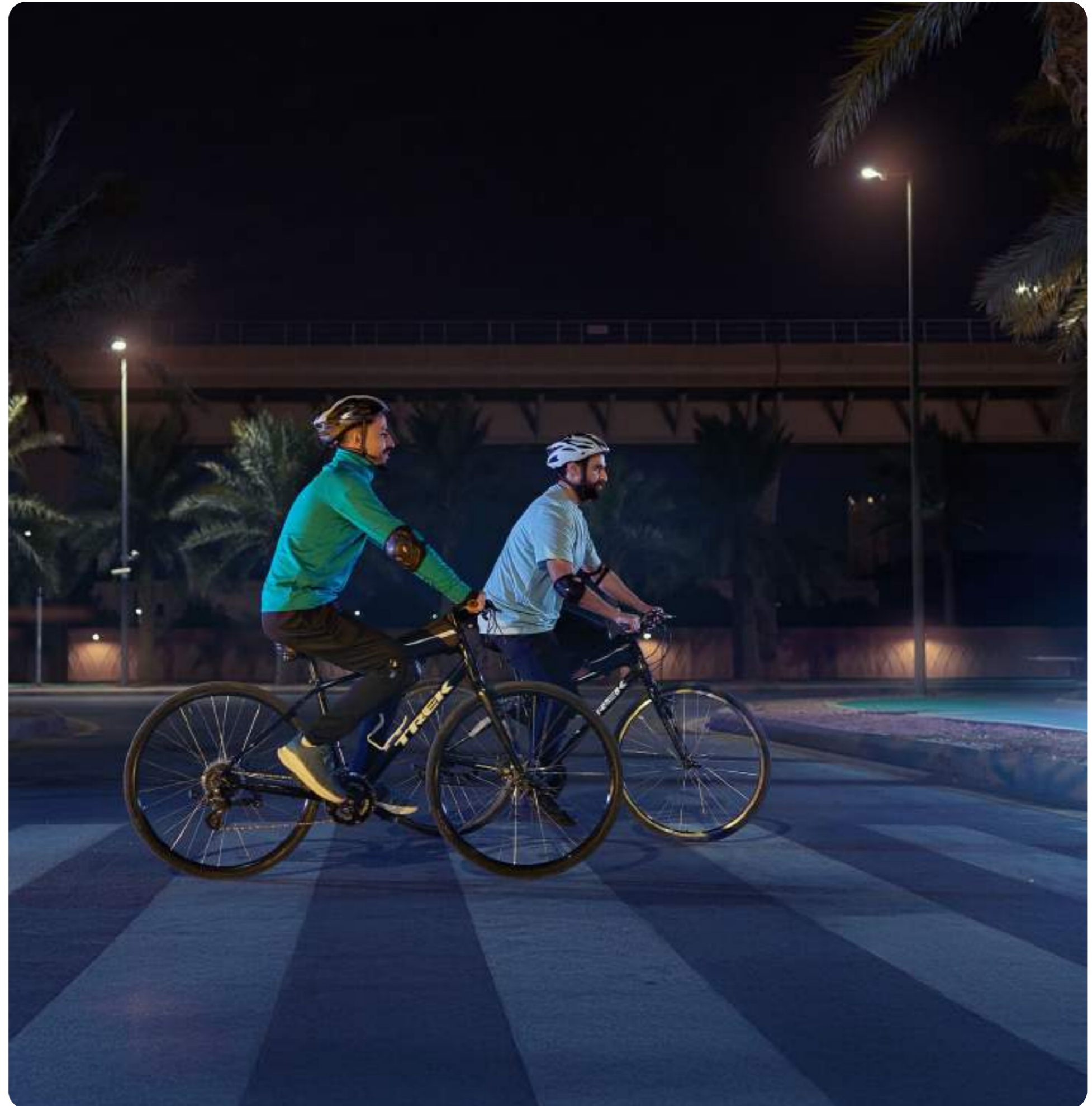
Vision 2030 has played a central role in laying the foundations for this comprehensive transformation of the sports sector. Key steps included establishing the Ministry of Sport to lead sector planning and regulation, as well as launching the Strategy to Support Sports Clubs and Federations, aimed at strengthening governance and improving operational efficiency.

The transformation also prioritized talent development and the strengthening of sports capabilities. Initiatives included the establishment of the Mahd Sports Academy, the activation of the Leaders Preparation Institute, and the launch of the Elite Athletes Development Program. In parallel, the number of sports federations expanded, and community sports participation was promoted through the creation of the Saudi Sports for All Federation.

This unprecedented enablement was further reinforced by the issuance of the first comprehensive sports law, the extension of social insurance coverage to Saudi players and coaches, and the initiation of sports club privatization, with implementation accelerating across the sector.

These reforms have produced tangible outcomes. Participation in physical activity has increased significantly, with 59.1% of adults (aged 18 and above) now engaging in regular physical activity, surpassing the 2027 target. The number of sports clubs has reached 133 clubs across 12 different sports, while employment opportunities in the sports sector have expanded at an unprecedented pace. Women's national teams have also grown significantly, reaching 25 national teams.

The impact extends further, including the documentation of Saudi football history, modernization of sports infrastructure, and the Kingdom's successful hosting of major international sporting events.



How Has Sport in Saudi Arabia Flourished?

- | | | | |
|------|---|---|---|
| 2017 | ◆ Establishment of the Saudi Esports Federation | 2021 | ◆ Launch of the Strategy for Supporting and Developing Sports Federations |
| 2018 | ◆ Establishment of the Saudi Climbing and Hiking Federation | ◆ The Leaders Preparation Institute launches the ISDE Master's Program in Sports and Entertainment Management | |
| | ◆ Women allowed to attend sports stadiums | | |
| | ◆ Establishment of the Saudi Sports for All Federation | 2022 | ◆ Launch of the Saudi Games |
| 2019 | ◆ Launch of the first edition of the Prince Mohammed bin Salman eCup | ◆ Launch of the "Move With Us" Program across 13 cities | |
| 2020 | ◆ Establishment of the Ministry of Sport | ◆ Launch of the Executive MBA in Sports Management | |
| | ◆ Launch of the Mahd Sports Academy | 2023 | ◆ Riyadh hosts the first Esports World Cup |
| 2021 | ◆ Launch of the first Saudi Women's Football League | ◆ Launch of the first Women's Volleyball League | |
| | ◆ Formation of the first Saudi Women's National Football Team | ◆ Beginning of the sports club privatization program | |
| | ◆ Launch of the Strategy to Support Saudi Sports Federations | 2024 | ◆ Number of sports federations reaches 97 |
| | ◆ Launch of the Elite Athletes Development Program | 2025 | ◆ Opening of Sports Boulevard |
| | ◆ Launch of the "Fakhr" Program to empower people with disabilities | ◆ Number of sports clubs rises to 133, practicing 12 sports and more | |
| | ◆ Launch of the Diploma in Sports Marketing and Investment Management | ◆ Issuance of the Sports Law | |
| | | ◆ Implementation of the social insurance system for Saudi players and coaches | |

Sports for All

Sport is becoming more inclusive and accessible, with participation extending across age groups, abilities, and interests. Engagement now spans community activities, organized sport, and digital platforms.

Clubs are offering a wider range of sports, creating more opportunities

for participation while supporting employment and investment across the sector.

Encouraging physical activity remains a central priority. The Saudi Sports for All Federation has expanded community participation through events and initiatives that engage

individuals and families across the Kingdom. At the same time, projects such as Sports Boulevard are creating new spaces for physical activity, supporting a more active lifestyle.

A Society That Practices Sport

adults (age 18+)

59.1%

150+ minutes weekly (surpassing 0 target)

(age 5-17)

19%

60+ minutes daily

Sports for All Dome (Dammam)

260K+

beneficiaries

250+

sports coaches

15+

sports disciplines

Opening of Sports Boulevard

6 destinations

- ◆ Wadi Hanifa
- ◆ Promenade
- ◆ Intersection between Prince Mohammed bin Salman bin Abdulaziz Road and Prince Turki bin Abdulaziz Al-Awwal Road
- ◆ Princess Nourah bint Abdulrahman University internal track
- ◆ Sands Sports Park (phase 1)
- ◆ The Grove

First year

3M+

visitors

50+

events and activities

Riyadh Marathon

40K+ participants annually

3.5K → 15K

Women's participation

A Dynamic Sports Sector

The sports sector in Saudi Arabia has become an increasingly important contributor to national development, generating both economic and social value through job creation and investment opportunities.

A key driver of this shift has been the Sports Clubs Privatization and

Investment Project, which has opened the sector to greater private sector participation. By enabling investors to acquire stakes in sports clubs, the initiative is helping position sport as a more productive and commercially viable sector, with measurable economic impact.

At the same time, sports infrastructure across the Kingdom has been upgraded. Stadiums and facilities have been modernized to improve the fan experience and create more accessible spaces for communities, while also strengthening the Kingdom's ability to host major international events.

First Clubs Privatized

Public Offering

◆ Al-Ansar Club

◆ Al-Kholood Club

◆ Al-Zulfi Club

Expansion of Sports Clubs

Clubs offering multiple disciplines

2019

9

clubs (10+ sports)

2025

133

clubs (12+ sports)

Full-time employment in sports clubs

2019

0

2025

11.1K+

employees

Infrastructure Upgrade

- 2019 ◆ Prince Nasser bin Abdulaziz City in Wadi Al-Dawasi
- 2021 ◆ Prince Nayef bin Abdulaziz City in Qatif
- 2022 ◆ Prince Abdullah Al-Faisal Stadium in Jeddah
- ◆ Prince Abdulaziz bin Musaed City in Hail
- ◆ King Fahd Sports City in Taif
- ◆ Prince Saud bin Jalawi Sports City in Al-Khobar
- ◆ King Abdullah Sports City in Al-Qassim
- 2023 ◆ King Abdullah Sports City in Jeddah
- ◆ King Fahd International Stadium in Riyadh
- ◆ Prince Faisal bin Fahd Stadium in Riyadh
- ◆ Prince Mohammed bin Fahd City in Dammam
- ◆ King Faisal Sports City in Jazan
- ◆ Prince Abdullah bin Jalawi Sports City in Al-Ahsa

- 2024 ◆ Prince Abdullah bin Musaed Sports City in Arar
- 2025 ◆ King Abdulaziz Sports City in Makkah
- ◆ Prince Sultan bin Abdulaziz Sports City in Abha
- ◆ Prince Mohammed bin Abdulaziz Sports City in Madinah
- ◆ King Saud bin Abdulaziz Sports City in Al-Baha
- ◆ Al-Khadra Sports Hall in Riyadh
- ◆ Al-Khadra Sports Hall in Jeddah
- ◆ Al-Khadra Sports Hall in Dammam
- ◆ King Salman Sports City in Al-Majma'ah
- ◆ King Khalid Sports City in Tabuk

Developing Competitive Athletes

The development of athletic talent has been a core part of the sector's evolution. A range of initiatives now support the identification, training, and progression of athletes, creating clearer pathways to international competition. The Sports Academies Development Initiative focuses on identifying and nurturing talent across the Kingdom. Under this initiative, the Sports Excellence Center and Mahd School were established. The program initially focused on football, with plans to expand to additional sports.

The Elite Athletes Development Program represents another cornerstone of this effort, providing specialized training programs, domestic and international training camps, and access to high-level technical and medical expertise. The program aims to prepare athletes to compete at the highest levels locally, regionally, and globally. Its impact has also extended to empowering athletes with disabilities, reinforcing an inclusive approach to supporting talent across all segments of the sports community.

Talent Development

National talent database

480K+
children

Coaches and educators trained

12K+

Specialized training

950+
athletes



Saudi Athletes on the Global Stage

356
medals won

166
gold

117
silver

133
bronze



A Leading Destination

Saudi Arabia's identity is shaped by its history, geography, and cultural depth. Located at the crossroads of three continents, the Kingdom has long connected people, trade, and ideas. It is home to sites of profound religious significance, a rich legacy of civilizations, and a landscape that ranges from mountains and deserts to coastlines and marine environments.

Today, these strengths are becoming more visible and accessible. Building on its long-standing role in serving pilgrims, the Kingdom continues to improve the Hajj and Umrah experience, while opening up to a wider range of visitors.

At the same time, culture, tourism, and entertainment are expanding. New destinations are taking shape, existing ones are being revitalized, and experiences are growing throughout the year. Together, this is changing how the Kingdom is explored and experienced.



Pilgrims	198
Tourism	208
Entertainment	224
Culture	228
Media and Creativity	240

Pilgrims

A Seamless Journey from Planning to Experience

Serving pilgrims has long been central to Saudi Arabia's identity. For generations, the Kingdom has welcomed visitors to the Holy Mosque in Makkah, the sacred sites, and the Prophet's Mosque in Madinah, with a focus on care, organization, and hospitality.

Today, this role continues at a larger scale and with greater reach. Through the Pilgrim Experience Program, efforts have focused on making the journey easier from the moment it begins, from planning and arrival to movement between sites and the

overall experience on the ground.

Procedures have been simplified, and access has expanded. A wider range of visa options is now available, while digital platforms such as Nusuk allow pilgrims to plan their journeys in advance. Initiatives like the Makkah Route enable many to complete key steps before departing their home countries, reducing waiting times on arrival.

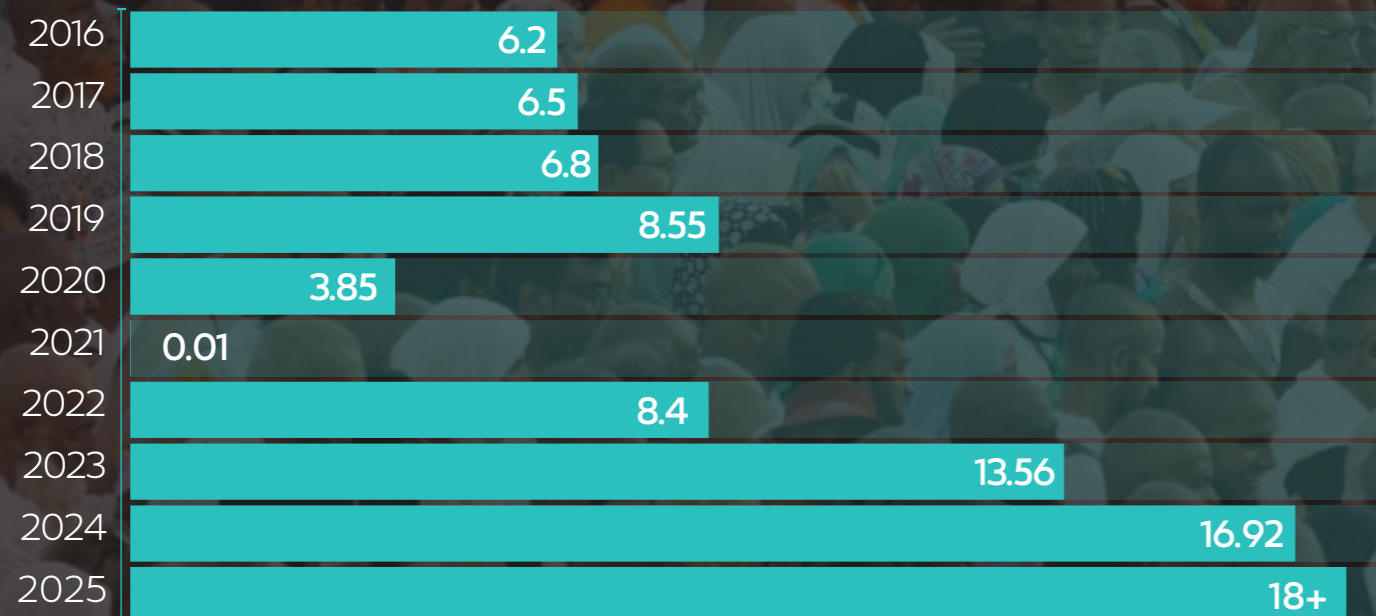
At the same time, transport and infrastructure have been significantly developed. The Haramain High-Speed Railway connects Makkah and Madinah

through key transit points, while the Haramain High-Speed Railway and Makkah buses support movement within the holy sites. Together, these systems help manage large volumes of pilgrims more efficiently and improve the overall experience.

These improvements are reflected in the steady growth in the number of visitors. Umrah performers from outside the Kingdom have reached record levels, supported by expanded services and increased capacity.

Record Growth in Umrah Performers from Outside the Kingdom*

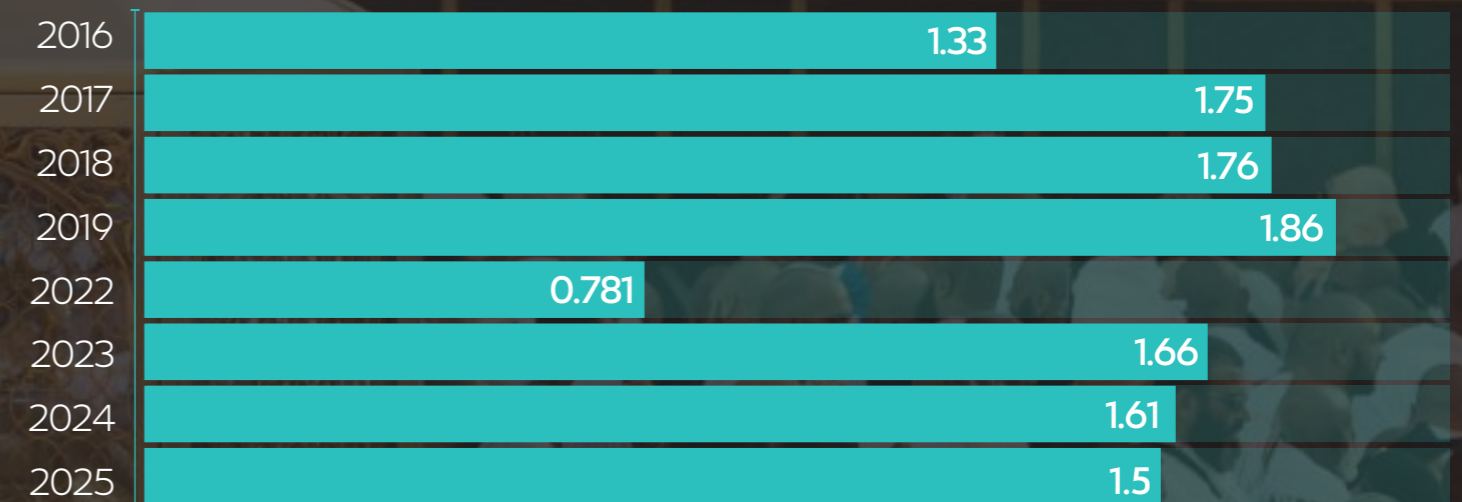
(Million pilgrims)



* The decline in numbers in 2020 and 2021 was due to the circumstances of the COVID-19 pandemic.

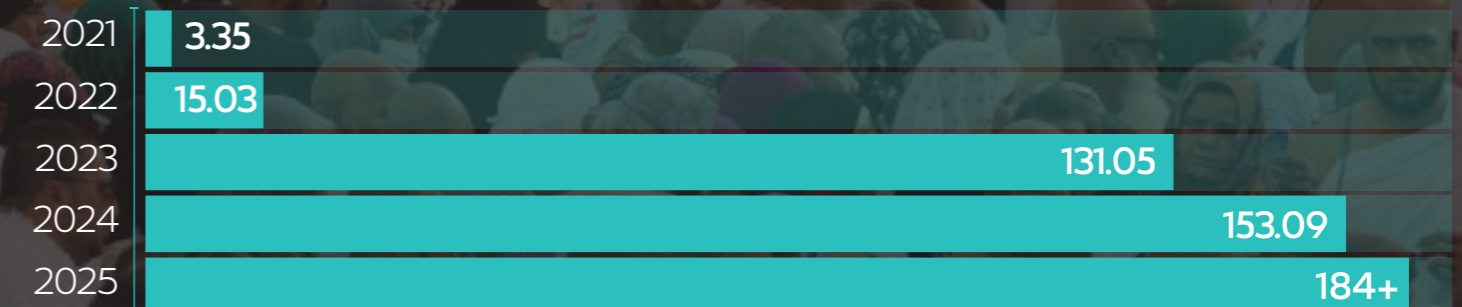
Hajj Pilgrims from Outside the Kingdom*

(Million pilgrims)



Volunteers Supporting Pilgrims

(Thousand volunteers)



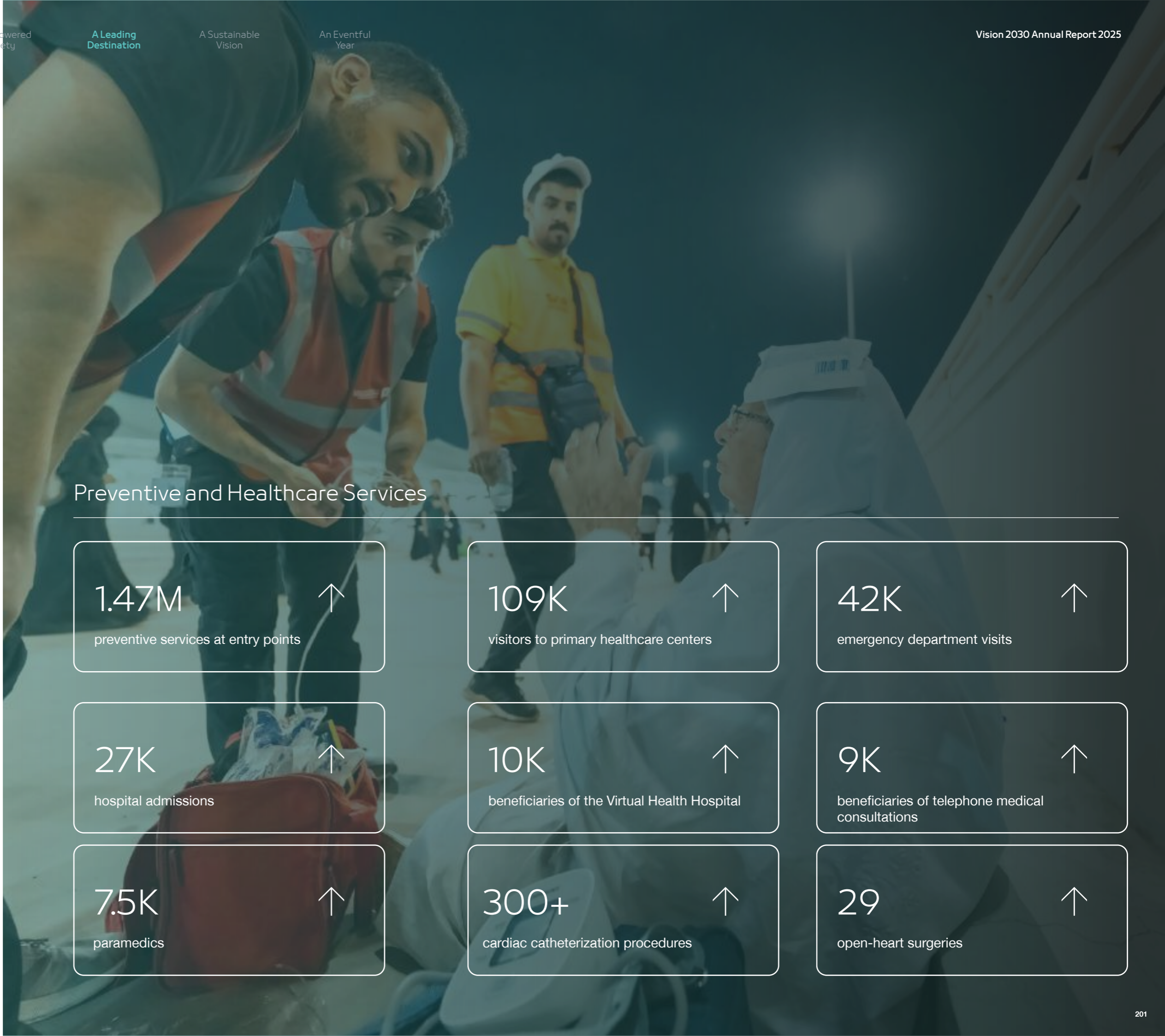
* The decline in numbers in 2020 and 2021 was due to the circumstances of the COVID-19 pandemic.

Care that Extends to Health

Healthcare has become an integrated part of the pilgrimage experience, supporting safety and continuity of care.

During the 2025 Hajj season, hospital capacity increased significantly, alongside the introduction of new services. These included remote consultations through the Virtual Health Hospital, systems enabling the exchange of medical information with pilgrims' home countries, and the deployment of a Mobile Stroke Unit to serve visitors in and around the Holy Mosque.

These efforts are supported by a wide network of facilities and medical teams operating throughout the season.



Preventive and Healthcare Services

1.47M



preventive services at entry points

109K



visitors to primary healthcare centers

42K



emergency department visits

27K



hospital admissions

10K



beneficiaries of the Virtual Health Hospital

9K



beneficiaries of telephone medical consultations

7.5K



paramedics

300+



cardiac catheterization procedures

29



open-heart surgeries

Planning the Journey

Planning and arrival have become more streamlined through expanded visa options and digital platforms. Nusuk enables pilgrims to plan their journeys in advance, access services, and manage their experience end-to-end.

The Makkah Route Initiative allows many pilgrims to complete key procedures before departure, reducing waiting times and simplifying entry into the Kingdom.

This shift reflects a broader change: services are being adopted at scale, supporting a growing number of pilgrims with greater consistency and ease.

Makkah Route Initiative

2017

1.6K

pilgrims

2025

1.2M+

pilgrims



Nusuk Platform

44M+

app downloads; now the top app in the Gulf



4B

user interactions



5

supported languages



190

countries worldwide



60%

of users are from outside the Kingdom



2

minutes to book Umrah trip



Connecting to Islamic History

Makkah and Madinah are home to sites that reflect key moments in Islamic history, offering pilgrims a deeper connection to the life of the Prophet, peace be upon him, his companions, and the early years of Islam.

In recent years, these sites have been carefully restored and developed to make them more accessible and meaningful to visitors. Efforts have focused on preserving their historical significance while providing clear, engaging ways to understand their context.

As a result, more locations are now open and prepared to receive visitors, adding a new dimension to the pilgrimage experience, one that connects rituals with history.

Number of Developed Islamic Historical and Cultural Sites



2022

5

2025

18



Moving at Scale

Transport plays a central role in managing the movement of millions of pilgrims across cities and holy sites within a limited timeframe. In recent years, a more connected network has made it easier to move between arrival points, Makkah, Madinah, and the sacred sites.

This network brings together air, rail, and ground transport. Pilgrims can arrive through Jeddah or Madinah, travel via the Haramain High-Speed Railway between major cities, and rely on systems such as the Mashaer Train and Makkah buses to move within and around the holy sites.

Together, these services support the movement of large numbers of pilgrims while helping reduce congestion and improve access throughout the journey.



Movement During Hajj

Air Transport



1.4M+
seats allocated for pilgrims

10K+
scheduled and charter flights

62
participating airlines

Seamless Arrival Connections



85K+
pilgrims connected directly from international arrivals to domestic flights and high-speed rail

Ground and Rail Transport Growth

Makkah Buses



2022
25.5M

2025
187.8M+

Haramain High-Speed Railway



2018
143K

2025
9.6M

Tourism

Opening Saudi Arabia to the World

Saudi Arabia is undergoing a rapid expansion in tourism, building on its cultural depth, natural diversity, and long-standing tradition of welcoming visitors. While the Kingdom has always received millions of pilgrims each year, broader tourism activity was historically limited.

In recent years, this has changed. New destinations have opened, cities have been prepared to receive visitors, and access has expanded. From AlUla and Diriyah to Aseer and the Red Sea coast, tourism is now developing across multiple regions, offering a wider range of experiences throughout the year.

At the same time, tourism is becoming more closely linked with other sectors. Major events, seasons, and international conferences are drawing visitors for different purposes, from leisure and culture to business and entertainment.

Looking ahead, continued development of destinations and the hosting of global events, including Expo 2030 in Riyadh, are expected to further expand the sector and its contribution to economic and social growth.

Tourism at a Glance



123M
tourists in 2025

30M+
international visitors

\$81B
in tourism spending

100M
visitors target achieved ahead of schedule

150M
new ambition for visitors by 2030



Building a Tourism Destination

- 2017** ◆ The Red Sea Project was launched
- 2018** ◆ Winter at Tantora was launched as AIUla's first annual international festival
- ◆ AMAALA was announced as a tourism destination within the Red Sea Project
- ◆ The General Authority for Exhibitions and Conferences was established
- 2019** ◆ Saudi Seasons was launched
- ◆ The electronic tourist visa was introduced
- 2020** ◆ The National Tourism Strategy was launched
- ◆ The Ministry of Tourism was established
- ◆ The Saudi Tourism Authority was established
- ◆ The Tourism Development Fund was established
- ◆ The Visit Saudi platform was launched
- 2021** ◆ The Tourism Pioneers Program was launched to support human capital development
- ◆ The UN World Tourism Organization (UNWTO) opened its regional office in Riyadh
- ◆ Rijal Almaa village was recognized among the World's Best Tourism Villages by the UNWTO
- 2022** ◆ The Tourism Support Program for micro and small tourism enterprises was launched
- ◆ The Digital Tourism Strategy was launched
- 2022** ◆ The new Tourism Law was issued
- ◆ The first phase of the Red Sea Project was completed
- 2023** ◆ Saudi Arabia won the bid to host Expo 2030
- ◆ The Kingdom hosted World Tourism Day
- ◆ The target of 100 million visitors was exceeded ahead of schedule
- 2024** ◆ The tourism target was raised to 150 million visitors by 2030
- ◆ The electronic visit visa was expanded to 66 countries
- ◆ "Sarah," the digital Saudi tourism guide, was launched in pilot phase
- ◆ Saudi Arabia won the bid to host the FIFA World Cup 2034
- ◆ The first Aroya Cruise voyages were launched
- 2025** ◆ Three regulatory frameworks covering Saudi yachts, visiting yachts, and superyacht chartering were issued
- ◆ Localization policies for tourism activities and workforce registration were launched
- ◆ The Fortune Global Forum was hosted in the Kingdom for the first time
- ◆ The Tourise Global Forum was held
- ◆ Riyadh hosted 26th UN World Tourism Organization General Assembly



Riyadh Expo 2030

A Destination for Major Global Events

Major events are becoming an increasingly important part of Saudi Arabia's tourism landscape, attracting visitors for business, culture, and sport throughout the year.

The Kingdom now hosts a growing calendar of international conferences, exhibitions, and forums. Events such as the Future Investment Initiative, LEAP, and the World Defense Show bring together global leaders, investors, and industry experts, contributing to the expansion of business tourism.

At the same time, large-scale sporting events have drawn global audiences. Saudi Arabia has hosted international competitions across motorsport, football, golf, boxing, and esports, including the Dakar Rally, Formula 1, and major football tournaments. These events are taking place across multiple cities, supporting wider geographic distribution of tourism activity.

This momentum is reflected in the Kingdom's growing role as a host of global events. Riyadh has been

selected to host Expo 2030, and Saudi Arabia will host the FIFA World Cup 2034, marking two of the largest international events in the coming decade.

◆ Preparing to Host the World

Final Registration Dossier approved by the Bureau International des Expositions (BIE)

Completed in half the usual timeframe

Expo Flag received, marking the start of implementation

◆ Expo 2030 Riyadh Company

Leading development and operations of the Expo site

Driving long-term investment

Post-Expo transformation into a Global Village



Esports World Cup 2025

- 2022** ◆ Launch of the first national Gaming and Esports Strategy of its kind globally
- 2023** ◆ Announcement of the Esports World Cup
 - ◆ Establishment of the Esports Foundation (formerly the Esports World Cup Foundation)
- 2024** ◆ Hosting of the first Esports World Cup in Riyadh
 - ◆ Team Falcons crowned champions by HRH the Crown Prince Mohammed bin Salman
 - ◆ 1M+ visitors to championship events
 - ◆ 29% increase in visitor numbers to Riyadh during the championship period compared to 2023
 - ◆ 32+ entertainment and cultural events
 - ◆ 500M+ viewers worldwide
- 2025** ◆ Hosting of the second Esports World Cup in Riyadh
 - ◆ Team Falcons crowned champions for the second time by HRH the Crown Prince Mohammed bin Salman
 - ◆ Ticket sales increased by 53% compared to the first edition
 - ◆ Growth in demand for local content (+40%) and international sales (+64%)
 - ◆ 3M+ visitors to championship events
 - ◆ 750M+ views worldwide
 - ◆ 1,500+ entertainment, cultural, and community events
 - ◆ Launch of the first-ever Esports Nations Cup

Exhibitions and Conferences

Market Growth

10% | **\$2.67B**
 growth over five years, among the fastest in the G20 | added to GDP

Advanced and Supportive Infrastructure

300K+ | **923**
 m² of exhibition space, a 320% increase compared to 2018 | accredited venues

Private Sector Enablement

17K+ | **330%**
 companies (up from 400 in 2018) | growth in the number of companies since 2018

Attracting Global Investment

13 | **70%**
 international organizers operating in the Kingdom | of leading global companies represented

Developing National Talent

90K+ | **1K+** | **20%**
 young people trained | trainees obtained the international Certified in Exhibition Management (CEM) credential | of global CEM holders are Saudi

Tourism Growth and Impact

The expansion of the tourism sector in Saudi Arabia is reflected in rising visitor numbers, increased tourism revenues, and stronger domestic and international demand. As more destinations have opened and cities have been prepared to receive visitors, tourism activity has grown across the

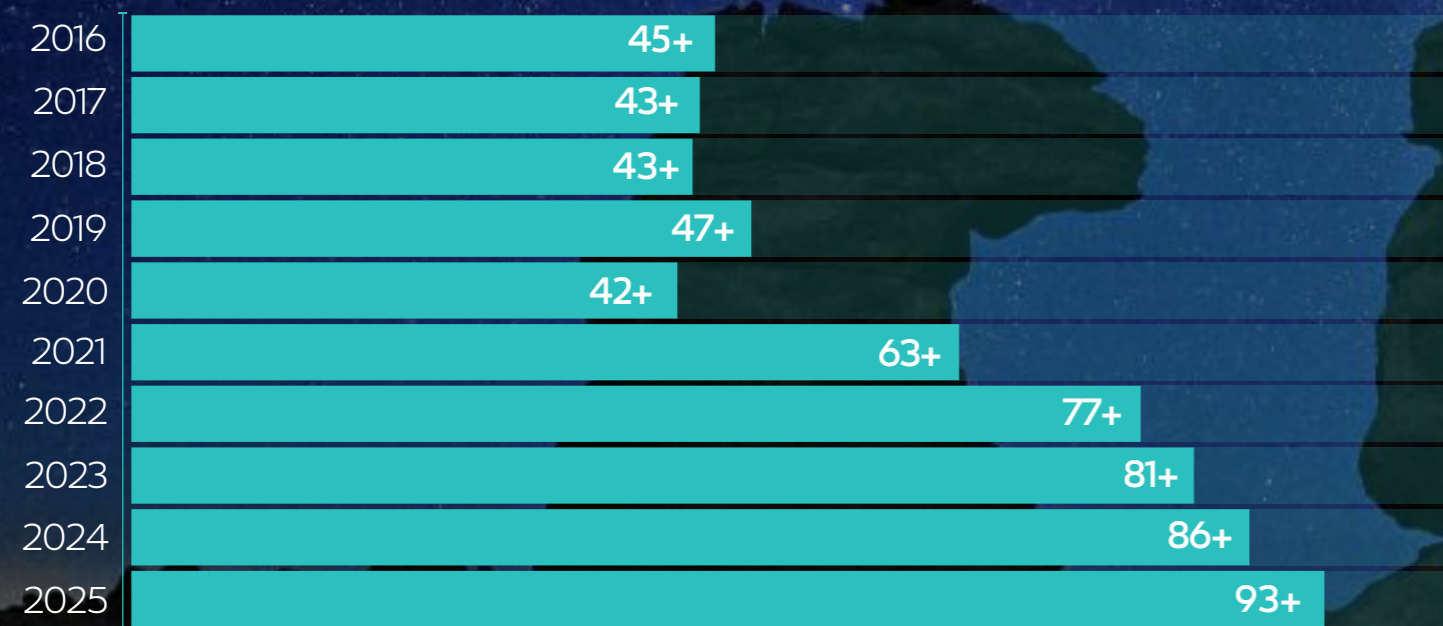
Kingdom throughout the year.

This growth has also supported increased investment in the sector, contributing to a rise in tourism's share of GDP, which has reached 5%, with a target of 10% by 2030. At the same time, the number of

licensed accommodation facilities has increased, alongside improvements in sector capacity and a growing travel surplus in the balance of payments.

Growth in Tourist Numbers

Domestic Tourists (Million)



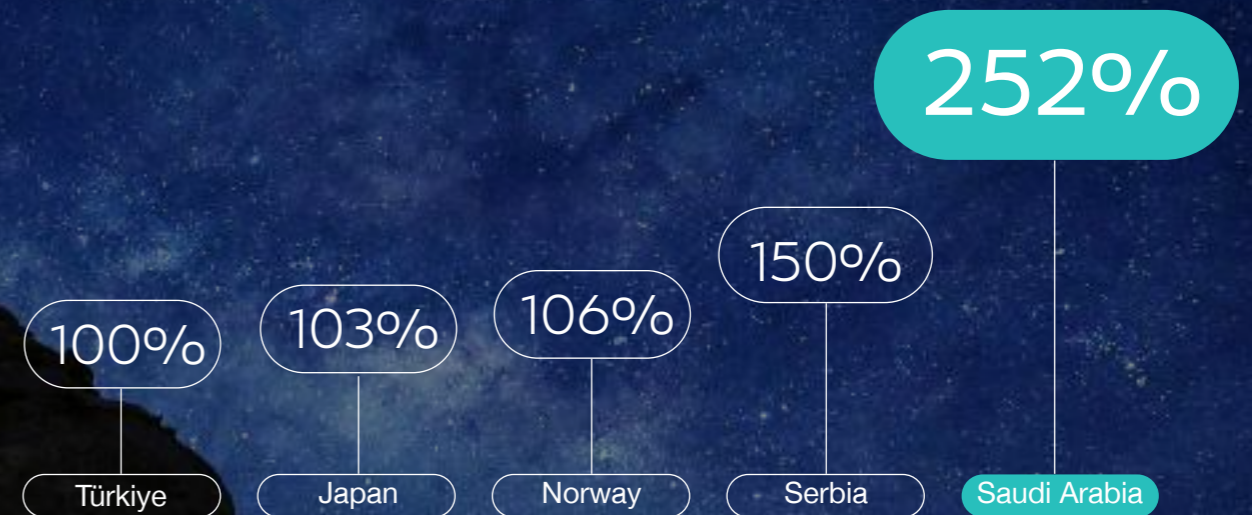
Inbound Tourists (Million)



Leading Global Growth

Highest growth in international tourism revenues (Q1 2025 vs 2019)

UN Tourism World Tourism Barometer (September 2025)



Developing and Empowering Tourism Talent

◆ Graduates of an advanced training program in partnership with UN Tourism

50
graduates from leading global universities

◆ Expanding Employment

2025
1M+
(47% held by women)

Tourism Talent

◆ Building a Workforce at Scale

1M+
employed in tourism

47%
of roles held by women

◆ Leadership Pipeline

300
leaders in executive tourism programs

Delivered with leading global institutions, including **Glion, Les Roches, and EHL**

◆ Developing Skills

50
graduates from international training programs

◆ Global Partnerships

Training and education delivered in collaboration with top hospitality institutions in Switzerland and Spain

Programs aligned with international standards across tourism and hospitality

Tourism Investment

Investment in tourism has accelerated in recent years, supporting the development of destinations, hospitality, and infrastructure across the Kingdom.

This growth is reflected in the expansion of hotels and tourism facilities, increasing the sector's

capacity to receive visitors. As more projects are developed, cities and regions are becoming better equipped to host a wider range of tourism activity.

At the same time, tourism investment is contributing to local economies. Increased visitor activity is supporting

small businesses, generating employment, and driving commercial activity across cities, governorates, and smaller communities.

Growth in Tourism Investment

\$3B



Expanding Hospitality Capacity Licensed Rooms

Licensed Tourism Facilities



2025
5,937

2023
280.8K+

2025
596.9K+



Strong Performance of Saudi Tourism

Saudi Summer 2025

24M+
domestic tourists

2%
growth vs. 2024

\$10B+
in total domestic tourism spending

21%
growth vs. 2024



Saudi Tourism Destinations

The Kingdom now offers a diverse range of destinations across its regions, each shaped by its own natural and cultural identity. Together, they provide visitors with a broader mix of experiences, from coastal tourism to heritage and cultural exploration.

The Red Sea is emerging as a new coastal destination, with resorts opening along its shoreline and growing connectivity through Red Sea International Airport. Since welcoming its first guests in 2023, the destination has continued to expand, offering a range of experiences rooted in sustainability and natural surroundings.

In the north, AIUla has developed into a cultural destination centered on heritage, history, and events. Ongoing investment in infrastructure, hospitality, and programming continues to attract visitors from within the Kingdom and abroad.

Diriyah reflects the historical roots of the Saudi state, with the restoration and development of At-Turaif and surrounding areas. As new districts open, visitor numbers are increasing, supported by a growing mix of cultural, residential, and hospitality offerings.

Madinah has also seen steady growth in visitor numbers, supported by its religious significance and expanding range of historical and cultural experiences. The launch of a dedicated tourism brand has further strengthened its position.

Across these destinations, visitor behavior is shifting toward longer stays and more comprehensive travel experiences, supporting local economies and expanding opportunities across regions.

The Red Sea, A Growing Coastal Destination

- 2023**
 - ◆ Red Sea International Airport opened
 - ◆ The Red Sea destination launched
 - ◆ First resort opened: Six Senses Southern Dunes
- 2024**
 - ◆ Opening of The St. Regis Red Sea Resort
 - ◆ Opening of Nujuma, a Ritz-Carlton Reserve, the first of its kind in the region
 - ◆ Opening of Desert Rock Mountain Resort
 - ◆ Opening of Shebara Resort
- 2025**
 - ◆ Launch of Red Sea Health and opening of its first facility at Red Sea International Airport
 - ◆ Shebara Resort chosen as one of TIME Magazine's "Greatest Places in the World 2025"
 - ◆ Opening of Shura Island, featuring three luxury hotels: SLS, EDITION, and InterContinental
 - ◆ InterContinental Red Sea wins "Best Hotel Design" at the Commercial Interior Design Awards
 - ◆ Five resorts awarded Michelin Keys
 - ◆ \$533M in residential sales recorded
 - ◆ 50K+ tourists received

AIUla, A Cultural Destination

Winner of the World Travel Awards (three consecutive years)

Best

Cultural Tourism Project in the Middle East

Best

Events and Festivals Destination in the Middle East

Best

Leading Cultural Tourism Project in the Kingdom

Expansion of AIUla Airport

700K+

passenger capacity

Empowering AIUla youth

1K+

students awarded scholarships

Diriyah, A Heritage Destination

3.6M+
visitors

\$6.6B+
in projects and awarded contracts

8
major projects under development

5
luxury hotels and branded residences announced

Saudi talent at Diriyah Company

82%
Saudi workforce

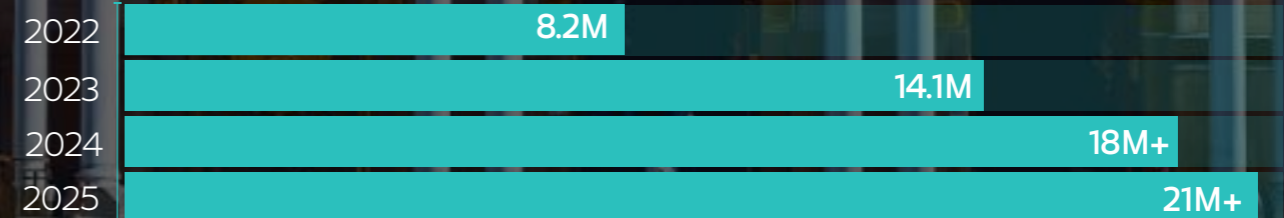
39%
Saudi women

14%
from the Diriyah community

Global presence

100
Diriyah Company listed among TIME magazine's "100 Most Influential Companies"

Madinah, A Growing Destination



Entertainment

Experiences that Enhance Quality of Life

Entertainment has become a more visible part of daily life across Saudi Arabia, with a growing range of events, activities, and destinations available throughout the year.

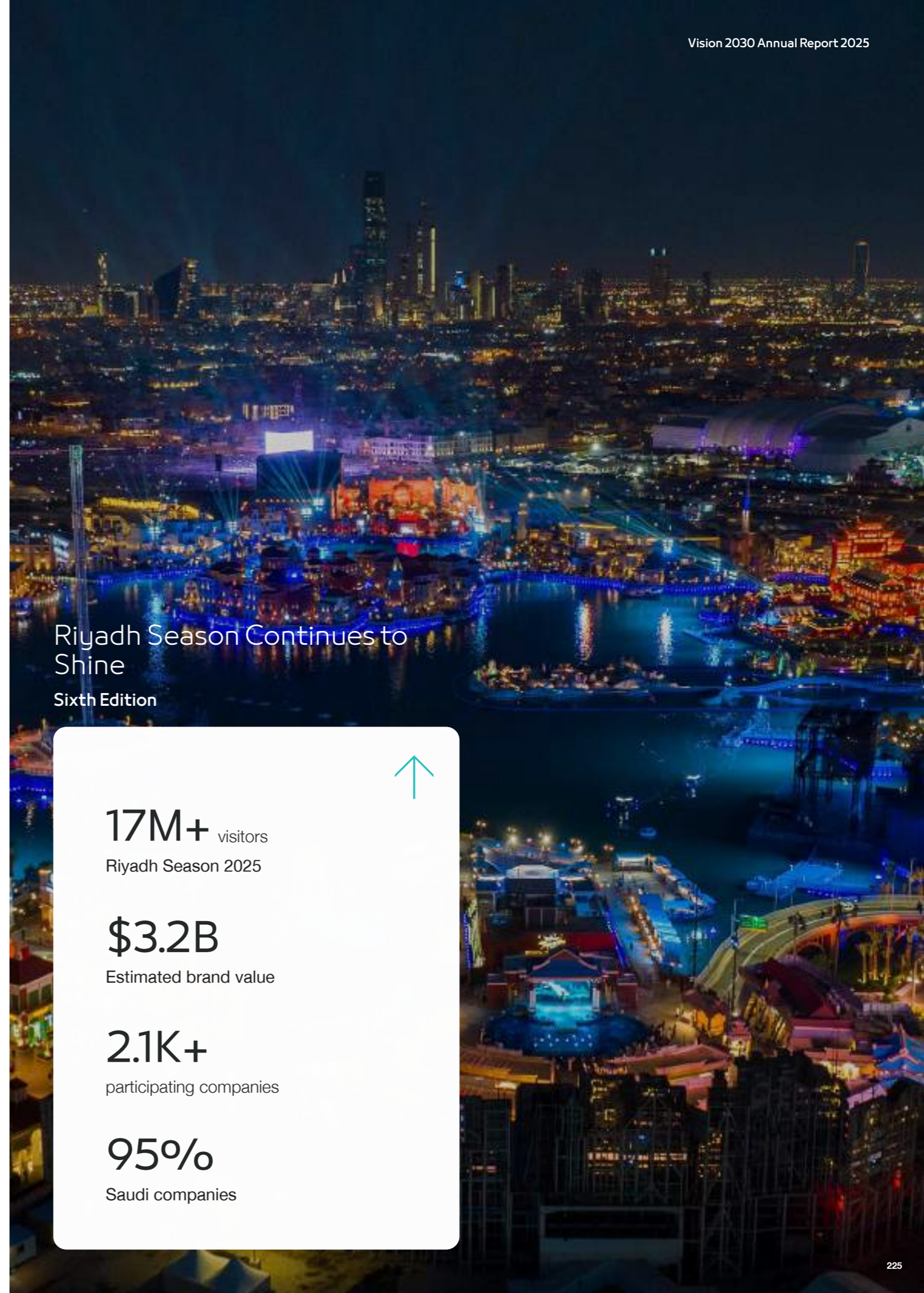
Seasonal events have played a central role in this expansion. Riyadh Season, Jeddah Season, and others have introduced large-scale experiences across cities, bringing together

entertainment, culture, and sport. These events attract millions of visitors and offer a wide variety of activities for different audiences.

At the same time, the sector is expanding through new destinations and projects. Developments such as Qiddiya are introducing large-scale entertainment offerings, while initiatives across different regions are ensuring

that experiences are not limited to major cities.

This growth is also creating opportunities. Entertainment activities are supporting local businesses, creating jobs, and providing platforms for talent across creative and cultural fields.



Riyadh Season Continues to Shine Sixth Edition



17M+ visitors
Riyadh Season 2025

\$3.2B
Estimated brand value

2.1K+
participating companies

95%
Saudi companies

◆ Qiddiya, A New Entertainment Destination

Opening of Six Flags

Largest in the region

Longest, fastest, and tallest

Falcon's Flight roller coaster sets three records

Progress

95%+

Aquarabia Water Theme Park

36%+

Speed Park



Culture

A Growing Cultural Scene

Culture in Saudi Arabia is becoming more visible across cities and communities, building on a long history of heritage, arts, and creative expression.

In recent years, cultural activity has expanded across multiple fields, including film, music, museums, heritage, design, literature, and performing arts. New platforms, events, and institutions are supporting

artists, creators, and practitioners, while opening more opportunities for audiences to engage with culture in everyday life.

This expansion is reflected in a growing calendar of festivals and initiatives. Events such as the Red Sea International Film Festival and programs supporting traditional arts and heritage are bringing cultural expression to wider audiences, both within the Kingdom and internationally.

At the same time, cultural identity is being reinforced through national milestones and institutions. The recognition of Founding Day and Saudi Flag Day, along with initiatives supporting the Arabic language and traditional arts, are strengthening connections to heritage and identity, particularly among younger generations.

Saudi Arabia's cultural presence is also expanding globally. The Kingdom continues to be represented through heritage sites and cultural elements recognized by UNESCO, reflecting the depth and diversity of its cultural landscape.

How Saudi Culture Has Taken Shape

- 2018**
 - ◆ Ministry of Culture established
 - ◆ Mohammed bin Salman Project for the Development of Historic Mosques launched
- 2019**
 - ◆ First music institute opened
 - ◆ National Cultural Strategy announced
 - ◆ Cultural Scholarship Program launched
 - ◆ Riyadh Art Program launched
 - ◆ Red Sea International Film Festival launched
 - ◆ Saudi National Orchestra and Choir established
- 2020**
 - ◆ Cultural Years Initiative launched
 - ◆ 11 cultural commissions established under the Ministry of Culture
 - ◆ Diriyah Biennale Foundation established
 - ◆ 80+ cultural professions added to the new unified Saudi occupational classification
 - ◆ National Cultural Awards launched
 - ◆ King Salman Global Academy for Arabic Language established
- 2021**
 - ◆ Royal Institute of Traditional Arts (Wrth) established
 - ◆ JAX Arts and Culture District opened
 - ◆ Cultural Development Fund established
 - ◆ First Diriyah Contemporary Art Biennale inaugurated
- 2021**
 - ◆ Theater and Performing Arts strategy launched
 - ◆ Music sector strategy launched
 - ◆ Saudi Trouq Program launched to document traditional arts
 - ◆ Literary Partner Initiative launched to host cultural activities in cafés
- 2022**
 - ◆ Film Sector Financing Program launched
 - ◆ Saudi Music Hub began operations
 - ◆ Guide for documenting and digitally archiving cultural heritage issued
- 2023**
 - ◆ Cultural Index for the Islamic World (CIW) launched
 - ◆ Professional music association established in Riyadh
- 2024**
 - ◆ Target of 8 UNESCO World Heritage Sites achieved ahead of schedule
- 2025**
 - ◆ Oldest known architectural human settlement in the Arabian Peninsula discovered
 - ◆ Saudi Arabia selected to host the UNESCO World Conference on Cultural Policies and Sustainable Development in 2029
 - ◆ 17 restaurants included in the Michelin Guide
 - ◆ UNESCO Intangible Cultural Heritage inscriptions reach 18 elements
 - ◆ Riyadh joins the UNESCO Creative Cities Network (Design)
 - ◆ Madinah joins the UNESCO Creative Cities Network (Gastronomy)
 - ◆ Prince Mohammed Bin Salman Global Center for Arabic Calligraphy opened
 - ◆ First Script and the Saudi Script launched
 - ◆ Saudi Architecture Map launched, featuring 19 styles
 - ◆ JAX Film Studios announced
 - ◆ Red Sea Museum opened in Jeddah Historic District

Saudi Arabia and UNESCO

Saudi Arabia's cultural presence is increasingly reflected on the global stage through its engagement with UNESCO, building on a heritage that spans thousands of years.

The Kingdom reached its target of eight World Heritage Sites ahead of schedule, with these locations now open to visitors and attracting more than 6.5 million visitors by the end of 2024.

At the same time, Saudi traditions and cultural practices continue to be documented and recognized internationally, reflecting the depth and diversity of the Kingdom's heritage.

This presence now extends beyond heritage sites. Saudi Arabia is represented across UNESCO platforms, from Global Geoparks to the Creative Cities Network, reflecting a broader cultural footprint across nature, design, and gastronomy.

6.5M+
visitors



World Heritage Sites

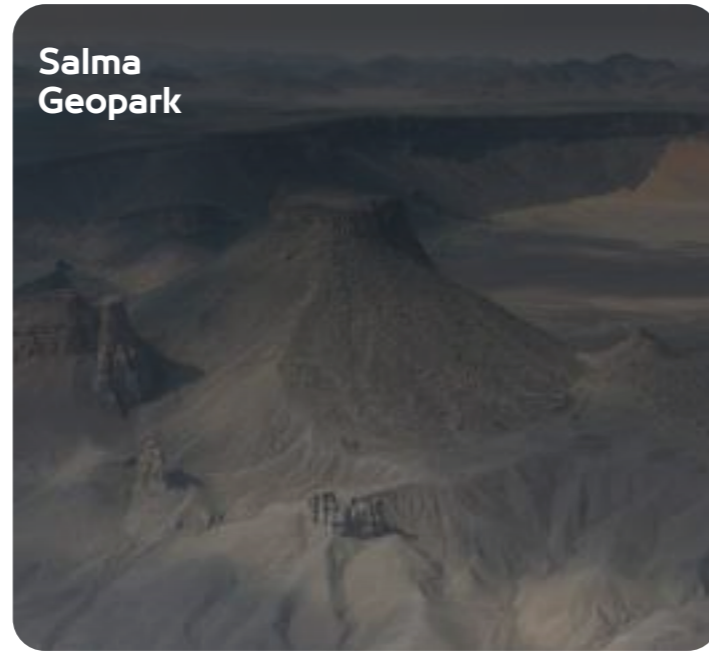
◆ 8 sites inscribed on the UNESCO World Heritage List



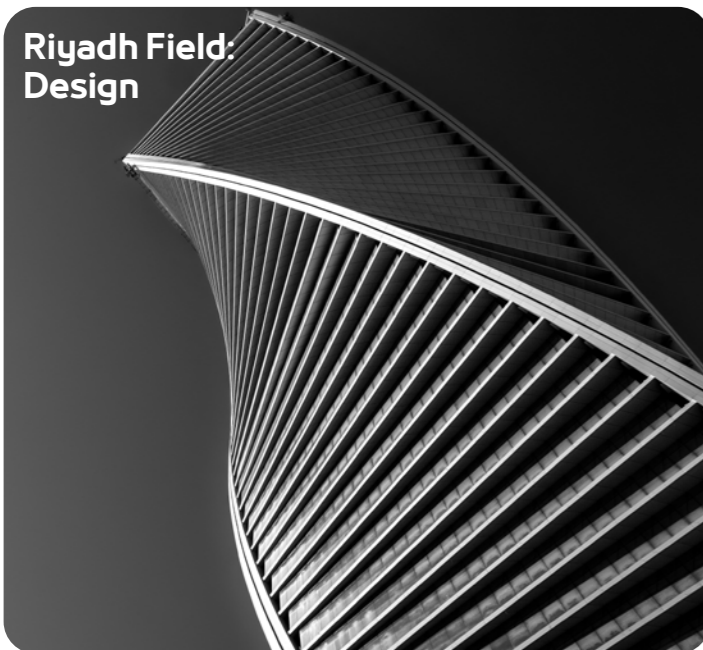
18 elements inscribed on UNESCO's Representative List

- 2015** ◆ Najdi Ardah | Al-Majlis
- 2016** ◆ Almezmar
- 2017** ◆ Al-Qatt Al-Asiri
- 2021** ◆ Falconry | Arabic Calligraphy
- 2022** ◆ Camel Riding | Al-Kholani Coffee | Date Palms
- 2023** ◆ Haris | Metal Engraving
- 2024** ◆ Arabic Coffee | Taif Roses | Henna | Sesame Grinder
- 2025** ◆ Arabic Kohl | Bisht | Sadu

UNESCO Global Geoparks Network



UNESCO Creative Cities Network



Preserving National Heritage

Efforts to preserve and document Saudi Arabia's heritage have expanded in recent years, covering archaeological sites, historic landmarks, and traditional practices. Work in this area includes research, surveying, and restoration, helping protect sites of historical significance and making them more accessible to the public. At the same time, documentation efforts are growing, supported by academic research and national records that reflect the depth of the Kingdom's history.

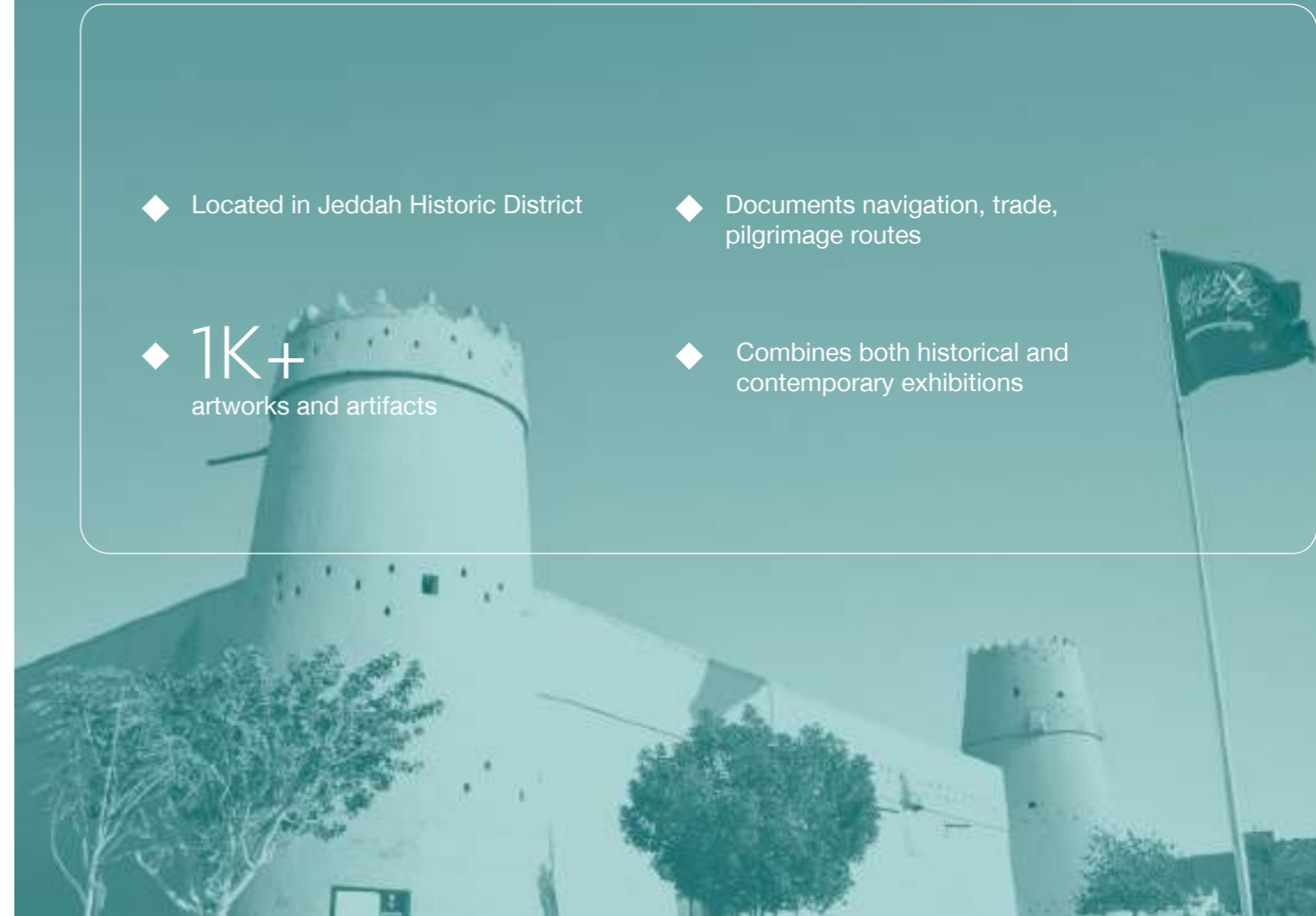
Projects such as the Prince Mohammed bin Salman Project for the Development of Historic Mosques continue to restore and preserve places of cultural and religious importance, ensuring they remain part of the Kingdom's living heritage.

Al-Masmak Museum

- 1865** ♦ Built as a defensive fortress
- 1902** ♦ Site of the recapture of Riyadh by King Abdulaziz
- 1995** ♦ Converted into a national museum
- 2025** ♦ Reopened following restoration and rehabilitation

Red Sea Museum

- ♦ Located in Jeddah Historic District
- ♦ Documents navigation, trade, pilgrimage routes
- ♦ **1K+** artworks and artifacts
- ♦ Combines both historical and contemporary exhibitions



Early Human Settlement at Masyoun Site

Located northwest of Tabuk

Key Milestones

- 1978** ♦ Listed in the National Antiquities Register
- 2022** ♦ Modern field studies initiated
- 2025** ♦ Identified as the oldest known architectural settlement in the Arabian Peninsula

Prince Mohammed bin Salman Project for the Development of Historic Mosques

- 2018** ♦ Project launched to develop 130 mosques across the Kingdom
- 2020** ♦ 30 mosques completed (phase one)
- 2025** ♦ 30 mosques completed (phase two)

Documenting Heritage at Scale

50K

registered built heritage sites

11.5K+

registered archaeological sites

9.9K+

entries in the National Register of Artisans



Cultural Investment

Investment in culture is supporting the growth of the sector as both an economic contributor and a platform for talent.

New institutions are expanding opportunities for education and training in the arts. Initiatives such as the Arts and Culture Academy and Riyadh University of Art are helping develop skills and support the next generation of creative talent.

At the same time, investment in cultural fields continues to grow. Total investment has exceeded \$500 million, alongside \$500 million in foreign direct investment, reflecting increasing interest from international investors. This is contributing to job creation and expanding the number of professionals working across cultural sectors.

Employment in the Cultural Sector

2023

216.8K+

2025

282.7K+



Fashion Sector Employment

340K+

employees

55%

are Saudi women

44%

of women in leadership roles



Safeguarding and Empowering the Arabic Language

Efforts to support and develop the Arabic language are expanding through dedicated institutions and initiatives that strengthen its use across different fields.

The King Salman Global Academy for Arabic Language plays a central role in this work, contributing to the development of dictionaries and the standardization of terminology. This supports clearer usage across sectors while reinforcing the role of Arabic in education, research, and public life.

In recent years, a growing number of specialized dictionaries have been introduced, covering fields such as data and artificial intelligence, energy, transport, and statistics. These resources support researchers, students, and professionals by making technical language more accessible and consistent.

Enriching Arabic Terminology

- 2022 ◆ Data and AI Dictionary
- 2024 ◆ Digital Government Terminology Dictionary
- ◆ Energy Terminology Dictionary
- ◆ Esports Terminology Dictionary
- 2025 ◆ Road Terminology Dictionary
- ◆ Statistical Terminology Dictionary
- ◆ Wildlife Terminology Dictionary
- ◆ Financial and Economic Dictionary



Media and Creativity

Creative industries are becoming a more visible part of Saudi Arabia's economy, supported by the growth of media, culture, and entertainment.

The media sector is expanding in both scale and capability, with new platforms and institutions supporting content creation and communication. Initiatives such as the Government Communication Center, the Saudi Media Academy, and national platforms like Saudipedia are contributing to the development of media skills and the production of locally relevant content.

At the same time, creative initiatives are encouraging storytelling and content production. Programs such as the Konoz initiative focus on documenting national stories and heritage, while supporting

creators across different formats.

This growth is also reflected in the development of dedicated spaces for creative work. New districts in Riyadh and Diriyah are bringing together media companies, startups, and educational institutions, creating environments that support collaboration and innovation.

Together, these developments are strengthening the role of creative industries as a source of economic value, talent development, and cultural expression.

Building a Modern Media Landscape

- 2018**
 - ◆ First cinema opens
 - ◆ Media regulations introduced
- 2019-2020**
 - ◆ Center for Government Communication established
 - ◆ Saudi Media Forum launched
 - ◆ National media platforms and awards introduced
- 2021-2022**
 - ◆ Expansion of content platforms, including Saudipedia
 - ◆ New licensing frameworks and media initiatives introduced
- 2023-2024**
 - ◆ Media Regulation Authority framework approved
 - ◆ Saudi Media Academy launched
 - ◆ New digital platforms and content ecosystems introduced
- 2025**
 - ◆ Media Scholarship Program launched
 - ◆ Creative District (KAFD) and Media & Innovation District (Diriyah) announced

Talent Development

Media Leaders Program

40
participants in the first cohort

Media Scholarship Program

15
destination countries

35+
private sector partners

Creative District – KAFD

◆ **30K+**
m² of office space

◆ Hosts a mix of leading local and international organizations

Media and Innovation District – Diriyah

◆ **250K+** m² total area

Professional Accreditation

Registrations increased
7x in three years

2023
928

2025
7,263

Global Presence

Saudi Treasures Initiative

productions
9

international awards
18

Saudi Media Forum

52K+
attendees

400+ international guests
300+ speakers from 20 countries

120+ sessions and workshops
250+ participating entities

A Sustainable Vision

Sustainability has been part of Vision 2030 from the beginning, shaping how growth and environmental protection are approached together.

Over the past decade, this has translated into a more balanced energy transition. Renewable energy is expanding, while existing energy resources continue to be developed to support economic stability. At the same time, large-scale environmental programs have been introduced, including the expansion of protected areas, afforestation efforts, and the reintroduction of wildlife into natural habitats.

National and regional initiatives such as the Saudi Green Initiative and the Middle East Green Initiative are driving these efforts, alongside international frameworks like the Circular Carbon Economy, introduced during the Kingdom's G20 presidency.

This approach also extends to the development of energy-related industries. Projects such as King Salman Energy Park (SPARK) are building new value chains, linking energy production with manufacturing and investment.

Together, these developments reflect a more structured approach to sustainability, one that supports economic growth while strengthening environmental resilience over the long term.

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Agriculture and Food

Security that Supports Stability and Growth

Food security is a central component of long-term economic stability. Since the launch of Vision 2030, the Kingdom has strengthened its agricultural and food systems through structural reform and targeted investment.

Institutional frameworks have been reinforced with the establishment of the General Food Security Authority to manage strategic reserves and ensure supply continuity, alongside the privatization of flour mills to improve efficiency and competitiveness. Targeted programs have supported productivity and rural livelihoods, while the Agricultural Development Fund has expanded access to financing across the sector.

At the same time, efforts to improve resource efficiency and reduce waste have been supported by the adoption of advanced technologies and the implementation of national programs to reduce food loss and waste.

As a result, agricultural output has increased, self-sufficiency has improved across key food categories, and waste levels have declined, contributing to a more resilient and sustainable food system.

A Sector Expanding in Scale and Output

Production Volume



2016
6M tons

2025
12M+ tons

Agricultural Development Fund



\$6.6B+
from 2021 to 2025

\$9.5B+
in investments generated by these loans

The Agricultural Subsidies Program

\$3.1B+ in support provided since 01

◆ Aquaculture

◆ Poultry

◆ Livestock



Reef Saudi Arabia Program

Tangible impact

\$770M+

in direct financial support for small farmers (2020-2025)

92K+

beneficiaries

49.5K+

households supported

70%

are women

Global leadership

Recognized by the Food and Agriculture Organization for its impact and innovative approach

Strengthening Food Self-Sufficiency

Dairy products



120%

Table eggs



105%

Poultry meat



76%

Fish and prawns



6%

Red meat



55%

A Growing Hub for Food Industries

Efforts to enhance food security have comprised the development of a competitive food market and industry. As the largest market in the region, the Kingdom has grown its agricultural base while advancing food manufacturing and processing.

National companies have been established to capture emerging opportunities, including the Halal Products Development Company, Sawani in camel dairy, Al Madinah Heritage Company in date production, and the Saudi Coffee Company. At the same time, the Saudi Agricultural and Livestock Investment Company (SALIC) has strengthened supply chains through international

investments, supporting food availability and continuity.

Institutional measures have further enhanced competitiveness and global reach. The Halal Saudi Center has introduced certification systems that facilitate trade, support exports, and ensure compliance with international and Sharia standards.

Together, these developments are positioning the Kingdom as a growing hub for food industries, supported by a strong market, expanding infrastructure, and rising investment.

Localizing Global Food Production

Sadia Products Manufactured in the Kingdom (First time in 50 years)

Sadia Products Manufactured in the Kingdom (First time in 50 years)

- ◆ Supporting food security
- ◆ Strengthening national industrial capabilities
- ◆ Positioning Saudi Arabia as a global hub for food industries

Expanding Value Chains in Specialized Products

Sawani

- 2023**
 - ◆ Established by PIF
 - ◆ Launch of Noug, the first specialized camel milk brand
 - ◆ Opening of first retail stores
- 2024**
 - ◆ Expansion with two Noug stores in Makkah and Jeddah
- 2025**
 - ◆ Launch of the model farm and camel milk factory in partnership with a global company

Water

Securing a Strategic Resource

Water is one of the Kingdom's most critical strategic resources, shaped by environmental conditions and limited natural supply. In response, the sector has developed into an integrated system focused on sustainability, efficiency, and long-term security.

Reforms have strengthened governance and coordination across

the water value chain, including the transformation of the Saline Water Conversion Corporation into the Saudi Water Authority. At the same time, the establishment of the Global Water Organization in Riyadh reflects a growing role in addressing shared water challenges at the international level.

Ongoing investment has expanded

capabilities across desalination, groundwater development, and water distribution, improving supply reliability while increasing efficiency.

Water Management at a Global Level

◆ Global Water Organization launched in Riyadh

- The first organization dedicated to addressing global water sector challenges
- Founding countries signed the Charter

◆ United Nations selected the Kingdom as a global model for water management

Building a More Resilient Water System

Storage capacity

2016
13.6M m³

2025
30M m³ (121%+)

Groundwater resources

2016
8,279 wells

2025
8,845 wells

Investment and Infrastructure

Total investment

\$64B+
across the water value chain

\$56B+
private sector investment

Project scale

1,780+
projects across the supply chain

Network expansion

Pipeline length expanded by

150%

2016 7,400 km **2025** 18,500 km

Transmission capacity

2016 8.7M m³/day **2025** 17.2M m³/day (98%+)

System Efficiency

Wastewater treatment capacity

2016 4.0M m³/day

2025 7.81M m³/day (95%+)

Energy efficiency

85% reduction
in energy required or water production

Localization

66% local content
in the water sector

98% national workforce
(engineers and technicians)

Innovation and Ecosystem

patents registered

74

start-ups incubated

41

Continued Leadership in Desalination

Desalination remains a cornerstone of the Kingdom's water security, supporting sustainable supply in an environment with limited natural water resources. Today, Saudi Arabia is the world's largest producer of desalinated seawater, with a system designed to meet growing demand at scale.

Building on decades of expertise, the sector has developed into an integrated system spanning production, operations, and management. This has enabled the

deployment of advanced technologies across large-scale projects, improving both efficiency and reliability.

Ongoing innovation has focused on reducing energy consumption, increasing output, and optimizing resource use. These advances are strengthening the sustainability of desalination while reinforcing its role as a dependable source of water supply.

World's largest producer of desalinated seawater

11M+ m³/day

Efficiency

2.34 kWh/m³

Lowest energy consumption (Shuaiba Phase 5)



Scale

670K+ m³/day

Largest RO plant (Al Khobar System Phase 2)



System Capability

12

Guinness World Records

3

mobile and floating desalination plants

200%+

production increase (Al-Baha)

Major facilities:

Jubail 3B

Shuaiba 3



Major Desalination Plants

Al-Khobar System (Phase 2)

670K m³/day



Shuaiba System (Phase 5)

660K m³/day



Shuaiba 3

660K m³/day



Jubail 3B

600K m³/day capacity



Al-Shuqaiq System (Phase 4)

451K m³/day



Restoring the Natural Landscape

Accelerated Steps to Restore Vegetation Cover

Desertification and the loss of vegetation have long been key environmental challenges in the Kingdom. In response, efforts have been brought together under a more coordinated national approach.

Since the launch of Vision 2030, regulatory frameworks and institutional capacity have been strengthened. The Environment Law established a clear basis for protecting natural landscapes, while the National Center for Vegetation Cover Development and Combating Desertification now leads work across rangelands, forests, and national parks.

Implementation has accelerated through initiatives such as the Saudi Green Initiative and the Middle East Green Initiative, alongside a national roadmap to plant 10 billion trees. Supporting programs, including cloud seeding and regulated grazing, are helping to improve vegetation density and manage land use more sustainably.

As a result, vegetation cover is expanding, degraded land is being restored, and natural areas are becoming more accessible, contributing to environmental sustainability and quality of life.

How Did Vegetation Cover Grow?

- 2017** ◆ Mangrove restoration initiatives launched
- 2018** ◆ National Environment Strategy introduced
- 2019** ◆ National Center for Vegetation Cover Development and Combating Desertification established
- 2020** ◆ Global Initiative on Land Degradation and Habitat Conservation announced at the G20 Riyadh Summit
- ◆ Environment Law approved, strengthening the regulatory framework
- 2021** ◆ Saudi Green Initiative and Middle East Green Initiative announced
- 2022** ◆ Inauguration of the Mangrove Eco-Park near Ras Tanura
- 2023** ◆ National afforestation program scaled, with a roadmap to plant 10 billion trees
- 2024** ◆ Implementation of the 10 billion trees program begins
- 2025** ◆ 151M+ trees planted across the Kingdom
- ◆ 1M+ hectares rehabilitated

Saudi Green Initiative

10B trees target **151M+** trees planted **1M+** hectares of land rehabilitated

Ecosystem in Action

Mangroves ↑

170+ hectares

Cities ↑

7M+ m² green space

Protected Resources

Preserved for Future Generations

Saudi Arabia's biodiversity and natural resources are being protected through a more coordinated national framework under Vision 2030.

Regulatory and institutional systems have been strengthened, including the establishment of Royal Reserves, a governing council, and dedicated development authorities. The National Center for Wildlife leads efforts to

protect biodiversity across land and sea, supported by the Special Forces for Environmental Security.

These efforts have expanded protected areas and supported breeding and reintroduction programs for endangered species, helping preserve ecosystems for future generations.



How Has the Kingdom Protected Its Natural Wealth?

- 2018** ◆ Royal Reserves Council established and initial reserves designated
- 2019** ◆ National Center for Wildlife established
- 2020** ◆ Environment Law approved, strengthening environmental governance
- 2021** ◆ The Farasan Islands Protected Area inscribed on the UNESCO's Man and the Biosphere Program
- 2023** ◆ Royal Reserves expanded and long-term targets set to 2030 'Uruq Bani Ma'arid inscribed on the UNESCO World Heritage List
- 2024** ◆ Key reserves recognized internationally, including listings on the IUCN Green List
- 2025** ◆ Multiple reserves added to global environmental lists, including IUCN Green List, Ramsar, and UNESCO Man and the Biosphere Program
- ◆ More than 10,000 fungi reintroduced across protected areas

Saudi Reserves on International Lists

◆ UNESCO World Heritage List

'Uruq Bani Ma'arid Reserve

◆ Key Biodiversity Areas (KBA)

King Salman bin Abdulaziz Royal

◆ IUCN Green List of Protected Areas

Multiple Saudi reserves recognized

◆ Reserve Ramsar and UNESCO Biosphere listings

Farasan Wetland Reserve
Imam Turki bin Abdullah Royal Reserve

Protection Targets Achieved

Under the Saudi Green Initiative



18.1%

protected terrestrial areas

16.1%

protected marine areas

Advancing Conservation

Science

◆ Arabian Leopard genome decoded (KACST)

◆ Supporting endangered species protection

◆ New species identified in protected areas

◆ Expanded biodiversity research and mapping

◆ **35** species identified in first comprehensive reptile survey in King Abdulaziz Royal Reserve

People

◆ First all-female inspection team

◆ **34%** women in teams (exceeding global benchmark of %11)

◆ **35K+** female rangers

Circular Economy

A More Efficient Use of Resources

The circular economy has become a key approach to resource management, focused on reducing waste and extending the use of materials. Under Vision 2030, this model has been adopted to support sustainable growth while improving environmental efficiency.

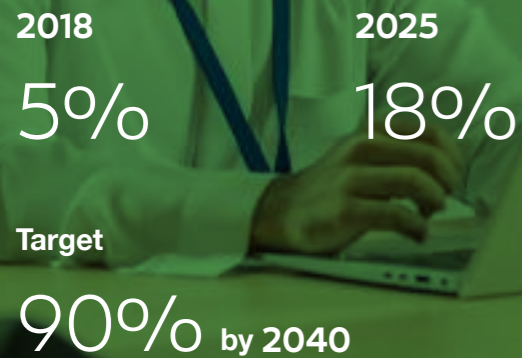
Saudi Arabia has played a leading role in advancing this approach globally, including through the Circular Carbon Economy framework introduced during its G20 presidency. National efforts have focused on building the required regulatory and institutional foundations, alongside investment in recycling, waste management, and carbon capture technologies.

These efforts are supported by the Waste Management Law, the National Center for Waste Management,

and the Saudi Investment Recycling Company, which are enabling the development of recycling infrastructure and improving waste utilization, as a result, the waste recycling rate has more than tripled compared to 2021. At the same time, initiatives such as the regional carbon capture hub and the voluntary carbon market are expanding new areas of investment and supporting emissions management.

As a result, recycling rates are rising, waste diversion is improving, and new opportunities are emerging across sustainability related sectors, contributing to both environmental outcomes and economic growth

Waste Diversion from Landfills



Recycling activity expanding



Voluntary Carbon Market

- ◆ Regional carbon market established by PIF and Saudi Tadawul Group ↑
- ◆ 13M+ tons of carbon credits traded
- ◆ \$93M+ in total value
- ◆ 2.5M+ tons traded in a single auction
- ◆ 30+ carbon projects launched
- ◆ 12+ countries participating



Energy

A Balanced Approach to Sustainable Supply

Saudi Arabia has long been a reliable supplier of energy to the world, supported by the effective management of its oil and gas resources. Under Vision 2030, this role has expanded to include a more diversified energy system that responds to changing global needs.

The sector has evolved from a primary focus on oil and gas to a broader mandate that includes renewable energy and emerging technologies. This shift has been supported by institutional and regulatory changes, alongside investments in solar, wind, and hydrogen, building on the Kingdom's natural advantages in climate, geography, and scale.

At the same time, the Kingdom continues to invest in oil and gas exploration and production, maintaining supply reliability while advancing cleaner energy solutions. This approach reflects a balance between meeting global energy demand today and preparing for a more sustainable energy future.

How Does the Kingdom Ensure the Sustainability of Energy Supplies?

- 2017** ◆ National Renewable Energy Program launched
- 2018** ◆ Expansion into nuclear and alternative energy capabilities
- 2019** ◆ First utility-scale solar project connected to the grid
- ◆ Energy sector mandate expanded
- 2020** ◆ Circular Carbon Economy framework adopted at the G20
- ◆ Jazan Refinery commissioned, with capacity of 400K+ barrels/day
- 2021** ◆ Large-scale solar projects launched
- 2022** ◆ Hydrogen and clean energy initiatives scaled
- 2023** ◆ Integration into global carbon capture and storage efforts
- 2025** ◆ Discovery of 14 new oil and gas fields



Investment in Renewable Energy

Renewable energy has grown rapidly in recent years, becoming a central part of Saudi Arabia's efforts to diversify its energy mix and strengthen long-term sustainability.

A broad portfolio of projects is now underway across the Kingdom, spanning solar, wind, hydrogen, and energy storage. The total capacity of renewable energy projects proposed in the Kingdom is approximately

64 gigawatts by the end of 2025, expanding clean energy capacity and supporting a more balanced energy system.

This progress is reinforcing Saudi Arabia's position as a competitive player in renewable energy, while contributing to economic diversification and a more sustainable energy future

Expanding the Energy Mix

Renewable capacity

64GW

Battery energy storage capacity projects

30GWh

Battery energy storage projects connected to the electrical grid

8GWh

Total capacity of projects

20.6GW

Total capacity of projects connected to the electrical grid

12.3GW

Among the Lowest Cost Worldwide

Solar Energy

\$1.04

cents/kWh (Shaybah)

\$1.09

cents/kWh (Najran)

Wind Energy

\$1.33

cents/kWh (Dawadmi)

\$1.57

cents/kWh (Al Ghat)

World's First Renewable Energy Storage System

Successfully Operated by Aramco to Support Gas Well Production

- ◆ 1 MWh energy storage system supporting long-term operations across gas wells
- ◆ Based on **Saudi patented technology**, designed for reliability in harsh conditions
- ◆ Adapts to changing energy demand while maintaining efficiency

Advancing Low-Carbon Energy Solutions

NEOM Green Hydrogen Project

600

tons per day

Yanbu Green Hydrogen Hub

- ◆ Integrated production and export facilities

Maximizing Energy Value Chains

Vision 2030 identified significant opportunities to expand value across the energy sector, building on the Kingdom's long-standing capabilities in oil and gas. The focus has shifted from resource extraction to developing integrated industries, strengthening local supply chains, and increasing local content.

King Salman Energy Park (SPARK) plays a central role in this transformation, providing an industrial platform that brings together manufacturing, services, and advanced

energy industries. Its location near major energy resources and export networks, supported by dedicated infrastructure such as a dry port, enhances its role as a hub for investment and industrial activity.

As the energy landscape evolves, this approach supports both the growth of renewable energy and the continued development of oil and gas, ensuring that value is captured across the full energy value chain

King Salman Energy Park (SPARK)



\$3.2B+
in investments

60+
investors (local and international)

Industrial growth



7
factories operational

14
factories under construction

Global companies present



- ◆ Baker Hughes
- ◆ Halliburton
- ◆ Yokogawa
- ◆ Emerson
- ◆ SLB

Localization and Investment Growth



8
factories opened and expanded

\$339M
in investments

Ensuring Energy Supply Through Balanced Management

Saudi Arabia continues to play a central role in global energy supply, supported by effective resource management and long-term planning.

As global energy systems evolve, the Kingdom is pursuing a gradual and balanced transition. This approach recognizes the continued importance of oil and gas in meeting global demand, while also advancing technologies that reduce emissions and support more sustainable energy production.

At the same time, investment in exploration and field development continues, supported by strong technical capabilities and accumulated expertise. This ensures that energy supply remains reliable while enabling the development of new energy-related industries.

Continued Exploration and Development

Recent oil and gas discoveries

2020	2022	2023	2024	2025
6	8	7	6	14

An Eventful Year

Over the past year, progress took shape in visible moments across the Kingdom. From global platforms to local communities, these moments reflect a transformation that is increasingly experienced in real time.

Saudi Arabia continues to position itself as a destination for dialogue, investment, and cultural exchange, while advancing efforts to expand opportunities, empower people, and strengthen international cooperation in a rapidly changing world.

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Key Events and Launches

Jan



AFC Asian Cup Saudi Arabia 2027™

Dates and host stadiums announced.



Largest Livestock City in the Middle East

The establishment of the largest livestock city in the Middle East in Hafar Al-Batin was announced, including state-of-the-art livestock breeding facilities, feed mills, a veterinary hospital, and processing

plants for red meat production



Healthcare Innovation

First fully robotic artificial heart pump (HeartMate 3) implanted at King Faisal Specialist Hospital in Riyadh.



World Economic Forum

Saudi Arabia to host a recurring high-level World Economic Forum meeting in Riyadh.

Feb



King Salman Automotive Industrial Complex

The area designated for automotive manufacturing activities within the

King Abdullah Economic City has been named the "King Salman

Automotive Industrial Complex."



AI Safety Report

Saudi Arabia contributed to the world's first international AI safety report.



Phosphate Production

Launch of the Phosphate Project 3 in Waad Al-Shamal; to support the phosphate production industry and strengthen the Kingdom's position as a hub for mining investments.



Qiddiya

Qiddiya Investment Company and Mercedes-AMG partnered to build the "Mercedes-AMG World".



NEOM

Launch of a \$5 billion AI project in Oxagon in partnership with DataVolt.

Feb



Launch of the Aviation Industries Cluster

The cluster was launched at Madinah Oasis in Jeddah to localize

advanced technologies and strengthen the aviation sector's supply chains.



Saudi Riyal Symbol

Adoption of a new national currency symbol.



AI Charter

Approved by 53 countries through ICESCO.



Saudi Geological Survey Academy

Launched alongside an online platform to develop national capabilities and competencies and enhance the Kingdom's competitiveness in the mining sector.



Olympic Recognition

Dunya Abutaleb awarded the Equality, Diversity and Inclusion Award for Asia.



Saudi Architecture Map

Launched, highlighting 19 architectural styles.

Mar



Red Sea

Shebara Resort named among TIME's World's Greatest Places 2025.



Discoveries

8 oil and 6 gas discoveries announced.



Innovation

Saudi team won the Grand Prize at the Geneva International Inventions Exhibition.



Opera in Diriyah

Development contract awarded for the Royal Diriyah Opera House (\$1.3 billion).



Dairy Industry

The Dairy Industry Complex in Al-Kharj Industrial City launched, comprising dairy and feed factories, packaging facilities, and storage and refrigeration units.



Geospatial Leadership

The Kingdom ranked first regionally, and ninth globally according to Geospatial World Organization.

Mar

Apr

| Apr



Sports

Al-Ahli crowned AFC Elite Champions League winners.

| May



Aviation

Saudi Arabia elected to the ICAO Council representing the Arab group.



HUMAIN

Launch of a new AI company.



Aviation Leasing

AviLease signed a deal with Boeing for 30 aircraft.



Space

Agreement signed with NASA to launch a Saudi satellite under Artemis II.



Science

Saudi team won 23 awards at ISEF 2025.



Energy

Aramco implemented a renewable energy storage system in gas operations.

Oil discovery announced in the Neutral Zone.

| May



Global Water Charter

Launch of the Global Water Organization in Riyadh.

| Jun



PIF-FIFA

Partnership signed with FIFA for the Club World Cup 2025™.

| Jul



Cybersecurity

Saudi Arabia ranked first globally in the World Competitiveness Yearbook.



PIF Brand

Ranked as the world's most valuable sovereign wealth fund brand.

| Aug



Sports

Bader Al-Tamimi crowned world champion in horseback archery.



Esports

Team Falcons crowned Esports World Cup champions.

| Sep



Red Sea Destination

Opening of Shura Island to visitors.

| Oct



UNESCO

Saudi Arabia announced as host of Mondiacult 2029.



Nobel Prize

Omar M. Yaghi awarded the Nobel Prize in Chemistry.



Riyadh Expo 2030

Saudi Arabia received the Expo flag at the Osaka closing ceremony.



Sports

Haniya Minhas won the Accra International Tennis Championship.

Saudi national team qualified for the FIFA World Cup 2026.

Salem Al Dawsari named Asian Player of the Year.

Saudi national team won the Arab Camel Racing Cup.



Riyadh Air

Riyadh Air launched its first flight to London.



Energy

Aramco completed an \$11 billion gas infrastructure deal.

| Nov



Tourism

Adoption of the Riyadh Declaration on the Future of Tourism.



Transport

Riyadh Metro listed as the world's longest driverless metro network.



Industry

Adoption of the Riyadh Declaration for Sustainable Industrial Development.



Diriyah

Agreement signed with Apple to open a flagship store.

| Dec



Digital Government

Saudi Arabia ranked second globally in the World Bank GTMI index.



AI

Ranked first in MENA in the Government AI Readiness Index.

| Dec



Culture

Opening of the Prince Mohammed bin Salman Global Center for Arabic Calligraphy.



Space

Breakthrough nanomaterial for cartilage repair developed in space



Qiddiya

Opening of Six Flags Qiddiya City.

Major Events and Occasions

| Jan



International Mining Conference 2025

Hosted with 405 speakers and over 18,000 participants from 165 countries, alongside 132 signed agreements and MoUs.



World Economic Forum 2025

Saudi Arabia participated in the WEF Annual Meeting in Davos to strengthen international cooperation and share economic best practices.



Italian Super Cup

Hosted in Riyadh for the fifth time with four participating clubs.



Spanish Super Cup

Hosted in Jeddah for the fifth time with four participating clubs.



Dakar Rally

Held for the sixth consecutive year across the Kingdom.

Jan



Saudi Tourism Forum

Third edition held in Riyadh with over 40 international speakers and participation from 450+ brands.



Richard Mille AIUla Desert Polo

Hosted in AIUla with six teams and international players.



Islamic Arts Biennale

Second edition held in Jeddah featuring over 500 artifacts and works by more than 30 artists.



Hajj Conference and Exhibition

Held in Jeddah with 280 exhibitors and participation from 87 countries.



International Labour Market Conference

Hosted in Riyadh with over 10,000 participants and representatives from 100+ countries.

Jan



Future of Real Estate Forum

Fourth edition held in Riyadh with participation from over 120 countries and 500 speakers.

Feb



Formula E Prix

Hosted in Jeddah with 11 teams and 22 drivers.



PIF and Private Sector Forum

Third edition held with over 10,000 participants and 100+ company pavilions.



LIV Golf Riyadh

Hosted as the opening event of the global season.



Restatex Riyadh Real Estate 2025

Recorded sales exceeding \$5.9 billion with more than 85,000 visitors.

Feb



LEAP

Held in Riyadh with 1,000+ speakers, 1,800 exhibitors, and 680 startups.



Archives in the Digital Age

Hosted in Riyadh with participation from international archival leaders.



Sports for All Expo 2025

Attracted over 35,000 visitors with interactive sports and health experiences.



Saudi Media Forum and Future of Media Exhibition

Featured more than 80 sessions and 200 speakers.



Saudi Cup

Sixth edition held with total prize money of \$38.1 million.

Apr



AFC Elite Champions League

Final-stage matches hosted in Jeddah for the 2024-2025 season.



Human Capability Initiative (HCI) Conference

Second edition held in Riyadh with participation from 38 countries.



Formula 1® stc Saudi Arabian Grand Prix

Hosted in Jeddah as part of the Formula 1 World Championship.

May



Saudi Food Show

Third edition held with 1,300 exhibitors from 100 countries.

Jul



Esports World Cup

Hosted with over 2,000 players and 200 clubs from more than 100 countries, with a prize pool exceeding \$70 million.

Aug



Event Tech Meetup

Held to support innovation and digital transformation in the events sector.

Sep



Crown Prince Camel Festival

Hosted in Taif with record participation exceeding 100,000 camels.



Cultural Investment Conference

Held in Riyadh with 150+ speakers and 1,500 participants.



Index Saudi Arabia

Hosted with 400+ exhibitors and participation from 33 countries.



National Cultural Awards Ceremony

Fifth edition held to recognize cultural contributions.



Saudi International Railway Exhibition and Conference

Hosted in Riyadh with 248 exhibitors from 22 countries.



Fortune Global

Hosted in Riyadh with participation from global CEOs and business leaders.

Oct



Saudi Film Confex

Third edition held with participation from 35 countries.



Al Khobar Season

Delivered 147 events across seven zones, generating over 7,200 jobs



Future Investment Initiative

Ninth edition held with over 8,000 participants and 600 speakers.



Six Kings Slam Tennis Championship

Hosted in Riyadh and broadcast globally.



Global Health Exhibition

Hosted with 2,000+ exhibitors and 500 speakers from 130 countries.



Money 20/20

Reinforcing Saudi Arabia's position as a global financial hub

Oct

Nov



Diriyah Season

Held under the theme “Your Pride, Your Place,” celebrating heritage and local talent.



Second International Judicial Conference

Hosted in Riyadh with participation from 40+ countries.



Cityscape Real Estate Exhibition

Recorded deals totaling \$63.2 billion.



Global Insurance Conference and Exhibition

Featured more than 100 international speakers and 150 local and international entities across various insurance sectors.



Misk Global Forum

Ninth edition held with 30,000+ participants and global virtual attendance.



“Tourise” Global Forum

Brought together tourism leaders and decision-makers from more than 120 countries around the world to shape the future of global tourism and promote its sustainable growth.

Nov



Islamic Solidarity Games

Hosted the 6th Islamic Solidarity Games, featuring over 3,000 athletes from 57 countries across 23 sports.

Dec



Industrial Transformation Expo

Hosted for the first time in the Kingdom, with the participation of industrial transformation leaders and experts, industrial and technology companies, investors, and innovators, This will solidify the Kingdom’s industrial standing and support efforts to enable local factories to keep pace with the Fourth Industrial Revolution by connecting them with technology solution providers.



King Abdulaziz Camel Festival

Tenth edition held, celebrating heritage and cultural value.



Industrial Transformation Saudi Arabia

Focused on advanced technologies and industrial innovation.



Red Sea International Film Festival

Fifth edition held in Jeddah with global participation.



Riyadh International Philosophy Conference

Fifth edition held under the theme “Philosophy Between East and West.”

| Dec



Made in Saudi Exhibition

Featured 300+ exhibitors supporting local products and exports.



Digital Government Forum

400+ entities, 2,000+ participants, and 15+ strategic agreements, advancing digital transformation

Appendix

Vision Realization Programs



Financial Sector Development Program

The program develops a resilient and inclusive financial sector that supports financing, investment, and savings through a broad range of financial products and services. It plays a central role in enabling economic diversification and private sector growth while safeguarding financial stability. The program has moved from reform design to implementation and market deepening, with regulatory and institutional frameworks now firmly established.



Public Investment Fund Program

The program strengthens the role of the Public Investment Fund as a long-term investor supporting economic diversification and private sector development. It acts as a catalyst for new sectors, capital formation, and market development. The program is in an advanced execution phase, with growing emphasis on crowding in private investment and asset optimisation.



Privatization Program

The program expands private sector participation in the delivery, ownership, and management of public services and assets. It supports efficiency, competitiveness, and diversification by introducing market mechanisms and partnerships across sectors. The program has progressed from framework development to execution, with privatization and PPP models embedded across multiple sectors.



Quality of Life Program

The program enhances livability by expanding access to culture, entertainment, sports, tourism, and public spaces. It supports social participation and urban vitality as part of a broader quality-of-life agenda. The program has moved from activation to scaling, with delivery embedded across cities and regions.



National Industrial Development & Logistics Program

The program advances mining, energy, industry, and logistics to strengthen economic diversification and non-oil growth. It integrates local content and Fourth Industrial Revolution enablers to enhance competitiveness and value creation. The program is in a delivery and expansion phase, supporting large-scale investments and sectoral transformation.



Health Sector Transformation Program

The program leads the restructuring and modernization of the health sector to deliver integrated, efficient, and patient-centred care. It supports population health outcomes by shifting the system toward prevention, early intervention, and sustainability. The program is in an advanced delivery phase, with new governance and service delivery models operating nationwide.



Housing Program

The program enables Saudi families to access suitable housing by improving market efficiency, expanding housing supply, and strengthening financing mechanisms. It plays a key role in social stability and urban development by aligning public, private, and non-profit stakeholders. The program has transitioned from scale-up to consolidation, with digital platforms and regulatory frameworks embedded across the sector.



Human Capability Development Program

The program develops citizens' skills, values, and knowledge to meet current and future labour market needs. It serves as a cross-cutting enabler of productivity, participation, and competitiveness across the economy. The program is in a scaling and institutionalisation phase, with capability development embedded across education, training, and workforce systems.



Pilgrim Experience Program

The program enhances services for Hajj and Umrah pilgrims by improving accessibility, capacity, and the overall spiritual and cultural experience. It supports the Kingdom's long-standing role in serving the Two Holy Mosques while contributing to service excellence and economic activity. The program is in a sustained delivery phase, with digital and operational improvements institutionalised.



National Transformation Program

The program accelerates government effectiveness, infrastructure development, and service delivery across public and private sectors. It serves as a foundational enabler of Vision 2030 by strengthening institutional performance and regulatory quality. The program has moved into a maturity phase, with reforms embedded across government entities.

National Strategies

Integrated Strategy for Mining and Mineral Industries

The strategy provides a long-term framework for developing the mining and mineral industries as a key pillar of national industrial growth. It guides exploration, investment, and supply-chain development to maximise the economic value of the Kingdom's mineral resources. The strategy aligns geological surveying, regulatory reform, and investor incentives to support sector competitiveness and integration with domestic and global markets.

Strategic Objectives

- ◆ Accelerate exploration and prospecting activities
- ◆ Enhance the economic feasibility of projects
- ◆ Encourage investment and ownership
- ◆ Strengthen social benefits
- ◆ Increase the sector's contribution to state revenues.

National Strategy for Statistical Development

The strategy establishes a comprehensive framework for developing the statistical sector to meet the growing demand for data and evidence under Vision 2030. It guides the production, governance, and dissemination of official statistics in line with international standards. The strategy supports informed decision-making by improving data quality, integration, and accessibility across government and society.

Strategic Objectives

- ◆ Produce and present statistical data and information
- ◆ Use the latest technologies across all statistical work
- ◆ Promote statistical knowledge and public awareness of the importance of statistics through education and outreach
- ◆ Improve the effectiveness of the statistical sector and reduce gaps between its components

Comprehensive Real Estate Sector Strategy

The strategy provides a roadmap for developing a modern, well-regulated, and sustainable real estate sector capable of responding to evolving demand. It guides governance reform, market transparency, and data availability to enhance efficiency and investor confidence. The strategy also supports innovation, private sector participation, and the adoption of modern construction and design practices.

Strategic Objectives

- ◆ Build a well-regulated real estate sector
- ◆ Enable and sustain the real estate sector
- ◆ Create a vibrant, attractive, and trustworthy market for participants
- ◆ Deliver innovative services among partners

Labor Market Strategy

The strategy sets direction for developing a labor market that attracts talent, supports productivity, and expands participation. It aligns education, training, regulation, and employment policies to improve labor market efficiency and outcomes. The strategy supports economic diversification by strengthening the link between skills development and labor demand.

Strategic Objectives

- ◆ Reduce unemployment
- ◆ Increase productivity
- ◆ Increase participation
- ◆ Improve market efficiency

National Transport and Logistics Strategy

The strategy provides a framework for leveraging the Kingdom's geographic position to strengthen transport and logistics capabilities. It guides infrastructure development, regulatory alignment, and investment to improve efficiency and connectivity. The strategy supports economic growth, urban quality of life, and the Kingdom's role in global trade and logistics networks.

Strategic Objectives

- ◆ Strengthen the Kingdom's position as a global logistics hub
- ◆ Improve quality of life in Saudi cities
- ◆ Contribute to achieving a balanced public budget
- ◆ Improve government performance

Asir Region Development Strategy

The strategy sets direction for developing the Asir Region as a year-round tourism destination while supporting balanced regional growth. It aligns economic development, cultural preservation, and environmental stewardship to enhance regional attractiveness. The strategy provides a framework for coordinated investment that reflects the region's natural, cultural, and social assets.

Strategic Objectives

- ◆ Develop the regional economy and increase its contribution to GDP
- ◆ Preserve the region's heritage and culture
- ◆ Build a cohesive community moving steadily toward a prosperous future
- ◆ Promote environmental sustainability and protect the region's natural environment

National Investment Strategy

The strategy provides a framework for increasing investment by focusing on sectors of national priority. It guides policy, incentives, and market development to enhance the Kingdom's attractiveness to domestic and international investors. The strategy supports private sector-led growth and contributes to expanding non-oil economic activity.

Strategic Objectives

- ◆ Increase investment opportunities
- ◆ Increase the contribution of targeted investor segments
- ◆ Stimulate financing activity by diversifying investment funding options
- ◆ Enhance the attractiveness and competitiveness of the investment environment
- ◆ Contribute to increasing non-oil GDP

National Strategy for the Gaming and Esports Sector

The strategy sets direction for developing the full gaming and esports value chain. It aligns investment, regulation, and talent development to support economic and social impact. The strategy leverages youth potential while guiding ecosystem growth across content creation, technology, and competitive platforms.

Strategic Objectives

- ◆ Develop technologies and devices, including peripherals
- ◆ Produce and distribute games
- ◆ Develop the esports ecosystem
- ◆ Leverage intellectual property and broadcasting rights

National Industrial Strategy

The strategy provides a framework for advancing industrial development in line with global trends. It guides sectoral prioritization, investment, and competitiveness to strengthen non-oil economic activity. The strategy supports resilience, export growth, and industrial diversification.

Strategic Objectives

- ◆ Build a resilient national industrial economy capable of adapting to change
- ◆ Increase the industrial sector's attractiveness for investment
- ◆ Grow non-oil GDP
- ◆ Increase non-oil exports

National Biotechnology Strategy

The strategy sets direction for developing biotechnology as a contributor to health, sustainability, and economic diversification. It aligns research, localisation, and investment to support sector development. The strategy supports innovation while enabling the growth of biotech industries within the Kingdom.

Strategic Objectives

- ◆ Position the Kingdom as a regional and global leader in the sector
- ◆ Create sustainable positive economic and social impact
- ◆ Contribute to improving quality of life
- ◆ Localize biotechnology industries
- ◆ Support economic growth and diversification

Strategy of the National Center for the Development of the Non-Profit Sector

The strategy aims to empower the National Centre for the Development of the Non-Profit Sector to fulfil its role in developing the sector, stimulating voluntary work and enhancing the efficiency of non-profit organisations, within an institutional framework underpinned by transparency and governance that promotes sustainability, and to increase the non-profit sector's contribution to social and economic development.

Strategic Objectives

- ◆ To direct the activities of the non-profit sector towards achieving economic, social and international impact.
- ◆ To promote the growth of stakeholders in the non-profit sector.
- ◆ To raise the quality and efficiency of services and products in the non-profit sector.
- ◆ To enhance financial sustainability and increase revenue streams for non-profit organisations.
- ◆ To promote communication and raise awareness of the non-profit sector locally and internationally.
- ◆ To increase research and studies and promote the adoption of innovative solutions in the non-profit sector.
- ◆ To strengthen financial and administrative oversight in the non-profit sector.
- ◆ To protect the rights of stakeholders and increase their satisfaction within the non-profit sector.

The National Privatization Strategy

The strategy aims to improve the quality of services provided to beneficiaries by harnessing the competitiveness of the private sector and increasing its involvement in service delivery and the operation of government facilities, through the expansion of privatisation across various sectors and fields. This will enhance the efficiency of government performance by focusing government roles on planning, organisation and supervision, thereby improving the quality of service delivery and ensuring it is provided efficiently and competitively. The strategy also contributes to enhancing fiscal sustainability and increasing the private sector's economic and social effectiveness by boosting its capacity and enabling it to drive economic growth and create jobs.

Strategic Objectives

- ◆ To improve the quality and efficiency of infrastructure and public services.
- ◆ To provide opportunities for the private sector to operate government assets and public facilities.
- ◆ To involve the private sector in the provision of specific public services through privatisation.
- ◆ To increase the private sector's contribution to social and economic development.
- ◆ To enhance the sustainability of public finances.
- ◆ To redirect the government's role to focus on planning, regulation and oversight.
- ◆ To create an enabling environment for privatisation.

