

A man and a woman, both dressed in traditional Saudi attire, are standing in a server room. The woman, wearing a dark blue hijab and abaya, is holding a tablet and looking at the screen. The man, wearing a white thobe and a red and white checkered ghutra, is standing next to her, looking at the same screen. The screen displays various data visualizations, including a line graph and a bar chart. The background shows rows of server racks with glowing lights.

KSA'S NATIONAL SERVICE CATALOGUE

FOR AI DATA CENTERS

August 2026

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01

Introduction

KSA has set an ambition to become a regional AI hub...

HRH the Crown Prince expressed the ambition for the Kingdom in AI infrastructure



"We are living in a time of scientific innovation, with new technologies, such as AI and IoT, if used optimally, can bring enormous benefits to the world¹"

"2026 will be designated as the Year of Artificial Intelligence in Saudi Arabia²"

1. State of AI in Saudi Arabia, GAIN Summit September 2024 2. 2026 designated as the year of AI

... and has already secured significant investments in AI infrastructure



500 megawatts is just the beginning, the ambition here [KSA] is enormous. If we're talking about what comes next, we're talking about numbers that are almost incomprehensible

Elon Musk
(Founder & CEO of SpaceX)



AI, like electricity, is essential infrastructure for every nation. Together with Saudi Arabia, we will build AI infrastructure for the people and companies of the Kingdom

Jensen Huang
(CEO of Nvidia)



Introduction

The world is entering a new phase of economic transformation, driven by artificial intelligence. Adoption of advanced AI models, agentic systems, and real-time inference applications is reshaping how value is created across every sector, from energy and finance to industry and government services.

This transformation rests on a physical foundation. Behind every AI model and application is a network of AI data centers, which are purpose-built facilities that house the storage, compute, and networking required to train and run AI workloads at scale.

Today, demand for AI compute is scaling at a pace unmatched by any prior infrastructure category, making AI data centers the fastest-growing layer of the AI stack, ahead of applications, models, and traditional cloud infrastructure.

The nations that offer the power, land, capital and regulation to build them at scale will define the global AI map for decades.

The Kingdom of Saudi Arabia enters this race from a position of structural advantage. Under Vision 2030, KSA has built a digital economy growing three times the global average, supported by world-class connectivity, abundant energy, available land, and a young workforce, positioning the Kingdom to become a global hub for AI data centers by 2030

KSA AI Ambitions

AI data center builds by 2030

3 GW

Available AI DC capacity by 2030

Investment
opportunity by 2030

\$130B

Cumulative CAPEX
funding by 2030





02

Why AI DCs?

AI DCs offer a high-growth, high-return opportunity, and form the backbone of the AI economy

Compute

AI DCs form the foundation of the AI stack, powering model development, training, and deployment

~\$1T

Projected global AI data center market value by 2030³

Capital

AI DCs offer strong investment potential, with high upfront capex but expected to be recouped in the long term

16-20%

Expected internal rate of return for AI data center investments¹

Customers

AI DC market is expected to grow rapidly over an aggregate 10-year horizon, despite potential short-term disruptions

~20-30%

Expected CAGR of the global AI DC market through 2032²

03

Why KSA?

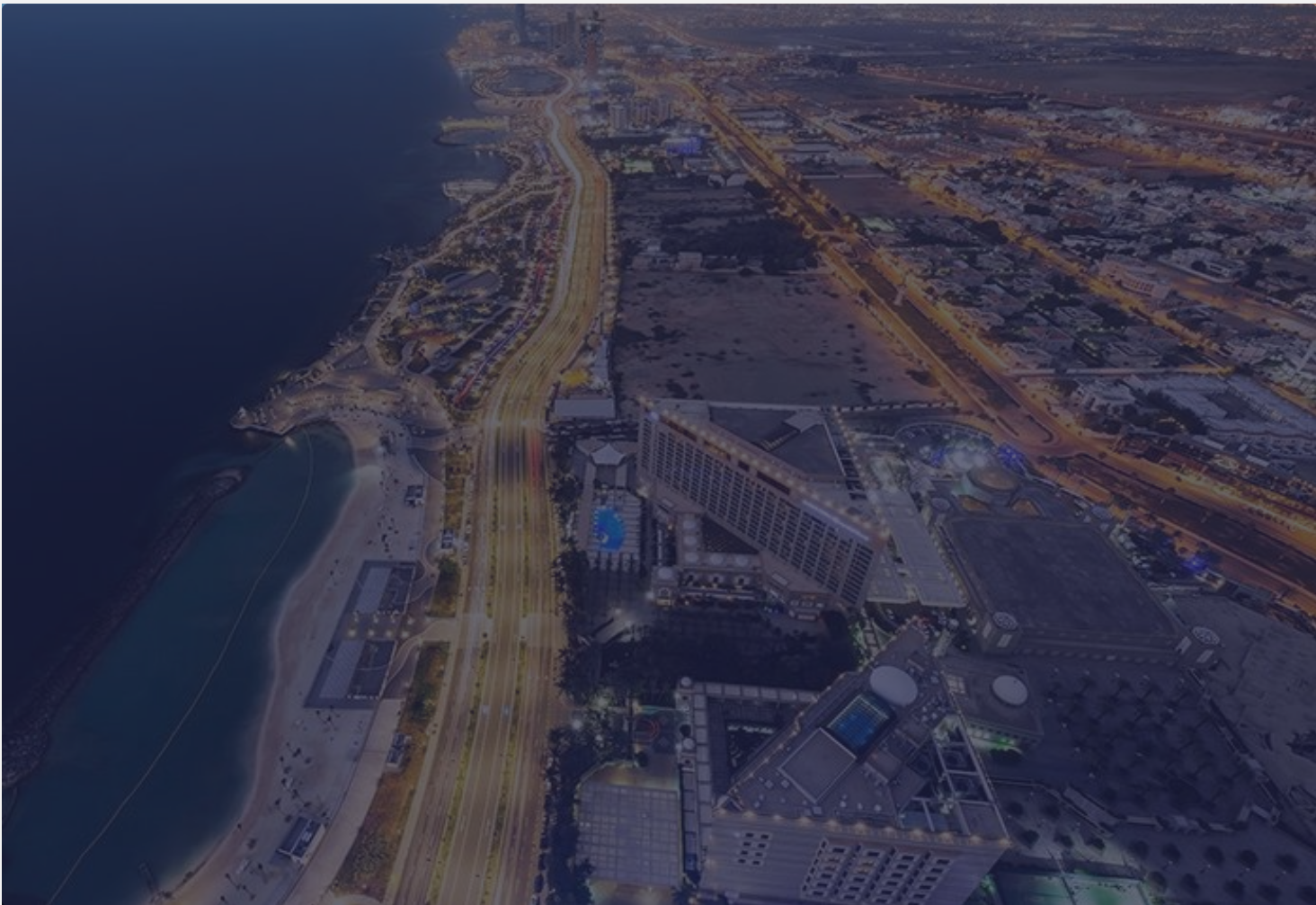


Saudi Arabia offers a unique value proposition for AI data center investors

Compute		Capital		Customers	
~12.8 GW	of available power capacity, exceeding the total power generation capacity of entire nations (e.g. Ireland, New Zealand, Serbia)	Long-term financing	access to wide financing options through innovative financing solutions with flexible structures and repayment profiles	~3B+	population covered within a 5,000-km radius of KSA, spanning Asia, Africa, and Europe, with ~30 ms latency
	of lands within close proximity of utility services, enabling scalable and geographically distributed DC development		To review and conclude the assessment of CAPEX financing support applications from the date of submission		tailored incentives to strategic investors based on investment needs (e.g., funding infrastructure development, custom duty waiver)
Enablers		Customer-centric regulatory s available under KSA's Global AI Hub Law for government and private sector entities		Amongst the leading countries globally in AI jobs growth (3 rd globally), with 400K+ ICT professional, forming KSA's strong talent base	

Saudi Arabia

is emerging as one of the world's fastest growing AI DC markets



2nd globally

In overall AI DC market attractiveness by Bloomberg¹, validating KSA's unique value proposition for AI DC investors

Bloomberg

3rd

Among G20 economies in the 2026 IMD World Competitiveness Yearbook², positioning KSA as a globally competitive hub for technology and innovation

IMD



~7x

5-year increase in DC capacity from ~70MW to ~470MW (2021-2026), putting KSA among fastest-growing DC markets

1. Bloomberg DC development market ranking 2. IMD



04

AI DC service catalogue

A large, modern building with a curved, glass facade and a prominent, curved roof structure. The building is illuminated at night, with lights reflecting on the glass. The text "AI Office" is overlaid on the left side of the image.

AI Office

Delivering KSA's DC ambition requires coordinated execution across a wide stakeholder landscape...

... including a diverse universe of investors and developers, regulators, landowners, infrastructure and network providers, and incentive bodies

The AI Office was established under the Ministry of Communications and Information Technology...

... as the single point of contact for AI DC investors, streamlining government services and enabling investment to KSA

AI Office services

The AI Office supports investors in accessing government support across five dimensions



1. Land and permitting

Land bank within close proximity of utility services
Dedicated land reserved for AI DCs, with attractive leasing prices and readily available infrastructure

Contracting and permitting
Streamlined permitting, contracting, and contractor coordination, with 10-24 months time to market

2. Infrastructure (Power, water, connectivity)

Power infra facilitation
Dedicated power infrastructure support at globally competitive tariffs, locked in for 15 years

Water supply facilitation
Special support to ensure sustainable water supply at scale with competitive industrial tariffs

Connectivity facilitation
Direct support with providers to access connectivity infrastructure at lower costs

3. TCO reduction enablers

Infrastructure financing
Dedicated CAPEX funding envelope for infrastructure development

Targeted incentives
Incentives allocated on a deal-by-deal basis, tailored to each investor's needs¹

Customs duty waiver
0% customs duty on GPU imports for qualifying AI DC investments

4. Regulations

Global AI Hub Law
Customer-centric regulations available under KSA's Global AI Hub Law for government and private sector entities

5. Talent enablement

Talent enablement
Targeted upskilling programs and mobility support to build local capability and attract global talent

1. For more details, contact your AI office representative



AI DC service catalogue Land and permitting

Land

KSA offers access to one of the largest dedicated AI DC landbanks, organized under a land cluster approach that groups development-ready sites within close proximity to power and water sources, established water and fast/diverse connectivity infrastructure

50
Lands

Selected with 5 superclusters prioritized for AI DCs, ensuring redundancy and proximity to key infrastructure corridors

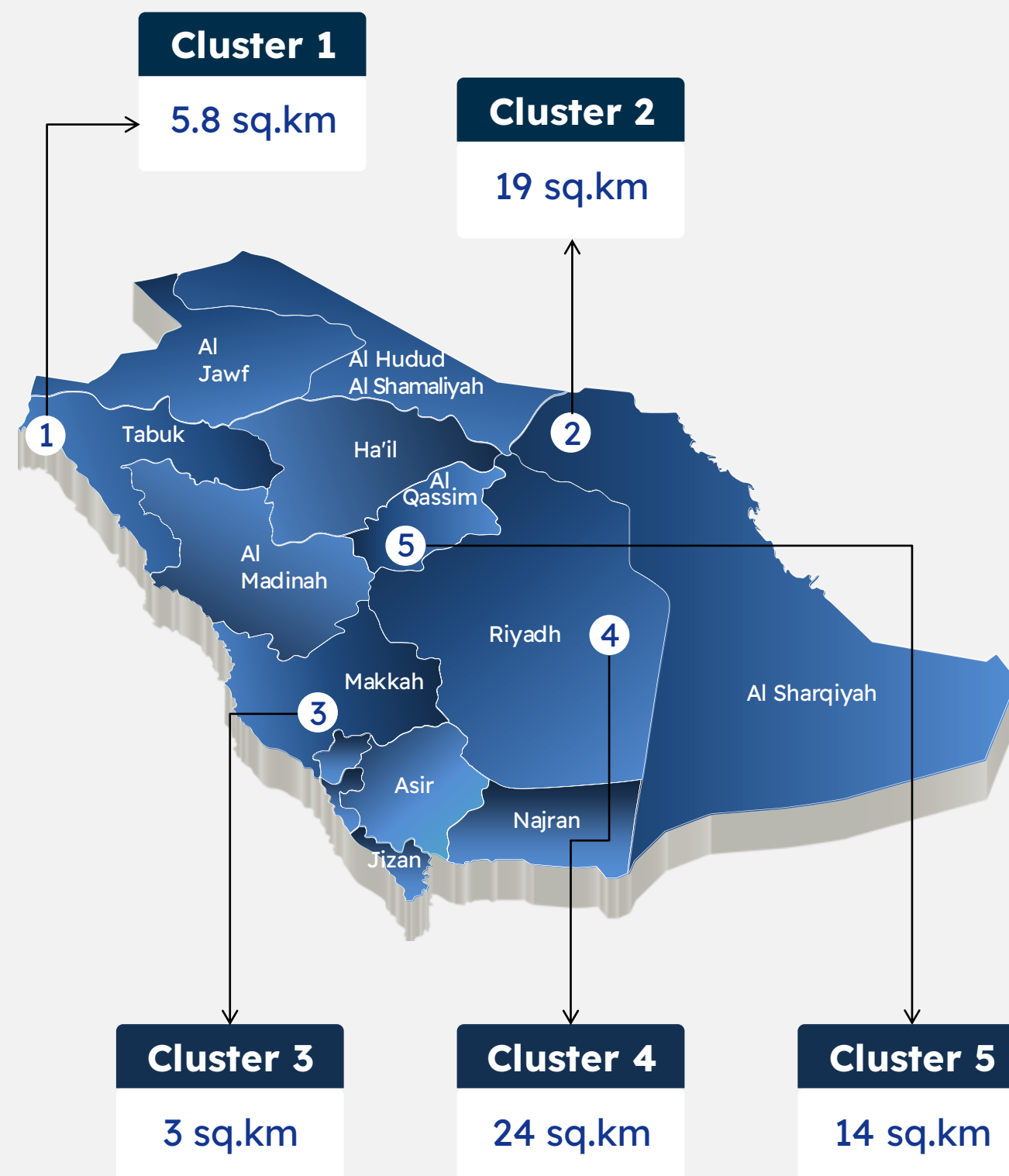
80+
sq.km

Of development-ready land, one of the largest dedicated AI DC landbanks globally

<2
months

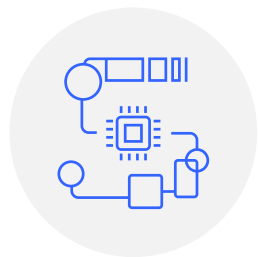
From land request to allocation, among the fastest in the region

Overview of the 5 superclusters dedicated to AI DCs





Contracting



500MW+

Of existing DC capacity in the Kingdom, demonstrating proven track record



6+ qualified AI DC contractors

With demonstrated experience delivering large-scale AI DC projects

1. Source: Bloomberg DC development market ranking

Permitting

KSA ranked
2nd globally by
Bloomberg

On land permitting for AI data center development¹, driven by land availability and accelerated permitting timelines

AI office
facilitates
fast
permitting

**2
months**

From
masterplan
submission to
building permit
issuance

**15
working
days**

From license
application to
DC service
provision

All permits follow streamlined processes and end-to-end coordination via AI Office

AI DC service catalogue Infrastructure

Infrastructure

Power

Power is one of KSA's strongest competitive advantages for AI DC investors, combining unmatched scale and accelerated grid timelines

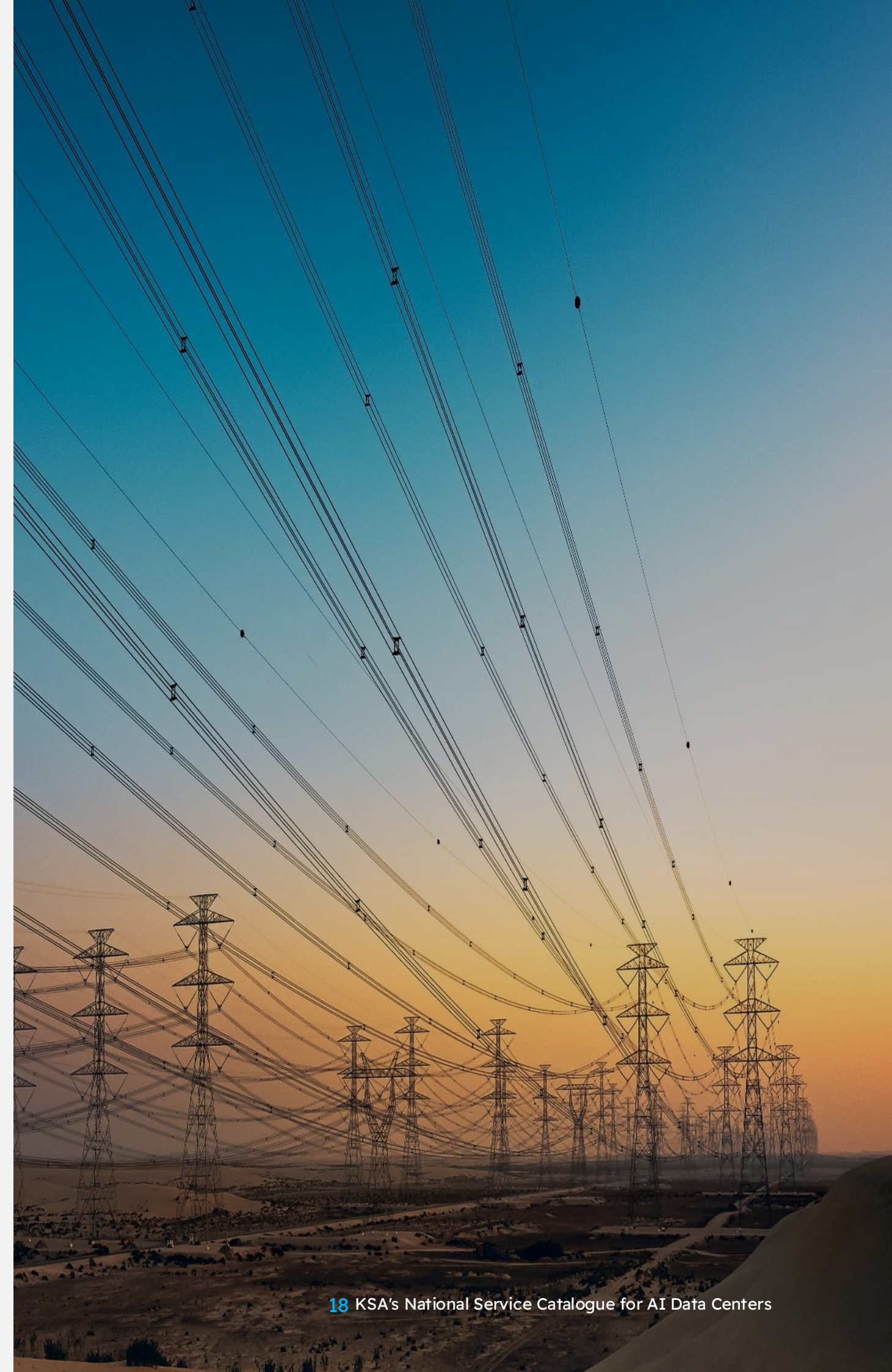
12.8
GW of available power capacity distributed across the grid

6
months Temporary power available, enabling construction to begin immediately

<30¹
months Time-to-market, including full-scale grid connection, among the fastest in the world

15
years Secured competitive power tariffs, vs. volatile prices across Europe, US, and Asia

1. Less than 27-30 months



Infrastructure

Water

Water infrastructure for AI DCs is delivered through Ministry of Environment, Water, and Agriculture in KSA, running in parallel with power buildout to keep construction on track



11 weeks

Approval of treated water connection requests, with end-to-end coordination via AI office



6-7M+ m³/day

Of treated water capacity, with 19M+ m³/day transmission capacity



Infrastructure Connectivity

KSA's strategic location, anchored by multiple subsea cables, delivers high-capacity and low-latency connectivity to Europe, Africa, and Asia, making it one of the world's most resilient and best-performing network hubs

3B+
population
covered

Within a 5,000-km radius of KSA, spanning Asia, Africa, and Europe, with ~30 ms latency, positioning KSA as a natural hub for AI inferencing

3
routes

Spanning East and West, expanding to 7 routes by 2030, to ensure route diversity across key corridors (Asia, Africa, Europe)

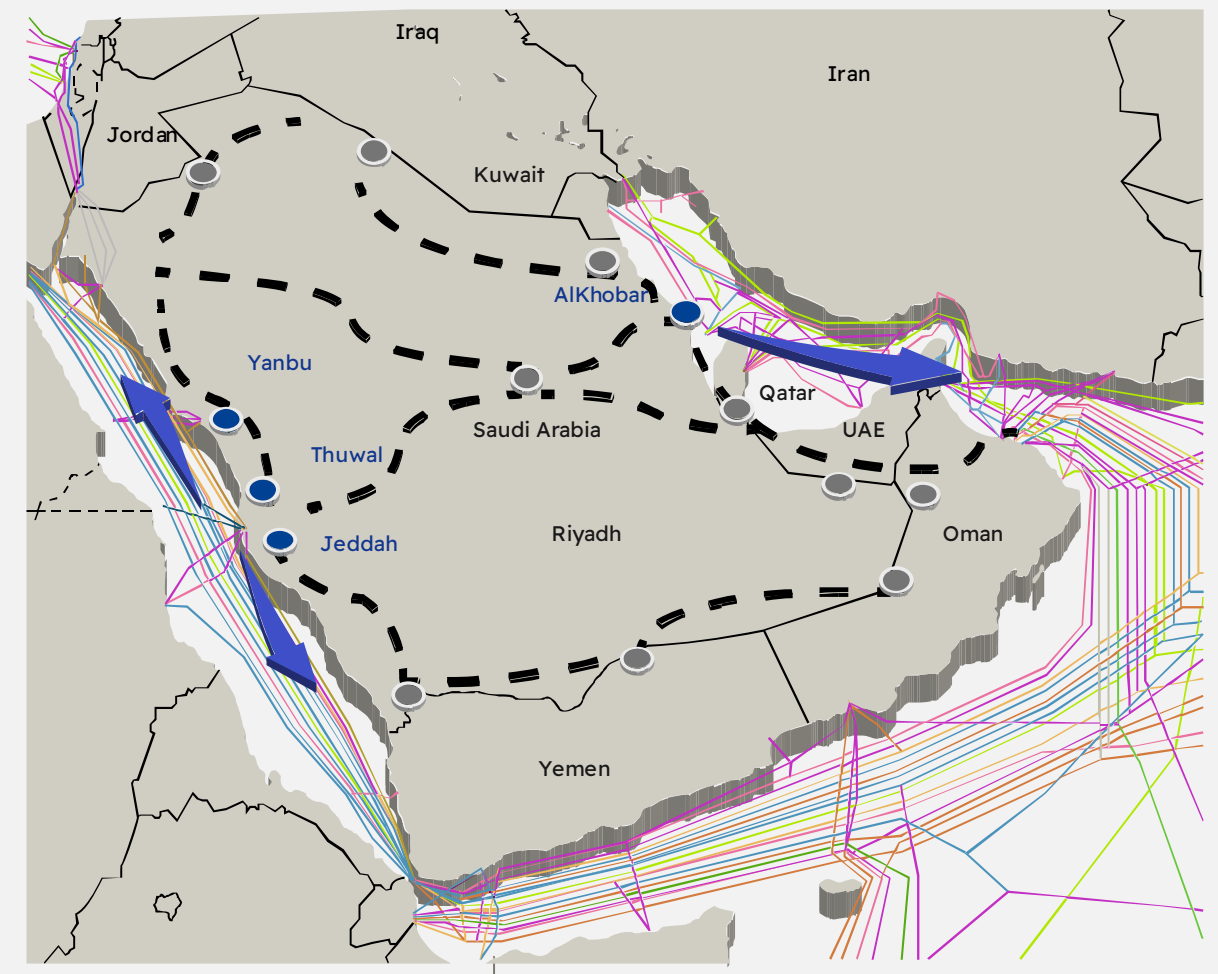
15+
subsea
cables

Landing in KSA, increasing redundancy and network resilience of the Kingdom

278
Tbps

International bandwidth capacity to come online before 2030, enabling hyperscale AI workloads at globally competitive performance

Current KSA subsea cable supply across 3 international routes



● Landing City → International Route ● Terrestrial Connection

AI DC service catalogue TCO reduction enablers

Dedicated Financing Solutions

Financing is a core pillar of KSA's AI DC investor proposition, delivered through a dedicated CapEx envelope to materially reduce the cost of deployment

infra.

صندوق البنية التحتية الوطني
NATIONAL INFRASTRUCTURE FUND



Dedicated financing envelope structured to facilitate participation by global and local institutional investors, supporting the continued scaling of KSA's AI ambitions



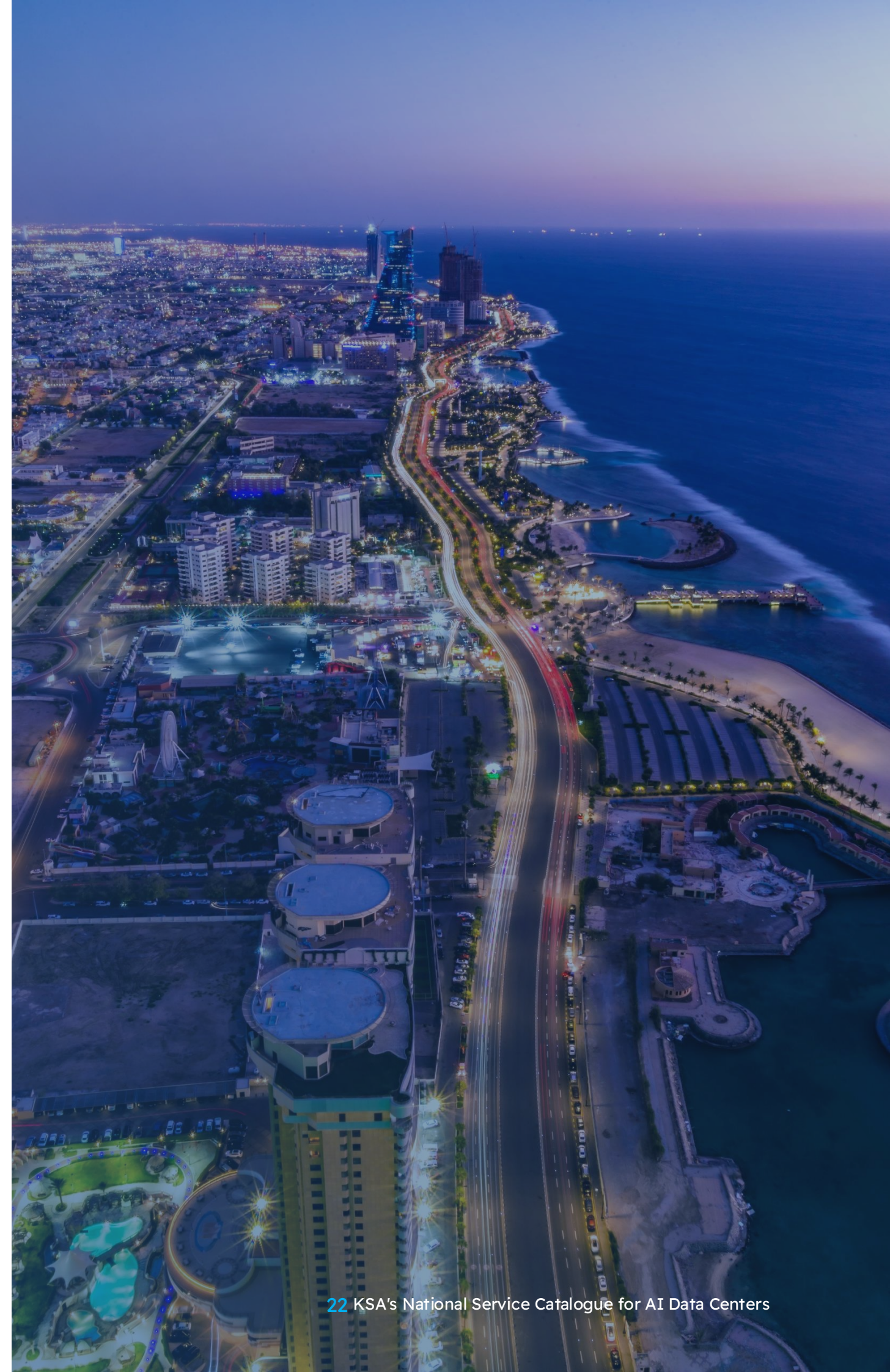
Long-term financing

access to wide financing options through innovative financing solutions with flexible structures and repayment profiles



4 months

To review and conclude the assessment of CAPEX financing applications (facilitated by the AI Office) from the date of submitting all required information in a satisfactory manner to Infra





Targeted incentives

KSA's targeted incentives are in place to strengthen investment economics and improve the financial attractiveness of AI DC projects

Deal by deal basis

Tailored incentives to strategic AI DC investors based on investment needs (e.g., funding infrastructure development)

4 Weeks

To approve targeted incentive applications from date of submission, facilitated through the AI Office



AI DC service catalogue Regulations

Regulations

Global AI Hub Law

KSA offers a tailored set of regulations, each designed to match a distinct investor profile and workload type. Formalized through the new Global AI Hub Law, these regulations give governments and private operators full clarity on sovereignty, jurisdiction, and operating terms

Private Hub (physical)

Allows governments to establish AI data centers inside foreign territory with full sovereignty and diplomatic immunity¹

Government

Extended Hub (physical)

Allows governments and private operators to run AI workloads with full sovereignty and diplomatic immunity via G2G agreements

Government & Private sector

Virtual Hub

Allows private AI service providers to host customer content and data as sovereign property under home-country regulations

Private sector

1. Law enforcement jurisdiction follows the originating (guest) country, in line with diplomatic immunity and bilateral agreements



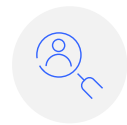


AI DC service catalogue Talent enablement

Talent enablement

The AI Office partners with government entities, leading academic institutions, and hyperscalers to build a world-class AI talent pipeline, empowering local Saudi talent while attracting top international executives and specialists to the Kingdom

Talent upskilling programs:



400K+

ICT¹ professionals form KSA's strong talent base, making it largest in the region



3rd globally

For growth in AI jobs², reflecting KSA's accelerating AI talent ecosystem



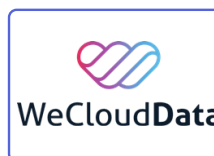
Tailored programs

Digital Infrastructure & AI Diploma:

3-year certified program producing AI DC talent, plus a 1-year AI Diploma producing job-ready practitioners

AI DCs Training Program: Builds multidisciplinary professionals to oversee the full lifecycle of advanced AI DCs

AI DC Engineer Bootcamp: 12-week bootcamp training participants to design, operate, and support AI-optimized DC infrastructure.



Premium residency

Distinguished long-term Saudi residency status citizenship-like benefits, with MCIT fast-tracking residency approvals for exceptional talent

Talent matchmaking

Target hiring of top global AI experts to align with companies' needs, ensuring organizations in KSA have access to the global AI talent pool across all required roles from researchers to professionals

Subsidized training programs

Up to 90% training cost coverage for SMEs (75% for large companies), with local and international development and leadership programs to grow AI DC workforce

The background is a deep blue gradient with intricate, glowing patterns of light blue and white particles. These particles form swirling, nebula-like structures and star trails, creating a sense of motion and depth. The overall effect is futuristic and high-tech.

05

How to engage?

Get in touch with the AI Office

KSA invites you to build the future of AI infrastructure

Join us in the Kingdom of Saudi Arabia as we shape the future of AI infrastructure – where vision meets certainty, scale meets support, and technology meets national ambition in a future-proof, growth-ready environment

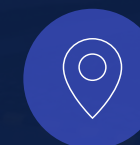
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Thank You