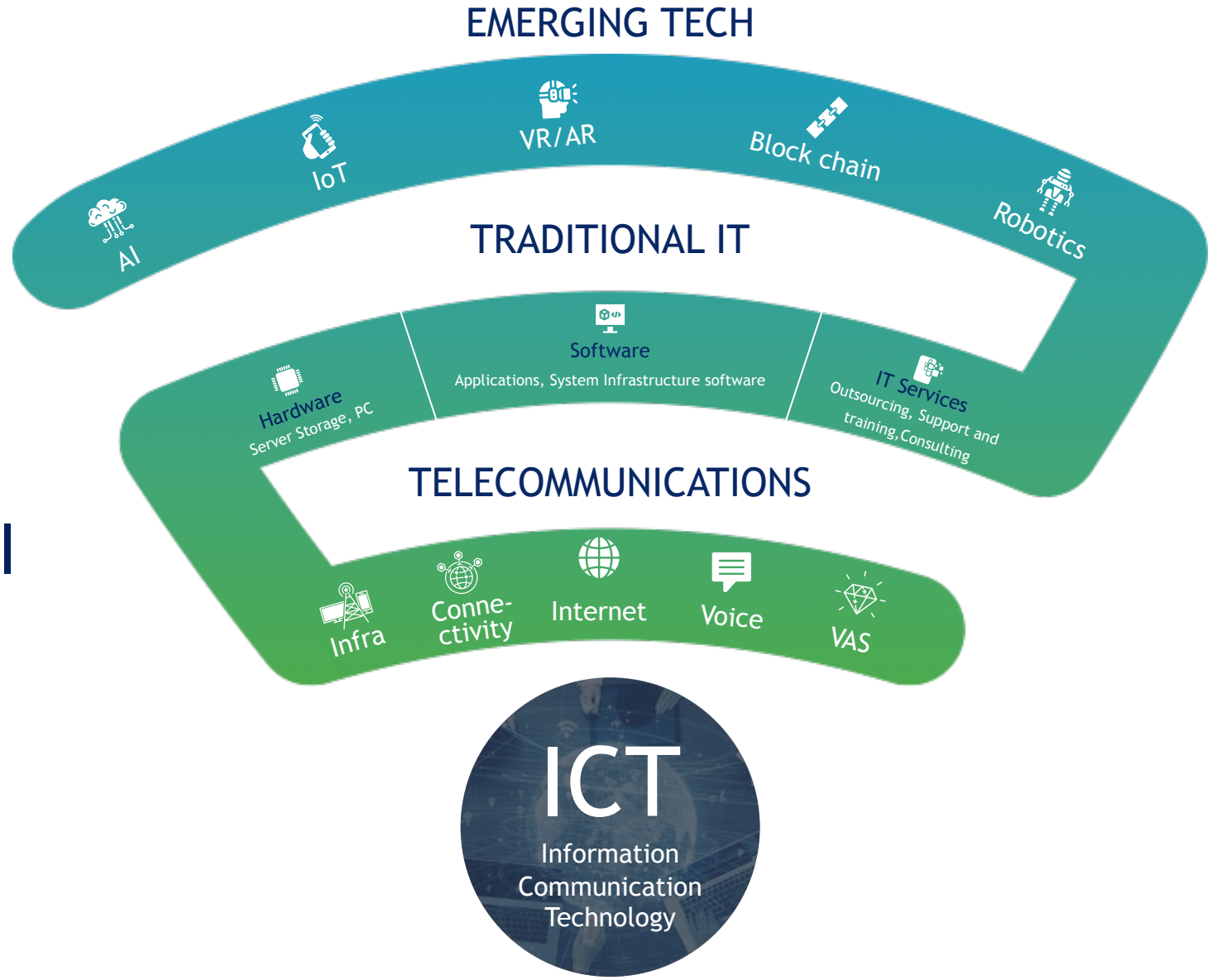
Saudi Arabia ICT Sector Strategy 2023
Summary

وزارة الاتصالات وتقنية المعلومات
MINISTRY OF COMMUNICATIONS AND INFORMATION TECHNOLOGY

ICT sector

encompasses several key technologies



Empowering Digital Saudi

OTHER SECTORS

E-Government | National data | Smart city | Industry | Digital health | Digital education | Digital Commerce

ICT SECTORS

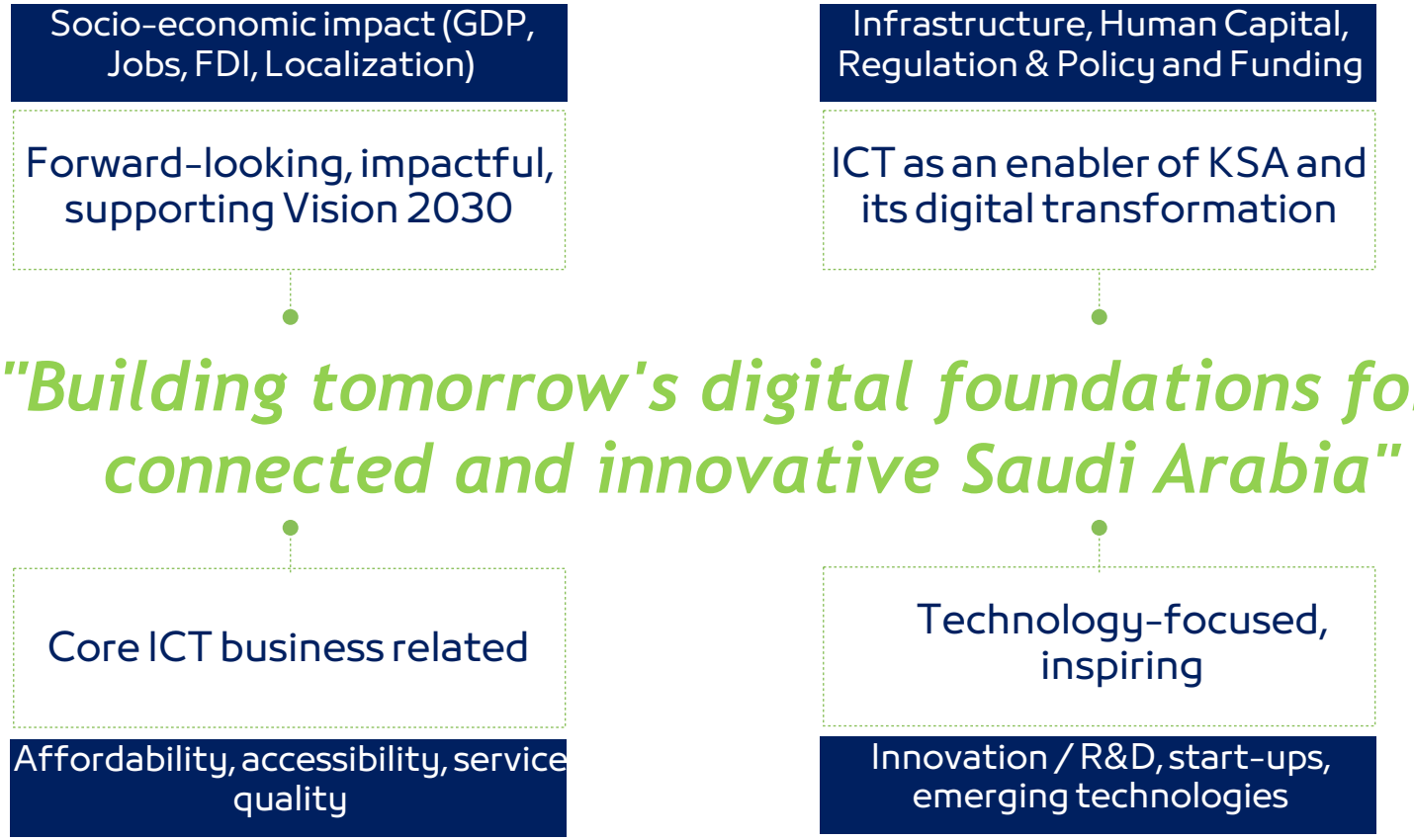
ICT R&D and Innovation | ICT Human Capital | Funding & Private sector investment | Policy and regulation | Infrastructure | IT & Emerging tech market | Telecom market

The ICT sector is one of the major enablers of Vision 2030

Among our commitments… a developed digital infrastructure

- Develop the telecommunications and information technology infrastructure, especially high-speed broadband
- Develop building standards to facilitate the extension of broadband networks
- Strengthen the governance of digital transformation
- Establish an effective partnership with telecom operators
- Support local investments in the telecommunications and information technology sectors

Our vision:


Socio-economic impact (GDP, Jobs, FDI, Localization)
Infrastructure, Human Capital, Regulation & Policy and Funding
Forward-looking, impactful, supporting Vision 2030
ICT as an enabler of KSA and its digital transformation
"Building tomorrow's digital foundations for a connected and innovative Saudi Arabia"
Core ICT business related
Technology-focused, inspiring
Affordability, accessibility, service quality
Innovation / R&D, start-ups, emerging technologies
Key words of ICT Strategy objectives

Themes detailed into 13 strategic priorities

1 Improve effectiveness of Telco market	2 Increase local content	3 Grow IT and Emerging Tech market
Improve level of competition, especially in fixed retail and wholesale markets	Increase share of local content in traditional IT industry	Grow the IT and emerging technology sub-sector
Enhance fixed and mobile markets	Increase female participation in the ICT sector	
Ensure readiness of Telco infrastructure for enablement of tech. and sectorial digitization	Attract key multinational corporations in priority areas of emerging tech	
	Stimulate demand of IT and tech products and services from Saudi businesses	
	Advance technology and digital knowledge and awareness	
	Drive tech innovation by fostering R&D and start-up ecosystem in the Kingdom	
Improve tech skills of local ICT workforce		
Ensure alignment of all ICT-related public and private stakeholders		
Enable the development of KSA mega-projects		

Source: BCG analysis

ICT sector strategy fully aligned with Vision 2030

ICT Strategy Vision

"Building tomorrow's digital foundations for a connected and innovative Saudi Arabia"

8 level 3 Vision 2030 direct objectives

- 3.1.6 Attract foreign direct investment
- 3.3.2 Develop the digital economy
- 3.3.7 Increase localization of non-oil sectors
- 3.4.3 Localize cutting-edge technology and knowledge through PIF
- 4.1.5 Develop our brightest minds in priority fields
- 4.1.6 Ensure alignment of educat. outputs with labor market needs
- 4.2.2 Increase women participation in the labor market
- 4.3.1 Nurture and support the innovation & entrepreneurship culture

12 level 3 Vision 2030 indirect objectives

- 1.2.2 Improve quality of services provided to Hajj and Umrah visitors
- 3.7.1 Support national champions consolidate their leadership globally
- 3.7.2 Develop promising local comp. into regional and global leaders
- 3.3.3 Localize promising manufacturing industries
- 3.5.1 Create and improve performance of logistic hubs
- 3.5.2 Improve local, reg. and int'l connect. of trade & transport ntwk
- 4.3.2 Grow SME contribution to the economy
- 5.2.3 Improve productivity of government employees
- 5.2.5 Improve quality of services provided to citizens
- 5.3.1 Enhance transparency across government roles
- 2.5.1 Develop & diversity entert. opportunities to meet pop.'s needs
- 4.1.2 Improve equity of access to education (esp. in rural areas)

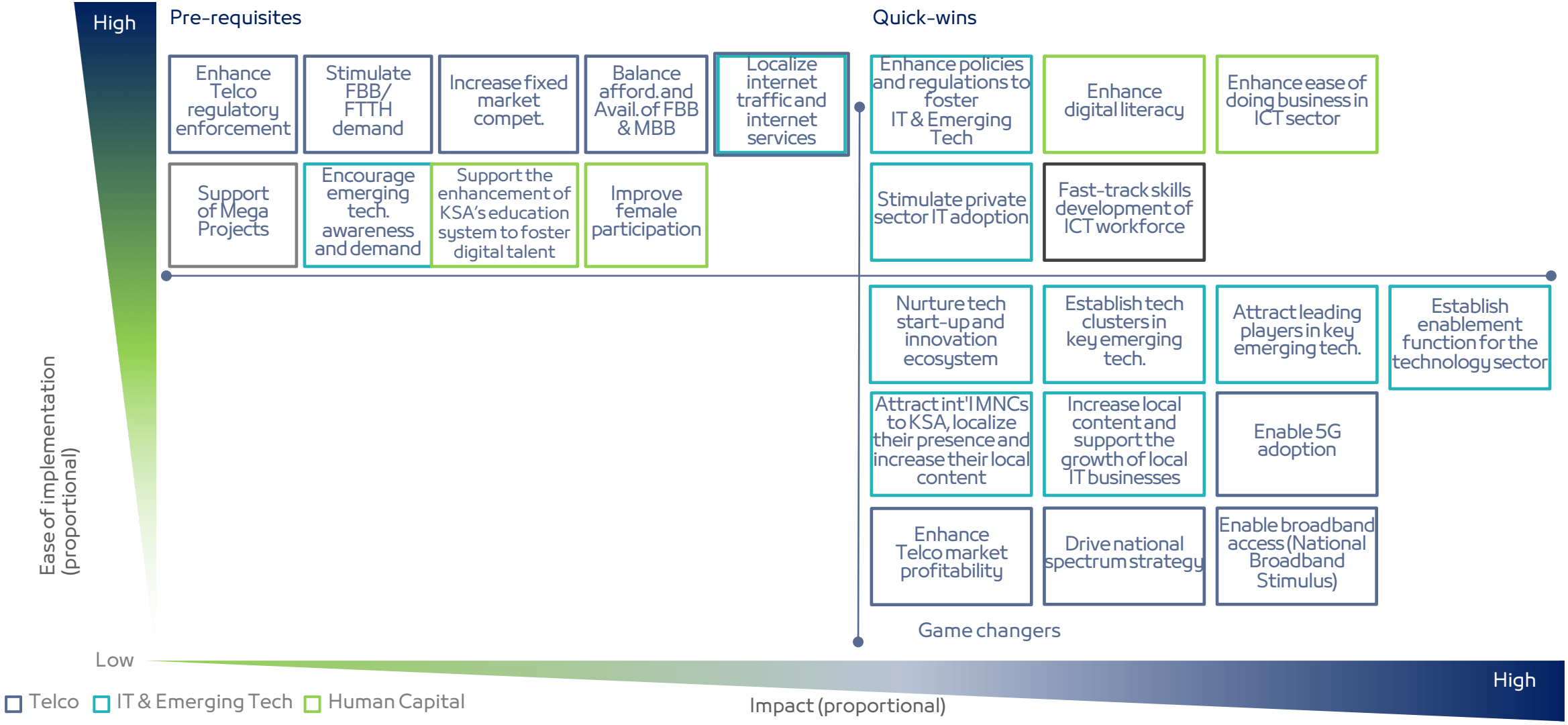
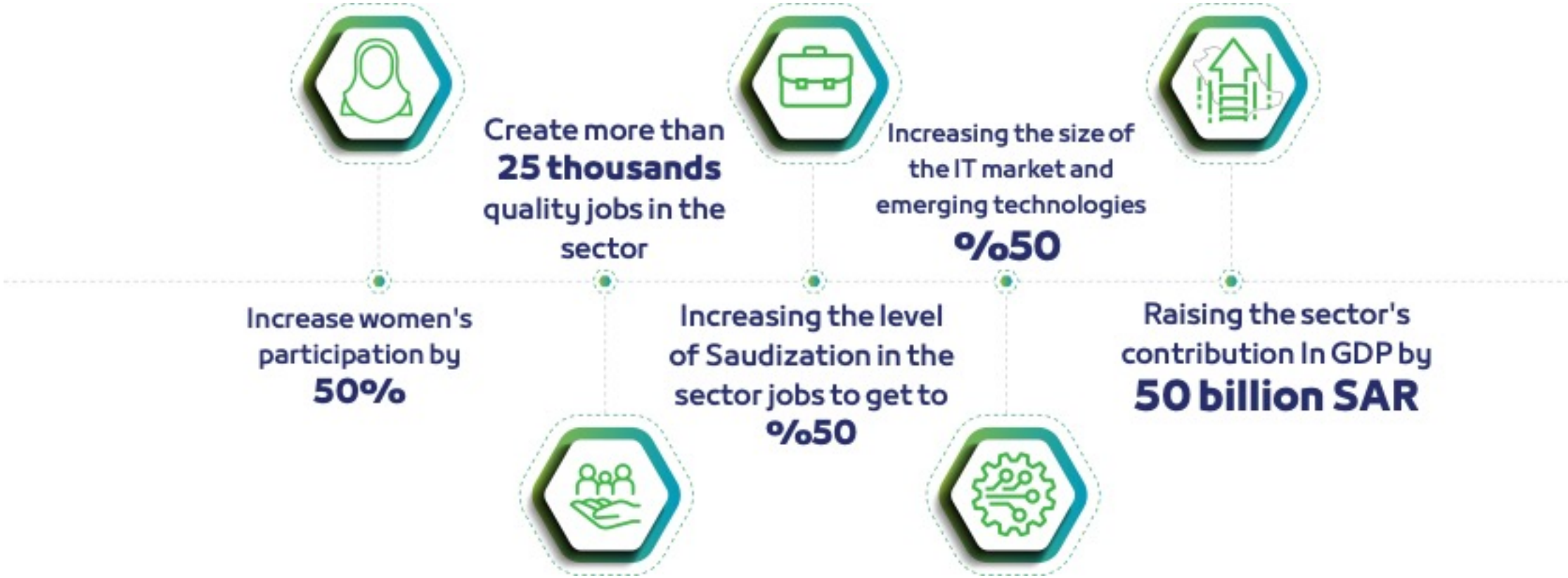
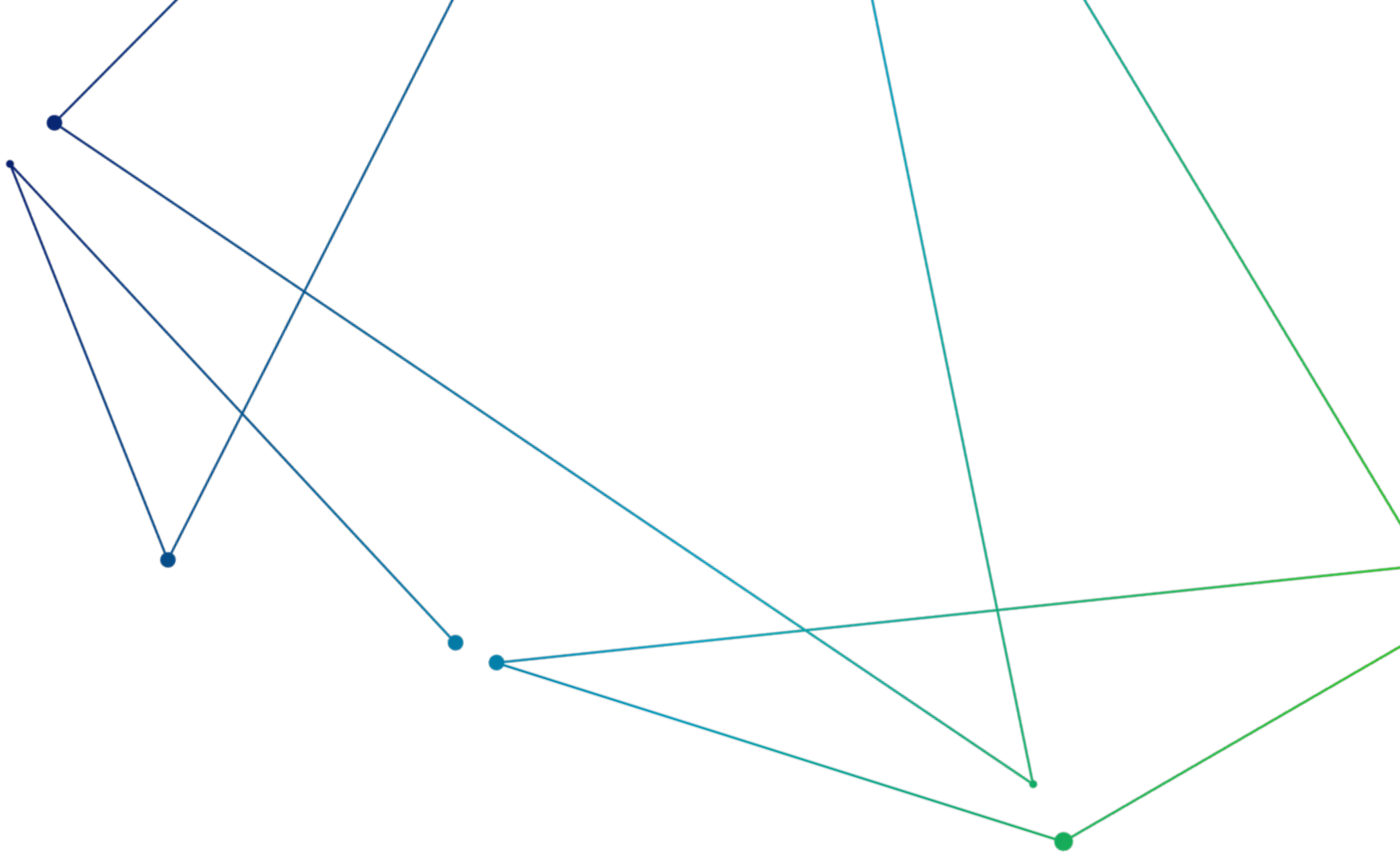
National Indust. Development and Logistics Program	National Indust. Development and Logistics Program	Human Capital Program	NTP 2.0	Quality of Life Program	PIFP	National Char. Enrichment Program	National Companies Promot. Program
1 0	3 1	1 2	4 3	1 0	0 1	0 1	2 0

24 initiatives mapped to 3 strategic themes for ICT sector

Building tomorrow's digital foundations for a connected and innovative Saudi Arabia

Improve effectiveness of Telco market	Increase local content across ICT	Grow IT and Emerging Tech market
Enhance market profitability	Establish enablement function for the Technology sector	
Increase fixed market competitiveness	Attract int'l MNCs to KSA, localize their presence and increase their local content	Stimulate private sector IT adoption
Balance affordability and availability of FBB & MBB	Increase local content and support the growth of local IT businesses	Encourage emerging tech. awareness & demand
Stimulate FBB/FTTH demand	Improve female participation	
Enable 5G adoption	Establish tech clusters in key emerging tech.	
Enable broadband access (National Broadband Stimulus)	Nurture tech start-up and innovation ecosystem	
	Attract leading players in key emerging tech.	
Localize internet traffic and internet services		Enhance policies and regulations to foster IT & Emerging Tech
Drive national spectrum strategy	Enhance ease of doing business in ICT sector	
Enhance Telco regulatory enforcement	Enhance digital literacy	
Support the enhancement of KSA's education system to foster digital talent		
Fast-track skills development of ICT workforce		
Support development of Mega Projects		

Categorization of 24 strategic initiatives



Highlights of the ICT Strategy 2023