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:

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

- 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
- Core ICT business related
  - Affordability, accessibility, service quality
- Technology-focused, inspiring
  - 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**
   - Improve level of competition, especially in fixed retail and wholesale markets
   - Enhance fixed and mobile markets
   - Ensure readiness of Telco infrastructure for enablement of tech. and sectorial digitization

2. **Increase local content**
   - Increase share of local content in traditional IT industry
   - Increase female participation in the ICT sector
   - 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

3. **Grow IT and Emerging Tech market**
   - Grow the IT and emerging technology sub-sector

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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 educ. 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 entertain. opportunities to meet pop.’s needs
• 4.1.2 Improve equity of access to education (esp. in rural areas)
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**
- Enhance market profitability
- Increase fixed market competitiveness
- Balance affordability and availability of FBB & MBB
- Stimulate FBB/FTTH demand
- Enable 5G adoption
- Enable broadband access (National Broadband Stimulus)
- Localize internet traffic and internet services
- Drive national spectrum strategy
- Enhance Telco regulatory enforcement

**Increase local content across ICT**
- Establish enablement function for the Technology sector
- Attract int’l MNCs to KSA, localize their presence and increase their local content
- Increase local content and support the growth of local IT businesses
- Improve female participation

**Grow IT and Emerging Tech market**
- Stimulate private sector IT adoption
- Encourage emerging tech. awareness & demand
- Establish tech clusters in key emerging tech.
- Nurture tech start-up and innovation ecosystem
- Attract leading players in key emerging tech.
- Enhance policies and regulations to foster IT & Emerging Tech
- Enhance ease of doing business in ICT sector
- 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

**Pre-requisites**
- Enhance Telco regulatory enforcement
- Stimulate FBB/FTTH demand
- Increase fixed market compet.
- Balance afford and Avail. of FBB & MBB
- Localize internet traffic and internet services
- Support of Mega Projects
- Encourage emerging tech awareness and demand
- Support the enhancement of KSA’s education system to foster digital talent
- Improve female participation

**Quick-wins**
- Enhance policies and regulations to foster IT & Emerging Tech
- Enhance digital literacy
- Enhance ease of doing business in ICT sector
- Stimulate private sector IT adoption
- Fast-track skills development of ICT workforce

**Game changers**
- Nurture tech start-up and innovation ecosystem
- Establish tech clusters in key emerging tech.
- Attract leading players in key emerging tech.
- Establish enablement function for the technology sector
- Attract int’l MNCs to KSA, localize their presence and increase their local content
- Increase local content and support the growth of local IT businesses
- Enable 5G adoption
- Enable broadband access (National Broadband Stimulus)

**Impact (proportional)**
- Telco
- IT & Emerging Tech
- Human Capital

**Ease of implementation (proportional)**
- High
- Low
Highlights of the ICT Strategy 2023

- Create more than 25 thousands quality jobs in the sector
- Increasing the size of the IT market and emerging technologies by 50%
- Increasing the level of Saudization in the sector jobs to get to 50%
- Raising the sector’s contribution in GDP by 50 billion SAR

Increase women’s participation by 50%