MINISTRY OF COMMUNICATIONS
AND INFORMATION TECHNOLOGY

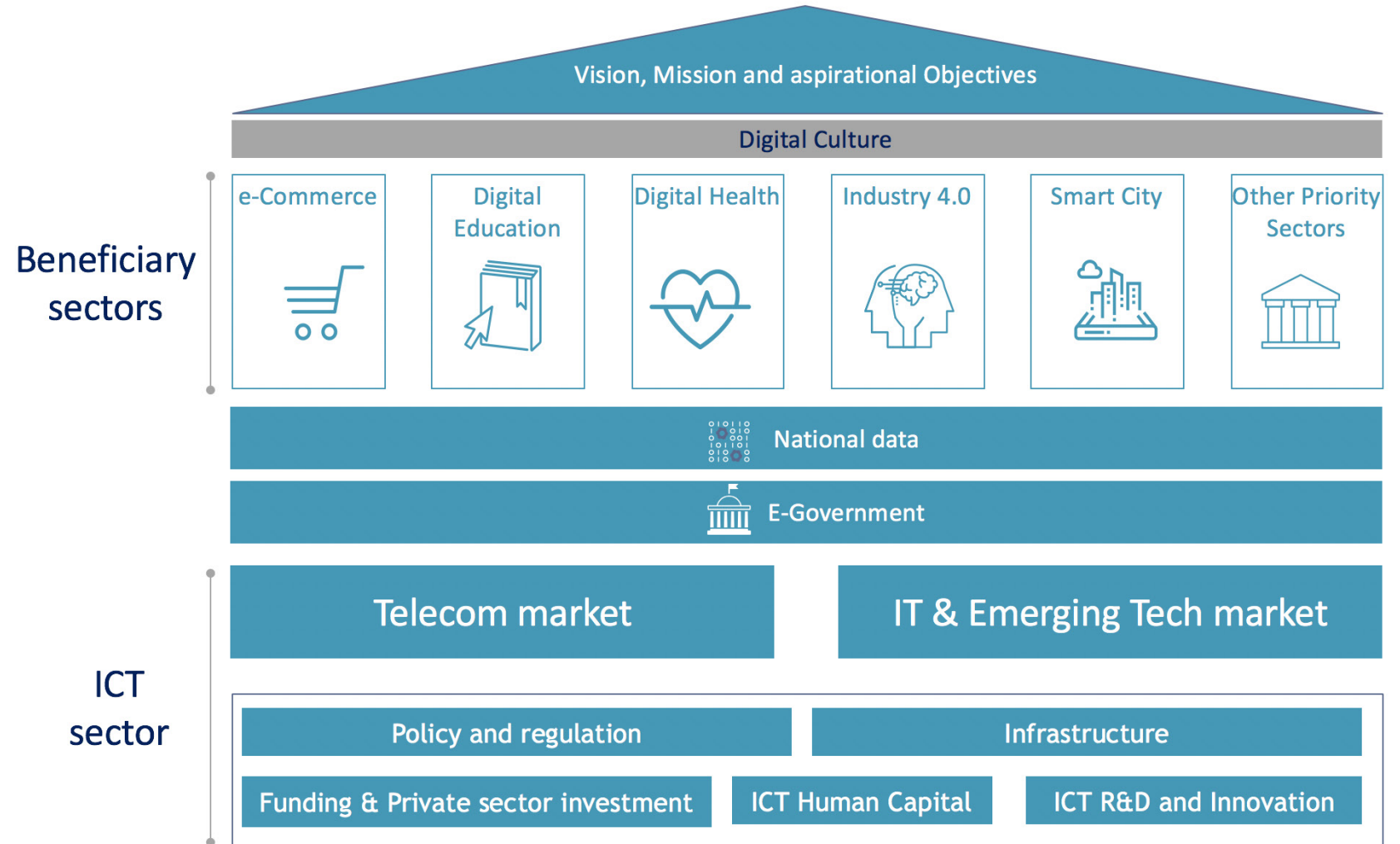# ICT Sector
Strategy 2023
Saudi Arabia

Summary & Highlights

ICT sector encompasses several... key technologies
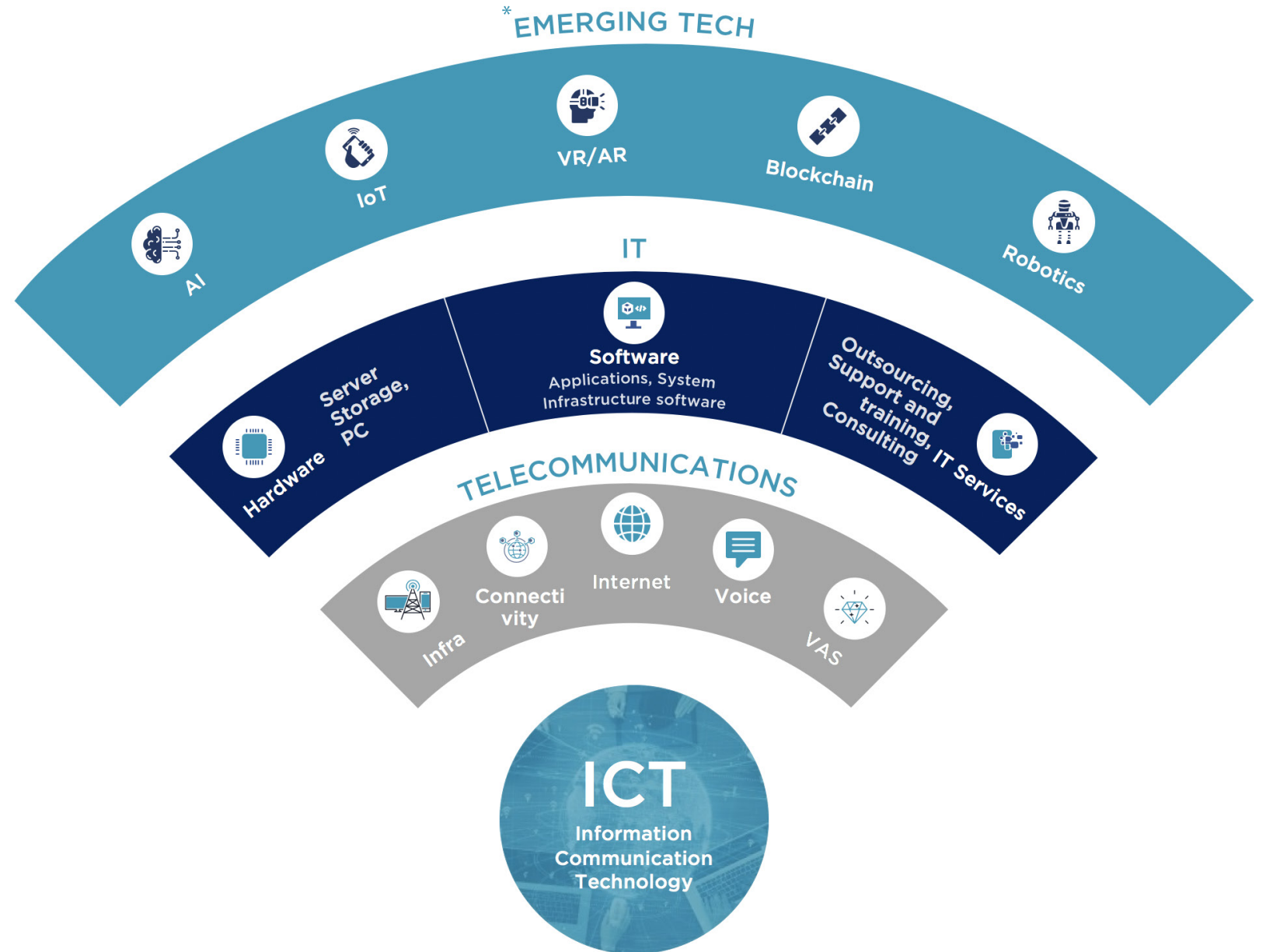
* Note: Listed Emerging technologies for example only

ICT sector serves as the foundation for digitizing KSA

Vision, Mission and aspirational Objectives

Digital Culture

Beneficiary sectors

| e-Commerce | Digital Education | Digital Health | Industry 4.0 | Smart City | Other Priority Sectors |

National data

E-Government

ICT sector

Telecom market

IT & Emerging Tech market

Policy and regulation

Infrastructure

Funding & Private sector investment

ICT Human Capital

ICT R&D and Innovation

ICT sector strategy defined based on a holistic approach

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1 Baseline/ benchmarks	2 Target state	3 Strategy	4 Execution model

ICT sector contribution and strategic positioning

Markets & Ecosystem

Telecommunications	IT & Emerging Tech

- Legislation and Supervision
- Regulating and monitoring
- Funding & Private Sector Investment
- Infrastructure
- Human Capital
- R&D and innovation
- Sector Governance

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

Among our commitments...
a developed digital infrastructure

VISION رؤيـــة
2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

Develop the telecommunications and information technology infrastructure, especially high-speed broadband

Enabling Smart Government

Support local investments in the telecommunications and information technology sectors
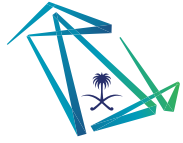
Establish an effective partnership with private sector

Strengthen the governance of digital transformation

Develop building standards to facilitate the extension of broadband networks

Our vision

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

Strategic themes detailed into 13 priorities

1 ICT Transformation	**2** Support Technology Localization	**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

Alignment with the Vision
ICT sector is one of the major enablers of Vision 2030

ICT Strategy Vision

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

8 level 3 Vision 2030 direct objectives	12 level 3 Vision 2030 indirect 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	• 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)

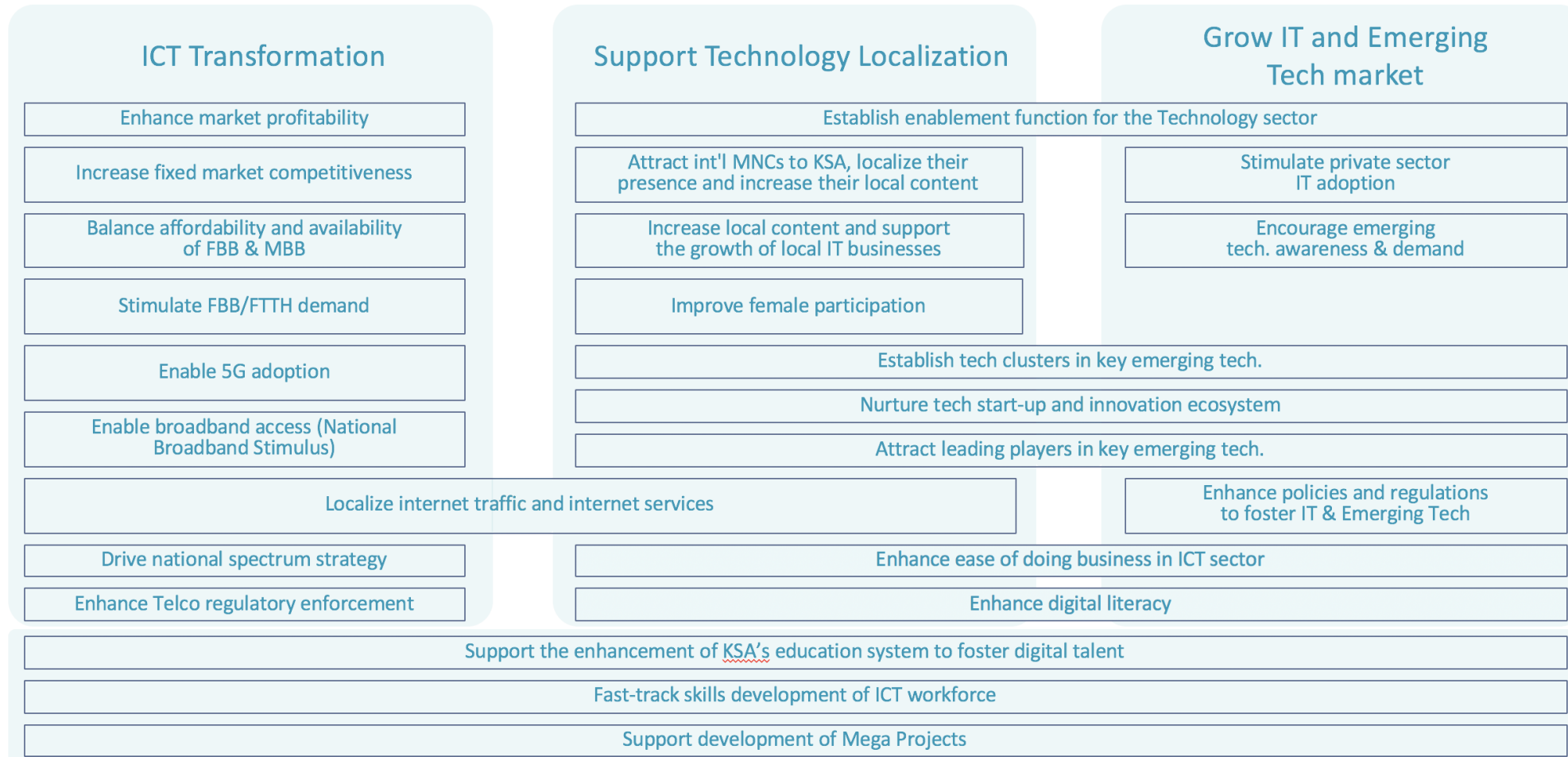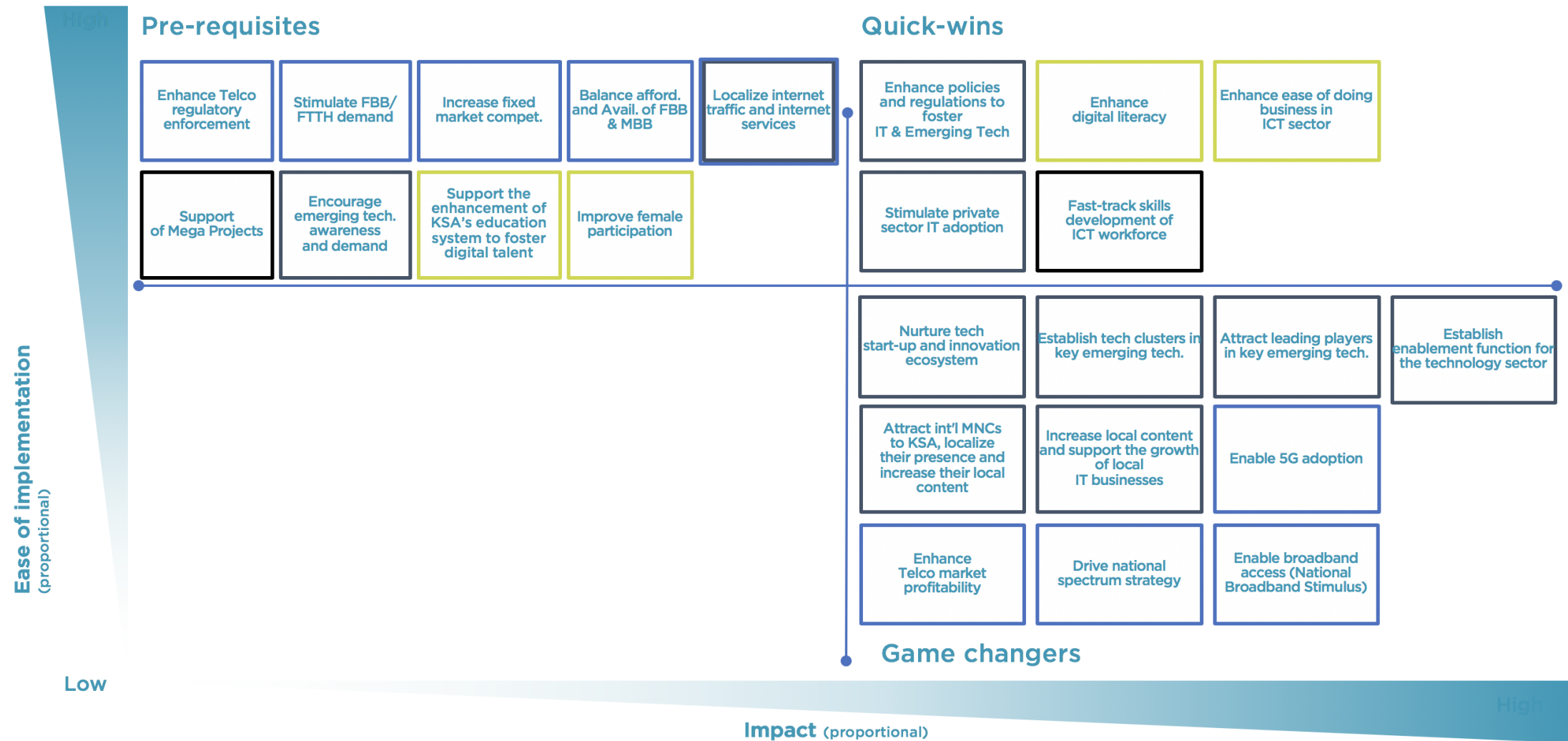| National Indust. Development and Logistics Program	National Indust. Development and Logistics Program	Human Capital Program	NTP 2.0	Quality of Life Program	PIFP	National Char. Enrichment Program	National Companies Promot. Program
1 — 0	3 — 1	1 — 2	4 — 3	1 — 0	0 — 1	0 — 1	2 — 0

Indirect link with vision goals ⚪
Direct link to vision goals 🔵

24 initiatives mapped to 3 strategic themes for ICT sector

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

ICT Transformation

- 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)

Support Technology Localization

- 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.

- 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

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ICT Sector Strategy Major Targets for 2023

Increase the level of Saudisation in the Sector to reach **50%**

Increase the ICT Sector contribution to the GDP by 50 billion over five years

Increase women's participation in the sector by **50%**

Create more than **25** thousands quality jobs in the Sector

Increase IT and Emerging technologies market size by **50%**