



هيئة المدن والمناطق الاقتصادية الخاصة
Economic Cities and Special Zones Authority

THE KINGDOM OF SAUDI ARABIA

Investing in Saudi Arabia's
Special Economic Zones



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Foreword



It is with great pleasure that we present this overview of the competitive investment landscape within Saudi Arabia, including details of our first Special Economic Zones and the opportunities that they create.

Designed in consultation with global investors and with their needs at heart, our Special Economic Zones are designed to accelerate the development of key sectors within Saudi Arabia.

The tailored environment they create, combined with a supportive ecosystem, will allow investors from across the world to establish a foothold and expand rapidly.

The development of these zones comes against the backdrop of a much broader transformation of our economy.

Saudi Arabia's Vision 2030 seeks to unlock the potential of the private sector to drive growth and innovation. We have already implemented sweeping reforms to open our economy and enhance competitiveness – and these Special Economic Zones will help take these efforts to the next level.

This is why, for ambitious global companies looking to innovate and grow, there are few opportunities at the scale of Saudi Arabia.



Not only do we offer a thriving domestic market – the fastest growing economy in the G20 last year – but through our world class infrastructure and favorable geographic location we provide investors with the opportunity to connect to key global value chains.

In a challenging and uncertain global economy, we offer unmatched opportunities and a government that is fully committed to doing whatever it takes to help you access these.

We will ensure that your experience of setting up in Saudi Arabia is seamless – and we will support you every step of the way as you expand and grow your business over the longer term.

We welcome you to the Kingdom, and we look forward to being your partner as you set out for the exciting next phase of your story.

**His Excellency
Khalid A. Al Falih**
Minister of Investment
and Chairman of the Board
of Directors of ECZA

Foreword



I am delighted to present this overview of the first wave of Special Economic Zones within Saudi Arabia.

Diversifying the Kingdom's economy lies at the heart of Vision 2030, and we are placing great emphasis on implementing a national SEZ agenda and developing a network of competitive zones, to strengthen the investment environment across a wide range of industry sectors.

These SEZs have been designed to complement existing strengths in the Kingdom's economy and create new investment

opportunities in a rapidly evolving global economy. The benefits available to investors within each of the zones will enable industries to build regional competitiveness and global scale from the Kingdom.

Our new SEZs span strategic locations throughout the Kingdom, offering compelling propositions across key, forward-looking industries. With robust infrastructure and connectivity, supportive regulation, attractive incentives, competitive costs, and abundant local talent, we have created an environment that maximizes opportunity while minimizing risk for businesses.



We are dedicated to supporting investors at every step of the investment process, from a streamlined application and approval process to an integrated one-stop-shop service, acting as the only resource an investor will need to access all SEZ services and support. Establishing a business in the Kingdom has never been easier.

As the Kingdom's economy grows and investors' needs evolve, we plan to expand our network of SEZs in the future.

We look forward to engaging with you and sincerely hope that you decide to locate and grow your business in the future from one of our locations.

A warm welcome awaits you.

Nabil Khojah
Secretary General
Economic Cities and
Special Zones Authority
(ECZA)

INTRODUCING THE SAUDI ARABIAN ECONOMY

02



An investment powerhouse at the heart of the Middle East

Saudi Arabia is striving to become a global investment powerhouse. This ambition is centred around the development of a vibrant society, a thriving economy, and an ambitious nation.

Enabled by Vision 2030, the Kingdom's socio-economic transformation is unleashing growth opportunities across several promising sectors and regions.

A network of Special Economic Zones in exceptional and competitive locations in Saudi Arabia provides investors with a wealth of untapped opportunities for business growth and success.



As the various strategies and reforms of **Vision 2030** are implemented, the Kingdom can already boast impressive results. Saudi Arabia is well on its way to becoming a global investment powerhouse. Join us!

| | 2015 | 2022 |
|--|---|--|
| | (before Vision 2030) | |
| Non- oil revenues | USD 44bn | USD 110bn |
| Value of FDI in Saudi Arabia (annual flow) | USD 8.1bn | USD 19.3 bn *2021 |
| Number of factories | 7,206 factories | 10,518 factories |
| Time to establish companies and issue commercial registers | 15 days by visiting 8 government entities | 30 minutes in one step online |
| Participation of women in the labour force | 19.4% *2017 | 37% |
| Published scientific research papers from Saudi institutions | 19,145 papers | 46,932 papers |

Macroeconomic Strengths



Growth

8.7%

GDP growth in 2022

5.4%

non-oil GDP growth in 2022



Investment

\$19.3bn

FDI inflows in 2021

25%

Gross Fixed Capital Formation (GFCF) share of GDP



Stability

2nd

lowest in debt to GDP ratio among G20 countries

\$28bn

budget surplus in 2022

\$460 bn

Total reserve assets in 2022

Source: IMF/World Bank Database, 'Foreign Direct Investment, Net Inflows'; Saudi Gazette, 'FDI inflows jump %10.7 in Q3 of 2022', Feb 2023; Trading Economics, 'Country List Government Debt to GDP, G20'; Arabian Business, 'Saudi Arabia records 27\$bn budget surplus, forecasts 328\$bn revenue next year', Dec 2022; World Bank & IMF datasets on total reserve assets

A connected economy sitting at the heart of global trade

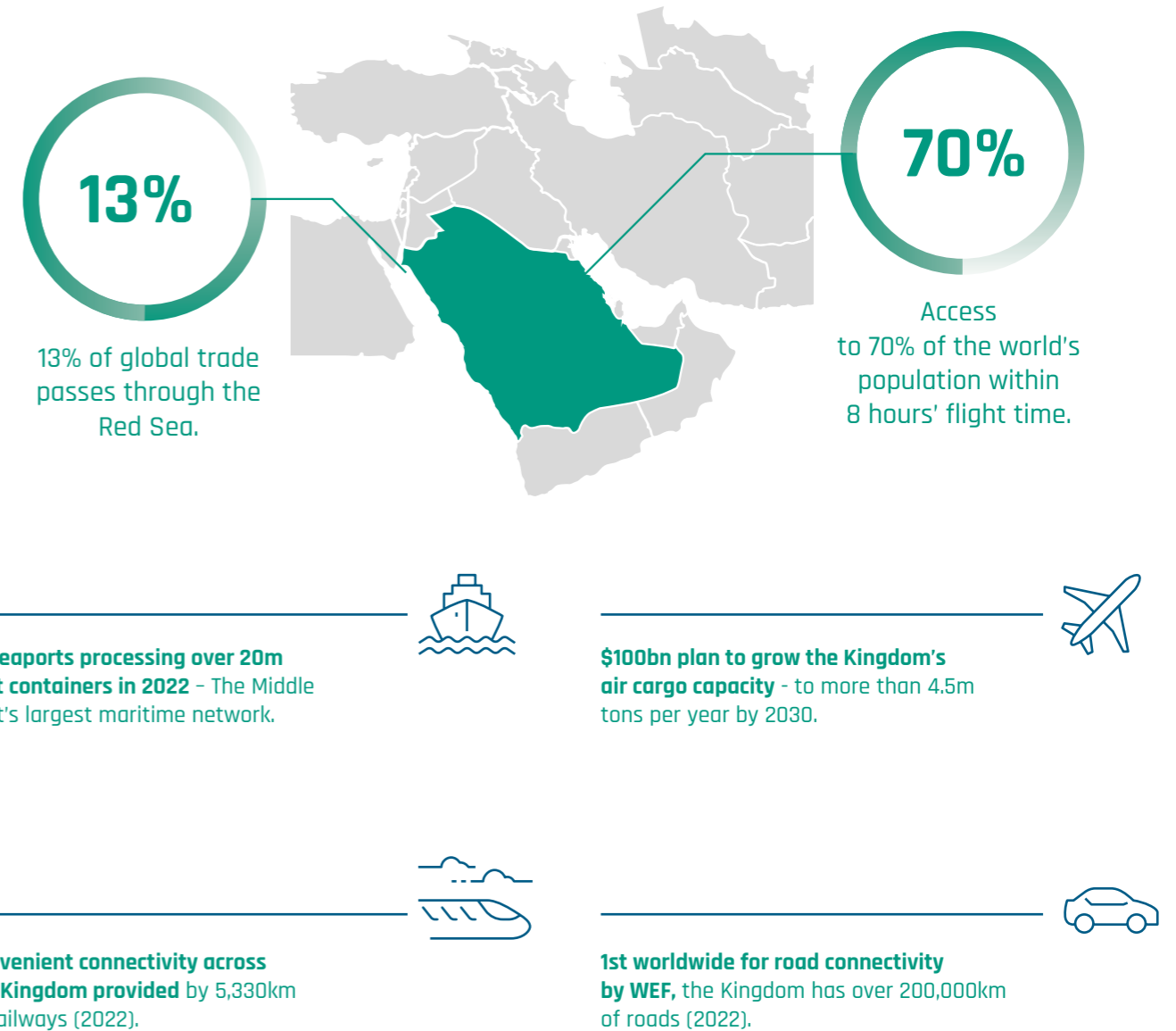
Backed by its formidable foundations in industry, education and infrastructure, the Kingdom has the ideal business environment for your company to grow and thrive.



Strategic Global Location

Take advantage of the Kingdom's strategic global location and excellent connectivity

Transport and logistics infrastructure is highly developed and the growing network of SEZ sites present numerous opportunities for supply chain integration, R&D, manufacturing and distribution activities.

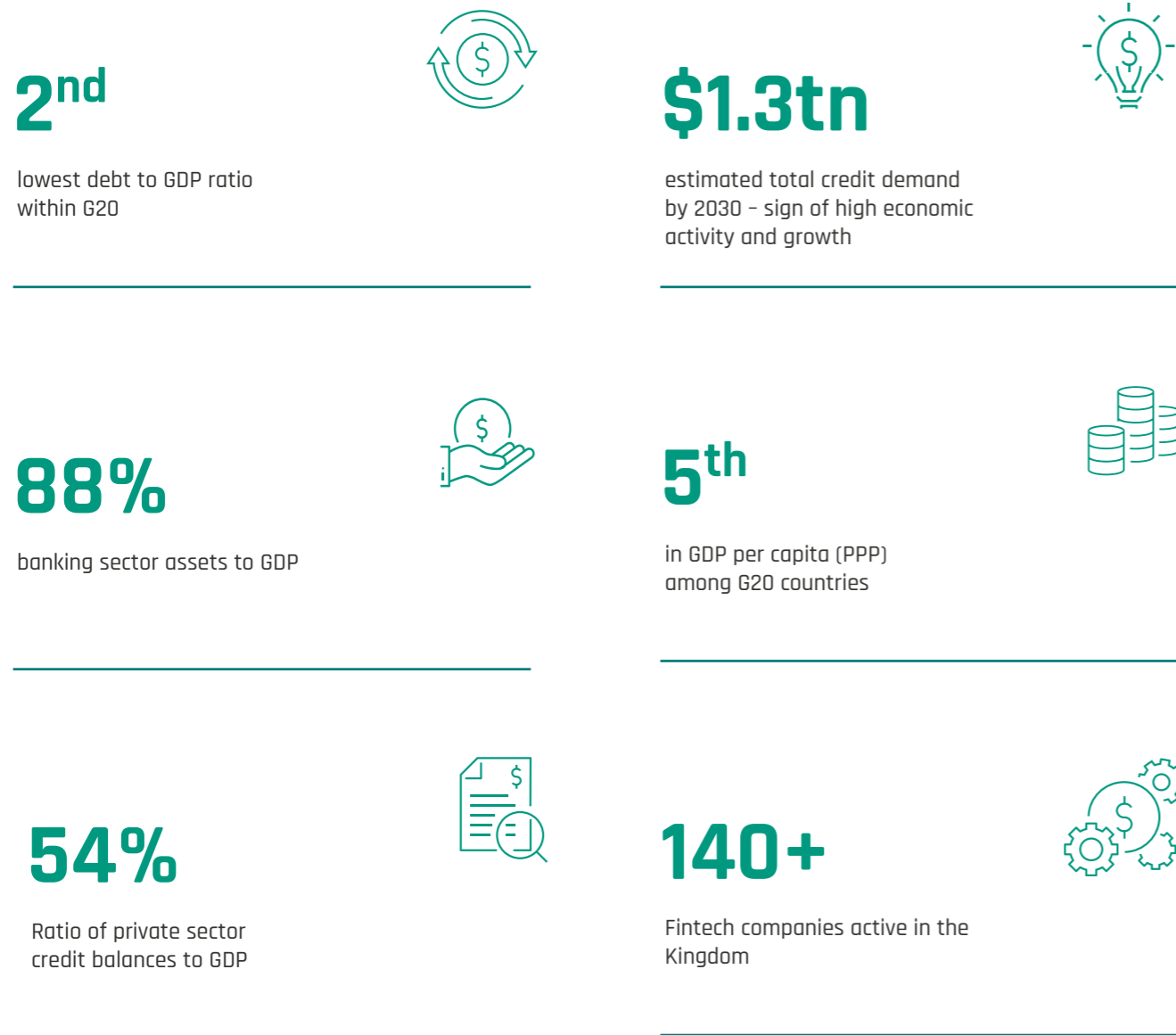


Source: Arab News, 'Saudi Arabia aiming for 100\$bn aviation investment; launch new airline: Minister Saleh Al-Jasser', May 2022; WEF, 'Global Competitiveness Report, 2020'; DLCA, Saudi Arabia Road Network'

Leading Financial Sector

Tap into the Kingdom's leading financial sector and benefit from a resilient banking system

Saudi Arabia benefits from a mature and historically stable financial services sector, and a strong capital markets infrastructure. Looking forward, the sector will act as a platform for future economic growth within the Kingdom, providing access to a wide range of finance and growth capital necessary to support investor requirements. The sector is rapidly evolving, driven by a rapid rise in FinTech activities, providing cutting edge services that will further enhance the investor experience.



Source: CEIC, 'Saudi Arabia Private Debt: % of Nominal GDP'; Invest Saudi, 'Macroeconomic Overview'; 'Leading Financial Sector'; Fintech Saudi, Annual Report 2022-2021

Competitive Cost of Doing Business

Benefit from competitive cost of doing business across energy, property and utilities

Whilst Saudi Arabia is an affluent and growing global economy, its abundance of natural resources means that businesses here can benefit from highly competitive utility costs (including water, electricity and gas).

This is complemented by large areas of developable land and existing high-grade office and industrial locations, again at very competitive rates when compared to other GCC and developed economies.



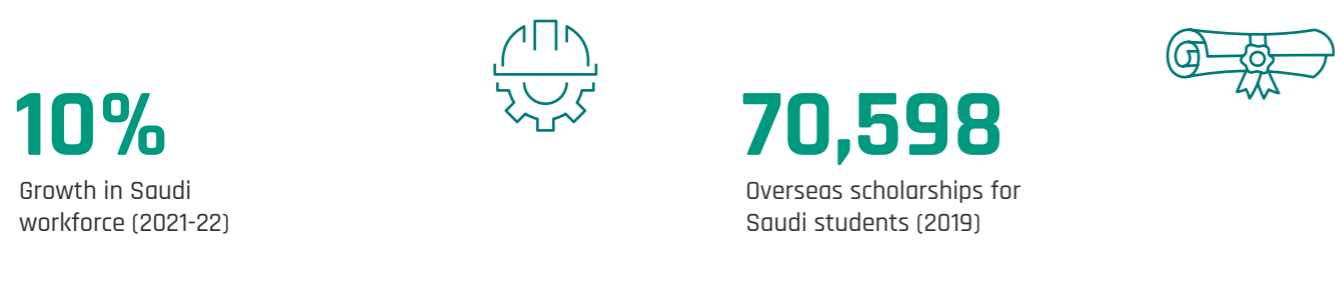
Source: Invest Saudi, 'Attractive Property Solutions'

Skilled Workforce

Harness a young and skilled workforce, backed by government commitment to education and excellence

As the Kingdom progresses with its large-scale reforms and economic diversification, it is supported by a rich heritage of investing in its people. Expenditure on education accounts for 17% of government spending and the resulting workforce is highly skilled and proficient across a range of sectors.

A large percentage of Saudis also study overseas before returning to the Kingdom. This means that our workforce has excellent language skills and experience of international practices.

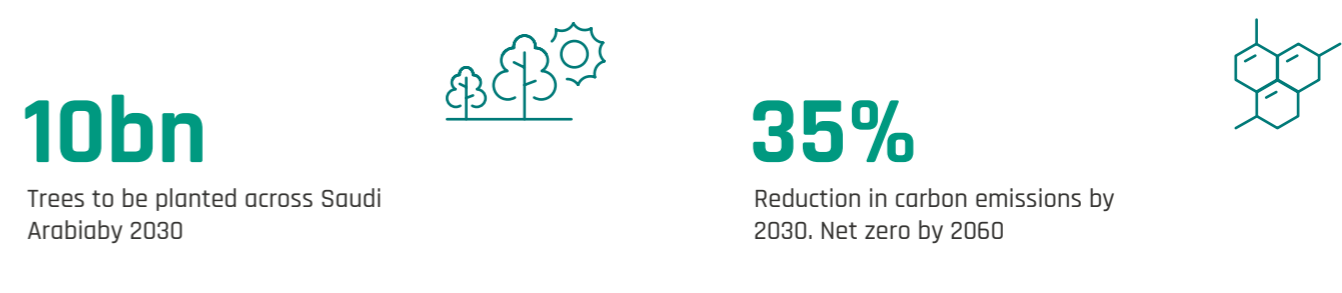


Expanding Quality of Life

Experience unparalleled quality of life, advanced healthcare, and a commitment to sustainability

As integral parts of Vision 2030, quality of life and improved healthcare for all are being driven by dedicated strategies. Each of these strategies are seeing widespread reforms and results throughout the Kingdom, improving further the daily lives of residents and visitors in the country.

Additionally, the Kingdom is embarking on sweeping efforts to reduce carbon emissions.



Source: UNWTO, 'World Tourism Barometer'; Invest Saudi, 'Expanding Quality of Life'; Independent, 'Saudi Arabia doubles its carbon emissions reduction target for 2030', Oct 2021; World Happiness Report 2022

Ambitious Reforms

Ambitious reforms, driven by a suite of strategic initiatives, are creating game changing opportunities

Spearheaded by the government's large-scale and highly ambitious Vision 2030 program, Saudi Arabia is in the process of widespread economic and social reform.

There have been over 600 reforms undertaken in recent years to improve the business environment and create opportunity for foreign investors, while putting the Kingdom at the center of the global value chains of the future.

Saudi Arabia has developed a range of strategic initiatives and programs designed to drive the success of Vision 2030. Each strategy focuses on specific areas of business, industry and environment to increase the Kingdom's competitiveness and position on the global stage.

The SEZs will help to achieve these key strategic initiatives by attracting quality FDI and diversifying the economy while supporting strategic sectors.

**Ambitious.
Vibrant. Thriving.**

Driving holistic economic growth across the Kingdom.



Game Changing Opportunities



Global Supply Chain Resilience Initiative

Putting Saudi Arabia at the center of the global value chains of the future



Saudi Green Initiative

Uniting the country to address the climate challenge



National Industrial Clusters Development Program

Stimulating the establishment and development of five industries in the Kingdom:
 Manufacture of cars and their parts
 Metals and steel industry
 Solar energy industry
 Plastic and packaging materials industry
 Home appliances industry



Digital Economy Policy

Setting out guiding principles for government agencies to promote the digital economy through their respective specialties and mandates, with the goal of achieving sustainable economic growth and creating and maintaining competitive advantages for the Kingdom



Labor Market Initiative

Focusing on bringing about radical reforms in the labor market, including packages of initiatives, to increase the rate of economic participation, raising skills and productivity and improving market efficiency

Game Changing Opportunities

Placing the Kingdom at the center of the global value chains of the future

The **Global Supply Chain Resilience Initiative (GSCRI)** aims to make Saudi Arabia the location of choice for leading global industrial companies looking to drive competitive advantage and improve business resilience.

The initiative will help to overcome the current challenges faced by global supply chains and will support the growth of key sectors and value chains.

Four investment themes underpin GSCRI



Sustainability and Climate Change



Future Industry Enablement



Global Supply Diversification



Advanced Manufacturing

Investors boosting supply chain attractiveness in the Kingdom can avail themselves of several incentives.

SEZs will position Saudi Arabia at the heart of global value chains through the development of wide clusters, linked to global supply chains through leading logistics hubs.



Enabling investors from all sectors to benefit from the Kingdom's resources and capabilities.





**INVESTING
IN SAUDI ARABIA**

03

Benefit from a developed and thriving ecosystem ready to support your investment

Saudi Arabia's SEZ ecosystem is dedicated to facilitating investment and promoting economic diversification. Through collaboration between various government entities, they aim to set a new investment standard, create seamless investment processes, and accelerate growth in multiple sectors.

The Economic Cities and Special Zones Authority (ECZA) is at the forefront of this agenda aimed at attracting international and domestic investors, and has implemented various measures to make sure that the SEZ network is attractive and competitive for them.



Core regulations benchmarked against international best practices to enable a world-class business environment



Cross-government agreements established to activate incentives and regulations, strengthening the SEZ business environment.



SEZs designed to attract entire industries and value chains, ensuring a dynamic and innovative environment for future investors.



An integrated Government services platform (One Stop Shop) implemented to streamline, facilitate, and simplify processes for investors.



To ensure the ongoing competitiveness and drive operational excellence within the zones, highly detailed and comprehensive blueprints will be seamlessly integrated

A continually improving investor experience and business environment

In partnership with the wider government, Economic Cities and Special Zones Authorities (ECZA) is activating key regulations that build on existing Saudi law to create a truly best-in-class experience throughout your investment journey in our SEZs



Best-practice companies regulation provides clarity on establishment, company status, share capital, debt, management, accounts and liquidation.



Greater protection and transparency on tax due to Saudi Arabia's 30 double taxation agreements.



A simplified **licensing** process, obtaining the necessary company licensing through the SEZ one stop shop (OSS), reducing your touchpoints with different entities.



Locating within an SEZ allows companies to avail of unrestricted **capital repatriation**.



Labor regulations and conditions that support business growth, including standardized contracts and the ability to transfer staff across different companies within a zone.



A single, overarching Intellectual Property Rights regulation, building on the Kingdom's ranks of 35/129 for **Intellectual Property Rights** and 3/132 for Ease of Protecting Minority Investors.



Import/Export regulations that simplify the distribution of many products, supporting a seamless flow of goods in and out of SEZs.



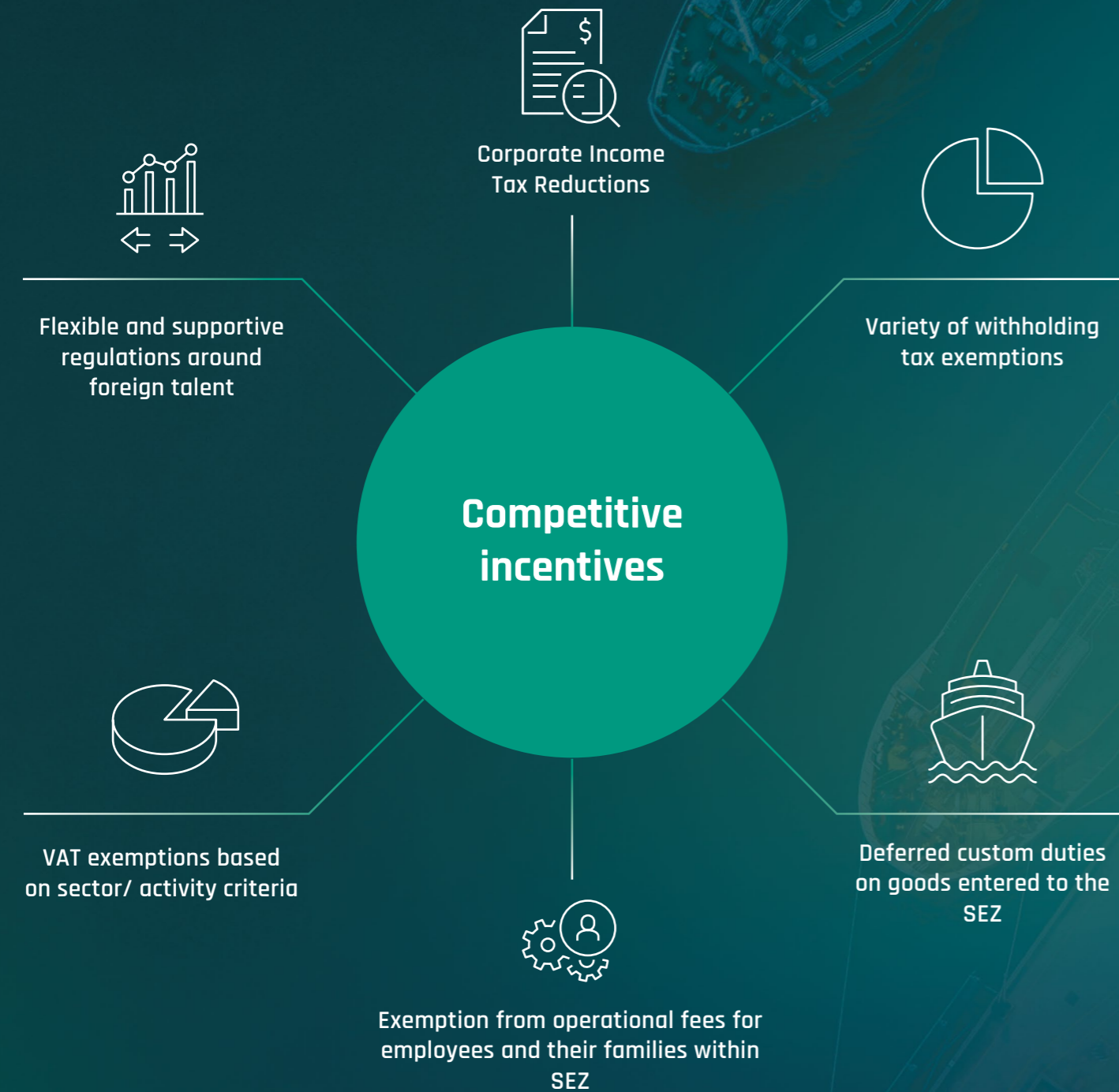
Security and stability through **Real Estate and Property** regulations that safeguard increases to rent and ensure fair treatment by landlords.



Robust safeguards for arbitration, including validity of the agreement, qualification and appointment of arbitrators, settlement and enforcement of the awards, and grounds for challenging awards, aligned with local or international arbitration centers.

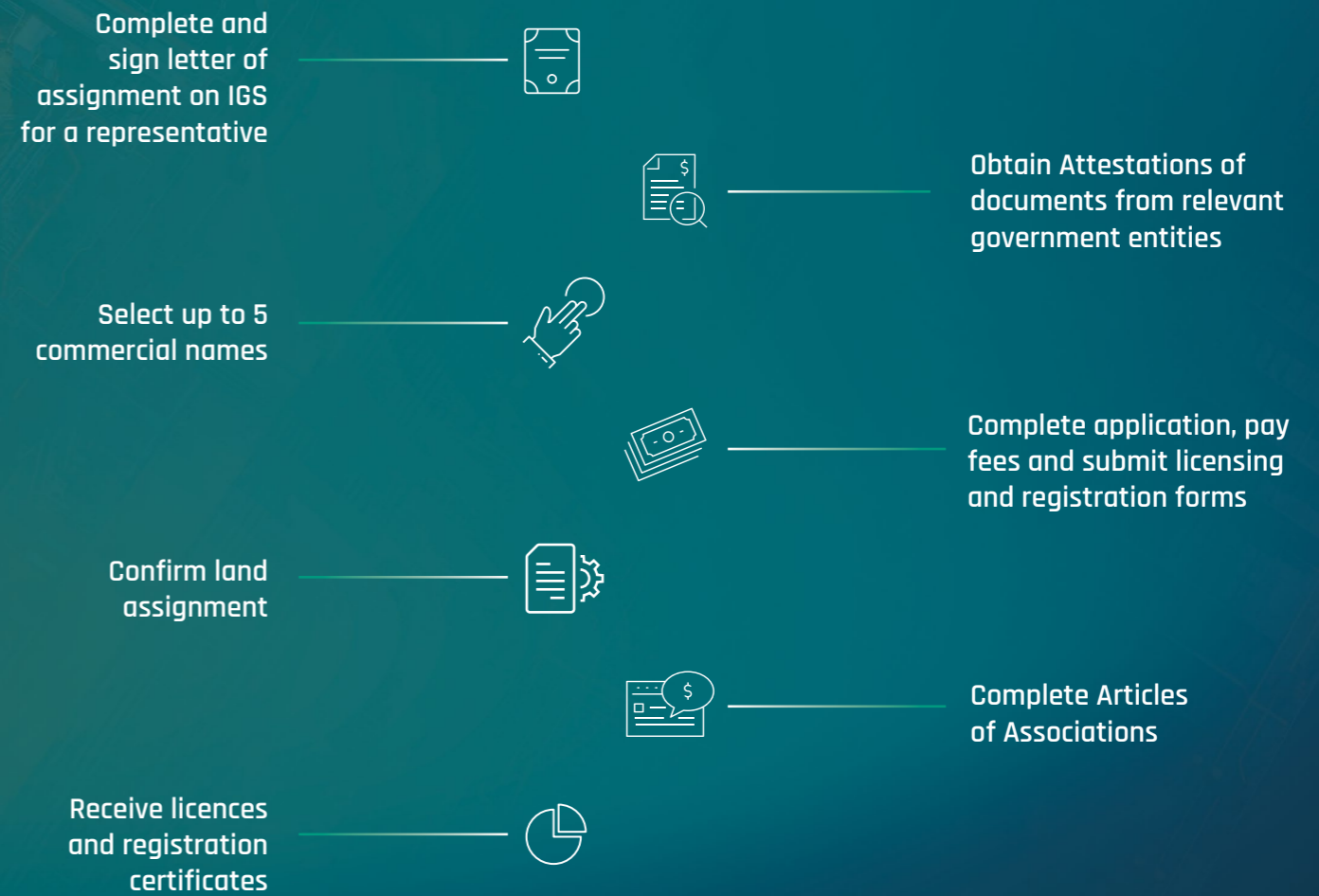
Access attractive economic incentives across the SEZ network

Investors will be eligible for a selection of competitive commercial incentives dependent on zone and sector



Investors are supported in a clearly defined application and approval process

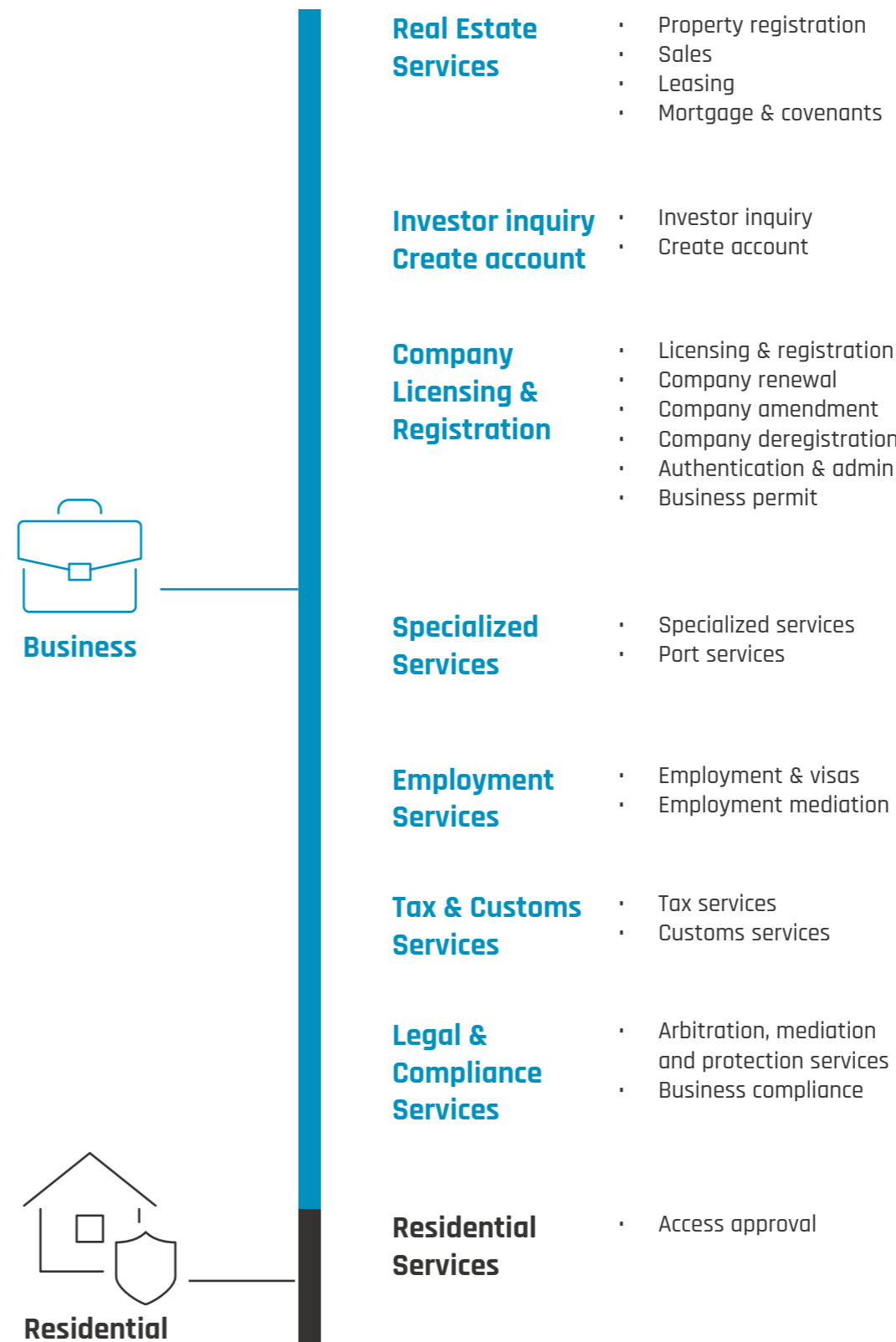
International best practices have been incorporated into the company application and approval process to provide a quick and simple journey



Set up your business through a seamless, integrated One Stop Shop

The One Stop Shop (OSS) will be a single window that provides you with comprehensive government, and non-government services, to make it easy and fast for you to benefit from the Special Economic Zones.

The only resource an investor needs to access Special Economic Zone services and support





SAUDI ARABIA'S
GROWING NETWORK
OF SPECIAL
ECONOMIC ZONES

04

Unlock a new route to global markets at one of Saudi Arabia's Special Economic Zones

To accelerate economic diversification and create a new route for investors to do business in the Kingdom, Saudi Arabia has launched its first five Special Economic Zones with special commercial regulations.

In launching these zones, which support a wide range of industry sectors and business activities, the Kingdom offers a platform for investors to accelerate their regional and international growth through a globally connected market.

The first five Special Economic Zones are:

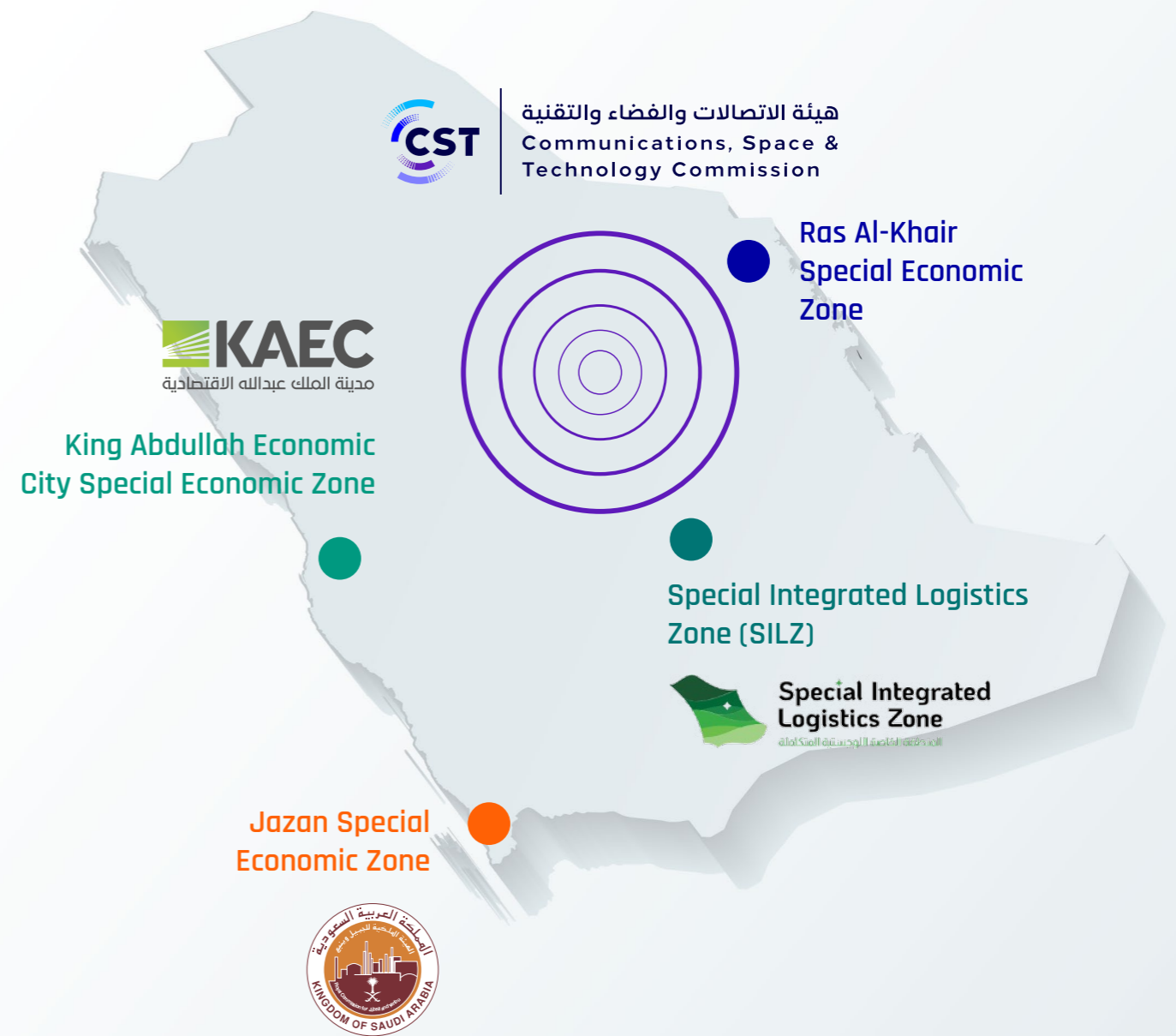
King Abdullah Economic City Special Economic Zone

Ras Al-Khair Special Economic Zone

Jazan Special Economic Zone

Cloud Computing Special Economic Zone

Special Integrated Logistics Zone (SILZ)



Harness game-changing opportunities and tap into vibrant and growing clusters across future forward industries

Seize the opportunities within the first wave of Special Economic Zones and join leading global players to accelerate, innovate and grow the established and emerging clusters and industries across the Kingdom.



Accelerate your business and turbo-charge the region's first end-to-end EV and automotive cluster



Seize the opportunity to localize end-to-end maritime value chains



Take advantage of the region's food security agenda by increasing production in the Kingdom



Join a community and grow the cloud computing sector across Saudi Arabia



Establish yourself in Saudi Arabia's own Silicon Valley - home to emerging and disruptive digital technologies



Power the future of healthcare through MedTech innovations and devices



Be at the forefront of innovation for regional ship repairs and maintenance



Embed the Kingdom's mining and metals industry into global value chains



Ideally position yourself in a growing regional hub for logistics



Support national, regional and global ambitions for the shift to Net Zero



Locate within Saudi Arabia's primary gateway to Africa



Access abundant and highly skilled workforce across the SEZ network

King Abdullah Economic City (KAEC) SEZ

A strategic location for global value chains



Benefit from a zone with a unique geostrategic location on the Red Sea, 13% of global trade passes through the Red Sea, which means your company can easily connect with global supply chains here, utilizing existing, world-class infrastructure and the world's most efficient port (according to the World Bank in 2022).

Leverage robust and established utilities assets in the wider economic city including gas, power, water and sewage and accelerate your growth with unmatched economic incentives.

Connecting with the wider Kingdom is effortless thanks to **high speed railway**. A 450km electric railway provides fast, convenient, reliable and safe travel using state-of-the-art technologies.

Located less than 90 minutes from **King Abdulaziz International Airport (Jeddah Airport)** and from **Jeddah, a vibrant city of 4 million people**, KAEC SEZ gives you ready access to a highly skilled workforce and a wide range of cultural and leisure activities to maintain a high quality of life.

Key location information

Province: Makkah

Size of the zone: 60km²

Located at the heart of the Red Sea and close to Africa markets

Focus Sectors

- Automobile supply chain and assembly
- Consumer goods
- ICT (Electronic light manufacturing)
- Pharmaceuticals
- MedTech
- Logistics

Contact Information

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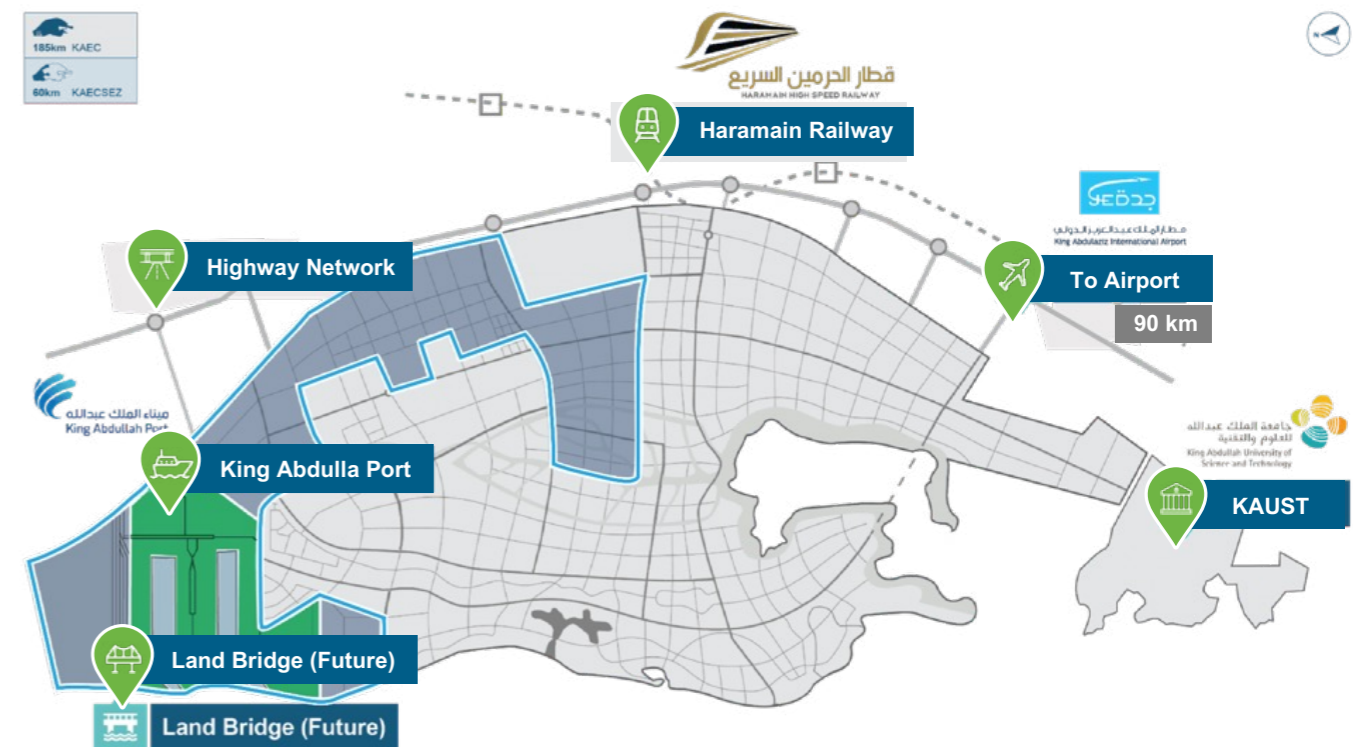
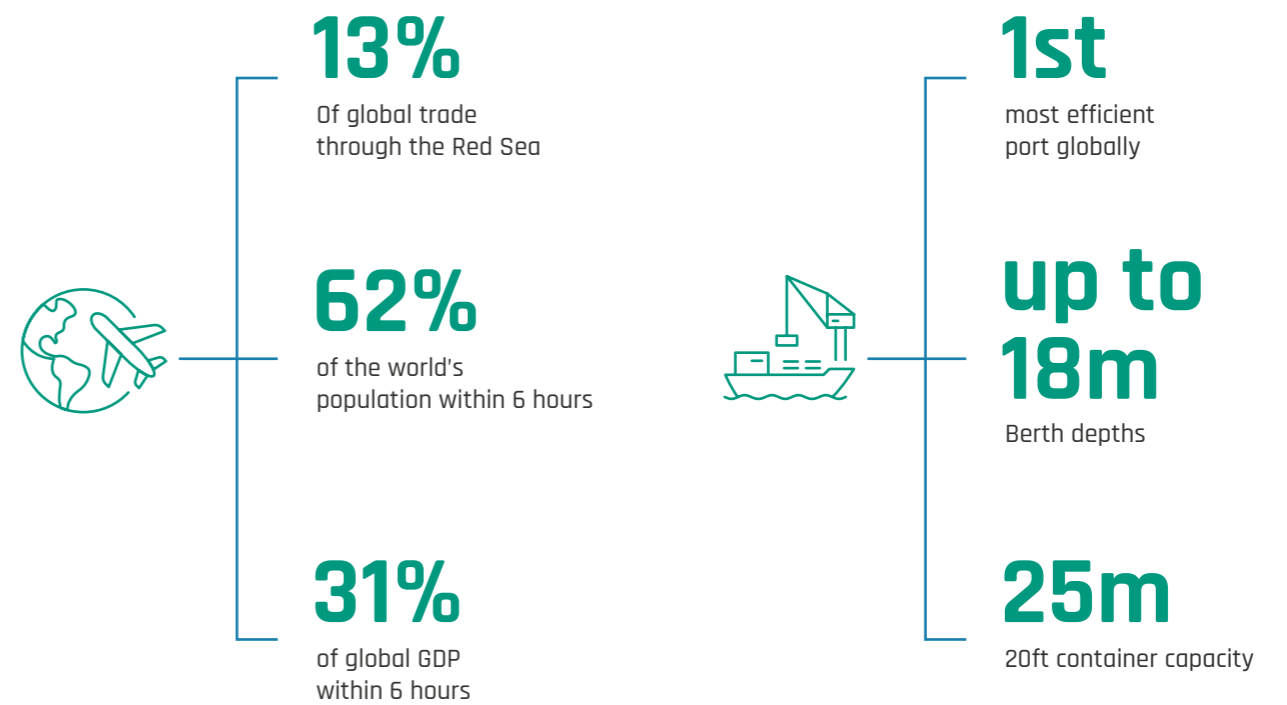
Access an unparalleled geostrategic location at the heart of global trade routes

Gain unrivalled access to key global markets through KAEC's position along the Red Sea and establish an ideal platform from which to access Europe, Africa and Asia.

Situated along a key maritime route of the Belt and Road Initiative (BRI), and connected to the rest of the Kingdom, locate your business at an unparalleled gateway to local, regional and global markets.

KAEC SEZ is anchored by Saudi Arabia's newest, full-service commercial port - King Abdullah Port. Boasting the facilities to service bulk & general cargo (30 mn tons per annum), as well as a Roll on/Roll Off terminal (1.5 mn vehicles per annum), the port can efficiently fulfill all of your business needs.

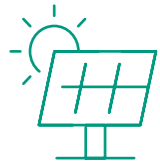
With a smart gate system and port community system, you can be sure of the latest intelligent and secure technology systems at your disposal.



Source: King Abdullah Economic City Special Economic Zone brochure, Oct 2022;
The Container Port Performance Index 2021, May 2022

Utilize world-class infrastructure and access high growth sectors

KAEC offers top-of-the-line utilities infrastructure to support current and future business requirements.



Plans in place to provide abundant electrical supply including over 29GWh of clean power annually.



Potable and process water supply, with distribution at a 1.5 bar minimum.



The Gas Zone will supply investors with natural gas at a significant cost advantage.



Wide portfolio of telecoms services with a state-of-the-art fiber network.



Reliable sewage networks, including a membrane bio-reactor plant.

Sources: Zawya, Saudi's King Abdullah Economic City announces hybrid solar power farm project', Aug 2022; Statista Mobility Market Outlook, September 2022; Statista Medical Devices Report 2021

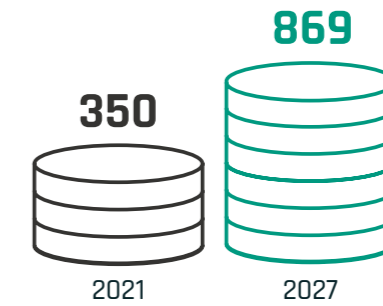
Sectors of opportunity

Accelerate your business and be part of the region's first end-to-end EV and Automotive cluster.

Immerse yourself in a growing ecosystem.

US\$ 869bn

Potential global EV market size by 2027

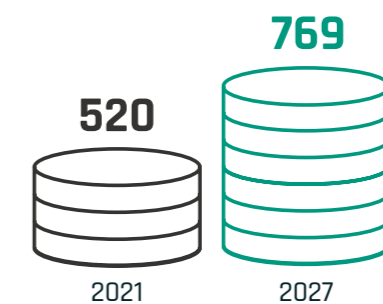


Be part of a new and vibrant MedTech cluster, where innovations will power the future of healthcare.

Seize the opportunity to drive import substitution and gain access to a growing local and global market for export, utilizing KAEC's world-class facilities.

US\$ 769bn

Potential global MedTech market size by 2027



Investing in KAEC SEZ provides **access to unparalleled economic incentives to drive the success of your business**

Alongside the supply of world-leading infrastructure and utilities, KAEC SEZ offers unique commercial incentives as foundations for success for investors and companies



5% Corporate Income Tax for up to 20 years



0% withholding tax permanently for repatriation of profits from SEZ into foreign countries



0% customs duties deferral for goods inside the SEZ



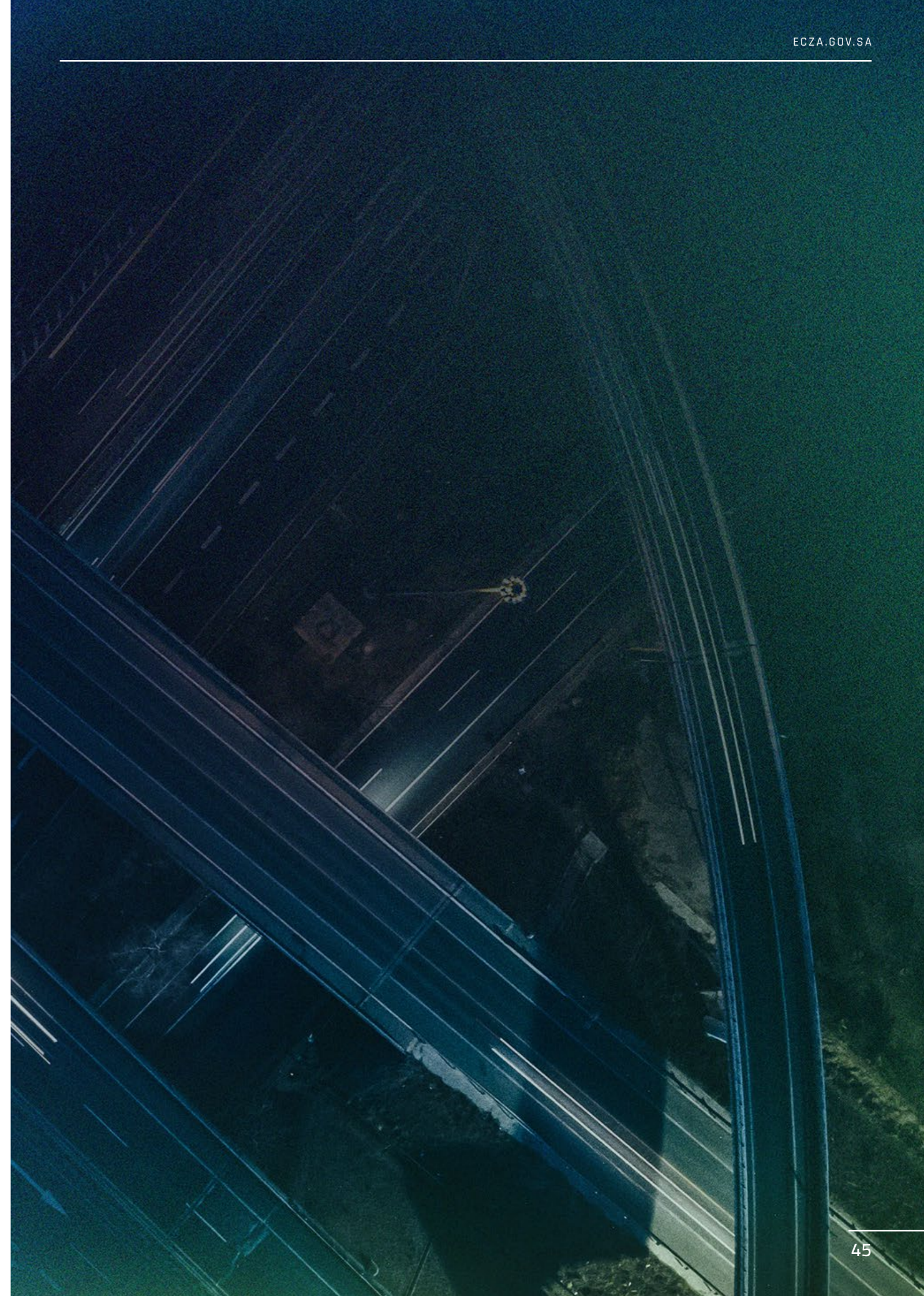
Flexible and supportive regulations around foreign talent during first 5 years



0% VAT for all intra-SEZ goods exchanged within the zone and between zones



Expat levy ensuring fees exemption for employees and their families in the zone





Ras Al-Khair Special Economic Zone

Establish your business
within a global powerhouse
in the maritime industries

Position yourself **at the center of the Arabian Gulf**, with an abundant supply of industrial talent and a quick and efficient multimodal transport system to connect your operation into global markets.

Be at the forefront of innovation. Benefit from the Kingdom's ambitions to localize end-to-end supply chains and create a docking point for regional ship repairs and maintenance.

Ras Al-Khair Special Economic Zone is building on established maritime industries in the area to grow this cluster and become a key regional player, driving towards Saudi Arabia's target of developing a US\$14B maritime industry.

Conveniently located near Ras Al-Khair Port, the Kingdom's newest industrial port, with the capacity to handle bulk cargo and serving more than 100 manufacturing projects. The port can accommodate any size of ship due to its depth.

Key location information

Province: Eastern Province

Size of the zone: 20km²

Located in Ras Al-Khair Industrial city, giving access to global markets

Focus Sectors

- Shipbuilding and MRO
- Rig platforms and MRO

Contact Information

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Website: www.rcjy.gov.sa

Source: Mawani, Saudi Ports Authority, 'Ras Al-Khair Port'.

Position yourself at the center of the Arabian Gulf - access a multimodal transport system



North-South Rail

Direct rail links to the Kingdom's mines via the North-South Line gives you unrivalled access to key input materials. And from King Salman Port, tap into the busiest oil and gas traffic and operations in the region.

100 km From the vibrant city of Jubail

<2 hours To Saudi Arabia's third largest airport, King Fahd International Airport, providing connectivity to 43 local and international destinations.

10 million passengers

Innovate and collaborate to build the maritime capabilities of the future

Access the largest and most technically advanced maritime yard in the MENA region

Ras Al-Khair SEZ will host the most comprehensive, state-of-the-art shipyard and fully integrated offshore cluster, to supply end-to-end maritime manufacturing services.

Ras Al-Khair's shipyard, the largest in the MENA region, has the capability to provide newbuild and maintenance services, repair and overhaul services for offshore support vessels, jackup rigs, very large crude carriers (VLCCs) and bulk carriers.



12 million square meters

\$10 billion of off take agreements over **10 years**



4 new offshore rigs

43 vessels

Sources: King Fahd International Airport, 'About King Fahd International Airport'; IMI 'International Maritime Industries signs agreement with Keppel LeTourneau to collaborate on offshore rigs', May 22; Offshore Mag, 'Second IMI jackup nears completion in Saudi Arabia', Oct 22.

Access an advanced maritime infrastructure and accelerate your growth



Access state-of-the-art technologies including AI, biometrics and IoT



Benefit from high-quality products and efficient schedules



Benefit from green products, materials and renewable energy sources



Access internationally competitive prices



Take advantage of innovative lifecycle management offerings

Sources: Ras Al-Khair Special Economic Zone, Fortune Business Insights on global marine vessel market size after COVID-19; Business Research company

Sectors of opportunity

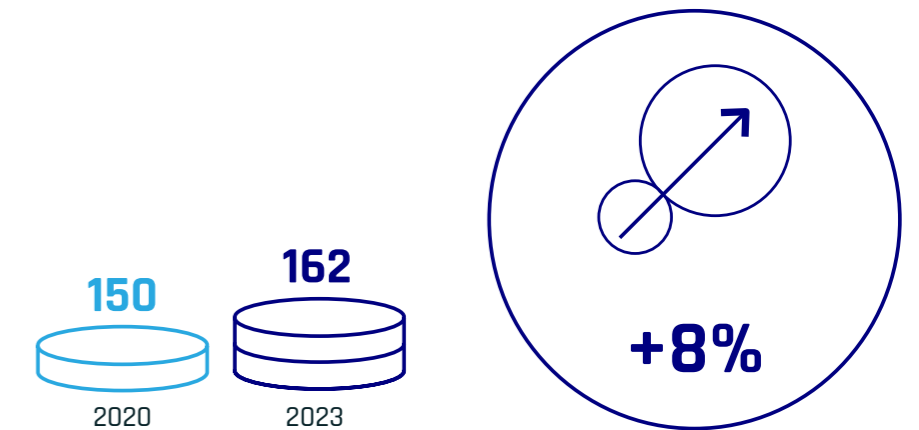
Establish yourself in a Zone with ambitions to localize end-to-end maritime value chains.

70% of ships produced in Ras Al-Khair Special Economic Zone will supply regional markets.

Tier 2 & 3 manufacturers discussing localizing supply chains for steel production and cranes manufacturing. Benefit from access to the Kingdom's 2nd largest aluminum facility and access the raw materials you need.

US\$ 162bn

Potential global maritime industry market opportunity by 2023

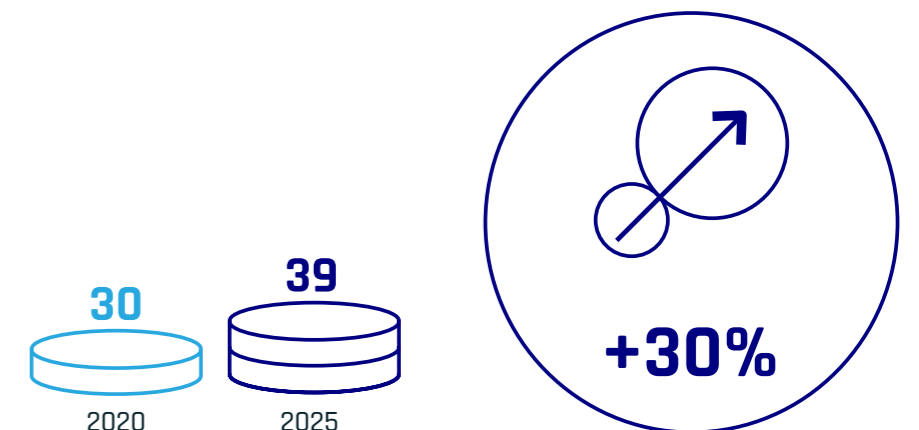


Be at the forefront of innovation and accelerate the Kingdom's ambitions to create a docking point for regional ship repairs and maintenance.

With the International Maritime Industries joint venture in place, the zone will produce 3 ships, 15 service vessels and 4 rigs per year. Be part of a dynamic, global cluster and lead the innovations in new fuels and shipbuilding.

US\$ 39bn

Potential global ship repairs market size by 2025



Investing in Ras Al-Khair SEZ provides **access to unparalleled economic incentives to drive the success of your business**

In addition to the various assets and benefits already listed, Ras Al-Khair Special Economic Zone sets itself apart from the competition through a range of SEZ incentives.



5% Corporate Income Tax for up to 20 years



0% withholding tax permanently for repatriation of profits from SEZ into foreign countries



0% Customs duties deferral for goods inside the SEZ



Flexible and supportive regulations around foreign talent during first 5 years



0% VAT for all intra-SEZ goods exchanged within the zone and between zones



Expat levy ensuring fees exemption for employees and their families in the zone



Jazan Special Economic Zone

Join an industrial city and a growth export hub, perfectly located on the Red Sea

Take advantage of Jazan's unique position on the crucial Red Sea shipping route, its proximity to growing African markets and its role as a platform for Saudi Arabia-China investment.

Jazan SEZ will enable Saudi Arabia's strong mining industry to play an increasingly important role in global construction and processed metals and minerals markets.

Investing here will give your company access to the region's biggest port for export of goods and import of manufacturing materials, as well as the Kingdom's world-leading chemicals, metals and agricultural industries.

Moreover, Jazan province has a unique mix of natural assets ranging from pristine islands to breathtaking mountains, the region is also increasingly capitalizing on its varied geography to foster the development of its rising tourism industry.

Key location information

Province: Jazan

Size of the zone: 24.6 km²

Ideal Red Sea location in close proximity to key mines and industrial assets

Focus Sectors

- Food Processing
- Metal conversion
- Logistics

Contact Information

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website: www.investjcpdi.com/

Source: Jazan SEZ

Reach global markets through the region's biggest export port

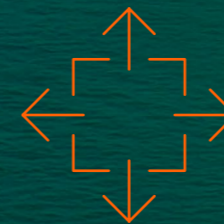
Located inside Jazan City for Primary and Downstream Industries (JCPDI) and on the Red Sea, the Jazan Special Economic Zone is in a prime position.

Notably, **the zone is adjacent to the biggest port in the region**. This allows for efficient delivery of materials with no land shipment costs.

Investors in the zone can take advantage of regional socio-economic developments, including NEOM and Belt & Road Initiative infrastructure projects across the Middle East and Africa.

In addition, the low existing industrial intensity and abundance of suitable land provides a high development potential for prospective investors - grow your global trading company here!

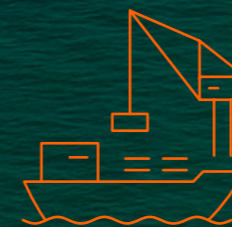
Source: Jazan SEZ



24.6km2
Land area



15% Global trade
(via Red Sea Corridor)



1st Export Port
in the Kingdom
Since 2022



Titanium & Iron
industries

Access abundant utilities and skills to succeed in industrial processing

Whether you require power, talent, land or water Jazan SEZ has you covered to ensure an efficient, competitive investment project



Cheap and readily available energy, including output of 2.4GW from the Aramco power plant



The region offers a large and highly skilled workforce



Competitive industrial lease compared nationally and to the region



A range of cheap and efficient water supply options, across irrigation, potable water and sanitary wastewater

Source: Business Research company

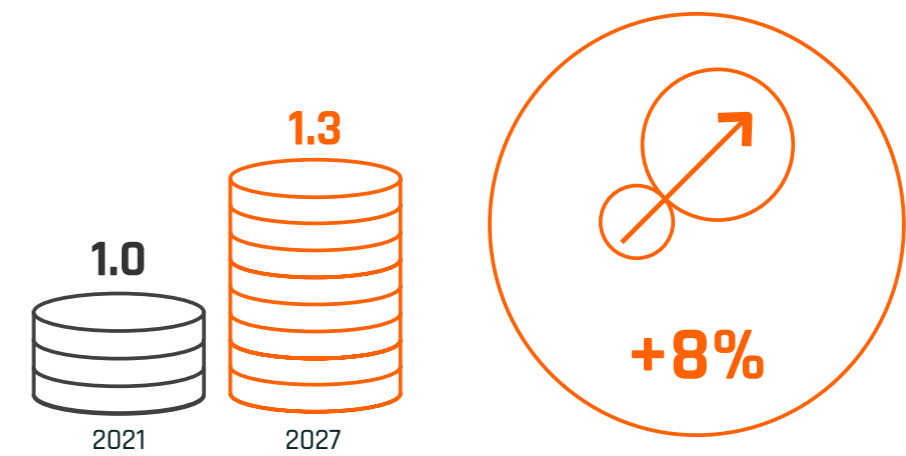
Sectors of opportunity

Embed Saudi Arabia's metals conversion industry into global value chains

Investors can leverage the region's strong metals conversion industry to serve the global construction and processed metals and mineral market. Immerse yourself in the Zone to take advantage of the opportunities.

US\$ 1.3tn

Potential global minerals market in 2026



Access building materials for construction to power infrastructure development

Gain direct access to raw materials such as limestone, gypsum, sand and marl, as well as natural gas. Take advantage of the SEZ's proximity to Aramco's Jazan Refinery Complex - a new smart self-powering refinery

Investing in Jazan SEZ provides access to **unparalleled economic incentives to drive the success of your business**

Jazan province, already a highly attractive location for international investors, is strengthened by the incentives that are available to companies establishing within Jazan SEZ.



5% Corporate Income Tax for up to 20 years



0% withholding tax permanently for repatriation of profits from SEZ into foreign countries.



0% Customs duties on capital equipment and inputs inside SEZ



Flexible and supportive regulations around foreign talent during first 5 years

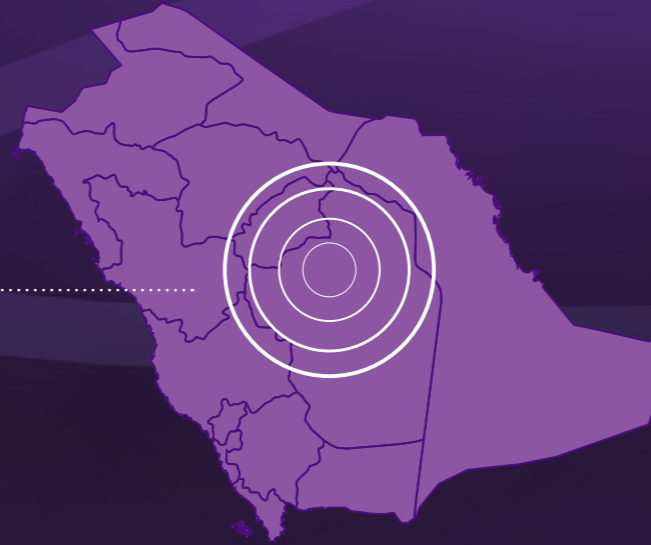


0% VAT for all intra-SEZ goods exchanged within the zone and between zones



Expat levy ensuring fees exemption for employees and their families in the zone





Cloud Computing SEZ

Where emerging and disruptive technologies flourish

Be part of Saudi Arabia's own 'Silicon Valley' and establish yourself in a home to emerging and disruptive digital technologies.

Driven by the National Strategy for Digital Transformation and the ICT Sector Strategy, benefit from government commitment to encouraging and supporting the growth of digital technologies in the Kingdom.

This growth includes a target for \$13bn investments (FDI & Domestic Direct Investment) by 2030 across Data and AI sectors with support from Cloud Computing SEZ.

Digital companies investing in the Kingdom can benefit from of a highly skilled workforce as well as large end users from across public sector and an eager public that are proven early adopters of new technology.

This zone is different from the others in that it lacks a central physical location. However, it is no less competitive and impactful and has received significant interest from major international companies to date.

Key location information

Location: Innovation Tower at King Abdulaziz City for Science and Technology (KACST)

Headquarters in Riyadh with the ability for businesses to build and operate data centers from all over the kingdom

Focus Sectors

- Cloud Computing Services

Contact Information

Email: CloudSEZ@cst.gov.sa

Website: <https://www.cst.gov.sa/>

Launch your cloud computing operations and accelerate growth in the Kingdom's digital economy

Benefit from an innovative hybrid zone:

The Cloud Computing SEZ enables investors to establish data centers and cloud computing infrastructure within the Kingdom. With ambitions to attract leading cloud computing companies, become part of an ecosystem primed to accelerate the digital economy.

While the Cloud Computing SEZ will have supportive and operative offices in King Abdulaziz City for Science and Technology (KACST), investment and establishment can occur anywhere within the Kingdom. Seize the opportunities in international communication services and data centers and access the latest communication and hosting technologies.



Sectors of opportunity

Access one of the most digitally competitive economies in the world and become part of a vibrant cluster of leading global tech companies.

With high internet usage penetration, 4th globally for 5G deployment and 2nd in the G20 for radio spectrum allocation, access a mature and growing market.

US\$834bn

Potential global cloud computing market size by 2027

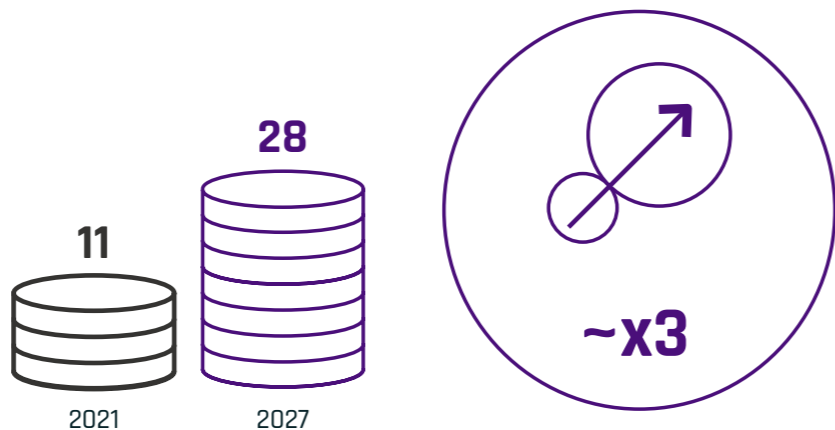


10\$bn Saudi Arabia Cloud market size by 2030, driven by a 'Cloud First' policy, creates the ideal base from which to tap into a local cloud computing market.

Set up in Saudi Arabia, joining Tech giants such as Google, Oracle and Alibaba Cloud who are already in the Kingdom.

US\$28tn

Potential global market opportunity from emerging tech sectors by 2027



Investing in the Cloud Computing SEZ provides access to unparalleled economic incentives to drive the success of your business

Access unique incentives that are available to companies establishing within the Cloud Computing SEZ.



Special tax treatment in line with OECD principle that avoids double taxation and accommodates CSPs operating model



Expat levy ensuring fees exemption for employees and their families in the zone



Affordable network connectivity and electricity prices. Electricity available at a competitive rate of 0.05 USD/kWh for businesses



Flexibility to provide cloud computing services from the zone, with the ability to build and operate data centers from all over the kingdom.

Sources: WEF, 'Here's how Saudi Arabia is investing in the technology of the future', Jan 2023, Statista Technology Outlook 2021; Statista Technology Market Outlook; Ministry of Communications and Information Technology (MCIT) analysis of cloud services demand by 2030 (figures converted to USD).



Invest in SILZ

The Kingdom's leading industrial and logistics zone



Locate your company in this cutting-edge development that aims to make Riyadh one of the top urban economies in the global economy.

Benefit from an ideal position next to King Khalid International Airport, which is establishing Saudi Arabia as a leading transport and logistics hub.

Access a range of direct and indirect fiscal incentives for Saudi and foreign investors.

These include:

- Suspension of customs duties on goods imported or transported within the SILZ.
- No VAT on goods entering the zone for servicing or manufacturing activities.
- Zero percent income tax rate on prescribed activities.

SILZ is a truly competitive and unique location for a range of light manufacturing, trade, distribution and value-add industries.

Key location information

Location: Adjacent to the King Khalid International Airport

Province: Riyadh
Centrally located in Riyadh with excellent air connectivity

Focus Sectors

- Consumer products
- Computer parts
- Pharmaceuticals
- Nutritional and medical supplies
- Aerospace spare parts
- Luxury goods, jewelry and precious metals

Contact Information

Email: SILZ@gaca.gov.sa

Website: www.silz.gaca.gov.sa

Position your company in the world's first **truly integrated logistics zone**

SILZ is the first zone of its kind that combines best practice in regulation, technology and infrastructure from around the world. This provides companies with frictionless linkages between investors, suppliers, customs and government.

SILZ enjoys global and regional connectivity due to its proximity to the airport and access to rail, metro, and ring road system.



Companies in SILZ can benefit from **supportive and flexible processes and regulations, developed to establish the zone as a global business hub**

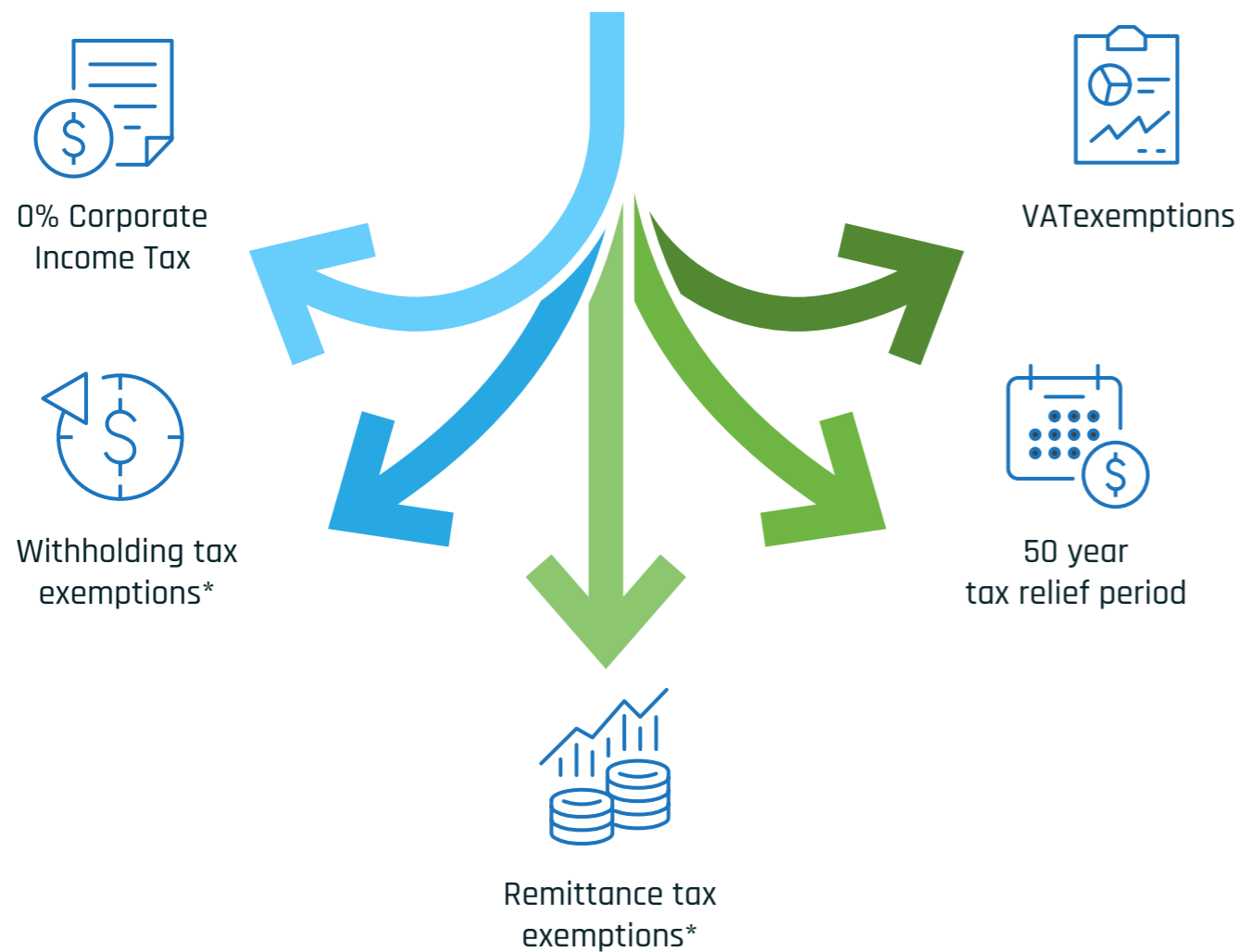
Enhanced ease of doing business benefits :

| | | | |
|---|---|--|--|
|  <p>One stop shop for administrative processes</p> |  <p>Bonded corridor to King Khalid Airport and other zones</p> |  <p>Rapid certification of goods for export</p> |  <p>Flexible Saudization requirements</p> |
|  <p>No restrictions on capital repatriation</p> |  <p>No customs for goods remaining in zone</p> |  <p>100% foreign ownership of business</p> | |



Source: SILZ Investor brochure

Investing in SILZ provides access to a range of competitive tax advantages to drive the success of your business



VAT exemptions for goods under customs suspension



0% VAT on servicing or manufacturing and assembly*

*Subject to meeting set criteria

Key Contacts

Contact the relevant Zone to register your interest today.

For additional information and to discuss specific investment opportunities, contact the relevant zone.

KAEC SEZ

Email: kaecsez@kaec.net
 W: <https://www.kaec.net/kaecsez/>

Ras Al-Khair SEZ

Email: rkez.info@rcjy.gov.sa
 Website: www.rcjy.gov.sa

Jazan SEZ

Email: info-investors@rcjy.gov.sa
 website: www.investjcpdi.com/

Cloud Computing SEZ

Email: CloudSEZ@cst.gov.sa
 Website: <https://www.cst.gov.sa/>

SILZ

Email: SILZ@gaca.gov.sa
 Website: www.silz.gaca.gov.sa

Economic Cities and Special Zones Authority

E: info@ecza.gov.sa
 W: <https://site.ecza.gov.sa/en>

Ministry of Investment of Saudi Arabia

E: InvestorCare@misa.gov.sa
 W: <https://misa.gov.sa/en/>



هيئة المدن والمناطق الاقتصادية الخاصة
Economic Cities and Special Zones Authority

The Kingdom of Saudi Arabia
Special Economic Zone Opportunities