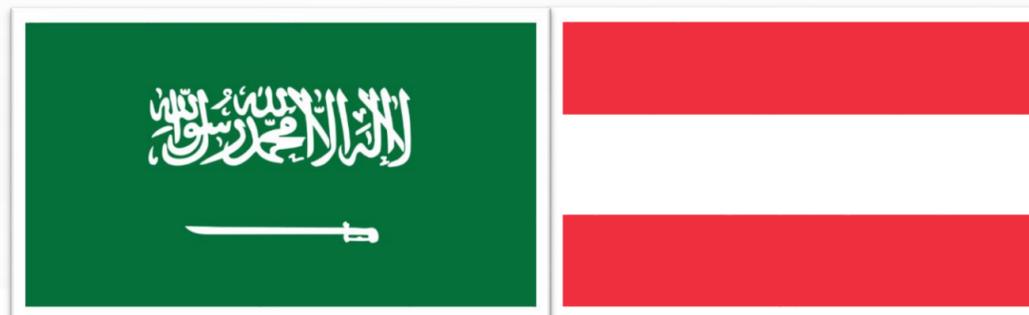




# Saudi Arabia Beyond Oil

AUSSEN WIRTSCHAFT FORUM SAUDI ARABIA



# The Saudi Arabian Economy

**20th**

Largest  
Economy

**5th**

Highest  
Growth  
(G20)

**17th**

Largest  
Exporter

**29th**

Largest  
Importer

# Saudi Arabia Today



**The heart of the Arab and Muslim world**

A bedrock of regional **stability**

A Rich cultural heritage

**A central location** between Europe, Asia and Africa

A young large and growing demography,

Rich in **Energy Resources**

**Global Leader in Petrochemicals**

Minerals including aluminum, phosphate, gold, copper, uranium and other raw materials.

رؤية  
VISION  
2030  
المملكة العربية السعودية  
KINGDOM OF SAUDI ARABIA

INVEST  
SAUDI

Kingdom of Opportunities

A Vision that changes  
Everything

\* KAFD King Abdullah Financial  
District

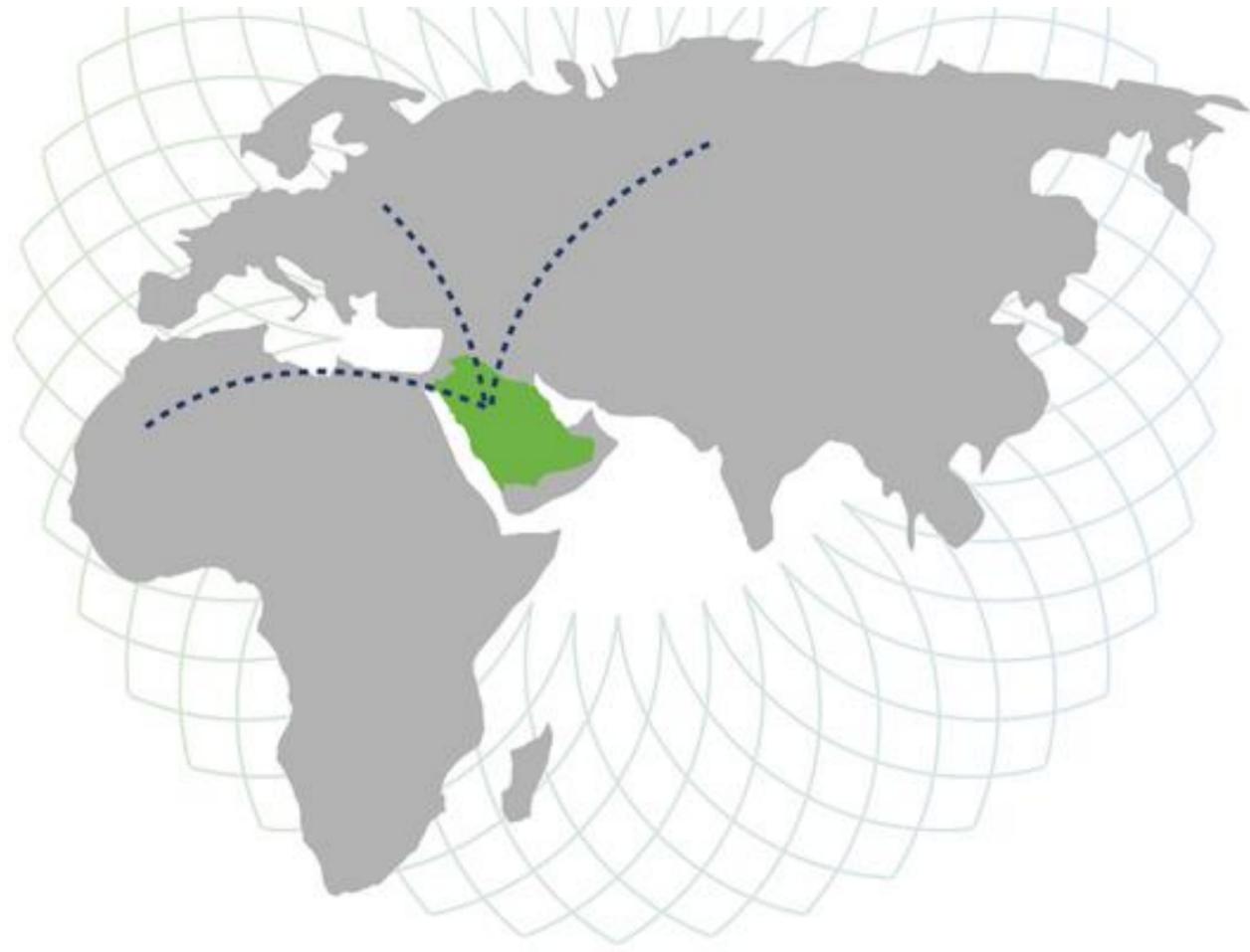


MY FIRST OBJECTIVE IS FOR OUR COUNTRY TO BE A PIONEERING AND SUCCESSFUL GLOBAL MODEL OF EXCELLENCE, ON ALL FRONTS, AND I WILL WORK WITH YOU TO ACHIEVE THAT...

Custodian of the Two Holy Mosques  
King Salman Bin Abdulaziz Al-Saud



# OUR VISION Pillars



## SAUDI ARABIA

The heart of the Arab and Muslim World



## AN INVESTMENT powerhouse

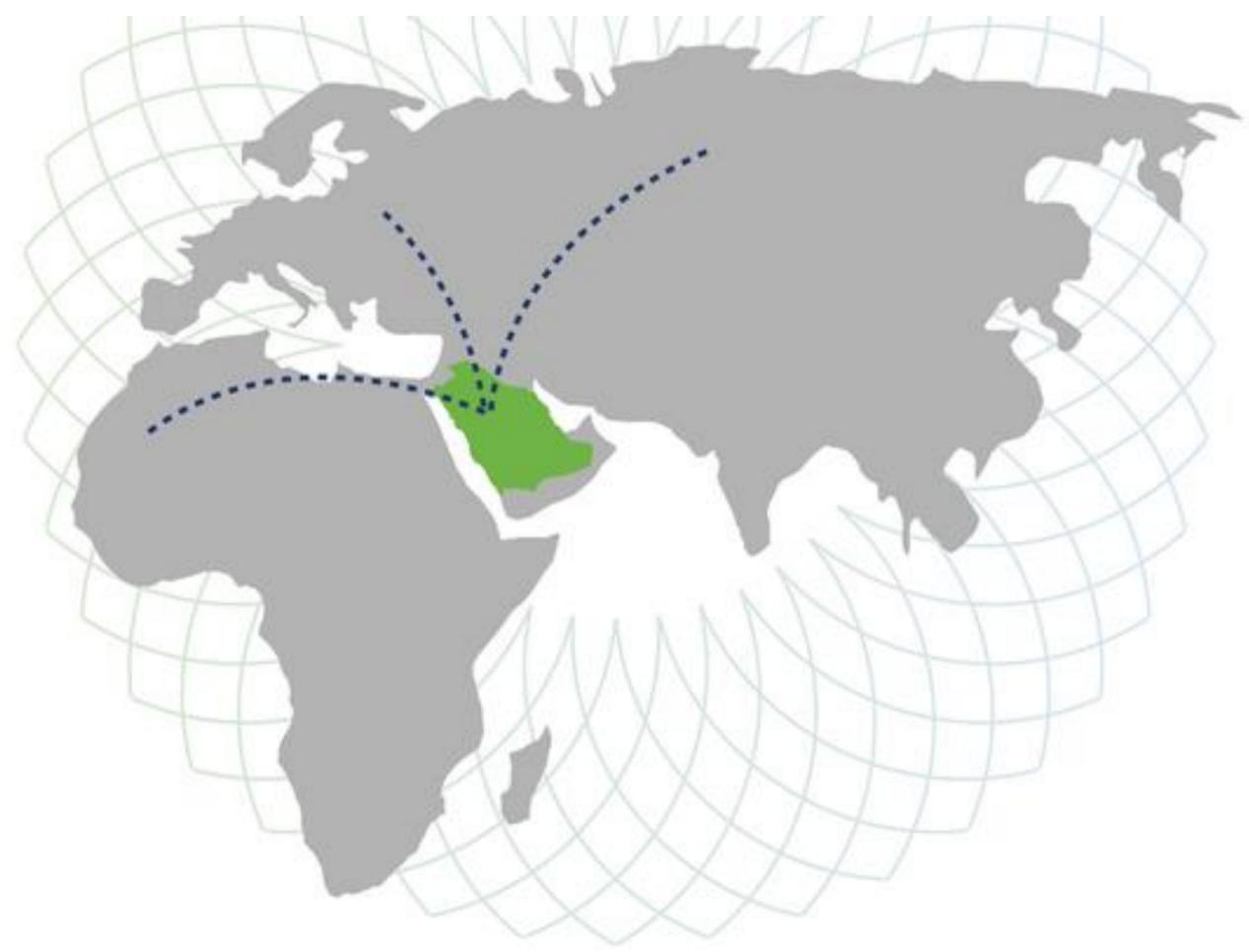


## A HUB

connecting three continents



# OUR VISION Themes



**A Vibrant  
Society**



**A Thriving  
Economy**



**An Ambitious  
Nation**

# A Strong Investment Ecosystem



- Remove all obstacles
- Empower private sector development

- Encourage Innovation & Competition
- Open up new investments



- Shift governments role to empower private sector

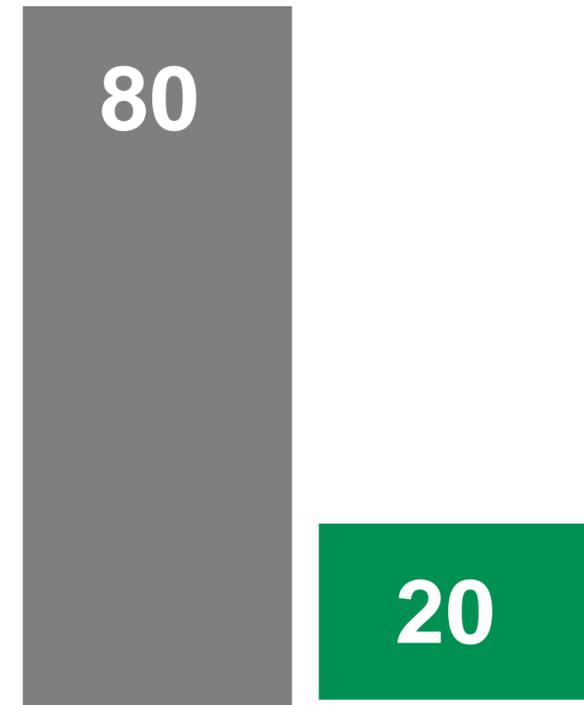
- Enable private sector to deliver traditionally government run services

**Top 5**

↑

**From 36**

Improving our  
**E-Government  
 Survey Index  
 ranking**



Improving our  
**Government  
 Effectiveness  
 Index ranking**

We will encourage local and international investments in various sectors, including:



# The Heart of the Muslim and Islamic World



**30 million**



**8 million**

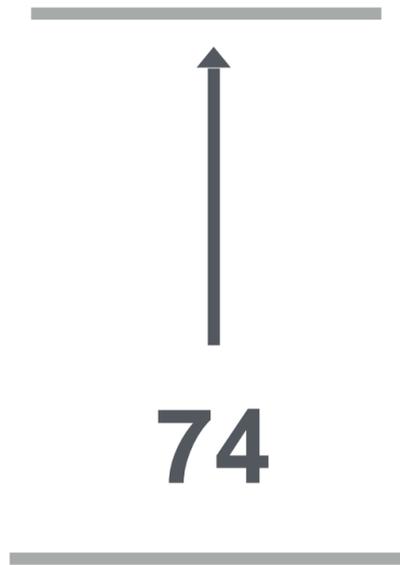


**Umrah Visitors to the holy sites**

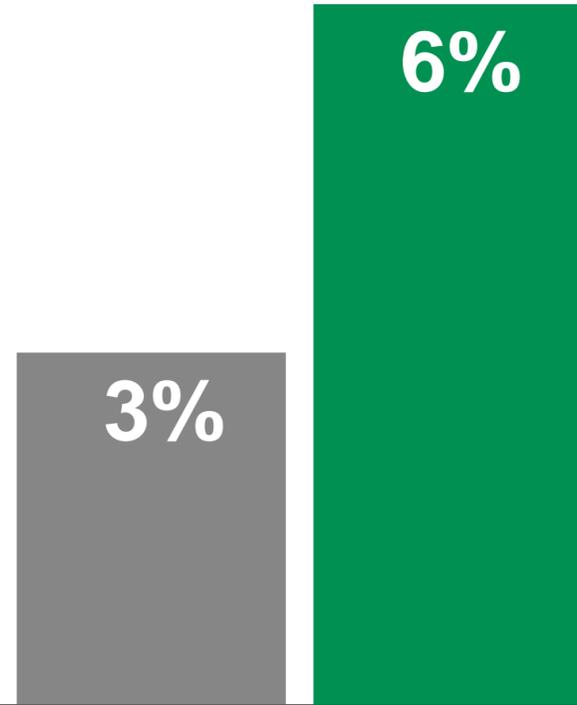


# A Vibrant Society

80 years

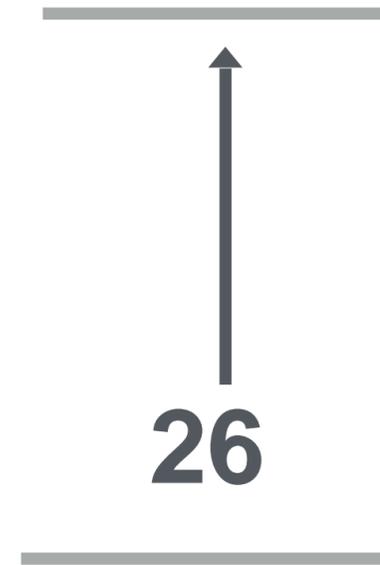


Life Expectancy



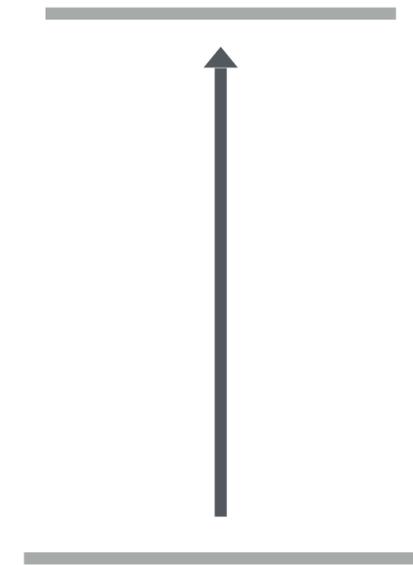
Disposable Income on Entertainment & Leisure

10



OECD Social Capital Index

Top 100



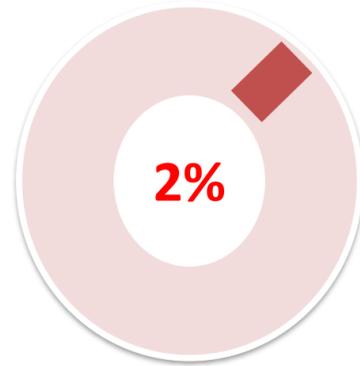
3 Saudi Cities Global Status

# Empowering Localization



## Defense & Military

3<sup>rd</sup> Biggest Military Spender



Only 2% of Spend in the Kingdom

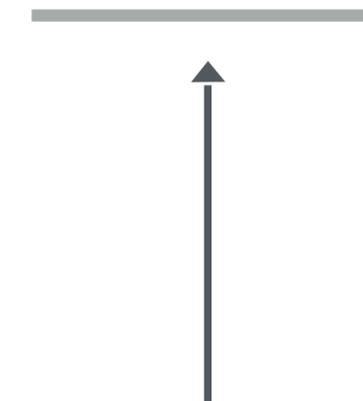
Vision 2030 Goals



Localize 50% of Military Spending

## Oil & Gas

75%



40

Local Content Oil & Gas

# Connecting 3 Continents

## A LOGISTICAL LOCATION

10% of World Trade passes by the Red Sea



Improving Governance and Easing Trade Movement



WE HAVE  
 Top Infrastructure

## OUR UPCOMING GOAL

1st in the GCC

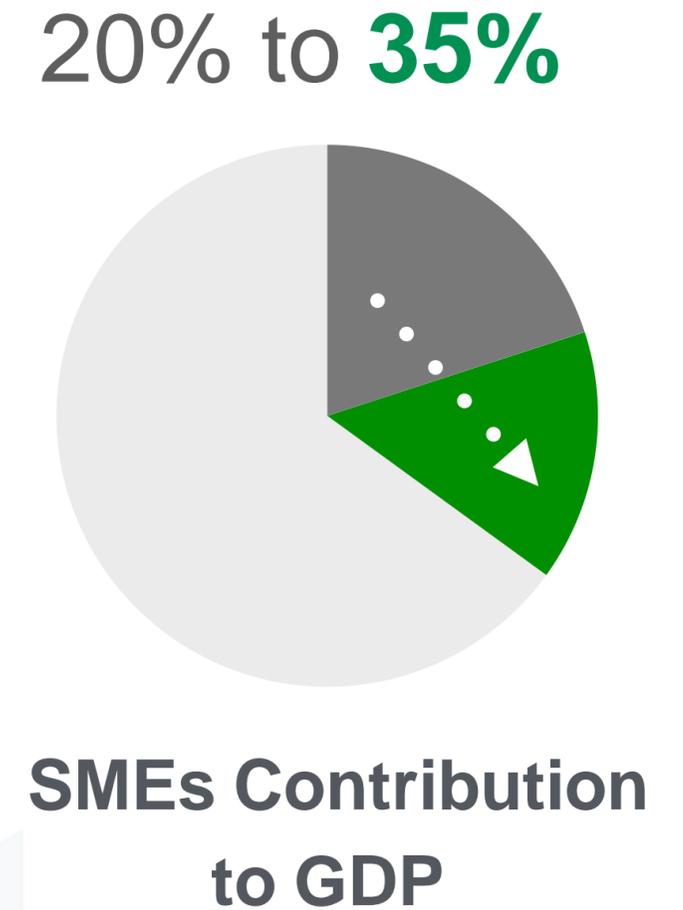
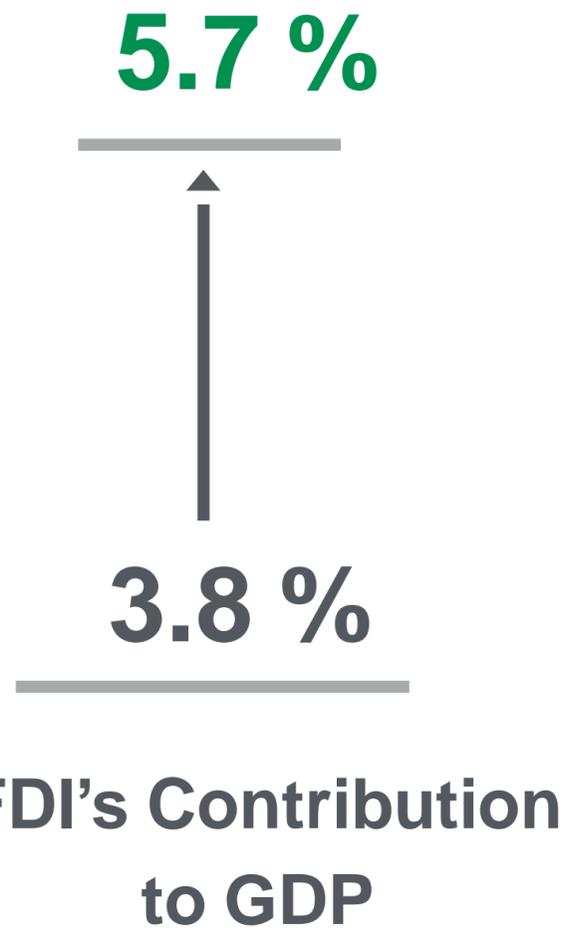


25

49

Logistics Performance Index

# A Thriving Economy

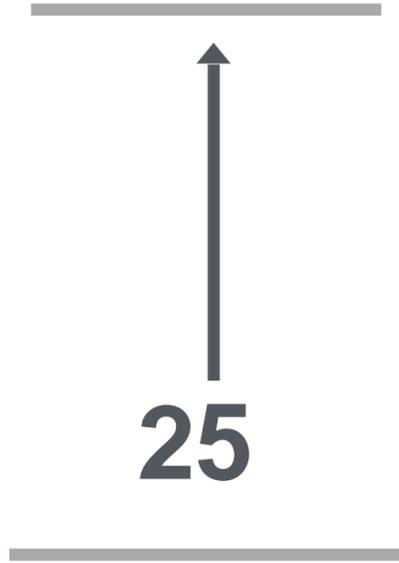


# Seamless Business Experience



**Ease of Issuing Instant Business Visas**

**Top 10**



**Global Competitive Index**



**Streamlined Government Procedures**

# Business Operating Environment



 **100%**

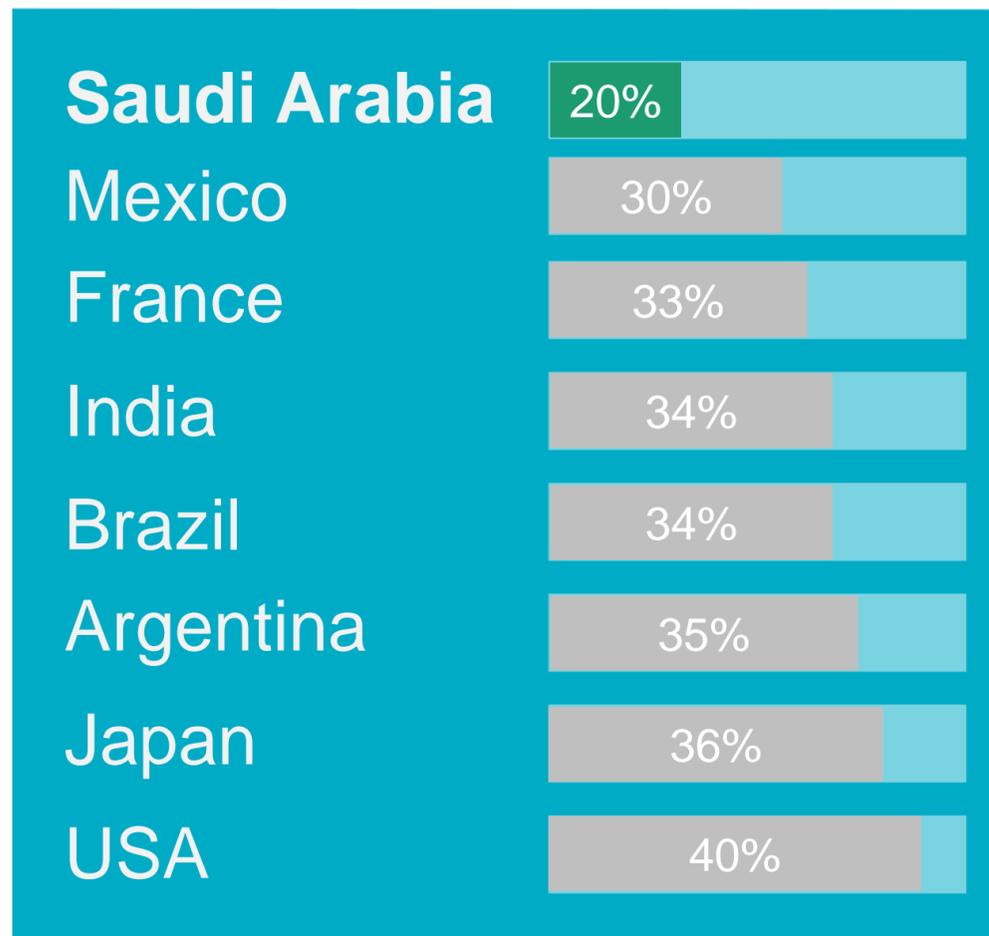
Foreign Ownership\*

 **20%**

Corporate TAX

# Taxation and Duties

## G20 Corporate Tax Rates 2015



### Current

- No VAT or Sales tax
- No personal income tax
- No land or property tax
- Full repatriation of profits,  
Subject to 5% withholding tax

### Future 2020

- Low VAT or Sales tax (selected products only, maximum 5%)
- Low personal income tax (Single digit tax for HNWI)
- No land or property tax (0.5 % to 1% tax on commercial)

# Financial Support



Up to

**75%**



**Project Cost**

Repayment  
Period

**15** Years

Grace Period

**2** Years

Up to

**50%**



**Saudis salaries\***

Period **2** Years

\* Certain Conditions Apply

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# Clear Goals, Clear Roles




**National Transformation Program 2020**

1. Enhanced Cooperation Between Entities
2. Effective Planning
3. Dynamic Governance

<b>543</b>	<b>178</b>	<b>376</b>
Initiatives	Strategic Initiatives	Key Performance Indicators



**THE STRATEGIC PARTNERSHIPS PROGRAM**

1. Building Economic Ties
2. Connecting Cultural & Social Ties
3. Building Political



**The Privatization Program**

1. Empowering Private Sector
2. Differentiating the Economy
3. Knowledge Transfer

**Transparency**

# SAGIA - One Stop Shop



## Advisory Services



Matching businesses to Investment opportunities

## Liaising Services



Tailored Coordination with all government departments

## Licensing Services



Instant Online Licenses



# ICT Opportunities in Vision 2030



## Examples of Government Investments in ICT

- Broadband stimulation fund
- Launch the Government Cloud
- Restructuring the Postal Sector
- E-Commerce stimulation programme
- Promote adoption of next generation IT services



This digital transformation is driving market opportunities across:

- E-Commerce
- Digital health
- Cloud computing
- Digital content
- Mobile gaming



# Transport Opportunities



## Investment PRIORITIES

01

Education & Hajj  
Bus

- + *School Bus*
- + *Hajj (pilgrimage) Bus*
- + *Bus Operations & Maintenance*
- + *Bus Components and Spare Parts*
- + *Alternative Financing Models (Bus aggregator leasing company)*

02

Metro & Rail

- + *Rolling Stock Components*
- + *Rail Infrastructure Components*
- + *Operations & Maintenance*
- + *Rolling Stock Manufacturing*

03

Airports & Aviation

- + *Airport Infrastructure*
- + *Airport Equipment*
- + *Operations & Maintenance*
- + *MRO*
- + *Aviation Components*

04

Maritime & Logistics

- + *Ports Operations*
- + *Training & Education Provision*
- + *Logistics Facilities & Operations*
- + *Infrastructure Development*
- + *Logistics Development zones*

# Healthcare opportunities



## Manufacturing

### Medical equipment

- Beds
- X-rays, CT scanners
- Ultrasound
- Monitors
- Advanced imaging and surgical equipment, software development and R&D

### Pharmaceuticals

- Vaccines
- Sterile injectables
- Plasma
- Generics
- Biosimilars
- API plant

## Services

### Service Provisioning

- New care sites
  - Primary healthcare centres
  - Long term care facilities
  - Mental healthcare facilities
  - Rehabilitation
  - Hospitals
  - Day surgery
  - Pharmacy led primary care
  - Urgent care clinics
- Home health service delivery
- E-health
- Outpatient laboratories and diagnostic services
- Alternative ownership and management models

### Support Services

- Waste management
- Bioequivalence centres
- Supply chain logistics
- Staff housing
- Staff recruitment
- IT platforms and tools

### Prevention

- Public health programs (Wellness)
- Fitness centre funding program

## Training and Research

### Education and Training

- Medical and nursing school capacity expansions
- AHP TVTC programs
- Advanced nursing programs
- CME programs
- Bridging programs for technical nurses
- Career entry training

Area



# Creating Opportunities



## Unique Opportunities



Retail



E-commerce



ICT



Renewable Energy



Tourism



Entertainment & Leisure



Financial Services

## Identified Projects



Healthcare



Transport



Industrial Equipment



Engineering Services



Downstream Chemicals



Mining

# 40 Years of success



“Dow is truly honored to be the first company to receive a trading license and advance our legacy of strategic partnerships and investments in the Kingdom...”

Dow has been a strategic partner in Saudi Arabia for nearly 40 years and we look forward to playing a key role in helping advance the Saudi’s Vision 2030 plan designed to create a vibrant society and a thriving diversified economy”

Andrew N. Liveris  
Dow Chairman and Chief Executive Office  
Dow Chemical Company



# 35 Years of success



“As a global leader in developing innovative solutions, our goal is to play an important role in the Kingdom’s effort to diversify its economy through knowledge and technology transfer. We will work closely with the Saudi government to enhance our manufacturing investment plans, invest in specialized research and development centers, and create high-value, technically sophisticated jobs.”

H. C. Shin

Executive Vice President for International Operations 3M



Science.  
Applied to Life.™



# 81 Years of success



“Over the last decade we’ve made a tremendous amount of progress in the kingdom helped by good guidance across the government, we believe that we’ve gotten a good return on our investment for our shareholders too.”

John G. Rice  
Vice Chairman GE



INVEST  
SAUDI

# Four decades of Success



## Honeywell

“We have found that Saudi presents a tremendous opportunity in terms of its local talent potential. The Saudi youth makes up more than 50 percent of the country’s population and this will provide a sustainable pipeline of talent to drive Saudi’s growth and economic diversification”

Norm Gilsdorf, President  
High Growth Regions, Middle East, Russia, Central Asia,  
Honeywell



# Austria's Transaction FDI to Saudi Arabia – Success Stories



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# Additional Slides



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