

# Localization of Industries In the Kingdom Of Saudi Arabia

- Aviation
- Customs
- **Industry**



# Main points of the report

- 01.** The importance of localizing industries in the Kingdom
- 02.** The connection of localization to Saudi Vision 2030
- 03.** Percentage of localization achieved until the end of 2024
- 04.** Sectors with the highest localization rates
- 05.** Industry ecosystem in the Kingdom / Government entities supporting the localization of industries
- 06.** The most prominent efforts of the Kingdom in the localization of industries
- 07.** Initiatives, legislations and programs which support the national industry
- 08.** National Industry Strategy
- 09.** The Role of Partnerships with the Private Sector in Strengthening Localization
- 10.** Supporting innovation and modern technologies in the industrial sector
- 11.** Challenges to localization and proposed solutions





## The importance of localizing industries in the Kingdom

Saudi Arabia's industry localization initiatives are key to achieving Saudi Vision 2030, which aims to diversify the economy and reduce dependence on oil. The importance of localizing industries lies in several key aspects:

### 01

#### Providing job opportunities and reducing unemployment

The localization of industries Leads to new job opportunities for citizens, which contributes to reducing the unemployment rate. And in line with Vision 2030

The Kingdom aims to reduce the unemployment percentage to 7%.

### 02

#### Strengthening the national economy

Localization of industries contributes to an increase in Gross Domestic Product (GDP), as GDP increased at constant prices for manufacturing industries

From 32 billion riyals in 1974 to about 319.5 billion riyals by the end of 2024 AD.

### 03

#### Enhancing innovation and technical development

Localization of industries supports the development of national capabilities in manufacturing and services, which enhances innovation and technical development in the Kingdom.

### 04

#### Strengthening national security

The localization of military industries contributes to enhancing the Kingdom's defense capabilities, which strengthens national security.

### 05

#### Achieving self-sufficiency

The localization of industries helps in achieving self-sufficiency and reduce dependence on imports, and also contributes to the strengthening of the national economy.

Especially in vital areas such as pharmaceutical industries.

### 06

#### Stimulating private sector

Localization of industries contributes to stimulating innovation within the private sector, by developing local skills and capabilities in manufacturing and services.

which strengthens the role of private sector in the national economy.



## The connection of localization to Saudi Vision 2030

Localization is closely linked to Saudi Vision 2030, as it is one of the main pillars for achieving the goals of the vision in developing the national economy and strengthens sustainable development. This connection manifests itself in several main points:

### 1. Providing job opportunities and reducing unemployment:

- **Increasing the participation of Saudis in the labor market:** Localization programs aim to increase the percentage of Saudis working in different sectors, which contributes to reducing unemployment rates.
- **Employment Statistics:** According to reports, the number of Saudi workers in the private sector reached about 2.2 million, with the Saudi workforce rising to 52.5%, and the vision aims to reach 60% by 2030. The localization percentage reached 23%, and unemployment percentage of 7.1% were recorded, which is unprecedented percentage in the Saudi labor market, and close to the target of Vision 2030, which is 7%.

**23%**

▲ Percentage  
of localization

**2,200,000**

Number of Saudi workers in  
the private sector

**7.1%**

▼ Unemployment  
percentage

### 2. Strengthening the Role of Private Sector:

- **Partnership with the Private Sector:** Localization programs are part of joint government and private sector efforts for strengthening economic development.
- **Private Sector Initiatives:** Major companies such as "SABIC" have launched initiatives for supporting investors in related fields, with the aim of driving investment and creating local demand.

### 3. Human Capital Development:

- **Human Capabilities Development Programs:** Vision 2030 focuses on investing human resources by developing the capabilities of citizens and preparing them for the future labor market.
- **Aligning Education with Market Demands:** Vision programs aim to improve the quality of education and training, and align education outcomes with labor market requirements, for enabling citizens to compete globally.



#### 4. Localization of Industries:

- **Strengthening Entrepreneurial Thought:** The Kingdom seeks to localize industries as part of achieving Vision 2030, in order to support entrepreneurial thinking and strengthening the national economy.

#### 5. Increasing women's participation in the labor market:

- **Empowering women:** Localization programs aim to empower Saudi women and increase their participation in the labor force, which strengthens her role in economic and social development.
- **High percentage of women's participation in the labor market:** Saudi women's participation in the labor market increased from 19.4% in 2017 to 35.8% in 2024.



#### 6. Attracting Global Talent:

- **Attracting Competencies:** The Kingdom seeks to attract global competencies and talents to contribute to achieving the goals of the Vision, by improving the work environment and providing appropriate opportunities.
- **Improving the Work Environment:** The Kingdom is working to improve the work environment and provide appropriate opportunities for attracting global competencies.



#### 7. Diversification of the economy and reducing dependence on oil:

- **Diversification of Sources of Income:** Localization contributes to the diversification of sources of national income through the development of new sectors and the localization of industries, reducing dependence on oil as a major source of revenue.
- **Development of New Sectors:** The Kingdom seeks to develop new sectors and localize industries to diversify the economy.

#### 8. Digital Infrastructure Development:

- **Digital Infrastructure Strengthening:** The Kingdom seeks to strengthen the digital infrastructure for supporting localization programs, which contributes to improve the efficiency of services and providing an advanced work environment.
- **Improving the Efficiency of Services:** Strengthening digital infrastructure contributes to improve the efficiency of services and providing an advanced work environment.



# Percentage of localization achieved until the end of 2024

Until the end of 2024, Saudi Arabia had made tangible progress in its localization efforts, reflecting the government's commitment for enhancing citizens' participation in the labour market. Here are some prominent statistics and decisions:



## 1. Increase in the number of Saudis working in the private sector

The number of Saudis working in the private sector reached 2.4 million in 2024, compared to 1.7 million in 2018.

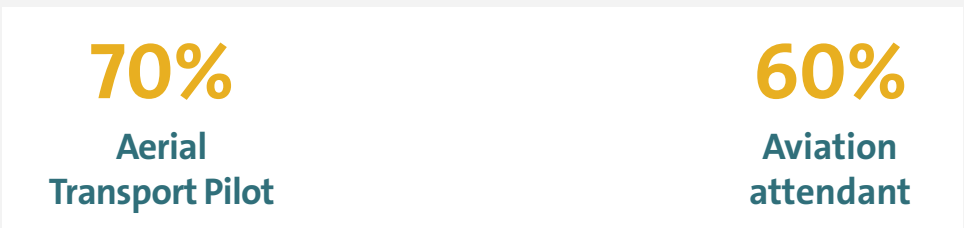


## 2. Localization of aviation professions

- The first phase, March 15, 2023, included the localization of the following professions:



- The second phase of March 4 included the localization of the following professions



## 3.Localizing of 269 professions in different sectors

The Ministry of Human Resources and Social Development has issued decisions to localize 269 professions in different sectors, in partnership with the Ministries of Health, Commerce, Municipalities and Housing. These decisions included the professions of dentistry, pharmacy, accounting, and engineering technical professions, with the aim of providing stimulating and productive job opportunities for male and female citizens in various regions of the Kingdom.



## 4. Localization of translation, secretarial work, data entry and inventory professions

Translation, secretarial work, data entry, and inventory custodian professions have been 100% localized, which means working in these jobs is entirely and exclusively Saudi.



## 5. Localization of Transport Sector Jobs

As of the end of the third quarter of 2024, 29 thousand jobs in the transport sector had been localized, with the percentage of local content increasing from 39% to 50% during the same year.



Note: The above list is not exhaustive

# Sectors with the highest localization rates

Labor market data in Saudi Arabia shows that some sectors have achieved high localization percentages, reflecting the Kingdom's efforts for strengthening the participation of citizens in various fields. The following are the most prominent sectors that witnessed the highest rates of localization:



1

## Financial and Insurance Sector

The localization percentage in this sector exceeded

83%

Which makes it **one of the top sectors** in hiring Saudis

2

## Mining Sector

This sector has recorded an approximate localization percentage

63%

Which reflects the efforts made for strengthening the participation of national cadres in the mining industries

3

## Communications and Information Technology Sector

The localization percentage was about

58%

Which reflects clear efforts to empower national talents in this vital sector.

4

## Construction Sector

This sector witnessed a localization percentage of

35%

With a marked increase in the employment of Saudis in construction projects

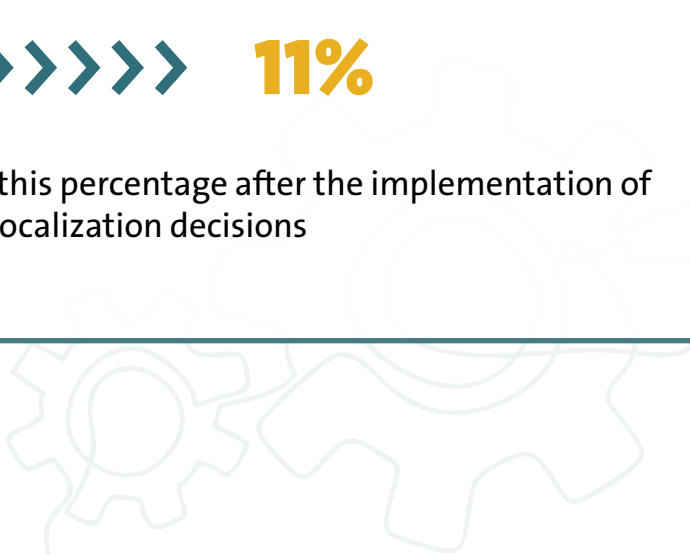
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## Wholesale and Retail Trade Sector

The localization percentage in this sector increased in the first quarter of 2021 to the second quarter of the same year

9% >>>>> 11%

With expectations of increasing this percentage after the implementation of the new localization decisions





## Industry ecosystem in the Kingdom Government entities supporting the localization of industries

The Kingdom of Saudi Arabia is working for strengthening the localization of industries through integrated efforts of several government entities, aimed to strength local content and reducing dependence on imports. The following are the most prominent of these entities with supporting sources:



The Ministry seeks to advance the industrial and mining sectors, and contribute to achieve sustainable development, in line with the Kingdom's Vision 2030, which identified these two sectors as strategic options for diversifying the national economy, and aimed to raise their contribution to GDP, through the implementation of the initiatives of the national industrial development and logistics program to transform the Kingdom into a leading industrial and mining power, and a global logistics platform.



With the aim of developing industrial cities in Jubail and Yanbu, the Authority works to provide an integrated industrial environment to support the national economy, through the development of infrastructure and the implementation of various industrial projects in areas such as petrochemicals and energy. It also seeks to provide an attractive investment environment and strengthening sustainable development.



Responsible for the development and management of industrial cities and technology zones in the Kingdom, with the aim of strengthening industrial investment and providing a suitable environment for investors.



The Authority works to for strengthening local content in government procurement, with the aim of strengthening local potential and maximizing the benefit of national purchasing power to build a strong and sustainable economy.



The Authority is concerned with increasing Saudi non-oil exports and opening up to international markets, and employing all its economic potentials, towards improving the efficiency of the export environment by developing programs and providing incentives to exporters, encouraging Saudi products in international markets, raising their competitive quality and achieving their access to international markets to reflect the status of the Saudi product, as the work of "Saudi Exports" comes as a translation of the Kingdom's Vision 2030 AD, and to meet the aspirations of the wise leadership towards diversifying sources of income for the national economy.



The Authority aims to provide geological and cadastral services in the Kingdom of Saudi Arabia. It also conducts geological studies and research and provides the necessary geological data to support economic and industrial development processes, in addition to providing technical support in the field of natural resources, such as water, minerals and energy.





This program aims to transform the Kingdom into a leading industrial power and a global logistics platform, through the development of industry, mining, energy and logistics sectors.



The National Center for Industrial Development seeks to contribute to achieving sustainable industrial development by targeting industrial sectors with an impact on the national economy and leading efforts towards developing, encouraging and empowering industries in line with the goals of Saudi Vision 2030.



The Industrial Fund continues its pioneering activity in developing the local industrial sector and keeping pace with developments, through integration with government entities, and expanding its support to include a number of promising sectors in the fields of industry, energy, mining and logistics.



The Made in Saudi program is a national initiative launched by the Saudi Export Development Authority as part of the National Industry and Logistics Development Program, and aims to stimulate national industries, encourage consumers to buy local goods, and develop and strengthens the Kingdom's exports to global markets.



It aims to enhance the development of Saudi non-oil exports and increase their competitiveness in international markets, by providing credit solutions to finance exports, guarantees, and securing export credit with competitive advantages, as part of the goals of the Kingdom's Vision 2030 to increase the proportion of non-oil exports.



## The most prominent efforts of the Kingdom in the localization of industries



The Kingdom of Saudi Arabia is working to strengthen the localization of industries through the development of infrastructure and the establishment of industrial zones, through several efforts and initiatives aimed to achieve the goals of Saudi Vision 2030. The following are the most prominent of these efforts:

### Road Infrastructure Development

The Kingdom has implemented smart transportation applications and activated initiatives such as the National Center for Road Safety, with the aim of improving infrastructure and reducing traffic accidents, which supports industrial and commercial movement.

### Achieve advanced positions in infrastructure indicators

The Kingdom ranked first in the Arab world and 20th globally in the Quality Infrastructure Index for Sustainable Development 2024, reflecting progress in infrastructure development to support industries.

### Supply Chain and Logistics Services Development

Since the launch of the National Industrial Development and Logistics Services Program in 2019 AD, the Kingdom has become a major global player in the energy, mining, industry and logistics services sectors. This development contributed to the diversification of the economy and the creation of multiple jobs, with a focus on the extraction of mineral wealth estimated at SAR 4.88 trillion.

### Strengthening the role of industrial engineering in infrastructure projects

Industrial engineering contributes to improve operations and productivity in infrastructure projects, such as the Haramain Road Project. By applying the principles of sustainability and innovation, the Kingdom aims to achieve excellence and leadership in infrastructure development.

### Focus on basic and manufacturing industries

The Kingdom pays great attention to the development of petrochemical industries, where it is one of the largest petrochemical producers globally through companies such as SABIC and Aramco. This is part of efforts to diversify the economy and reduce dependence on oil.



## Strengthening local content in various sectors

The Kingdom of Saudi Arabia seeks to strengthen local content and localize industries in various sectors, through a set of initiatives and programs aimed to develop the national economy and achieving the goals of Vision 2030. The following are the most prominent of these efforts:

### Initiatives of the Ministry of Environment, Water and Agriculture



The Ministry seeks to support local content through projects such as cultivating more than **5 million trees** within the Saudi Green Initiative, **and rehabilitating 118 thousand hectares** of land for vegetation cover development.

### "Nartaqi" (We Elevate) Program from Saudia Group



Saudia Group has launched the "Nartaqi" program to strengthen and develop local content, which has **increased the percentage of local content from 19% in 2019 to about 29% currently.**

### SABIC Initiatives



As part of its **commitment to achieve the goals of Saudi Vision 2030**, SABIC is working to strengthen national competencies and capabilities across the value chain.

### Global Corporate Initiatives



**Global companies, such as Mitsubishi Power**, support the localization of clean industries and strengthening local content by investing in national cadres and equipping them with advanced technical skills.

## Stimulating investment in local manufacturing

The Kingdom of Saudi Arabia seeks to stimulate investment in local manufacturing and localization of industries through a range of strategic initiatives and programs. The following are the most prominent of these efforts:



### Initiative of "Stimulating Local Industry"

The Ministry of Industry and Mineral Resources launched this initiative with the aim of **stimulating investment in the industrial sector and raising the percentage of local content.**



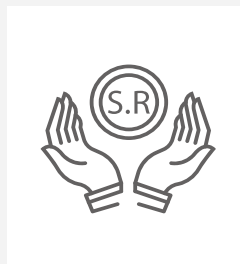
### "Nusaned" (We Support) Program by SABIC

This program is SABIC's first integrated localization engine, **aiming to stimulate local content development efforts and enable investment in the industrial sector.**



### Local Content Development Program

This program aims to increase the contribution of the Fund and its subsidiaries to local content to reach 60% by the end of 2025, and to support and empower the private sector.



### Increasing Foreign Direct Investment Inflows

**In 2023, the Kingdom attracted \$25.6 billion in foreign direct investment, exceeding the established target, with these investments concentrated in the manufacturing and financial sectors, insurance, construction, and trade.**

## Stimulating investment in local manufacturing

The Kingdom of Saudi Arabia seeks to strengthen the national industry by launching initiatives, legislation and programs, with the aim of achieving economic diversification and developing the industrial sector in line with the Saudi Vision 2030. The most prominent of which are:

01

### National Industry Strategy:

In January 2025, the Ministries of "Industry and Mineral Resources" and "Investment" announced the **allocation of 10 billion riyals to activate the standard incentives for the industrial sector.** These incentives aim to enable industrial investments and stimulate their growth, **with coverage up to 35% of the initial investment and a maximum of 50 million riyals per eligible project.**

02

### Initiative of Improving Regulations and the Legislative Environment in the Industry Sector:

This initiative aims to develop and adopt the industrial sector governance document, and localize the promising sectors targeted in the National Industrial Strategy, **which contributes to improve the legislative and regulatory environment for the industrial sector.**

03

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04

### System of Protection and encouragement of National Industries

This system aims to protect and encourage national industries by providing facilities and incentives to investors in the industrial sector, **which contributes to strengthen competitiveness and supporting local products.**

05

### Future Factories Program

This program aims to **transform 4000 factories** to rely on advanced technologies by 2030. **Financial incentives have been provided to more than 490 factories** within this program to strengthen digital transformation in the industrial sector.



# National Industry Strategy

The National Industrial Strategy of the Kingdom of Saudi Arabia seeks to achieve a set of ambitious goals for strengthening and developing the industrial sector. In addition to the aforementioned goals, additional goals include:

## 1 Reducing the Deficit in the Industrial Trade Balance

The strategy aims to reduce the deficit in the industrial trade balance by more than 80%, which enhances the balance of the Kingdom's foreign trade.

## 2 Increasing exports of high-tech products

The strategy seeks to raise the percentage of exports of advanced technical products from 0.6% of total exports in 2020 to 32%, reflecting the Kingdom's orientation towards high-value-added industries.

## 3 Developing a Governance Model for the Industrial Sector

A governance model for the industrial sector was developed through the formation of the Supreme Committee for Industry chaired by the Crown Prince, and the formation of the Industrial Council with the participation of the private sector, to ensure the involvement of industrial investors in decision-making and policy development.

## 4 Strengthening Regional Integration of Value Chains

The strategy seeks to lead the industrial regional integration of value chains, leveraging the strengths of the Saudi economy to achieve global leadership in a range of selected commodities.

## 5 Investing in New Technologies

The strategy focuses on investing in promising new technologies, which strengthens the competitiveness of the industrial sector and keeps pace with global technological developments.

## 7 Increasing the Number of Factories

The strategy aims to increase the number of factories in the Kingdom to about 36,000 by 2035, reflecting significant growth in the industrial sector.

## 9 Industrial Infrastructure Development

The Kingdom has allocated a budget of 68 billion riyals for the developing the sector, including 51 billion riyals for the development of industrial infrastructure, which contributes to improve the investment environment.

## 6 Creation of Specialized Jobs

The strategy aims to create tens of thousands of specialized high-value jobs in the industrial sector, providing meaningful jobs opportunities for citizens.

## 8 Strengthening Local Content

The strategy aims to strengthen local content in the oil and non-oil sectors, supporting national products and strengthening localization.

## 10 Supporting Small and Medium Enterprises

The strategy includes incentives to support small and medium enterprises, which enhances their role in the national economy and contributes to the diversification of the industrial base.

# Targeted Industrial Sectors

The National Industry Strategy in Kingdom of Saudi Arabia focuses on 12 sub-sectors with the aim of diversifying the industrial economy and strengthening sustainable growth. This strategy targets more than 800 investment

opportunities worth SAR 1 trillion, contributing to tripling industrial GDP and doubling the value of industrial exports to SAR 557 billion by 2030.

## Airplanes Industry

Developing the Kingdom's Capabilities in the Manufacture of Airplanes and their Components.



## Auto Industry

Strengthening the Production of Cars and Spare Parts Locally.



## Food Industries

Expanding the Production of Medicines and Medical Supplies.



## Food Industries

Production of High Value-Added Chemical Materials.



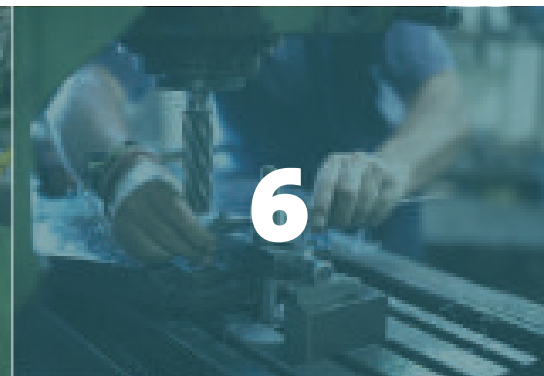
## Food Industries

Strengthening the Production and Export of Food Products.



## Machinery and Equipment Industry

Manufacture of heavy Machinery and Equipment.



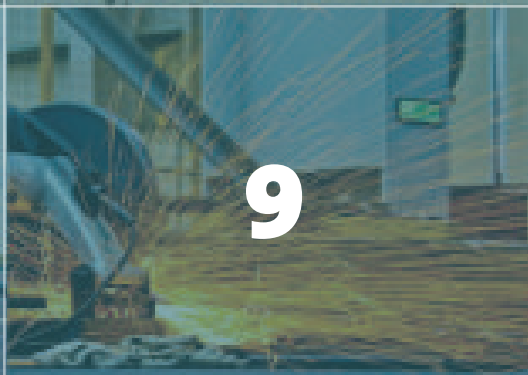
## Electronics Industry

Developing the Kingdom's Capabilities in the Production of Electronic Devices.



## Renewable Energy Industry

Manufacturing Solar and Wind Components.



## Metals Industry

Development of the Mining and Metals Processing Sector.



## Plastic and Rubber Industry

Production of Various Plastic and Rubber Products.



## Paper and Packaging Industry

Strengthening the Production of Paper and Packaging Materials.



## Textiles and Garments Industry

Development of the Textile and Ready-Made Garments Sector.



## The Role of Partnerships with the Private Sector in Strengthening Localization

Partnerships with the private sector play a vital role in strengthening localization in Kingdom of Saudi Arabia, as they contribute to achieve the goals of Vision 2030 aimed to diversify the economy and increase the participation of citizens in the labor market. The following are the most prominent roles of these partnerships:

1. Accelerate the Growth of Local Investments.
2. Achieving Economic Sustainability.
3. Increasing Local Content.
4. Launching Joint Platforms.
5. Injecting Huge Investments in the National Economy.
6. Infrastructure Development.
7. Strengthening Innovation and Technology.
8. National Skills Development.
9. Entrepreneurship Stimulation.
10. Strengthening Global Competitiveness.





# Supporting Innovation and Modern Technologies in the Industrial Sector

The Kingdom of Saudi Arabia seeks to strengthens innovation and the adoption of modern technologies in the industrial sector through several strategic initiatives and efforts aimed to achieve sustainable development and diversifying the national economy. The following are the most prominent of these efforts:

## King Abdel Aziz City for Science and Technology (KACST)

KACST has made qualitative leaps in the research, development and innovation sector, strengthening the Kingdom's position and competitiveness globally.

## National Industrial Development and Logistics Services Program (NIDLP)

The program aims to transform the Kingdom into a leading industrial power and a global logistics hub, benefiting from its strategic location and natural resources.

## Digital Transformation

The Kingdom seeks to strengthens digital transformation in various sectors, which contributes to improve efficiency and adopting modern technologies in the industrial sector.

## Supporting Emerging Technologies

The Kingdom is working to adopt quality solutions to support the future of digital government, which strengthens the use of modern technologies in the industrial sector.

## Financial Investments to Strengthen Innovation

The Kingdom has allocated 10 billion riyals to support standard incentives in the industrial sector, with the aim of achieving the goals of localizing industries and strengthening local competency, in line with the Kingdom's Vision 2030.

## Strategic Partnerships with Global Companies

The Kingdom is strengthening digital transformation through partnerships with leading technology companies such as "Dell Technologies", which has contributed to the localization of production, and the adoption of artificial intelligence, which strengthens the Kingdom's position in the field of technical innovation.

## Authority of Research, Development and Innovation Development

The Authority has launched a number of initiatives in support of the research and innovation system in the Kingdom, with the aim of finding innovative solutions in line with global trends.

## Developing the Knowledge Economy

The Kingdom is working to strengthen the knowledge economy as one of the pillars of Vision 2030, with the aim of diversifying the national economy and transforming into a knowledge-based and innovation-based economy.

## Development of Supply Chains and Logistics in the Military Industries

Saudi Arabia seeks to strengthen its industrial capabilities in the military sector through the Supply Chains Project, which aims to localize more than 50% of government spending on military equipment and services by 2030, including 76 investment opportunities worth 270 billion riyals.

## Holding Technical Exhibitions for Strengthening Innovation

The Kingdom hosted events such as LEAP 2025 in Riyadh, one of the largest technology gatherings in the world, where the latest innovations in artificial intelligence, the Internet of Things, and advanced industrial technologies were showcased. This exhibition is a strategic platform to strengthen the adoption of modern technologies in various sectors, especially the industrial sector, which supports the Kingdom's orientation towards digital transformation and sustainable industrial innovation.





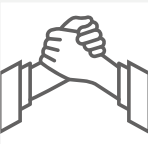
# Challenges to localization and proposed solutions

## Key Challenges

**1. Lack of skills and experiences:** Some sectors suffer from a lack of qualified local competencies, which leads companies to rely on foreign workers.



**2. Private Sector Resistance:** Some private sector establishments hesitate to hire Saudis due to perceptions of training and qualification costs.



**3. Regulatory Renewal and Alignment with Aspirations:** Ongoing updates to regulations create space for continuous development and improvement, encouraging some companies to realign their employment strategies in line with localization goals.



**4. Weak Working Environment in Some Sectors:** An unattractive or inappropriate working environment may discourage Saudis from joining some jobs, especially in the craft or manual sectors.



**5. High Employment and Training Costs:** Employing Saudis may require higher costs compared to expatriate workers, both in terms of salaries or training and qualification programs.



**6. Limited Geographical Mobility:** Some Saudis may be hesitant to move to areas away from their residence for the work, which reduces employment opportunities in certain areas.



**7. Commercial Concealment:** The existence of commercial concealment practices strengthens the chances of irregular foreign employment, which reduces the chances of Saudis getting suitable jobs.



**8. Alignment of Administrative and Organizational Procedures:** Some institutions may encounter opportunities for development in aligning their operations with government localization policies, due to existing administrative and organizational challenges.



## Proposed Solutions



**1. Developing specialized training programs:** Launching training programs aimed to provide Saudis with the skills required in the labor market, with a focus on sectors that suffer from a lack of competencies.



**2. Stimulating Private Sector:** Providing incentives to companies that are committed to hire and train Saudis, such as tax exemptions or financial support.



**3. Simplification of Administrative Procedures:** Facilitating and streamlining government policies related to localization for encouraging enterprises to comply without bureaucratic complications.



**4. Workplace Development:** Improving working conditions and providing an attractive work environment for Saudis, with a focus on developing facilities and offering additional benefits for strengthening job loyalty



**5. Providing incentives to companies committed to localization:** Granting tax benefits or financing facilities to companies that achieve high localization percentages, which encourages more companies to adopt the employment of Saudis.



**6. strengthening Geographic Mobility:** Providing financial or housing incentives to Saudis willing to work in areas far from their original residence, contributing to a more balanced workforce distribution.



**7. Combating Commercial Concealment:** Tightening control and applying strict penalties on commercial concealment practices, to ensure real employment opportunities for citizens.



**8. Establishing a Higher Authority for the Workforce:** Establishing a central authority for formulating policies and regulating the labor market, ensuring the coordination of efforts and the unification of legislation related to employment and localization.

**9. Strengthening Public-Private Partnerships:** Establishing strategic partnerships between government and the private sector to identify market needs and develop joint solutions to existing challenges.

## References



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### About Tarjama:

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