

Competitiveness

▶ Quarterly update from The National Competitiveness Center 4th 2025

▶ **Saudi-Italian Business Forum** Attracts 133 Italian Companies

▶ **Saudi Arabia Takes the Lead** in Global E-Commerce Measurement in Cooperation with UNCTAD



United Nations
UNCTAD

المركز الوطني للتنافسية
NATIONAL COMPETITIVENESS CENTER

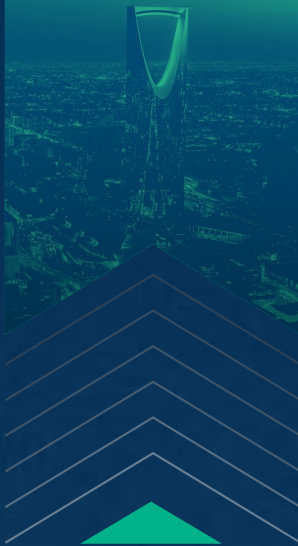


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A High-level Workshop on Digital Trade & AI



Quarterly Brief



The NCC newsletter for Q4 of 2025 outlines the developments the Kingdom has witnessed globally. It highlights the National Competitiveness Center's key activities and initiatives aiming to enhance Saudi Arabia's global competitiveness and improve the business environment.

The current edition of the newsletter, published by the National Competitiveness Center, highlights a high-level workshop held in Vienna. The workshop discussed digital trade & AI and their legislative and regulatory frameworks, as part of the Kingdom's cooperation with the United Nations in advancing international commercial law development.

The publication also features the Kingdom's participation in the 16th session of the United Nations Conference on Trade and Development (UNCTAD) in Geneva, with the theme "Shaping the future: Driving economic transformation for equitable, inclusive and sustainable development."

Additionally, it spotlights an official visit to Rome aimed at boosting bilateral trade in priority sectors and further strengthening the economic partnership between the two friendly nations.

What is Competitiveness?

It is a state's ability to make the best use of all of its resources, policies, and institutions to improve the adequacy and quality of services provided to individuals and businesses, thereby contributing to long-term development and placing it in a leading competitive position.

Our Vision



By 2030, the Kingdom will be one of the world's most competitive economies, driven by our focus on investment, entrepreneurship, innovation, and productivity.

Our Mission



is to improve the Kingdom's competitiveness and align government entities' strategies around a unified vision by developing the legislative and procedural environment.



The Knowledge Hub

Serves as an international platform that exchanges expertise, knowledge, ideas, and best practices among countries worldwide.

01

June 16 - 18, 2025

A Regional Workshop on the Business Readiness Report Methodology



02

October 14 - 16, 2025

Knowledge Exchange Workshop on Business Start-Up Reforms

03

November 24, 2025

Communication for Development Workshop



04

December 1, 2025

Advancing Industrial Competitiveness: Cluster-Based Approaches for Economic Growth

December 18 - 19, 2025

NCC and UNCITRAL Advance Dialogue on Digital Trade & AI



In light of ongoing developments in international commercial law, the National Competitiveness Center, in collaboration with the United Nations Commission on International Trade Law (UNCITRAL), organized a high-level international workshop in Vienna from December 18 – 19. The two-day workshop, held within the framework of collaboration between the Kingdom of Saudi

Arabia and the United Nations, focused on digital trade, AI, and their legislative and regulatory frameworks.

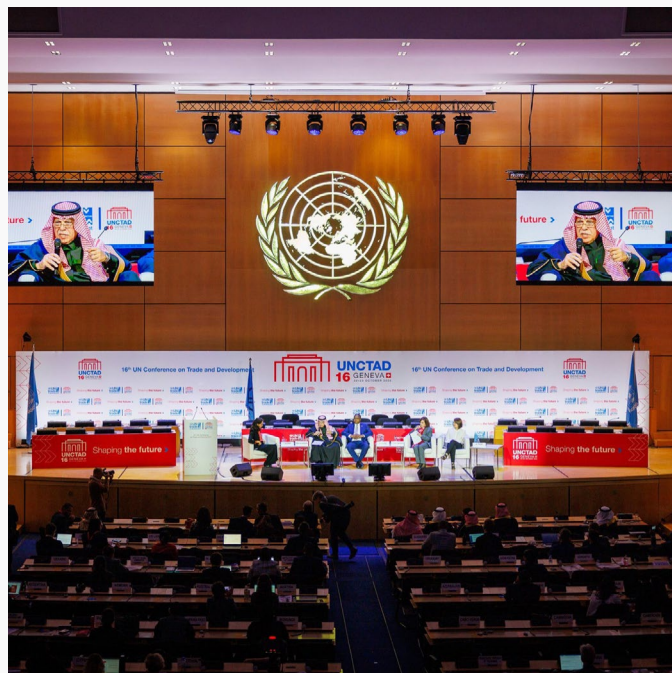
The workshop featured seven specialized sessions. Discussions addressed AI in international trade, with a focus on its role in enhancing supply chain efficiency, logistics operations, and facilitating e-commerce.

October 21, 2025

Saudi Minister of Commerce Participates in 16th Session of the United Nations Conference on Trade and Development (UNCTAD)

His Excellency Dr. Majid bin Abdullah Al-Kassabi, Minister of Commerce and Chairman of the Board of the National Competitiveness Center, emphasized the role of Saudi Vision 2030 during the proceedings of the 16th session of the United Nations Conference on Trade and Development. He noted that the Vision, launched by HRH Prince Mohammed bin Salman bin Abdulaziz Al-Saud, the Crown Prince and Prime Minister (may God protect him), has driven an unprecedented transformation of the Saudi economy, making it markedly different from the past.

The Kingdom took part in the session in Geneva, with the theme “Shaping the future: Driving economic transformation for equitable, inclusive and sustainable development.” The event brings together high-level governmental representation, including 60 ministers, 40 deputy ministers, and senior officials from 195 countries.



October 23, 2025

National Competitiveness Center Organizes Saudi-Italian Business Forum in Rome



His Excellency Dr. Majid bin Abdullah Al-Kassabi, Minister of Commerce and Chairman of the Board of the National Competitiveness Center, visited Italy's capital, Rome, accompanied by a Saudi business delegation from both the public & private sectors.

The official visit aimed to elevate the level of economic partnership between the Kingdom of Saudi Arabia and the Italian Republic. During the visit, His Excellency also participated in the Saudi-Italian Business Forum, organized by the National Competitiveness Center, which was attended by over 200 leaders from the public & private sectors of both countries, alongside 133

Italian companies. The event reflected the steady growth of bilateral relations and the strong commitment to building a sustainable strategic partnership.

H.E. Dr Al-Kassabi held meetings with officials from both the public & private sectors, which included the participation of HRH Prince Faisal bin Sattam bin Abdulaziz Al-Saud, Ambassador of the Custodian of the Two Holy Mosques to Italy. The discussions reviewed the investment opportunities created by Saudi Vision 2030 and explored ways to encourage Italian companies to expand their operations in the Kingdom, particularly in promising sectors.



December 2, 2025

Saudi Arabia Takes the Lead in Global E-Commerce Measurement in Cooperation with UNCTAD



During her participation in the UNCTAD Working Group on Measuring the Value of E-commerce (TG-eCOM), hosted by the WTO, Her Excellency Dr. Eiman Al-Mutairi, Vice Minister of Commerce and CEO of the NCC, emphasized that Saudi Arabia is collaborating with UNCTAD to build an integrated national framework to measure all types of domestic

and cross-border e-commerce transactions. The framework will cover B2C, B2B, and B2G activities, ensuring an accurate and comprehensive assessment of the Kingdom's e-commerce sector, which is projected to reach a market size of USD 15.4 billion by the end of 2025.

December 3, 2025

The World Trade Organization Highlights the Kingdom of Saudi Arabia's Experience in Promoting Trade in Services



During a high-level session hosted by the World Trade Organization (WTO) in Geneva, H.E. Dr. Eiman bint Habbas Al-Mutairi, Vice Minister of Commerce and CEO of the National Competitiveness Center, presented Saudi Arabia's experience in strengthening trade in services, alongside the economic and

development reforms undertaken. The meeting addressed how global cooperation and the "Services for Development" initiative of the WTO and World Bank Group can accelerate the integration of services trade into development strategies.

October 27, 2025

Al-Kassabi Holds Roundtable Meeting with U.S. Private Sector



H.E. Dr. Majid bin Abdullah Al-Kassabi, Minister of Commerce and Chairman of the National Competitiveness Center, met a delegation from the U.S. private sector led by Mr. Khush Choksy, Senior Vice President for the Middle East at the U.S. Chamber of Commerce, and Mr. Steve Lutes, Vice President for Middle East Affairs at the Chamber. The meeting was held earlier today at the National Competitiveness Center, aimed at discussing boosting economic

cooperation between the two countries.

The roundtable, jointly organized by NCC and the U.S. Chamber of Commerce, discussed the Economic Partnership Program in light of the growing momentum of Saudi-U.S. economic relations. The discussions focused on expanding bilateral trade and investment, strengthening private-sector partnerships, and enhancing cooperation in innovation and promising sectors.

October 27, 2025

Al-Kassabi & UK Treasury and Investment Ministers Hold Talks to Deepen Trade and Economic Relations



H.E. Dr. Majid bin Abdullah Al-Kassabi, Minister of Commerce and Chairman of the National Competitiveness Center, met a British delegation led by Rt. Hon. Rachel Reeves, UK Chancellor of the Exchequer, and Mr. Jason Stockwood, UK Minister of Investment, in the presence of H.M. Dr. Stephen Charles Hitchins, British Ambassador to Saudi Arabia, along with a number of senior British officials.

The meeting discussed ways to enhance trade and economic relations between the two friendly countries, with a focus on priority and high-potential sectors. Discussions also covered cooperation in financial services, fintech, e-commerce, innovation, advanced manufacturing, supply chains, competitiveness, and exports, in addition to reviewing key joint initiatives and developments under the Economic and Social Committee of the Saudi-UK Strategic Partnership Council.

December 10, 2025

A Delegation of 67 London Business School Executives Learned about Saudi Arabia's Approach to Implementing Reforms



As part of the partnership between the National Competitiveness Center and London Business School (LBS), which aims to develop academic content on Saudi Arabia's experience in implementing economic & development reforms and integrate it into the School's executive education curricula, thereby strengthening the Kingdom's position as a leading model for transformative economic policies in the global academic landscape, H.E. Dr. Majid bin Abdullah Al-Kassabi, Minister of Commerce and Chairman of the National Competitiveness Center, met

with a group of executive leaders participating in LBS executive education programs, led by Professor Florin Vasvari, Executive Dean, Executive Education.

The visit, which included 67 executives from 35 countries, aimed to showcase Saudi Arabia's experience in implementing economic & development reforms and their impact on enhancing the Kingdom's competitiveness, in addition to presenting case studies developed by the School on selected reforms implemented across both the public and private sectors.

December 8, 2025

NCC is Carrying Forward its Scheduled Meetings with the U.S.-Saudi Business Council

Her Excellency Dr. Eiman bint Habbas Al-Mutairi, Vice Minister of Commerce and CEO of the National Competitiveness Center, received a U.S. business delegation led by Mr. Charles S. Hallab, President & CEO of the U.S.-Saudi Business Council. The meeting explored ways to expand economic & trade ties, foster private sector collaboration, and tap into high-potential sectors.



November 24, 2025

Al-Mutairi Received a Delegation from Snøhetta to Discuss Ways for Joint Initiatives

Her Excellency Dr. Eiman bint Habbas Al-Mutairi, Vice Minister of Commerce and CEO of the National Competitiveness Center, met with Ms. Eli Synnevåg, Director of Acquisition and Business Development at Snøhetta. The meeting was at the NCC's headquarters and focused on developing local capabilities, fostering international partnerships, and discussing training and collaboration programs aimed at strengthening Saudi Arabia's position as a regional hub of excellence and innovation.

November 27, 2025

A Delegation from Italy's Webuild Group Reviews Promising Investment Opportunities in Saudi Arabia

Her Excellency Dr. Eiman bint Habbas Al-Mutairi, Vice Minister of Commerce and CEO of the National Competitiveness Center, met with Pier Massimo Marras, VP Operations for Saudi Arabia at Italy's Webuild Group, and his delegation. The meeting highlighted recent developments in the Kingdom's business environment and the attractive opportunities for foreign investment under Vision 2030.

December 7 - 10, 2025

Workshop on AI and Digital Transformation for the Public Sector

In collaboration with IMD, a workshop titled “AI and Digital Transformation in the Public Sector” was held to equip government leaders with advanced tools and strategies to drive transformative improvements in public services.



October 16, 2025

The Knowledge Hub Organizes a workshop on “Knowledge Exchange Workshop on Business Start-Up Reforms”

As part of the partnership between the Kingdom of Saudi Arabia -represented by the National Competitiveness Center- and the World Bank Group, the Saudi Knowledge Hub (K-Hub) organized its first workshop in Riyadh today. The workshop, which aimed to enhance international cooperation and promote a global culture of economic reform, saw the participation of 36 government officials specializing in business environment enhancement from Jordan, Iraq, Zambia, The Gambia, and the World Bank Group.



Organized by the K-Hub over three days, the workshop is tailored to the needs of participating countries. The agenda featured presentations of proposals, recommendations, and experiences designed to enhance business environments, with a special focus on the comprehensive model of the Saudi Business Center. The sessions also provided a holistic overview of the SBC, from implementing foundational reforms to designing a unified platform that streamlines the entire business lifecycle: start-up, operation, and closure.

December 1, 2025

The Knowledge Hub Organizes a Workshop on “Advancing Industrial Competitiveness”

At the “Advancing Industrial Competitiveness” workshop, senior economists from the Finance, Competition, and Innovation Team and the Global Investment Climate Unit at the World Bank Group, Dr. Christian Ketels and Dr. Gabriel Goddard, examined strategies

to strengthen industrial economic growth, highlighting its role as a key driver of regional development, economic diversification, and innovation. The workshop was attended by 22 officials from 14 government entities.

November 10, 2025

National Competitiveness Center & OECD Hold STRI Workshop



The National Competitiveness Center, in collaboration with the Organization for Economic Co-operation and Development, organized a high-level workshop on the Services Trade Restrictiveness Index (STRI). The two-day workshop held at the NCC headquarters brought together 70 representatives from 30 government entities as part of ongoing efforts to enhance the regulatory environment of the services sector and strengthen Saudi Arabia's global competitiveness.

The workshop featured a comprehensive overview of the STRI, including its background, data collection and analysis methodologies, and a detailed explanation of the Scoring & Weighting Methodology. Participants also explored how the index can serve as a policymaking tool, supporting evidence-based decisions. Discussions covered key service sectors such as logistics, postal and courier services, distribution, transport, finance, professional services, and telecommunications, and their impact on trade flows, global value chains, and the growth of e-commerce.

Virtual Workshops

In Q4 2025, the National Competitiveness Center, in collaboration with relevant authorities, conducted five workshops aimed at identifying challenges facing both public and private sectors, along with exploring ways to boost the growth of targeted economic activities.

Virtual Workshop

October 16, 2025

The Project of the Law of Arbitration

Virtual Workshop

October 9, 2025

Identifying & Addressing Challenges in the Healthcare Sector

Virtual Workshop

October 30, 2025

Identifying & Addressing Challenges in the Realstate Sector

Virtual Workshop

December 30, 2025

Identifying & Addressing Challenges in the Communications & Technology Sector

Virtual Workshop

December 31, 2025

Identifying & addressing Challenges Faced by Parcel Delivery Companies Regarding the National Address Requirement

The Center works with relevant government entities to enhance and improve the business environment by implementing legislative and procedural reforms in support of the Kingdom's economic transformation towards greater global competitiveness.

Key reforms implemented during the 4th quarter of 2025:

01.

Fees required for the issuance of health certificates to workers in the healthcare institutions have been cut by nearly 60% compared to previous rates.

02.

Updating the Implementing Regulations of the Precious Metals and Gemstones Law to regulate the trade and industry of precious metals, strengthen oversight, and ensure compliance with the standards governing these activities.

03.

Updating the regulations for private childcare centers.

04.

Developing Guidelines for Occupational Safety and Health for working women in collaboration with the National Council for Occupational Safety and Health.

05.

Providing gender-based land ownership statistics via the Ministry of Justice portal.

06.

Cataloguing government export incentives for private-sector exporters and making them publicly available on the Saudi Export Development Authority's website to boost the international presence of Saudi products.



Summary of the Kingdom's performance in international reports & indices evaluated by the NCC for Q4 2025

To advance Saudi Vision 2030's global competitiveness goals, the National Competitiveness Center tracks the Kingdom's performance across 31 key international reports.

The National Competitiveness Center is responsible for monitoring and analyzing global competitiveness indices and reports, benchmarking the Kingdom's performance against leading countries. The NCC also works to identify key specialized reports across various sectors and refer them to the relevant government entities with tailored recommendations for implementation.

The significance of these global reports lies in their ability to track and analyze a country's competitive performance within a strategic framework. They reflect ongoing development and improvement efforts, thereby contributing directly to the enhancement of national indicators and the elevation of the Kingdom's global competitiveness and stature.

Reports reflecting the Kingdom's improved performance

World Digital Competitiveness Report

International Institute for Management Development

IMD

In 2025, the Kingdom climbed five position, securing 22th place globally among 69 countries. The Kingdom's ranking improved across these 3 key areas:

Knowledge Area:

Increased by one position
(from 27th to 26th)

This area focuses on talent, education, and training, and the level of scientific engagement across countries.

Future Readiness Area:

Increased 9 positions
(from 28th to 19th)

This area evaluates how countries adapt, facilitate trade, and integrate information technologies.

Technologies Area:

Increased 4 positions
(from 27th to 23rd)

This area evaluates the regulatory, financial, and technological frameworks in countries.

Global Talent Competitiveness Index

Institut européen d'administration des affaires

INSEAD

In 2025, the Kingdom remained ranked 48th worldwide out of 135 countries. The Kingdom's ranking improved across these 3 key areas:

Growth Area:

Increased 8 positions
(from 53rd to 45th)

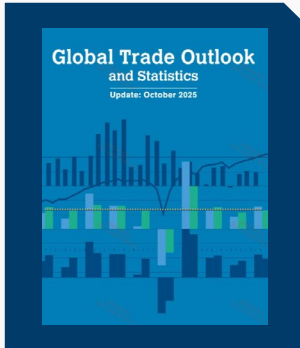
Talent Retention Area:

Increased 22 positions
(from 80th to 58th)

International Skills Area:

Increased 3 positions
(from 57th to 54th)

Key studies & research published by international organizations

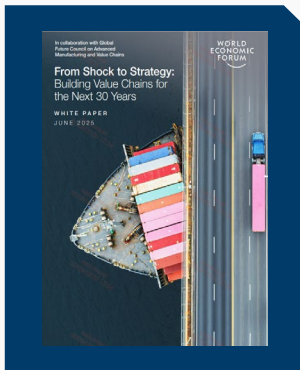


Global Trade Outlook World Trade Organization "WTO"

Published:
October 2025

Report Scope:

The report outlines global trade projections for 2025–2026, focusing on both goods and commercial services, and examines the performance of key regions such as Asia, Europe, the Americas, and developing countries. It also provides an analytical section on the effects of trade policies on global trade imbalances, including costs and trade barriers, enabling governments and businesses to make data-driven strategic decisions.



From Shock to Strategy World Economic Forum

Published:
June 2025

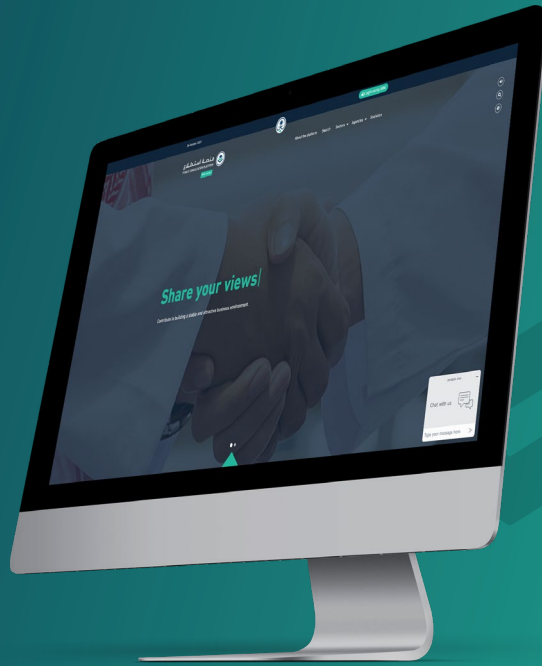
Report Scope:

This report focuses on how governments, businesses, and communities are transitioning from responding to global crises, such as the pandemic, inflation, geopolitical conflicts, and climate change, towards developing long-term strategies that enhance economic and social resilience.

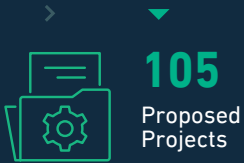


Istitlea: The Public Consultation Platform

The National Competitiveness Center's public consultation platform, Istitlea, allows the public and private sectors, as well as government entities, to express their opinions and provide feedback on laws and regulatory projects related to economic and developmental affairs before they are approved. This contributes to the improvement of the business environment and the Kingdom's competitiveness.



Istitlea, the public consultation platform, in the 4th quarter of 2025



Key Sectors



Finance & Oversight

Transportation & Communication

Municipal Services, Planning, & Urban Development



Key Proposed Projects



Regulatory Bylaw on Real Estate Marketing and Advertising

Regulatory Framework to Allow Non-Resident Foreign Investors to Invest Directly in Shares Listed on the Main Market

Code of Appearance and Conduct

Policy on Blueprint Inspection Process



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