

TABLE OF CONTENTS

Subject		Page
Preface		
Glossary of terms and Abbreviations		
Table of Contents		
List of Tables		
List of Figures		
List of Boxes		
1.	THE NATIONAL ECONOMY UNDER THE EIGHTH DEVELOPMENT PLAN	1
1.1	INTRODUCTION	1
1.2	THE ECONOMIC SITUATION	1
1.2.1	Principal Growth Rates	1
1.2.1.1	Oil-and-Gas Sector	2
1.2.1.2	Non-Oil Sectors	3
1.2.1.3	Production Sectors	4
1.2.1.4	Service Sectors	5
1.2.2	Gross Fixed Capital Formation	7
1.3	PRIVATE SECTOR	8
1.4	PUBLIC FINANCE	9
1.4.1	Expenditure on Development Sectors	11
1.4.2	Public Debt and Government Foreign Assets	12
1.5	FOREIGN TRADE AND BALANCE OF PAYMENTS	13
1.6	HUMAN RESOURCES DEVELOPMENT AND EMPLOYMENT	15
1.7	THE FINANCIAL SECTOR	17
1.7.1	Banks	17
1.7.2	Saudi Banks and the Global Financial Crisis	18
1.7.3	Specialized Lending Institutions	19
1.7.4	Domestic Liquidity	20
1.7.5	Saudi Stock Market	21
1.8	PRICES OF GOODS AND SERVICES	22
2.	MAIN DIRECTIONS OF THE NINTH DEVELOPMENT PLAN	25
2.1	INTRODUCTION	25
2.2	OBJECTIVES	25
2.3	IMPLEMENTATION MECHANISMS	27
2.4	GENERAL FRAMEWORK OF THE DIRECTIONS OF THE PLAN	30
2.4.1	Improving Standard of Living and Quality of Life	30
2.4.2	Balanced Development among Regions	31
2.4.3	Diversification of Economic Base	33
2.4.4	Towards a Knowledge-based Economy	34
2.4.5	Enhancement of Competitive Capacities	36
2.4.6	Human Resources Development	39
3.	LONG-TERM STRATEGY FOR THE SAUDI ECONOMY	43
3.1	INTRODUCTION	43
3.2	STRATEGIC ISSUES AND CHALLENGES	43
3.2.1	Raising the Standard of Living and Improving the Quality of Life	43
3.2.2	Achieving Sustainable Development	44

	Subject	Page
	3.2.3 Enhancement of Competitiveness	46
	3.2.4 Laying the Foundations for a Knowledge-Based Economy	47
	3.2.5 Regional and Arab Integration	47
3.3	SUPPORTING FACTORS FOR FACING CHALLENGES	48
3.4	TARGET PATHS ENVISAGED BY THE STRATEGY	50
	3.4.1 Long-Term Population Forecasts	51
	3.4.2 Future Vision of the Saudi Economy	52
	3.4.2.1 GDP and Per Capita Income	52
	3.4.2.2 GDP by Expenditure Item	53
	3.4.2.3 GDP by Sector	55
	3.4.2.4 Labour Force and Employment	58
	3.4.3 Target Path for Improving Quality of Life	60
	3.4.4 Target Path for Development of Scientific, Technological and Knowledge Capacities	60
3.5	LONG-TERM STRATEGY AND THE NINTH DEVELOPMENT PLAN	60
	4. NATIONAL ECONOMY UNDER THE NINTH DEVELOPMENT PLAN	61
	4.1 INTRODUCTION	61
	4.2 ENVIRONMENT OF PLAN PREPARATION	61
	4.3 MAJOR OBJECTIVES OF THE PLAN	63
	4.4 AGGREGATE SUPPLY	65
	4.4.1 Major Growth Rates	65
	4.4.2 Sectoral Growth and Economic Structure	67
	4.4.3 Imports	73
	4.5 AGGREGATE DEMAND	73
	4.5.1 Consumption	74
	4.5.2 Investment	75
	4.5.3 Change in Inventories	76
	4.5.4 Exports	76
	4.6 BALANCE OF PAYMENTS	77
	4.7 FINANCIAL REQUIREMENTS OF DEVELOPMENT SECTORS	77
	4.8 EMPLOYMENT AND UNEMPLOYMENT	80
	4.9 LOW-INCOME GROUPS AND REGIONAL DEVELOPMENT	81
	4.10 PRODUCTIVITY AND COMPETITIVENESS	81
	4.11 INSTITUTIONAL AND ADMINISTRATIVE DEVELOPMENT	82
	4.12 KNOWLEDGE ECONOMY	82
	4.13 ECONOMIC POLICIES	83
	4.13.1 Fiscal Policy	83
	4.13.2 Monetary Policy	84
	4.13.3 Investment Policy	84
	4.13.4 Foreign Trade Policy	85
	5. KNOWLEDGE-BASED ECONOMY	87
	5.1 INTRODUCTION	87
	5.2 CURRENT CONDITIONS	88
	5.2.1 Dissemination of Knowledge	88
	5.2.2 Knowledge Transfer and Indigenisation	89
	5.2.3 Knowledge Production	90
	5.2.4 Utilisation of Knowledge	91
	5.2.5 Favourable Environment	91

Subject		Page
	5.2.6 Projects Enhancing the Knowledge- Based Economy	93
5.3	ISSUES AND CHALLENGES	94
	5.3.1 Education and Dissemination of Knowledge	94
	5.3.2 Transfer and Indigenisation of Knowledge	96
	5.3.3 Knowledge Production Capabilities	96
	5.3.4 Transforming Knowledge into Products	98
	5.3.5 Knowledge Management	100
	5.3.6 Knowledge And Community	100
5.4	DEVELOPMENT STRATEGY	101
	5.4.1 Future Vision	101
	5.4.2 Objectives	101
	5.4.3 Policies	101
	5.4.4 Targets	104
6.	COMPETITIVENESS OF THE NATIONAL ECONOMY	107
6.1	INTRODUCTION	107
6.2	CURRENT CONDITIONS	107
	6.2.1 Elements of Competitiveness	107
	6.2.2 General Competitive Position	108
	6.2.3 The Private Sector and Competitiveness of National Products	110
	6.2.4 National Competitiveness Centre	111
	6.2.5 Access Programme	112
6.3	ISSUES AND CHALLENGES	112
	6.3.1 Technology Content of National Exports	112
	6.3.2 Innovation	113
	6.3.3 Favourable Environment for Exports	114
	6.3.4 Employment in the Private Sector	115
	6.3.5 Business Clusters	115
	6.3.6 Family Businesses	116
6.4	DEVELOPMENT STRATEGY	117
	6.4.1 Future Vision	117
	6.4.2 Objectives	117
	6.4.3 Policies	118
	6.4.4 Targets	121
7.	INSTITUTIONAL AND ADMINISTRATIVE DEVELOPMENT	123
7.1	INTRODUCTION	123
7.2	CURRENT CONDITIONS	124
	7.2.1 Overall Performance	124
	7.2.2 E-Government Transactions	126
	7.2.3 Protection of Integrity and Combating of Corruption	127
	7.2.4 Performance Measurement in Government Agencies	127
7.3	ISSUES AND CHALLENGES	129
	7.3.1 A Comprehensive Strategy for Institutional and Administrative Development	129
	7.3.2 Appropriateness of Organizational Structures	130
	7.3.3 Implementation of Public Projects	130
	7.3.4 Human Resources Development	131
	7.3.5 Performance Indicators	131
7.4	DEVELOPMENT STRATEGY	132
	7.4.1 Future Vision	132

	Subject	Page
	7.4.2 Objectives	132
	7.4.3 Policies	132
	7.4.4 Targets	133
	8. THE PRIVATE SECTOR	135
	8.1 INTRODUCTION	135
	8.2 CURRENT CONDITIONS	136
	8.2.1 Overall Performance	136
	8.2.2 Private Sector Enterprises	138
	8.2.3 Bank Credit	141
	8.2.4 Business Environment	141
	8.2.5 Chambers of Commerce and Industry	142
	8.2.6 The Private Sector and the Privatization Strategy	143
	8.3 ISSUES AND CHALLENGES	144
	8.3.1 The global financial crisis	144
	8.3.2 The World Trade Organization (WTO)	145
	8.3.3 National Employment	146
	8.3.4 Microfinance	147
	8.3.5 Institutional Framework for Development of SMEs	147
	8.4 DEVELOPMENT STRATEGY	148
	8.4.1 Future Vision	148
	8.4.2 Objectives	148
	8.4.3 Policies	148
	8.4.4 Targets	151
	9. INVESTMENT	153
	9.1 INTRODUCTION	153
	9.2 CURRENT CONDITIONS	153
	9.2.1 Overall Performance	153
	9.2.2 Sectoral Structure of Investment	154
	9.2.3 Balance of Savings and Investment	156
	9.2.4 Foreign Direct Investment (FDI)	157
	9.3 IMPROVEMENT OF INVESTMENT CLIMATE	158
	9.4 ISSUES AND CHALLENGES	160
	9.4.1 Public-Private Partnerships	160
	9.4.2 Medium-and Long-Term Finance	161
	9.4.3 Economic Cities	162
	9.4.4 Investment Incentives	162
	9.4.5 Entrepreneurs	162
	9.5 DEVELOPMENT STRATEGY	163
	9.5.1 Future Vision	163
	9.5.2 Objectives	163
	9.5.3 Policies	164
	9.5.4 Targets	166
	9.6 FINANCIAL REQUIREMENTS	168
	10. MANPOWER AND THE LABOUR MARKET	169
	10.1 INTRODUCTION	169
	10.2 CURRENT CONDITIONS	169
	10.2.1 Total Employment	169
	10.2.2 Employment and Saudization of Jobs in the Public Sector	171
	10.2.3 Employment and Indigenisation of Jobs in the Private Sector	172

Page

viii

Subject		Page
10.2.4	Institutional and Regulatory Development of the Labour Market	173
10.3	ISSUES AND CHALLENGES	174
10.3.1	Training of Saudi Manpower	174
10.3.2	Productivity of Saudi Manpower	175
10.3.3	Unemployment	175
10.3.4	Labour Force Participation of Saudis	176
10.3.5	Labour Market Services	176
10.4	DEVELOPMENT STRATEGY	177
10.4.1	Future Vision	177
10.4.2	Objectives	177
10.4.3	Policies	178
10.4.3.1	Policies for training and improving productivity of Saudi manpower	178
10.4.3.2	Policies for reducing unemployment and increasing Saudi labour force participation rates	179
10.4.3.3	Policies for supporting labour market services	180
10.5	LABOUR MARKET KEY INDICATORS	182
10.6	SAUDI MANPOWER SUPPLY	183
10.7	LABOUR DEMAND	184
10.7.1	Labour Demand by Sector and Economic Activity	184
10.7.2	Labour Demand by Major Occupational Groups	186
10.8	OCCUPATIONAL BALANCE OF EMPLOYMENT	187
11.	POPULATION AND STANDARD OF LIVING	189
11.1	INTRODUCTION	189
11.2	CURRENT CONDITIONS	190
11.2.1	Demographic Characteristics	190
11.2.2	Standard of Living and Quality of Life	194
11.3	ISSUES AND CHALLENGES	196
11.3.1	Population Issues and Challenges	196
11.3.2	Issues and Challenges Related to Standard of Living and Quality of Life	198
11.4	TARGET PATHS	200
11.5	DEVELOPMENT STRATEGY	205
11.5.1	Future vision	205
11.5.2	Objectives	205
11.5.3	Policies	205
11.5.4	Targets	207
12.	REGIONAL DEVELOPMENT	209
12.1	INTRODUCTION	209
12.2	CURRENT CONDITIONS	209
12.2.1	Pillars of Regional Development	209
12.2.2	Administrative Regions	211
12.2.3	Population Trends	212
12.2.4	Economic Activity	214
12.2.5	Unemployment	216
12.3	ISSUES AND CHALLENGES	217
12.3.1	Production Base	217
12.3.2	Database	217
12.3.3	Population Concentration	217
12.3.4	Environmental Aspects	218

	Subject	Page
	12.4 DEVELOPMENT STRATEGY	219
	12.4.1 Future Vision	219
	12.4.2 Objectives	219
	12.4.3 Policies	219
	12.4.4 Targets	221
	13. BUILDING AND CONSTRUCTION	223
	13.1 INTRODUCTION	223
	13.2 CURRENT CONDITIONS	223
	13.2.1 Developments	223
	13.2.2 Capital Assets	224
	13.2.3 Building Permits	225
	13.2.4 National Employment in the Sector	227
	13.2.5 Regulatory Environment	227
	13.2.6 Indicators of Activity in Building Materials	229
	13.3 ISSUES AND CHALLENGES	230
	13.3.1 Economic Efficiency of Contracting Activities	230
	13.3.2 Productivity and Saudization of Jobs	231
	13.3.3 Institutional and Organizational Development	231
	13.3.4 Information and Databases	232
	13.4 DEVELOPMENT STRATEGY	232
	13.4.1 Future Vision	232
	13.4.2 Objectives	232
	13.4.3 Policies	232
	13.4.4 Targets	234
	14. ENVIRONMENTAL MANAGEMENT	235
<i>x</i>	14.1 INTRODUCTION	235
	14.2 CURRENT CONDITIONS	236
	14.2.1 Environmental Protection	236
	14.2.2 Wildlife Protection	237
	14.2.3 Combating Desertification	239
	14.2.4 Pollution and Environmental Health	240
	14.2.5 Institutional and Organizational Development	242
	14.2.6 National Strategies and Plans for Environmental Protection	243
	14.3 ISSUES AND CHALLENGES	244
	14.3.1 Coordination of Environmental Action	244
	14.3.2 Natural Resources	244
	14.3.3 Environmental Pressures	245
	14.3.4 Marine Environment	245
	14.3.5 Exhaustion of Wildlife Resources and their Natural Habitats	246
	14.4 DEVELOPMENTAL STRATEGY	246
	14.4.1 Future Vision	246
	14.4.2 Objectives	247
	14.4.3 Policies	247
	14.4.4 Targets	248
	14.5 FINANCIAL REQUIREMENTS	249
	15. TOURISM AND ANTIQUITIES	251
	15.1 INTRODUCTION	251
	15.2 CURRENT CONDITIONS	252
	15.2.1 Tourist Attraction Factors	252
	15.2.2 Tourist Services	253

Subject		Page
15.2.3	Size of Tourism Market	254
	15.2.3.1 Inward Tourism	254
	15.2.3.2 Domestic Tourism	255
	15.2.3.3 Outbound Tourism	256
15.2.4	Achievements of the Saudi Commission for Tourism and Antiquities (SCTA)	257
15.2.5	Institutional and Organizational Development	259
15.3	ISSUES AND CHALLENGES	260
15.3.1	Domestic Tourism	260
15.3.2	Tourism Awareness	260
15.3.3	Tourist Products	261
15.3.4	Infrastructure	261
15.3.5	Traditional Crafts and Industries	261
15.4	DEVELOPMENT STRATEGY	262
15.4.1	Future Vision	262
15.4.2	Objectives	262
15.4.3	Policies	263
15.4.4	Targets	263
15.5	FINANCIAL REQUIREMENTS	264
16.	TRADE	265
16.1	FOREIGN TRADE	265
16.1.1	Introduction	265
16.1.2	Current Conditions	265
	16.1.2.1 Trade in merchandise	265
	16.1.2.2 Trade in services	269
	16.1.2.3 Inter-trade	270
	16.1.2.4 Balance of payments	272
	16.1.2.5 Institutional and organizational development	273
16.1.3	Issues and Challenges	273
	16.1.3.1 The global financial crisis	273
	16.1.3.2 Non-oil exports	274
	16.1.3.3 Free zones	274
	16.1.3.4 Balance of services and transfers	275
	16.1.3.5 Competitiveness of national exports	276
16.1.4	Development Strategy	278
	16.1.4.1 Future vision	278
	16.1.4.2 Objectives	278
	16.1.4.3 Policies	278
	16.1.4.4 Targets	279
16.2	DOMESTIC TRADE	280
16.2.1	Introduction	280
16.2.2	Current Conditions	280
	16.2.2.1 Domestic trade indicators	280
	16.2.2.2 Commercial Companies	283
	16.2.2.3 Specifications and standards	284
	16.2.2.4 Institutional and organizational development	285
	16.2.2.5 Employment	286
16.2.3	Issues and Challenges	286
	16.2.3.1 Classification of trade activities	286
	16.2.3.2 Small and Medium Enterprises (SMEs)	287
	16.2.3.3 Inflationary pressures	288

	Subject	Page
	16.2.3.4 Commercial and industrial fraud and counterfeit goods	289
	16.2.3.5 Contribution of Saudi manpower	290
	16.2.3.6 Fronting and issuance of NSF Cheques	290
	16.2.3.7 Joint-stock real estate ventures	291
	16.2.4 Development Strategy	292
	16.2.4.1 Future vision	292
	16.2.4.2 Objectives	292
	16.2.4.3 Policies	293
	16.2.4.4 Targets	295
	16.2.5 Financial Requirements	295
	17. FINANCIAL SERVICES	297
	17.1 INTRODUCTION	297
	17.2 CURRENT CONDITIONS	297
	17.2.1 Performance of Commercial Banks	297
	17.2.2 Banking Sector and the Global Financial Crisis	299
	17.2.3 Development of Stock Market Performance	300
	17.2.4 Investment Funds	302
	17.2.5 Development of Activity of Specialized Lending Institutions	302
	17.2.6 Insurance Market	304
	17.2.7 Islamic Banking and Sukuk (Bonds)	305
	17.3 ISSUES AND CHALLENGES	306
	17.3.1 Global Financial Crisis	306
	17.3.2 Developmental Role of Investment Banks	306
	17.3.3 Developmental Role of Islamic Sukuk	307
	17.3.4 Scarcity of Venture-Capital Companies	307
	17.3.5 Specialized Lending Institutions	308
	17.4 DEVELOPMENT STRATEGY	309
	17.4.1 Future Vision	309
	17.4.2 Objectives	309
	17.4.3 Policies	310
	17.4.4 Targets	311
	18. YOUTH AND DEVELOPMENT	313
	18.1 INTRODUCTION	313
	18.2 CURRENT CONDITIONS	314
	18.2.1 Demographic Profile of Youth	314
	18.2.2 Institutions Concerned with Youth	316
	18.2.3 Achievements	320
	18.3 ISSUES AND CHALLENGES	320
	18.3.1 Social Issues	320
	18.3.2 Educational Issues	322
	18.3.3 Economic Issues	323
	18.3.4 Health Issues	324
	18.3.5 Issues Concerning Young Women	325
	18.4 DEMAND FORECASTS	325
	18.4.1 Youth Activities	326
	18.4.2 Sports Facilities	326
	18.5 DEVELOPMENT STRATEGY	327
	18.5.1 Future Vision	327
	18.5.2 Objectives	327
	18.5.3 Policies	328

Subject		Page
18.5.4	Targets	329
18.6	FINANCIAL REQUIREMENTS	330
19.	WOMEN AND THE FAMILY	331
19.1	INTRODUCTION	331
19.2	CURRENT CONDITIONS	332
19.2.1	Main Features of Conditions of Women and the Family	332
19.2.2	Institutions Serving Women and Family	340
19.3	ISSUES AND CHALLENGES	341
19.3.1	Domestic Violence	341
19.3.2	Divorce	342
19.3.3	Unemployment	342
19.3.4	Illiteracy	343
19.3.5	People With Special Needs	344
19.3.6	Social Care Services	344
19.3.7	Social Safety Nets	345
19.4	DEMAND FORECASTS	346
19.5	DEVELOPMENT STRATEGY	347
19.5.1	Future Vision	347
19.5.2	Objectives	348
19.5.3	Policies	349
19.5.4	Targets	351
20.	HOUSING	353
20.1	INTRODUCTION	353
20.2	CURRENT CONDITIONS	354
20.2.1	Overall Performance	354
20.2.2	Home Ownership	355
20.2.3	Types of Housing	355
20.2.4	Institutional and Organizational Development	356
20.3	ISSUES AND CHALLENGES	357
20.3.1	Affordable Housing	357
20.3.2	Home Ownership	358
20.3.3	Costs of Housing Units	358
20.3.4	Real Estate Development Fund (REDF)	358
20.3.5	Real Estate Financing	359
20.3.6	Requirements of Housing and Urban Planning	359
20.3.7	Housing Sector Database	360
20.4	DEMAND FORECASTS	360
20.5	DEVELOPMENT STRATEGY	362
20.5.1	Future Vision	362
20.5.2	Objectives	362
20.5.3	Policies	363
20.5.4	Targets	364
20.6	FINANCIAL REQUIREMENTS	365
21.	SCIENCE, TECHNOLOGY AND INNOVATION	367
21.1	INTRODUCTION	367
21.2	CURRENT CONDITIONS	368
21.2.1	Research, Development and Innovation	368
21.2.2	Sponsoring Giftedness and Creativity	373
21.2.3	Scientific Publications and Patents	374

	Subject	Page
	21.2.4 Qualifying Scientific and Technical Cadres	376
	21.2.5 Economic Offset Programme	376
	21.2.6 Institutional and Organizational Development	377
21.3	ISSUES AND CHALLENGES	378
	21.3.1 Expenditure on Research, Development and Innovation	378
	21.3.2 Attracting Researchers and Technologists	379
	21.3.3 R&D at Universities	379
	21.3.4 Private Sector Participation	379
21.4	DEMAND FORECASTS	380
21.5	DEVELOPMENT STRATEGY	380
	21.5.1 Future Vision	380
	21.5.2 Objectives	381
	21.5.3 Policies	381
	21.5.4 Targets	383
21.6	FINANCIAL REQUIREMENTS	384
22. DEVELOPMENT OF HUMAN RESOURCES		385
22.1	GENERAL EDUCATION	385
	22.1.1 Introduction	385
	22.1.2 Current Conditions	386
	22.1.2.1 Kindergartens	386
	22.1.2.2 Primary, intermediate and secondary education	387
	22.1.2.3 Secondary education outputs	389
	22.1.2.4 Contribution of private general education	389
	22.1.2.5 Eradication of illiteracy	390
	22.1.2.6 Institutional and organizational development	391
	22.1.3 Issues and Challenges	392
	22.1.3.1 Rates of success, repetition and dropout	392
	22.1.3.2 School environment	393
	22.1.3.3 Raising quality of education	393
	22.1.3.4 Fostering early-childhood education	395
	22.1.4 Demand Forecasts	395
	22.1.4.1 Kindergartens	396
	22.1.4.2 Primary, Intermediate and Secondary Education	396
	22.1.5 Development Strategy	399
	22.1.5.1 Future Vision	399
	22.1.5.2 Objectives	400
	22.1.5.3 Policies	400
	22.1.5.4 Targets	402
	22.1.6 Financial requirements	403
22.2	HIGHER EDUCATION	404
	22.2.1 Introduction	404
	22.2.2 Current Conditions	405
	22.2.2.1 Accepted, enrolled and graduated students	405
	22.2.2.2 Postgraduate students	406
	22.2.2.3 Faculty members	406
	22.2.2.4 Absorptive Capacity	407
	22.2.2.5 Scientific research activity	407
	22.2.2.6 Institutional and organizational development	408
	22.2.3 Issues and Challenges	408
	22.2.3.1 Quality of education	408
	22.2.3.2 Quality absorptive capacity of higher education	409
	22.2.3.3 Identifying changing needs of labour market	410

Page

xiv

Subject		Page
22.2.4	Demand Forecasts	412
22.2.5	Development Strategy	412
22.2.5.1	Future Vision	412
22.2.5.2	Objectives	412
22.2.5.3	Policies	413
22.2.5.4	Targets	415
22.2.6	Financial requirements	417
22.3	TRAINING	418
22.3.1	Introduction	418
22.3.2	Current Conditions	419
22.3.2.1	Technical and Vocational Training Corporation (TVTC)	419
22.3.2.2	Institute of Public Administration (IPA)	420
22.3.2.3	Training in government agencies	421
22.3.2.4	Training in the Private Sector	421
22.3.3	Issues and Challenges	422
22.3.3.1	Absorptive Capacity	422
22.3.3.2	Vocational examination system	422
22.3.3.3	Actual training needs	423
22.3.4	Demand Forecasts	423
22.3.5	Development Strategy	426
22.3.5.1	Future Vision	426
22.3.5.2	Objectives	426
22.3.5.3	Policies	427
22.3.5.4	Targets	428
22.3.6	Financial requirements	429
23.	HEALTH	431
23.1	INTRODUCTION	431
23.2	CURRENT CONDITIONS	432
23.2.1	Overall Performance	432
23.2.2	Health Insurance	439
23.2.3	Emergency Medical Services	440
23.2.4	Advanced Specialist Treatment Services	440
23.2.5	Food and Drug Control	441
23.2.6	Institutional and Organizational Development	441
23.2.7	Saudization of Health Sector Manpower	443
23.2.8	Role of Private Sector	444
23.3	ISSUES AND CHALLENGES	445
23.3.1	Increased Demand for Healthcare Services	445
23.3.2	Medical and Health Employment	446
23.3.3	Improving Quality of Health Services	447
23.3.4	Health Information System	448
23.3.5	Healthcare Management and Operation	449
23.4	DEMAND FORECASTS	450
23.4.1	Curative Care	451
23.4.2	Primary Healthcare	454
23.5	DEVELOPMENT STRATEGY	456
23.5.1	Future Vision	456
23.5.2	Objectives	456
23.5.3	Policies	457

	Subject	Page
	23.5.4 Targets	459
	23.6 FINANCIAL REQUIREMENTS	462
	24. INFORMATION AND COMMUNICATIONS TECHNOLOGY	463
	24.1 INFORMATION AND COMMUNICATIONS TECHNOLOGY	463
	24.1.1 Introduction	463
	24.1.2 Current Conditions	464
	24.1.2.1 The National Communications and Information Technology Plan (NCITP)	464
	24.1.2.2 Communications and information services	465
	24.1.2.3 Bridging the digital divide	469
	24.1.2.4 Raising productivity of public and private Sectors	470
	24.1.2.5 Building a national information industry	471
	24.1.2.6 Institutional and organizational development	472
	24.1.3 ISSUES AND CHALLENGES	473
	24.1.3.1 Development of internet services	473
	24.1.3.2 Infrastructure	473
	24.1.3.3 Capacity Building	474
	24.1.3.4 Applications of ICT	474
	24.1.4 Demand Forecasts	474
	24.1.5 Development Strategy	479
	24.1.5.1 Future vision	479
	24.1.5.2 Objectives	479
	24.1.5.3 Policies	479
	24.1.6 Financial Requirements	480
	24.2 POSTAL SECTOR	480
	24.2.1 Introduction	480
	24.2.2 Current Conditions	481
	24.2.2.1 Postal facilities	481
	24.2.2.2 Volume of postal services	482
	24.2.2.3 Postal service performance	483
	24.2.2.4 Institutional and organizational Development	484
	24.2.3 Issues and Challenges	485
	24.2.3.1 Lengthy administrative procedures	485
	24.2.3.2 Competition and technological developments	485
	24.2.4 Demand Forecasts	486
	24.2.5 Development Strategy	488
	24.2.5.1 Future vision	488
	24.2.5.2 Objectives	488
	24.2.5.3 Policies	488
	24.2.5.4 Targets	490
	24.2.6 Financial Requirements	491
	25. WATER AND SANITATION	493
	25.1 INTRODUCTION	493
	25.2 CURRENT CONDITIONS	494
	25.2.1 Conservation and Development of Water Resources and Rationalisation of their Use	494
	25.2.2 Water and Sanitation Services	496
	25.2.3 Utilisation of Water for Industrial and Agricultural Purposes	498
	25.2.4 Integrated Management of Water Resources	498
	25.2.5 Institutional and Organisational Development	499

Subject		Page
25.3	ISSUES AND CHALLENGES	500
25.3.1	Water Resources Sustainability	500
25.3.2	Quality of Water and Sanitation Services	501
25.4	DEMAND FORECASTS	502
25.4.1	Water	502
25.4.2	Potable Water and Sanitation Services	505
25.5	DEVELOPMENT STRATEGY	507
25.5.1	Future Vision	507
25.5.2	Objectives	508
25.5.3	Policies	508
25.5.4	Targets	509
25.6	FINANCIAL REQUIREMENTS	510
26.	OIL AND NATURAL GAS	511
26.1	INTRODUCTION	511
26.2	CURRENT CONDITIONS	512
26.2.1	Exploration and Prospecting for Oil and Gas	512
26.2.2	Production of Oil and Gas	513
26.2.3	Refining and Distribution Capacity	514
26.2.4	Domestic Demand	516
26.2.5	Conservation and Rationalization of Use of Energy Resources	519
26.2.6	Environmental Protection	519
26.3	ISSUES AND CHALLENGES	520
26.3.1	Domestic Refining Capacity	520
26.3.2	Energy Facilities in the Regions	520
26.3.3	Indigenising Energy Industry Technologies	520
26.3.4	The Environmental and Technological Challenge	521
26.3.5	New Sources of Energy	521
26.4	DOMESTIC DEMAND FORECASTS	522
26.5	DOMESTIC PRODUCTION FORECASTS	524
26.6	DEVELOPMENT STRATEGY	525
26.6.1	Future Vision	525
26.6.2	Objectives	526
26.6.3	Policies	526
26.6.4	Targets	527
26.7	FINANCIAL REQUIREMENTS	528
27.	MINERAL RESOURCES	529
27.1	INTRODUCTION	529
27.2	CURRENT CONDITIONS	530
27.2.1	Improvement of Indicators of Production and Activities of the Sector	530
27.2.2	Private Sector Participation in Mining Activities	531
27.2.3	Diversity in Mining Activities	532
27.2.4	Manufacturing Industries	534
27.2.5	Investment Returns and Mining Activity	535
27.2.6	Mineral Resources Sector and Balanced Development	536
27.2.7	Institutional and Organizational Development	537
27.3	ISSUES AND CHALLENGES	537
27.3.1	Diversification of the Mineral-Resources Production Base	537
27.3.2	Land Use Conflicts	538
27.3.3	Infrastructure at Sites of Mineral Formations	538
27.3.4	Environmental and Social Aspects of Mining Investment	538

	Subject	Page
	27.3.5 Integration between Production Sectors and Mineral Resources Sector	539
27.4	DEMAND FORECASTS	539
27.5	DEVELOPMENT STRATEGY	541
	27.5.1 Future Vision	541
	27.5.2 Objectives	542
	27.5.3 Policies	542
	27.5.4 Targets	543
27.6	FINANCIAL REQUIREMENTS	543
28. AGRICULTURE		545
28.1	INTRODUCTION	545
28.2	CURRENT CONDITIONS	546
	28.2.1 Contribution of the Agricultural Sector to Diversification of the Economic Base	546
	28.2.2 Improving Efficiency of Natural Resources Use	549
	28.2.3 Improving Economic Performance of the Agricultural Sector	550
	28.2.4 Consolidation of Investment Capacity in the Agricultural Sector	551
	28.2.5 Institutional and Organisational Development	553
28.3	ISSUES AND CHALLENGES	554
	28.3.1 Non-Renewable Water Resources	554
	28.3.2 Marketing Efficiency of Agricultural Production	555
	28.3.3 Competitiveness of National Agricultural Products	555
	28.3.4 Fisheries Development	556
	28.3.5 Research and Development	556
	28.3.6 Environment and Public-Health Protection	557
28.4	DEMAND FORECASTS	557
28.5	DEVELOPMENT STRATEGY	559
	28.5.1 Future Vision	559
	28.5.2 Objectives	559
	28.5.3 Policies	559
	28.5.4 Targets	560
28.6	FINANCIAL REQUIREMENTS	560
29. INDUSTRY		561
29.1	INTRODUCTION	561
29.2	CURRENT CONDITIONS	561
	29.2.1 Overall Performance	561
	29.2.2 Financing	563
	29.2.3 Employment	565
	29.2.4 Geographical Distribution	566
	29.2.5 Competitiveness	566
	29.2.6 Infrastructure	569
	29.2.7 Support Services	569
29.3	ISSUES AND CHALLENGES	570
	29.3.1 Saudi Employment	570
	29.3.2 Technological Capabilities	571
	29.3.3 Small and Medium Enterprises (SMEs)	572
	29.3.4 Industrial Diversification and Geographical Spread	572
29.4	NATIONAL INDUSTRIAL STRATEGY	573
29.5	DEVELOPMENT STRATEGY	575
	29.5.1 Future Vision	575
	29.5.2 Objectives	575

Subject		Page
29.5.3	Policies	575
29.5.4	Targets	577
29.6	FINANCIAL REQUIREMENTS	579
30.	ELECTRICITY	581
30.1	INTRODUCTION	581
30.2	CURRENT CONDITIONS	581
30.2.1	Electric Power Consumption	581
30.2.2	Electricity Service Coverage	582
30.2.3	Power Loads	583
30.2.4	Electrical Generating Capacity	583
30.2.5	Generated Electric Power	585
30.2.6	Fuel Consumption in the Electricity Sector	585
30.2.7	The Electrical Grid	586
30.2.8	Employment	586
30.2.9	Institutional and Organisational Development	587
30.3	ISSUES AND CHALLENGES	587
30.3.1	Return on Investment	587
30.3.2	Rationalising Growth of Electrical Loads	588
30.3.3	Building a Comprehensive Database	589
30.4	DEMAND FORECASTS	589
30.4.1	Total Consumption of Residential Subscribers	589
30.4.2	Subscribers	590
30.4.3	Electricity Consumption	592
30.4.4	Peak Load	592
30.4.5	Targeted Productivity Improvement	592
30.4.6	Actual Generating Capacity	593
30.5	DEVELOPMENT STRATEGY	593
30.5.1	Future Vision	593
30.5.2	Objectives	593
30.5.3	Policies	594
30.5.4	Targets	595
31.	TRANSPORT	597
31.1	INTRODUCTION	597
31.2	CURRENT CONDITIONS	598
31.2.1	Roads	598
31.2.2	Railways	601
31.2.3	Air Transport	603
31.2.4	Seaports and Marine Transport	604
31.2.5	Intra-city Public Transport	605
31.2.6	Performance Efficiency	606
31.2.7	Traffic Safety	607
31.2.8	Environmental Protection	607
31.2.9	Institutional and Organizational Development	608
31.3	ISSUES AND CHALLENGES	609
31.3.1	Infrastructure Development	609
31.3.2	Transport of Goods and Trade Facilitation	610
31.3.3	Passenger Transport	612
31.3.4	Transport Safety	612
31.3.5	Protection of the Environment	613
31.4	DEMAND FORECASTS	613
31.4.1	Land Based Transport	613

	Subject	Page
	31.4.2 Railways	614
	31.4.3 Marine Transport	616
	31.4.4 Air Transport	616
31.5	DEVELOPMENT STRATEGY	617
	31.5.1 Future vision	617
	31.5.2 Objectives	617
	31.5.3 Policies	618
	31.5.4 Targets	619
31.6	FINANCIAL REQUIREMENTS	619
32. MUNICIPAL AFFAIRS		621
32.1	INTRODUCTION	621
32.2	CURRENT CONDITIONS	622
	32.2.1 Improving the Living and Environmental Conditions of the Population and Achieving Regionally Balanced Development	622
	32.2.2 Operational Efficiency of Municipal Facilities and Services	624
	32.2.3 Private Sector Role in Providing Municipal Facilities and Services	624
	32.2.4 Protecting the Environment and Promoting Sustainable Urban Development	625
	32.2.5 Institutional and Organizational Development	625
32.3	ISSUES AND CHALLENGES	629
	32.3.1 Demand for Municipal Services	629
	32.3.2 Municipal Services in Regions	629
	32.3.3 Coordination among Concerned Agencies in the Sector	629
	32.3.4 Environmental Health	630
	32.3.5 Horizontal Expansion of Cities	631
	32.3.6 Municipal Revenues and Expenditures	631
	32.3.7 Utilization of Land Grant Subdivisions	632
	32.3.8 Flash Flooding Risks	632
32.4	DEMAND FORECASTS	632
32.5	DEVELOPMENT STRATEGY	634
	32.5.1 Future Vision	634
	32.5.2 Objectives	634
	32.5.3 Policies	634
	32.5.4 Targets	635
32.6	FINANCIAL REQUIREMENTS	636
33. CULTURE AND INFORMATION		637
33.1	INTRODUCTION	637
33.2	CURRENT CONDITIONS	638
	33.2.1 Culture	638
	33.2.2 Information	641
	33.2.3 Education and Scientific Research	642
	33.2.4 Heritage	643
33.3	ISSUES AND CHALLENGES	643
	33.3.1 Preservation and Consolidation of National Identity	643
	33.3.2 Globalization and the Cultural Identity	644
	33.3.3 Developing Interest in Reading and Cultural Affairs	644
	33.3.4 Scientific Culture and the Drive Towards Knowledge Society	645
	33.3.5 Translation and Cultural Content	645
33.4	DEMAND FORECASTS	645
33.5	DEVELOPMENT STRATEGY	646

Subject		Page
33.5.1	Future Vision	646
33.5.2	Objectives	646
33.5.3	Policies	647
33.5.4	Targets	648
33.6	FINANCIAL REQUIREMENTS	650
34.	RELIGIOUS, JUDICIAL, HAJJ AND UMRAH SERVICES	651
34.1	RELIGIOUS SERVICES	651
34.1.1	Introduction	651
34.1.2	Current Conditions	652
34.1.2.1	Expansion of the Two Holy Mosques	652
34.1.2.2	Caring for the Holy Quran	652
34.1.2.3	Caring for Mosques	653
34.1.2.4	Development of Endowments (Awqaf)	654
34.1.2.5	Urging compliance with Islamic ethics	654
34.1.2.6	Institutional and Organizational Development	655
34.1.3	Issues and Challenges	656
34.1.3.1	Excess and Extremism	656
34.1.3.2	Development of Endowed Assets	656
34.1.4	Demand Forecasts	657
34.1.5	Development Strategy	658
34.1.5.1	Future Vision	658
34.1.5.2	Objectives	658
34.1.5.3	Policies	658
34.1.6	Financial Requirements	659
43.2	JUDICIAL SERVICES	660
34.2.1	Introduction	660
34.2.2	Current Conditions	661
34.2.2.1	Judicial Services	661
34.2.2.2	Notaries Public	661
34.2.2.3	Investigation and Prosecution	662
34.2.2.4	Raising Manpower Efficiency	662
34.2.2.5	Institutional and Organizational Development	663
34.2.3	Issues and Challenges	664
34.2.3.1	The Judiciary Hierarchy	664
34.2.3.2	Suitable Buildings for Judicial Services	664
34.2.3.3	Specialized and Supervisory Jobs	664
34.2.3.4	Facilities of Bureau of Investigation and Prosecution	665
34.2.4	Demand Forecasts	665
34.2.4.1	Judicial Services	665
34.2.4.2	Investigation and Prosecution	667
34.2.5	Development Strategy	667
34.2.5.1	Future Vision	667
34.2.5.2	Objectives	667
34.2.5.3	Policies	668
34.2.6	Financial Requirements	668
34.3	HAJJ AND UMRAH	669
34.3.1	Introduction	669
34.3.2	Current Conditions	669
34.3.2.1	Overall Performance	669
34.3.2.2	Development of the Holy Places	670
34.3.2.3	Improving Performance of Agencies Responsible for Providing Hajj and Umrah Services	671
34.3.2.4	Institutional and Organizational Development	671

	Subject	Page
	34.3.3 Issues and Challenges	672
	34.3.3.1 Performing Rituals and Worship	672
	34.3.3.2 Developing Pilgrims Transportation	672
	34.3.4 Demand Forecasts	673
	34.3.5 Development Strategy	674
	34.3.5.1 Future Vision	674
	34.3.5.2 Objectives	674
	34.3.5.3 Policies	674
	34.3.6 Financial Requirements	675
	35. STATISTICAL DATA AND INFORMATION SERVICES	677
	35.1 INTRODUCTION	677
	35.2 CURRENT CONDITIONS	678
	35.2.1 Statistical Information	678
	35.2.2 Provision of Timely Data and Information	682
	35.2.3 Statistical Capacity Building	682
	35.2.4 Institutional and Organizational Development	683
	35.3 ISSUES AND CHALLENGES	685
	35.3.1 Regional Databases	685
	35.3.2 Price index	685
	35.3.3 Dissemination of Statistical Data	685
	35.3.4 Private Sector Administrative Data and Indicators	686
	35.4 DEVELOPMENT STRATEGY	686
	35.4.1 Future Vision	686
	35.4.2 Objectives	687
	35.4.3 Policies	687
	35.4.4 Targets	687
	35.5 FINANCIAL REQUIREMENTS	688
	36. METHODOLOGY OF THE NINTH DEVELOPMENT PLAN	689
	36.1 INTRODUCTION	689
	36.2 PLANNING METHODOLOGY	689
	36.3 COMPONENTS OF DEVELOPMENT PLAN	690
	36.4 PREPARATION OF DEVELOPMENT PLAN	691
	36.4.1 Methodology Evaluation	691
	36.4.2 Supporting Studies	692
	36.4.3 Databases and Statistical Information	692
	36.4.4 Plan Preparation Manual	693
	36.4.5 Field visits	693
	36.4.6 Economic Models	693
	36.4.7 Strengthening of Participation of Government Agencies and the Private Sector	694
	36.5 ADVANCES IN PREPARATION OF DEVELOPMENT PLAN	694
	36.5.1 Strategic Dimension of the Plan	694
	36.5.2 Operational Plan	695
	36.5.3 Regional Plans	695
	36.5.4 Monitoring Plan Implementation	696
	36.6 FUTURE VISION OF PLANNING METHODOLOGY	696
	36.6.1 Geographical Dimension	697
	36.6.2 Linkage between Plan and Strategy	697
	36.6.3 Monitoring Mechanisms	697
	APPENDIX	699

Page

xxii

LIST OF TABLES

Subject		Page
1.1	Main Items of the State Budget under Eighth Development Plan	10
1.2	Government Expenditure under Seventh and Eighth Development Plans by Development Sector	11
1.3	Appropriations to Development Sectors of Budget Surplus for 2004–2006	12
1.4	Contributions of Major Sectors of National Economy in Provision of Employment Opportunities to National Labour, Eighth Development Plan	16
3.1	Population Developments over the Period of the Strategy	51
3.2	GDP and Saudi Per Capita Income at 1999 Constant Prices	53
3.3	GDP by Expenditure Items at 1999 Constant Prices	54
3.4	Exports Structure at the Beginning and End of the Strategy Period, at 1999 Constant Prices	55
3.5	Real GDP at 1999 Constant Prices	57
3.6	Labour Force and Employment Indicators	58
3.7	Saudi Labour Force by Level of Education	59
4.1	Macroeconomic Indicators of the Ninth Development Plan Compared with the Eighth Development Plan (1)	64
4.2	GDP by Activity, at Constant 1999 prices	68
4.3	Components of Aggregate Demand, Ninth Development Plan	73
4.4	Financial Requirements of Development Sectors, Ninth Development Plan	78
8.1	Private Sector Performance Indicators, Eighth Development Plan	136
8.2	Distribution of Private Sector Enterprises by Size and Type of Economic Activity, 2008	139
8.3	Percentage Distribution of Private Sector Variables by Economic Activity, Eighth Development Plan	140
8.4	Evolution of Bank Credit to Private Sector Under Eighth Development Plan	141
9.1	Investment by Category of Capital Goods, Eighth Development Plan, at Constant 1999 Prices	156
9.2	Balance of Savings and Investment, Eighth Development Plan	157
9.3	Planned Investment, Ninth Development Plan	167
10.1	Main Indicators of Labour Market, Ninth Development Plan	182
10.2	Total Employment by Sector and Economic Activity, Ninth Development Plan	185
10.3	Total employment by Major Occupational Group, Ninth Development Plan	186
10.4	Employment Balance by Occupational Group, Ninth Development Plan	188
11.1	Distribution of the Saudi and Non-Saudi Population by Age Group, and the Estimated Median Age of the Saudi and Non-Saudi Populations, 1992 and 2004	193

	Subject	Page
	11.2 Main Indicators of Improved Quality of Life, Ninth Development Plan	207
	12.1 Administrative Hierarchical Structure in Regions	212
	12.2 Population by Region, Eighth Development Plan	213
	12.3 Distribution of Developmental Credit among Regions in 2008	216
	12.4 Ratios of Population Concentration in Largest Two Governorates by Region, (2008)	218
	13.1 Capital Assets in Building and Construction Sector, Eighth Development Plan	225
	13.2 Evolution of Number of Building Permits by Category of Facility, Eighth Development Plan	226
	13.3 Building Permits by Province, 2008	226
	13.4 Employment and Value Added in the Construction Sector, Eighth Development Plan	227
	13.5 Distribution of Classified Contractors by Grade and Region, Eighth Development Plan	228
	13.6 Exports and Imports of Basic Building Materials, Eighth Development Plan	229
	14.1 Existing Protected Areas until 2008	238
	14.2 Number of Reintroduced Animals and Birds, Eighth Development Plan	239
Page	15.1 Tourist Services by Region, 2008	254
xxiv	15.2 Distribution of Inward Tourist Trips and Spending by Purpose of Visit, 2008	255
	15.3 Domestic Tourist Trips by Destination and Purpose in 2008	256
	15.4 Tourist Trips Abroad and Spending by Purpose of Visit, 2008	257
	15.5 Top Five Destinations for Tourism Abroad by Purpose of Visit, 2008	257
	16.1.1 Development of Commodity Exports, Eighth Development Plan	267
	16.1.2 Commodity Exports by Major Group of Countries, Eighth Development Plan	268
	16.1.3 Commodity Imports, Eighth Development Plan	269
	16.1.4 Exports and Imports of Services	270
	16.1.5 Non-oil Trade with GCC Countries, Eighth Development Plan	271
	16.1.6 Main Items of Balance of Payments, Eighth Development Plan	272
	16.1.7 Competitive Non-oil Exports, 2004–2007	277
	16.2.1 Activities of Domestic Trade and its Services, Eighth development Plan	282
	17.1 Monetary and Banking Indicators, Eighth Development Plan	298
	17.2 Saudi Stock Market Indicators, Eighth Development Plan	300
	17.3 Main Indicators for Investment Funds, Eighth Development Plan	302
	17.4 Performance of Specialized Lending Institutions, Eighth Development Plan	303
	18.1 Distribution of Young People by Marital Status 2007	315

Subject		Page
18.2	Distribution of Young People in and out of the Workforce, 2004	316
18.3	Care Services for Youth by Administrative Regions, 2009	317
18.4	Demand Forecast for Youth Activities, Ninth Development Plan	326
18.5	Demand Forecast for Sports Facilities, Ninth Development Plan	327
19.1	Household Possessions of Saudi Families in 2007	334
19.2	Progress Made in MDG Maternal and Children Indicators	335
19.3	Beneficiaries of Governmental Social-Welfare and Social-Development Institutions, 2008	339
19.4	Additional Demand for Care Units and Community Centres, Ninth Development Plan	347
20.1	Housing Units by Type, General Censuses of Population and Housing, 1992 and 2004	356
20.2	Demand for Residential Units, Ninth Development Plan	361
20.3	Demand for Residential Units and Land by Region, Ninth Development Plan	362
20.4	Distribution of Target Housing Units and Land by Region, Ninth development Plan	365
21.1	Areas of Scientific Publication, 1996–2006	375
22.1.1	Increase in Number of Kindergartens, Eighth Development Plan	387
22.1.2	Growth of Primary, Intermediate and Secondary Education, Eighth Development Plan	388
22.1.3	General Education (Primary, Intermediate and Secondary) by Administrative Region, 2008	388
22.1.4	Development of Secondary-Education Outputs, Eighth Development Plan	389
22.1.5	Contribution of Private General Education, 2008	390
22.1.6	Development of Adult Education, Eighth Development Plan	391
22.1.7	Forecast Demand for Kindergartens (Children Enrolled), Ninth Development Plan	396
22.1.8	Forecast Numbers of Students Enrolled in General Education (Primary, Intermediate, Secondary), Ninth Development Plan	398
22.1.9	Forecast Distribution of Graduates of Secondary School by Track, Ninth Development Plan	398
22.1.10	Forecast Demand for School Buildings, Ninth Development Plan	399
22.2.1	Numbers of New entrants, Graduates and Enrolled Students, Eighth Development Plan	405
22.2.2	New Entrants, Graduates and Enrolled Students by Region in 2008	406
22.2.3	Distribution of Students by Disciplines in Higher Education	411
22.3.1	Training Activity of TVTC, Eighth Development Plan	419
22.3.2	Activities of IPA, Eighth Development Plan	421
22.3.3	Forecast of Demand for Basic Training by TVTC, Ninth Development Plan	424
22.3.4	Forecast of Increase in Numbers of Training Staff, Ninth Development Plan	424
22.3.5	Forecast of Total Number of Male and Female Trainees in Joint, Government, Private Sector and Community-Service Programmes, Ninth Development Plan	425

	Subject	Page
	22.3.6 Major Training Activities Planned for IPA, Ninth Development Plan	425
	23.1 Health Facilities and Employment, Eighth Development Plan	433
	23.2 Percentage Contribution of Health Sectors, Eighth Development Plan	434
	23.3 Percentage Contribution of Health Sectors, Outpatients and Inpatients, 2007	435
	23.4 Maternity and Child Healthcare Indicators	438
	23.5 Incidence of Communicable Diseases, Targeted by Immunization	439
	23.6 Development of Private-Sector Health facilities, Eighth Development Plan	444
	23.7 Target Number of Hospital Beds by the end of 2014	451
	23.8 Target Number of MOH Hospital Beds by the End of 2014 by Region	452
	23.9 Target Number of Physicians in Hospitals by the End of 2014	453
	23.10 Target Number of Nursing Staff in Hospitals by the End of 2014	453
	23.11 Target Number of Ancillary Medical Workers in Hospitals by the End of 2014	454
	23.12 Target Numbers of MOH Healthcare Centres by the End of 2014	455
	23.13 Target Number of Workers in MOH Primary Healthcare Centres by the End of 2014	456
	24.1.1 Information and Communications Services, Eighth Development Plan	466
	24.1.2 Information and Communication Services by Region	470
Page	24.1.3 Forecast of Demand for ICT services, Ninth Development Plan	476
	24.1.4 ICT Services per 100 of People by Administrative Region, Ninth Development Plan	477
xxvi	24.1.5 Coverage of ICT Services by Administrative Region, Ninth Development Plan	478
	24.2.1 Postal-Service Facilities, Eighth Development Plan	481
	24.2.2 Postal Services Network by Administrative Region, 2008	482
	24.2.3 Development of Postal Services, Eighth Development Plan	483
	25.1 Water Balance, Eighth Development Plan	494
	25.2 Number of Dams and Storage Capacity, Eighth Development Plan	495
	25.3 Water Desalination, Eighth Development Plan	496
	25.4 Potable Water Services, Eighth Development Plan	497
	25.5 Sanitation Services, Eighth Development Plan	497
	25.6 Forecast of Water Supply and Demand, Ninth Development Plan	503
	25.7 Forecast of Water Demand by Region, Ninth Development Plan	504
	25.8 Water Desalination, Ninth Development Plan	504
	25.9 Forecast of Potable Water and Sanitation Services, Ninth Development Plan	505
	25.10 Forecast of Potable Water Services by Region, Ninth Development Plan	506
	25.11 Forecast of Sanitation Services by Region, Ninth Development Plan	507
	26.1 Domestic Production of Refined Products, Eighth Development Plan	515
	26.2 Domestic Energy Consumption, Eighth Development Plan	516
	26.3 Domestic Consumption of Natural Gas and Liquids, Eighth Development Plan	517
	26.4 Domestic Consumption of Refined Products, Eighth Development Plan	518
	26.5 Domestic Energy Consumption, Ninth Development Plan	522
	26.6 Domestic Consumption of Natural Gas and Liquids, Ninth Development Plan	523

Subject		Page
26.7	Domestic Consumption of Refined Products, Ninth Development Plan	524
27.1	Mining Activities Indicators, Eighth Development Plan	531
27.2	Mineral Resources Production Sector, Eighth Development Plan	533
27.3	Demand for Mining Products, Ninth Development Plan	541
28.1	Crop Production, Eighth Development Plan	547
28.2	Meat and Dairy Products, Eighth Development Plan	547
28.3	Animals and Poultry, Eighth Development Plan	548
28.4	Relative Distribution of Agricultural Land and Crops over Regions	549
28.5	Loans and Subsidies Provided by the Agricultural Development Fund, Eighth Development Plan	552
28.6	Beneficiaries of the Agricultural Development Fund Loans, 2008	552
28.7	Forecast of Demand for Basic Agricultural Products, Ninth Development Plan	558
29.1	Main Achievements of the Industrial Sector, Eighth Development Plan	562
29.2	Number of Factories, Funding and Employment, Eighth Development Plan	564
29.3	SIDF Loans until 2008	565
29.4	Number of Operating Factories, Employment and Finance by Administrative Region, 2008	567
29.5	Industrial Exports, Eighth Development Plan	568
29.6	Calibration and Quality Control Services, Eighth Development Plan	570
29.7	Targets for Industrial Sector, Ninth Development Plan	578
29.8	Calibration and Quality Control, Ninth Development Plan	578
30.1	Key Indicators of Electricity Sector, Eighth Development Plan	584
30.2	Key Indicators of Electricity Sector, Ninth Development Plan	590
30.3	Forecast of Peak Loads and Number of Subscribers by Administrative Region, Ninth Development Plan	591
31.1	Road Network by Administrative Region, 2008	599
31.2	Activity of Railway Network, Eighth Development Plan	601
31.3	Forecast of Land Transport Activity (Number of Trips), Ninth Development Plan	614
31.4	Forecast of Railway Activity by Major Route, Ninth Development Plan	615
31.5	Air Traffic Forecasts, Ninth Development Plan	617
32.1	Targeted and Implemented Municipal Services Projects, Eighth Development Plan	622
32.2	Approved Municipal Services Projects in Regions, Eighth Development Plan	623
32.3	Number of Regional Municipalities (Amanat), Municipalities and Village clusters At End of Seventh and Eighth Development Plans	626
32.4	Distribution of Amanat and Municipalities by Administrative Region, 2009	627
32.5	Planned Projects to Meet Demand for Municipal Services by Administrative Region, Ninth Development Plan	633
32.6	Municipal Services Targets by Administrative Region, Ninth Development Plan	636

	Subject	Page
33.1	Cultural and Information Services Targets by Region, Ninth Development Plan	650
34.1.1	Services of the Ministry of Islamic Affairs, Endowments, Call and Guidance, 2008	653
34.1.2	Demand Forecast of Religious Services by Region, Ninth Development Plan	657
34.2.1	Forecast of the Number of Courts by Category and Region, Ninth Development Plan	666
34.3.1	Forecast of the Number of Pilgrims and Umrah Performers, Ninth Development Plan	673
35.1	Implemented Statistical Surveys, Eighth Development Plan	679
35.2	Implemented Reports and Statistical Studies, Eighth Development Plan	681

Page

xxviii

LIST OF FIGURES

Subject	Page
1.1 Public Debt and Net Foreign Assets of Government under Eighth Development Plan	13
1.2 Distribution of Bank Credit by Maturity, Eighth Development Plan	18
3.1 Percentage Contribution of Economic Sectors to GDP	57
3.2 National Labour Force Structure by Level of Education	59
4.1 Growth Rate of GDP and its Major Components, Ninth Development Plan	66
4.2 Main Components of Aggregate Demand, Ninth Development Plan	74
4.3 Trade and Current Account Balance at Current Prices, Ninth Development Plan	77
4.4 Employment and Unemployment Growth Rates, Ninth Development Plan	80
6.1 General Ranking of Kingdom in Doing Business Report	110
8.1 Distribution of Private Sector Enterprises by Type of Economic Activity, 2008	138
9.1 Fixed investment, Capital Stock and GDP, Under Eighth Development Plan	154
9.2 Sectoral Structure of Major Investment Expenditure, Under Eighth Development Plan	155
9.3 Distribution of FDI Balance by Economic Sector, 2008	158
10.1 Percentage Distribution of Total Employment by Level of Education and Nationality, 2008	170
10.2 Distribution of Public Sector Workers by Type of Job, 2008	171
10.3 Percentage Distribution of Employment in Private Sector by Economic Activity, 2008	173
10.4 New Entrants to Labour Market by Level of Education, Ninth Development Plan	183
11.1 Population Pyramids of Saudis and Expatriates According to 2004 General Census of Population and Households	192
11.2 Quality of Life Index and its Components, Eighth Development Plan	196
13.1 Value Added in Building and Construction Sector, Eighth Development Plan	224
13.2 Cement Production, Eighth Development Plan	230
15.1 Percentage Distribution of Craftsmen and Craftswomen over Regions, 2008	253
16.1.1 Percentage Distribution of Non-Oil Exports by Major Item, 2008	267

	Subject	Page
	16.1.2 Non-Oil Exports and Re-Exported Goods, Eighth Development Plan	275
	16.2.1 Structure of Existing Registers for Activities of Domestic Trade, Eighth Development Plan	281
	16.2.2 Number of Companies, Eighth Development Plan	283
	16.2.3 Number of GCC, Mixed and Foreign Companies, Eighth Development Plan	284
	16.2.4 Employment in Domestic Trade Sector, Eighth Development Plan	286
	16.2.5 Number of Workers in Wholesale and Retail Trade, 2008	291
	18.1 Distribution of 15–24 Year Olds by Place of Residence, 2004	315
	22.1.1 Forecast of New Entrants by Education Level, Ninth Development Plan	397
	23.1 MOH Beds per 10 Thousand of Population, by Region	436
	23.2 MOH Physicians per 10 Thousand of Population by Region	436
	23.3 MOH Nursing Staff Per 10 Thousand of Population by Region	437
	24.1.1 Type of Internet Connection by Activity, Eighth Development Plan	468
	24.1.2 PCs and Internet Service Coverage, Eighth Development Plan	469
Page	26.1 Production of Oil and Natural Gas, Eighth Development Plan	514
	26.2 Forecast of Production of Natural Gas and Liquids, Ninth Development Plan	525
xxx	27.1 Development of Raw Materials Production, Eighth Development Plan	530
	27.2 Government Revenues from Mining Activities, Eighth Development Plan	535
	27.3 Distributions of Mineral Sites in the Kingdom	536
	28.1 Share of Regions in Total Demand for Main Agricultural Products, Ninth Development Plan	558
	29.1 Percentage Distribution of Industrial Employment, 2009	566
	30.1 Distribution of Electricity Consumption by Category of consumers, 2008	582
	30.2 Percentage Distribution of Electric Power Generated by Type of Generation, 2008	585
	30.3 Number of Subscribers, Ninth Development Plan	591
	30.4 Forecast of Electricity Consumption, Ninth Development Plan	592
	31.1 Paved-Road Network, Eighth Development Plan	598
	31.2 Road Transport Fleet, 2009	600
	31.3 Planned Railway Network, Ninth Development Plan	602
	31.4 Passenger Traffic at Airports, Eighth Development Plan	603
	31.5 Cargo Handled by Commercial and Industrial Ports, Eighth Development Plan	604
	31.6 Forecasts of Port Activity (Cargo Handling), Ninth Development Plan	616

LIST OF BOXES

Subject		Page
5.1	Most Important Supporting Projects for Building a Knowledge-Based Economy	94
5.2	Main Education Issues in the Kingdom	95
5.3	Main Challenges of Transfer and Indigenisation of Knowledge Content	97
5.4	Main Challenges of Building Capacity for Knowledge Production	98
5.5	Main Challenges of Transforming Knowledge into Products	99
6.1	Competitiveness of the Kingdom as Assessed by International Reports	109
6.2	Examples of Clusters	116
7.1	Projects in the Field of Electronic Transactions	126
9.1	Sectoral Focus of SAGIA for Investment	160
10.1	Saudi Employment Strategy	177
11.1	Tasks of the National Commission on Population	194
11.2	Main Measures for Reducing Cost of Living	197
21.1	Scientific Research Methods and Mechanisms	371
24.1.1	The General Objectives of NCITP	465
26.1	Domestic Refining Projects Underway	516
28.1	King Abdullah Initiative for Agricultural Investment Abroad	554
32.1	Main Regulatory Decisions Related to the Municipal Sector Passed under the Eighth Development Plan	628
33.1	King Abdul-Aziz Centre for National Dialogue	640

Ninth Development Plan

Page

xxxi

Table of Contents