

الهيئة العامة للمناطق الاقتصادية الخاصة والمناطق الحرة
Public Authority for Special Economic Zones and Free Zones
Sultanate of Oman



OPAZ

The Public Authority for Special Economic Zones and Free Zones
A focus on Renewable Energy Manufacturing & Green Steel Downstream



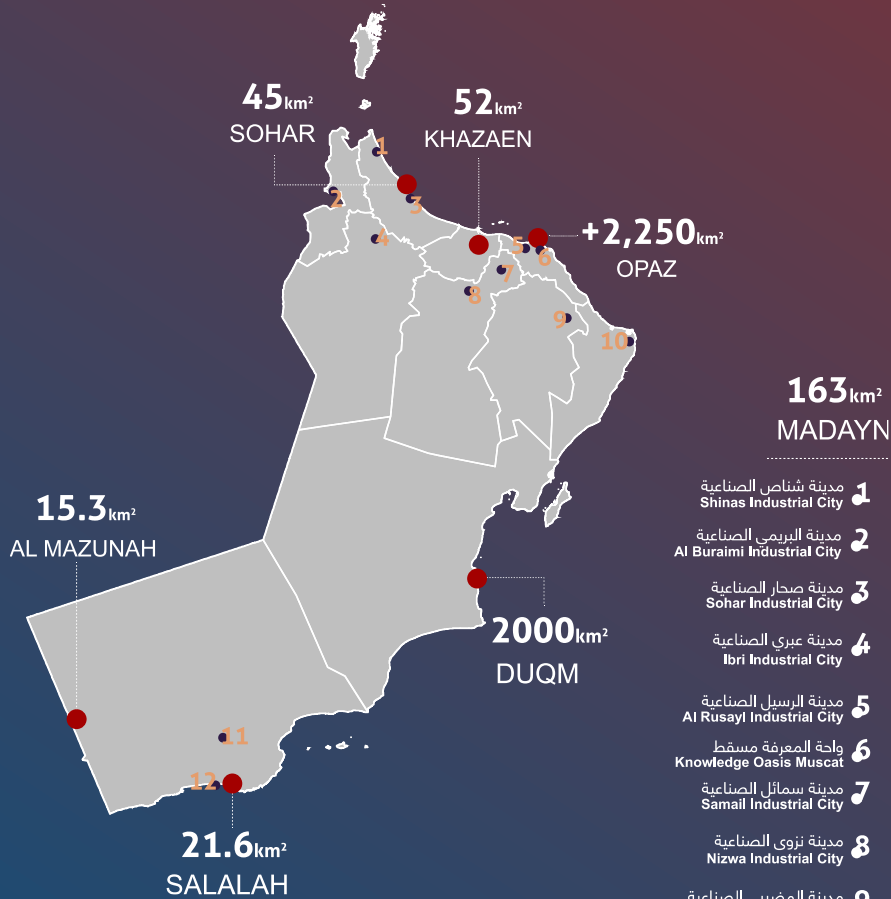
بإسناد وثقة
Moving Forward
with Confidence

رؤية عمان
2040
Vision Oman



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<https://omap.pm>

- 1 مدينة شناص الصناعية
Shinas Industrial City
- 2 مدينة البريمي الصناعية
Al Buraimi Industrial City
- 3 مدينة صحار الصناعية
Sohar Industrial City
- 4 مدينة عبري الصناعية
Ibri Industrial City
- 5 مدينة الرسيل الصناعية
Al Rusayl Industrial City
- 6 واحة المعرفة مسقط
Knowledge Oasis Muscat
- 7 مدينة سمائل الصناعية
Samail Industrial City
- 8 مدينة نزوى الصناعية
Nizwa Industrial City
- 9 مدينة المضبيبي الصناعية
Al Mudhaibi Industrial City
- 10 مدينة صور الصناعية
Sur Industrial City
- 11 مدينة ثمريت الصناعية
Thumrait Industrial City
- 12 مدينة ريسوت الصناعية
Raysut Industrial City

OPAZ

The Public Authority for Special Economic Zones and Free Zones

Is the government entity responsible for all Special Economic Zones, Free Zones, and Industrial Estates.

49 Billion USD

Total investment volume in the zones affiliated to the Authority until Dec 2023

22 Zones

- 1 (1) Established Special Economic Zone
(2) Under-establishment
- 2 (3) Established Free Zones
(1) Under-establishment
- 3 (9) Established Industrial-Estates
(6) Under-establishment

About OPAZ

The Public Authority for Special Economic Zones and Free Zones was established August 2020 by Royal Decree No. 105/2020

Vision: The investment destination of choice

Mission: Developing and regulating the zones affiliated with OPAZ and providing an attractive and sustainable investment environment

The Authority’s functions and its relationship to the Special Economic Zone at Duqm, the Free Zones and the Industrial Estates:

OPAZ Strategic Pillars | 6 Strategic Objectives | 28 Sub-Objectives

Plan & Develop	Regulate & Supervise	Facilitation & Aftercare	Market & Attract	Activate & Accelerate	Organization Excellence
Ensure that OPAZ zones plan for and provide property solution that meet future priority sector	Ensure a business friendly regulatory environment in OPAZ zone plans and preformation	Deliver investor centric approach to company facilitation and aftercare to ensure efficient company setup and growth	Partner with key stakeholders to develop and promote sector specific value proposition that attract and deliver core target investors	Work with partners to realise a new economic growth pole in Duqm by activating & accelerating core sub-zone development plans that compliment Oman’s overall national offering	Ensure that OPAZ has the right culture, plans, skills and systems to deliver its strategy & mandate



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Investor Incentives

Incentive	Details
Foreign ownership	100% wholly owned
Currency	All currencies permitted
Capital	No minimum requirement
Tax exemption	10 - 30 years depending on zone
Profit	100% repatriation permitted
Tenancy agreement	Usufruct agreement up to 50 years, renewable for similar periods
Foreign labor permits	Issued within 24 hours
Residency (investors & workforce)	Eased processes
Minimum required local workforce	10% in free zones 35% in industrial estates

With streamlined incentives across all FEZ's in Oman, investors can take advantage of the free & open eco-system to attract, grow, and foster businesses and investments

APPLY

- Fill the application form of land usufruct
- Proposed plot provided to investor

ADMIN

- Business set-up & Commercial Registration
- Submit registration documents

CONTRACT

- Usufruct submitted to investor for signature

PERMITS

- Krookie is submitted to investor
- Assign consultant & submit drawings to Zone
- Visa & Permits issued



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Ideal Business Environment

The Omani Special Economic and Free Zones are one of the most attractive destinations in the MENA region

Value proposition:



Multimodal
transportation
system



Diverse
natural
resources



Ease of doing
business



International
relationships



Strategic
location

OPAZ's fundamental pillars

1. Quality infrastructure
2. Connectivity
3. Utilities

1. Quality infrastructure
2. Connectivity
3. Utilities



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Bilateral Trade Relations and Tax Treaties

Free Trade Agreements and other International Agreements:

Oman has established a robust network of over 105 agreements and treaties, including Free Trade Agreements (FTAs) and bilateral investment treaties, to encourage foreign investment and enhance economic integration with the global economy.



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Close Proximity to Markets with more than 2.5B People

In the route of the most important maritime lines

Direct flights from the capital to most continents in the globe






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Oman already has topmost access to logistics and infrastructure required for localized manufacturing companies

overview

Infrastructure requirements	Oman positioning		
Utilities connection	<p>>\$10B FDI1 inflows in water & electricity sector</p> <p>Profound experience of planning & procuring for electricity & water necessities for incoming manufacturing companies</p>		
Road and rail	<p>Oman's roads were ranked in the TOP-10 globally and 2nd in the GCC which reflects sizeable financial commitment by the Government and quality of road. Oman to be connected with Etihad rail by 2027</p>		
Ports & Free zones			
	<p>Duqm - 50:50 JV between Port of Antwerp (Europe's 2nd largest port) & Sultanate of Oman (Asyad)</p>	<p>Salalah - Partly owned by APM terminals (Danish container operator, among world's largest)</p>	<p>Sohar - 50:50 JV between the Port of Rotterdam and the Sultanate of Oman (Asyad)</p>
Aviation	<p>Oman International Airport is voted one of the top airports in the world, ranked 7th best airport worldwide in 2019 in the category of 15-25M passangers3</p>		



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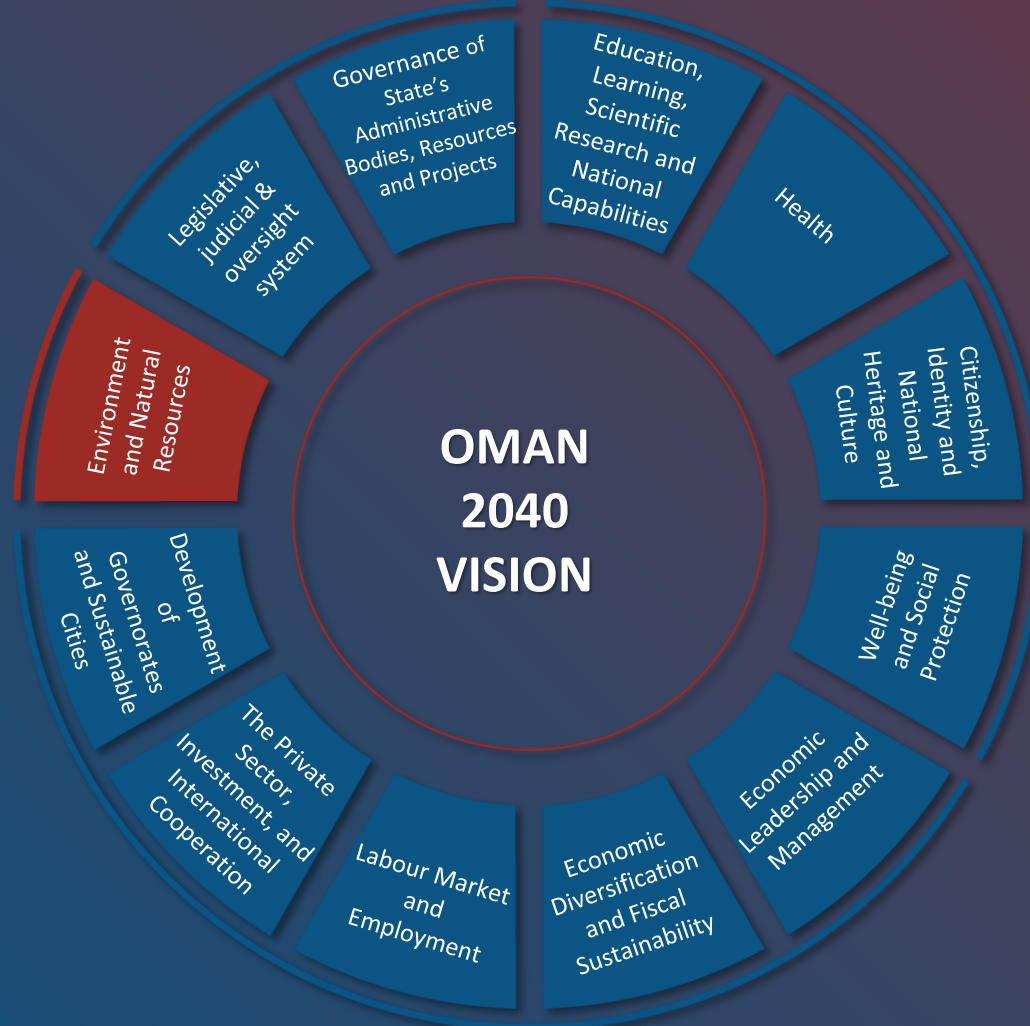


Renewable Energy

Oman is defining the national green hydrogen strategy – 30-60GW electrolyzer capacity by 2040 announced as preliminary ambition

Oman’s 2040 Vision prioritized a green economy path with a strong focus on green Hydrogen

His Majesty Sultan Haitham bin Tarik issued directives to drive H2 sector and creation of HYDROM by royal decree 10/2023



- Establishment of a company to develop the clean energy and H2 sector in Oman (HDO) followed by creating an entity in charge in orchestrate the hydrogen industry in Oman
- Inclusion of the sector as part of the organizational structure of the Ministry of Energy and Minerals
- Acceleration of procedures for regulating the sector and setting up the necessary legal frameworks and policies for its growth
- Allocation of appropriate sites (50K sq.km) for the production of green hydrogen with the aim of promoting foreign investment and localizing the technology
- Announcing 2050 as they year to achieve net-zero emotions



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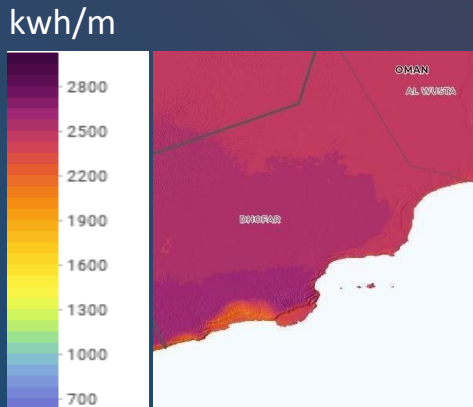
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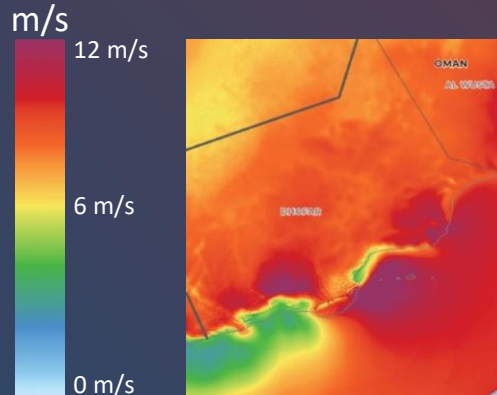
Oman has world class renewable resources



Solar PV Potential ¹

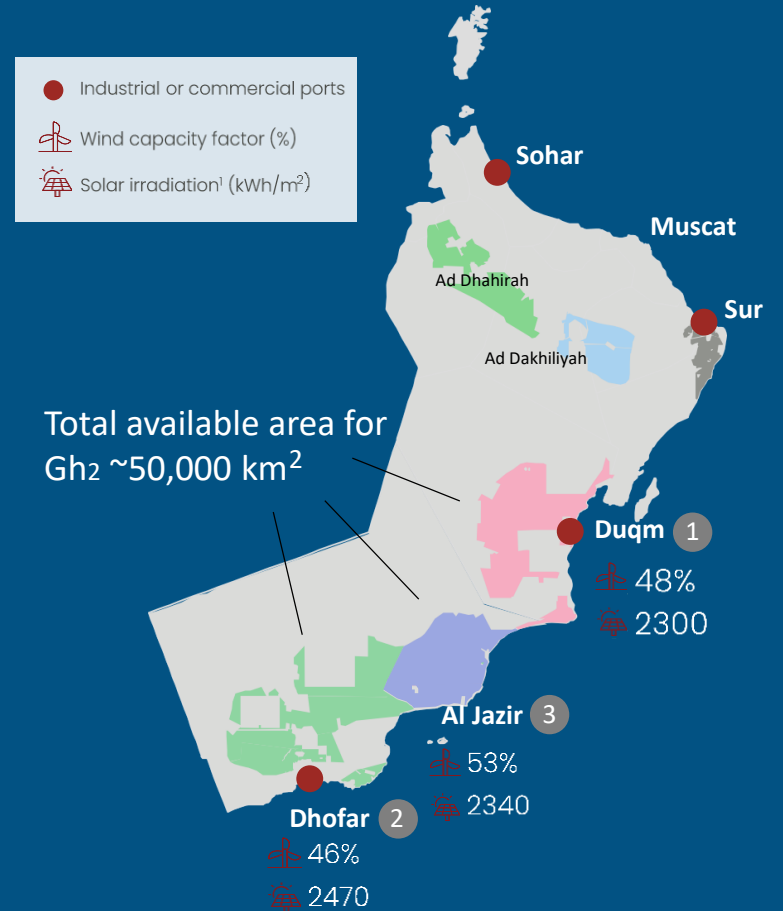


Wind speed



1. Global Horizontal Irradiation (Source: Global solar atlas, Global wind atlas (July '22))

3 zones selected to develop gh₂ projects





Establishment of the National Hydrogen Alliance (Hy-Fly) with 13 key public & private entities to promote clean Hydrogen (August 2021) including the Public Authority for Special Economic Zones

Oman ambition is to develop the entire value chain in the green H2 sector

H2 production

- Energy supply
- H2 production

H2 logistic

- Storage & transport
- Retail

H2 utilization

- Industrial processes
- Transport applications
- Power generation
















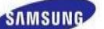









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Clear sector structure with four different roles to drive the Hydrogen economy in Oman

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role	Policy maker & Regulator		Orchestrator		Infrastructure	Developer					
H ₂ value chain	Country Strategy & policies	Regulations	Tender, land & infrast. mgmt	Off-take coordination	Transport & Storage	Financing	Renewable/ Power systems	H2 production	Derivatives	Shipping	
omani entities involved	 <p>وزارة الطاقة والمعادن Ministry of Energy and Minerals</p>				 <p>Public Authority for Special Economic Zones and Free Zones Sultanate of Oman</p>   <p>And others</p>	 <p>OQ + International developers</p>                					 <p>اسياد ASAD</p>

International investors are looking to Oman and announced several large-scale H2 projects with electrolyzer capacity over 19GW

Project	ACME proj. (Duqm)	Hyport Duqm	Green Energy Oman	Sohar H2 Plant	Salalah H2	BP Alternative Energy	Hyduqm	Project Amnah
Announced electrolyzer capacity	Powered by ~ 3GW solar + 500MW wind	~ 250-500 MW1 Powered by 1.3GW solar	~ 14 GW Powered by 25GW solar + wind	~ 35 MW3 Powered by ~1GW solar	~ 400 MW Powered by 1GW solar + wind	~ 3.3GW of electricity ~ 150,000 metric tons of hydrogen annually	~ 1.2M tons per annum of green ammonia	~ 215,000 tons of Green Hydrogen per annum
Current status	 Only announced, on feasibility development state (no Final Investment Decision)							
Key Partners								
Others	MEM signed a strategic framework agreement with BP for wind measurements for two sites (in Al Wusta and Dhofar)							



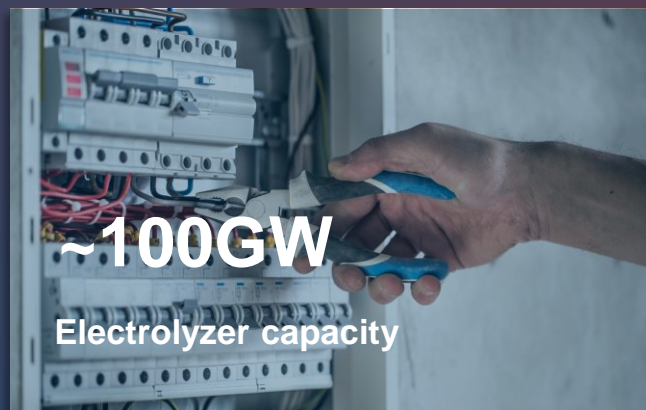
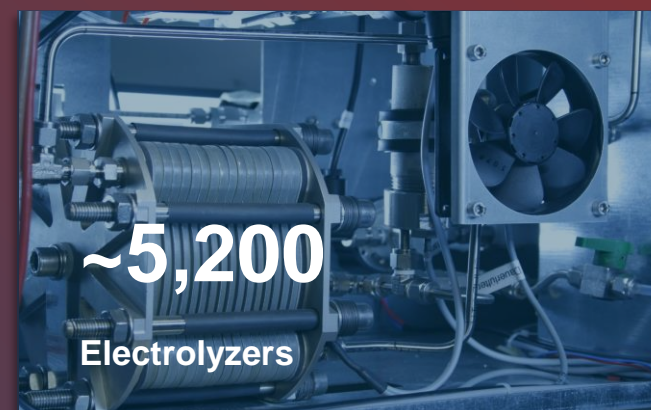
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The establishment of PV and Wind energy facilities across Oman will require significant amounts of components, parts and systems

Companies manufacturing and assembling these products are most welcome in Oman.



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Green Metals (Steel, Aluminum and Alloys) production Opportunities for manufacturers in Oman in Oman

Green Metal Manufacturers in the Special Economic Zone at Duqm

These companies have committed in excess of US\$7bn to establish in Duqm, to use green energy to manufacture green Iron, Steel and Aluminium



Part of Jindal Group
Green metals and alloys



Iron Metallics Business
Green metals and alloys



An integrated industrial complex for low carbon products

Jindal Shadeed (Vulcan) has started construction of its green steel facility and, working with OPAZ, plans to attract users of green steel to the Special Economic Zone at Duqm.

Green steel and alloys can be used by a very diverse range of downstream manufacturers including **Green Auto and EV manufacturing Sector**.



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 Markets



Project
VOPC&VODC



Markets



Project
Jindal Shadeed Iron & Steel



Establishment
Construction :2009
Production start up: 2011



Establishment
Commissioning of DRI
Plant in 2010
Upgrade in 2023



Production
9,313,899 Ton
of TBC



Production
- Square Billets
- Round Billets
- Rebar



Land size
“sqm” 1,031,600



Land size
Plant area 300 Acers with 600
Mts long Jetty



Import
PFPT : 6,849,093 Ton from
Tubaro

IOCJ: 3,455,779 from Ponta da
Madeira

1. Egypt
2. Libya
3. USA
4. KSA
5. Malaysia
6. Algeria
7. Spain
8. Qatar
9. India

1. Oman
2. UAE
3. KSA
4. Qatar
5. Bahrain
6. Yemen
7. Kuwait
8. India
9. Pakistan
10. Bangladesh
11. Indonesia
12. Malaysia
13. Thailand
14. Myanmar
15. Brunei
16. China
17. Taiwan
18. Singapore
19. Philippines
20. Egypt
21. Ethiopia
22. Tanzania
23. Mauritius
24. Italy
25. Germany
26. USA
27. Canada
28. Peru
29. Australia



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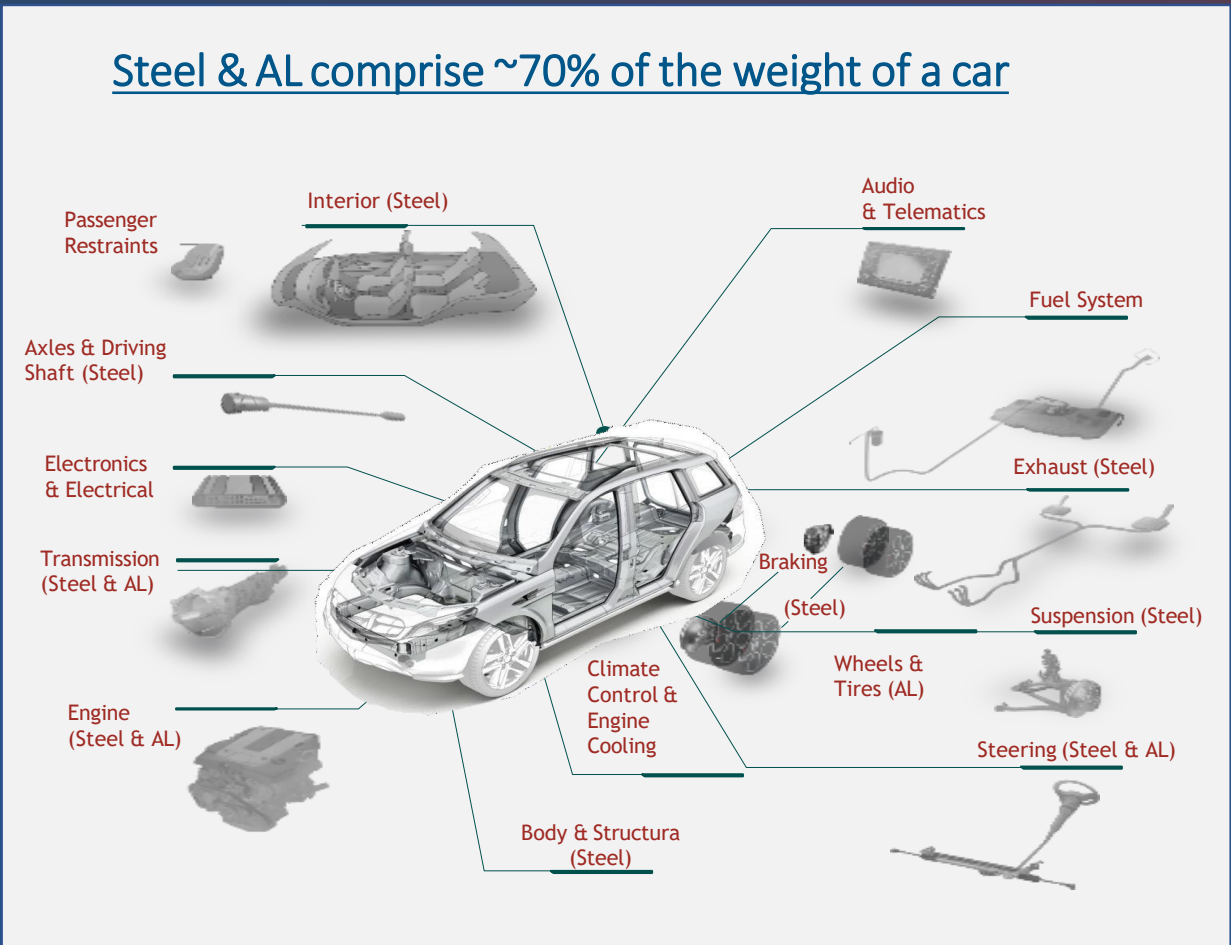
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Green Steel and Aluminum in the Automobile and EV Sectors

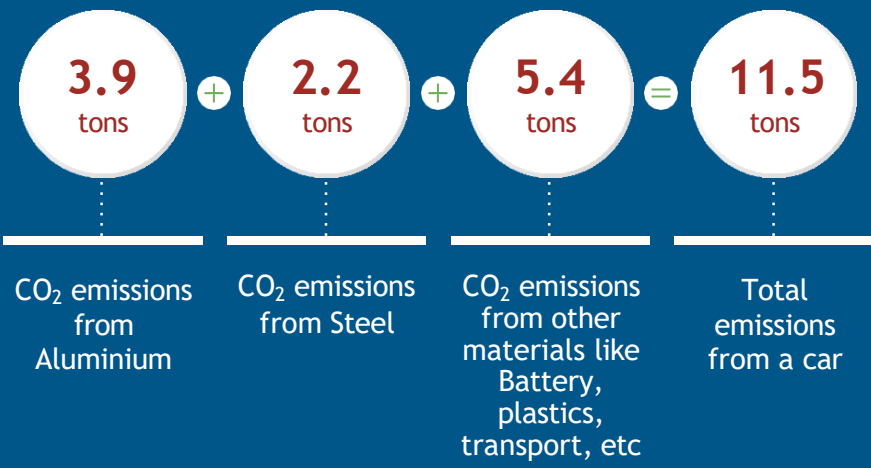
Courtesy of Jindal Shadeed

Steel & AL comprise ~70% of the weight of a car



Replacing Grey AL & Grey Steel in a car with Green AL & Green Steel would bring down CO₂ emissions of a car by >50%

Break-down of Scope 1, 2 & 3 CO₂ emissions from a car



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OPAZ is very interested in talking to companies manufacturing for the Auto/EV sector

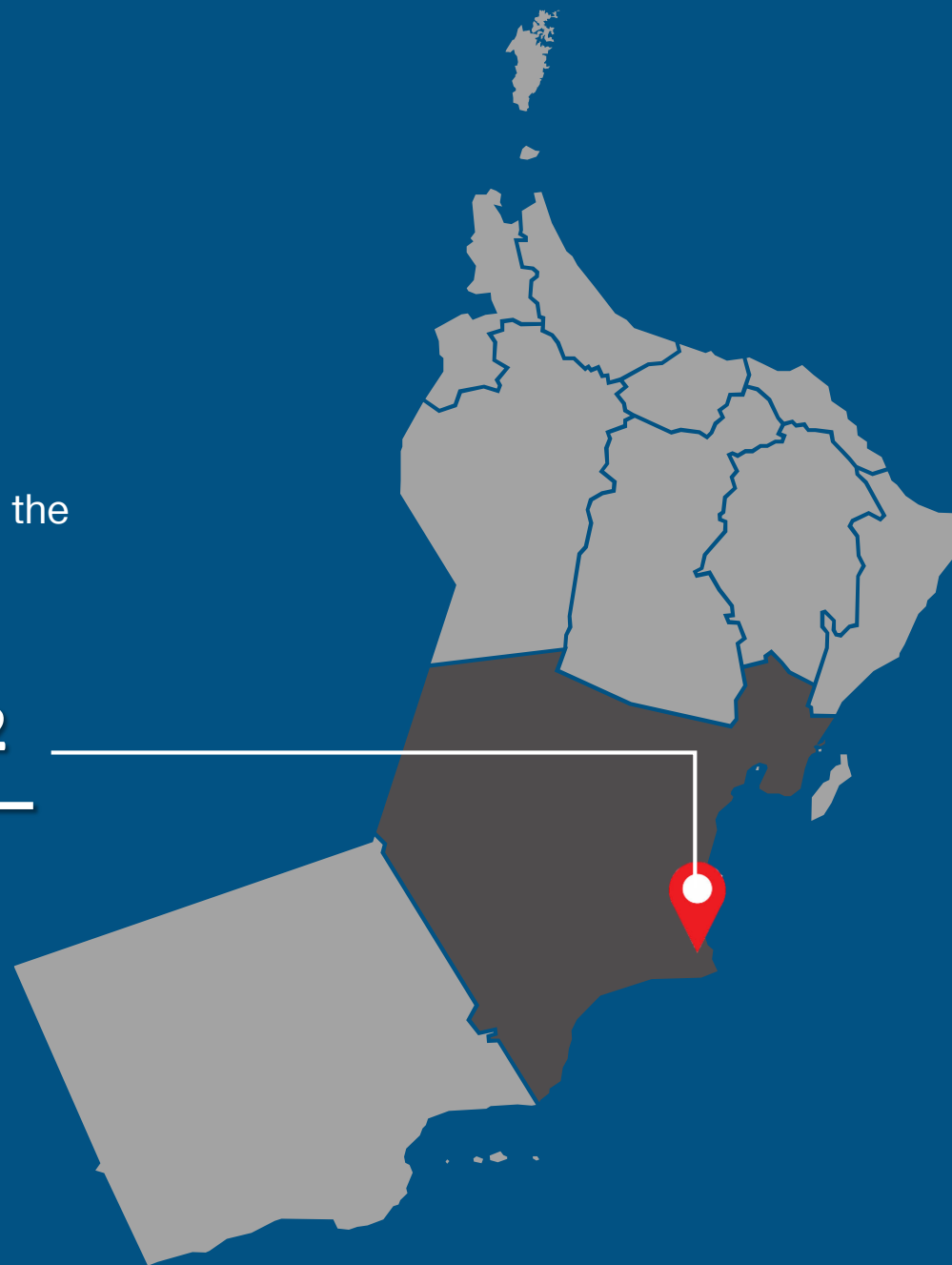
SEZAD

15

Billion USD

Total investment volume affiliated to the zone until Dec 2023

2,000 sq. km²



The largest Special Economic Zone in the Sultanate of Oman



Development period

2012 onwards



Accommodation

2000 Beds of 3 - 4 star hotels and hotel apartments
23,000 beds labor accommodation



Airport

Local Airport – 1 hour flight to Capital Muscat



Port facilities

Deep sea Multi-purpose port – Managed and operated the Port of Duqm Company



Medical & educational

Family friendly to accommodate quality living necessities facilities

Projectv	Details
Highways	World class roads connecting Duqm locally and internationally
Port	Multi-purpose port handling various operations with through a JV between ASYAD (Gov't owned) & Port of Antwerp (Belgium)



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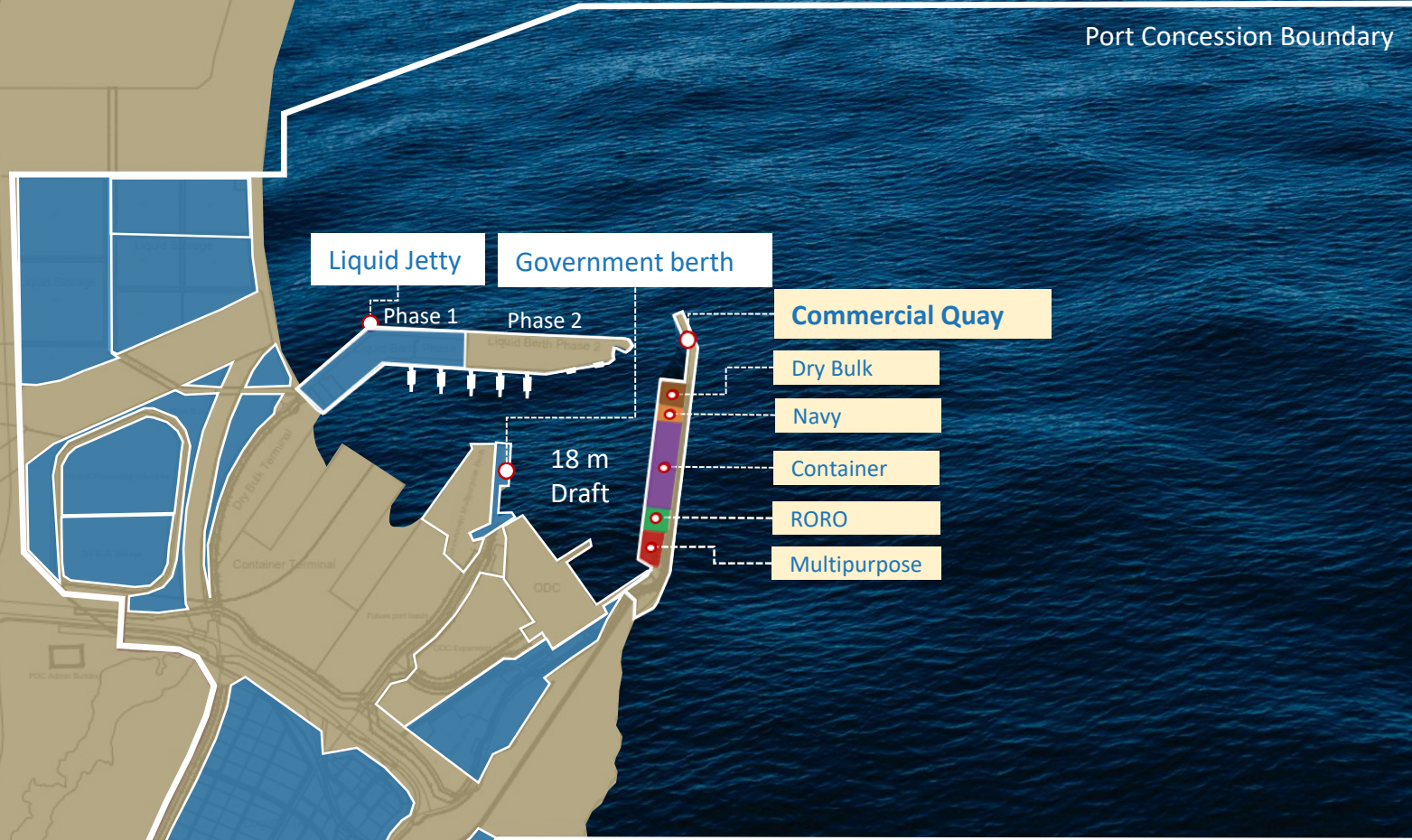
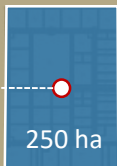


SEZAD

Port of Duqm – Master Plan



DILC* (Phase1)



 Land Managed by port authority

*Duqm Industrial Land Company (DILC) is subsidiary of Port of Duqm Company (PODC)

Liquid
Jetty



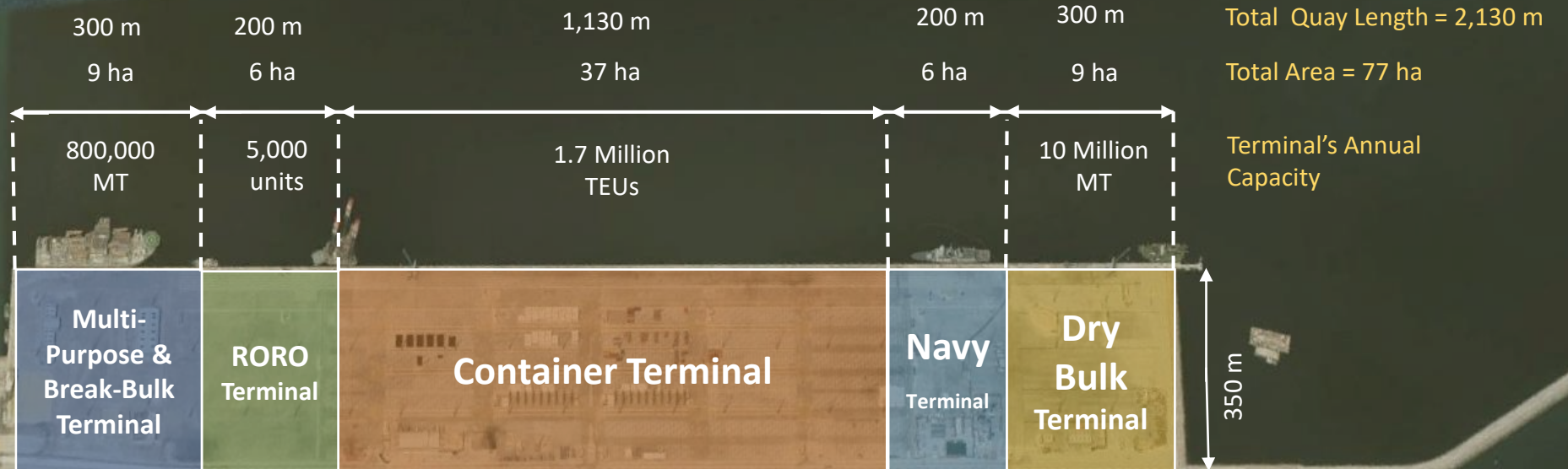
Terminals at the Commercial Quay

The Commercial Quay

- Quay Length : 2,230 meters
- Quay Width : 350 meters
- Quay Area : 77 hectares
- Draft : - 18 meters CD

ASYAD
Dry Dock

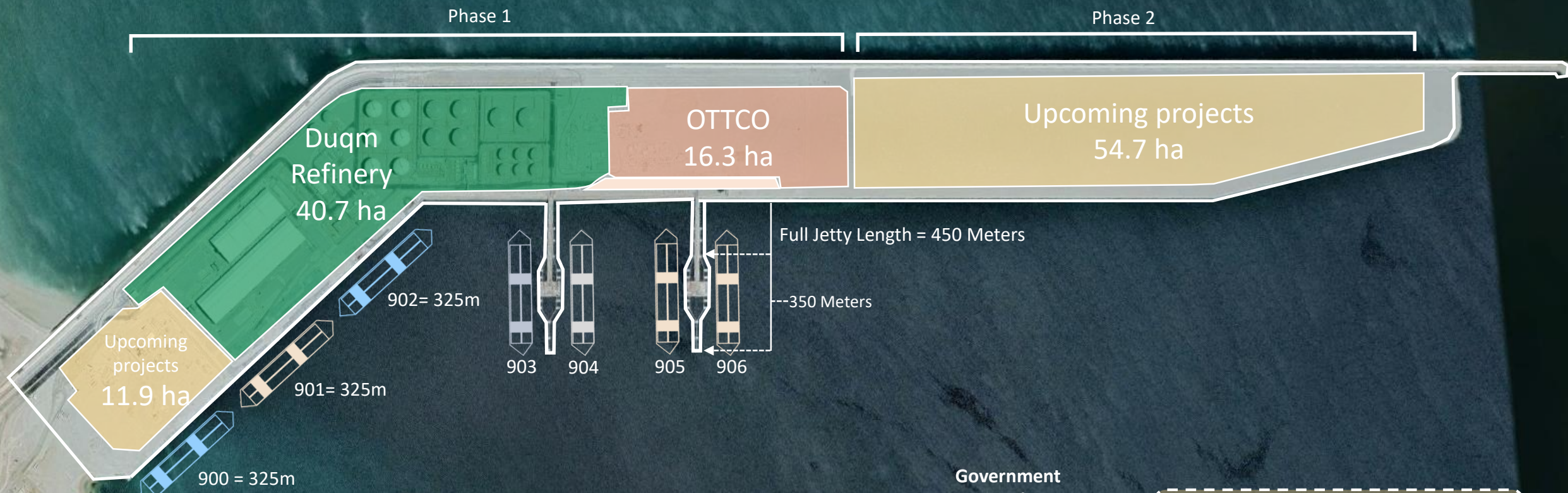
Commercial Quay



Oman Oil
Bunker Terminal

Port of Duqm

Port of Duqm - Terminals



Duqm Refinery Clean Products Export (Planned) :

- Diesel 7.0 Mtpa
- Jet Fuel 1.1 Mtpa
- Naphtha 2.9 Mtpa
- LPG 0.4 Mtpa
- Petcoke 0.85 Mtpa
- Sulphur 0.22 Mtpa

The Liquid Jetty

- # of Berths : 7 berths
- Quay Width : 350 meters
- Quay Area : ~125 hectares
- Draft : - 18 meters CD

About the Special Economic Zones at Duqm

Key Projects and Tenants



OQ8
Oil and Gas
Refinery



OTTCO
Oil and gas storage



HYPOR® DUQM
Green hydrogen plant



Asyad Dry Dock
Dry dock for ship
repair/maintenance and
steel fabrication



Tourism
Hotels & Leisure
developments



Renaissance Village
Accommodation & living
facilities



Karwa Motors
Bus assembly &
manufacturing
Investment: \$88.3M



**Fishery based
factories**
Freezing and packaging,
fish oil production



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OQ8

Oil and Gas Refinery

\$8.6_B

Investment of OQ8 & OTTCO

Duqm Refinery, one of the integral projects in Oman, was established through a JV between OQ and the Kuwait Petroleum International Company (KPI)

- Production capacity of 230,000 barrels/day



Asyad Dry Dock

Dry dock for ship repair/maintenance
and steel fabrication

1,170

No. of ships repaired and converted
from 2011-date

- One of the largest Dry Docks in the Middle East and Africa, ODC has two docks with a max. load of 600 DWT
- Services include shipbuilding, maintenance, steel fabrication servicing commercial, government, cruise ships and more

Duqm Airport



24 km from the Port
19 km from the city center



Cargo terminal to accommodate
25K tones of goods annually



Designed to accommodate all types of
aircrafts including those handling large
passenger loads or air cargo



Renaissance Village

Accommodation & living facilities

23,000 beds

Capacity for

- World class facility that provides accommodation for all levels of employees
- All accommodation includes meals, laundry, WiFi connectivity and essential support services: recreation, medical and a Mosque



Karwa Motors

Bus assembly & manufacturing
Investment: \$88.3M

\$200

M

Investment

- JV between Mowasalat Qatar, the state-owned transport company of Qatar, and Oman Investment Authority, Oman's sovereign wealth fund
- 600,000 sq. m of space and a capacity to produce up to 500 buses annually



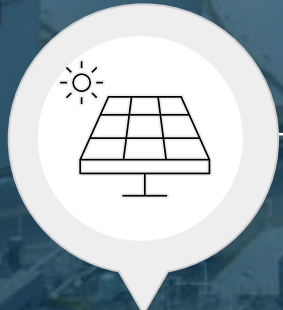
Multipurpose Fishery Port

\$160 M

Infrastructure

- Largest fishery port in Oman with a depth of -10m to become a multipurpose port for Dhows
- Management and operation will be lead by a consortium between OIA and SEM Lorient-Keroman, a leading French operator
- Fishery industrial complex in close proximity to the Port. Includes 5 fish process factories, plus 2 under construction

Investment opportunities



Renewables



logistics



Healthcare



Tourism



Residential



Education



Commercial



Fisheries



Port & Drydock



Industries



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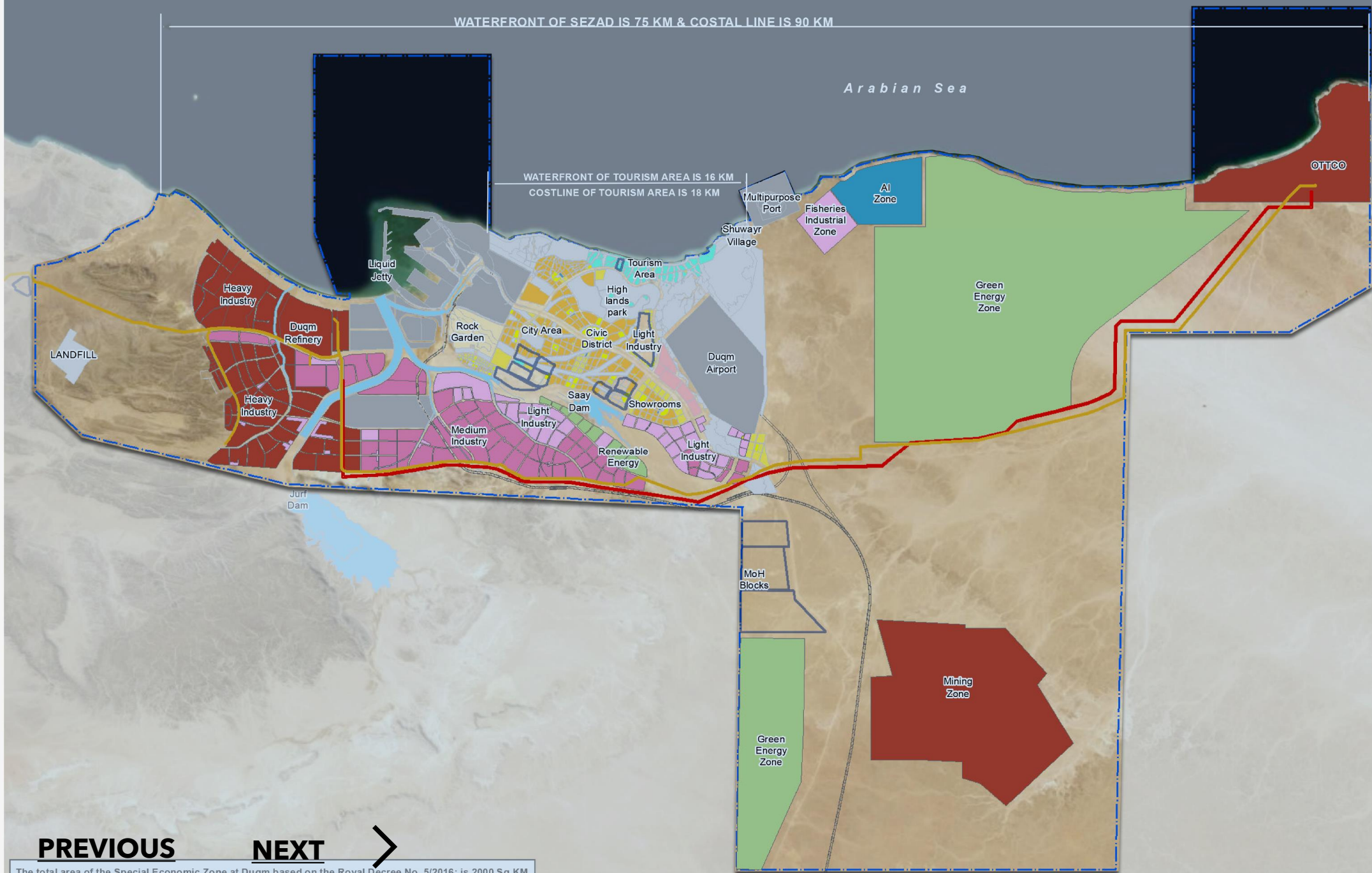
SEZAD

WATERFRONT OF SEZAD IS 75 KM & COSTAL LINE IS 90 KM

Arabian Sea

WATERFRONT OF TOURISM AREA IS 16 KM
COSTLINE OF TOURISM AREA IS 18 KM

OTTCO



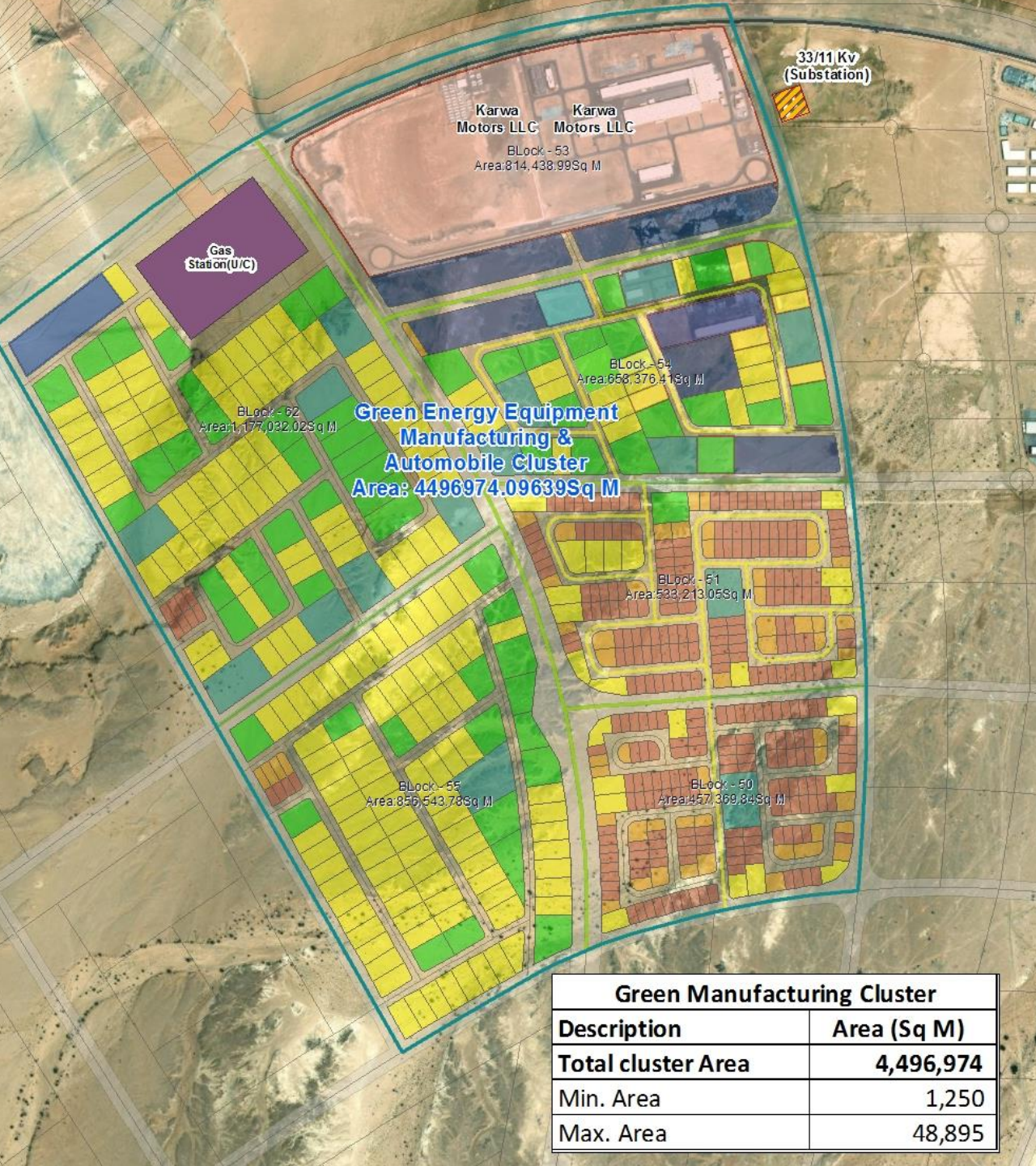
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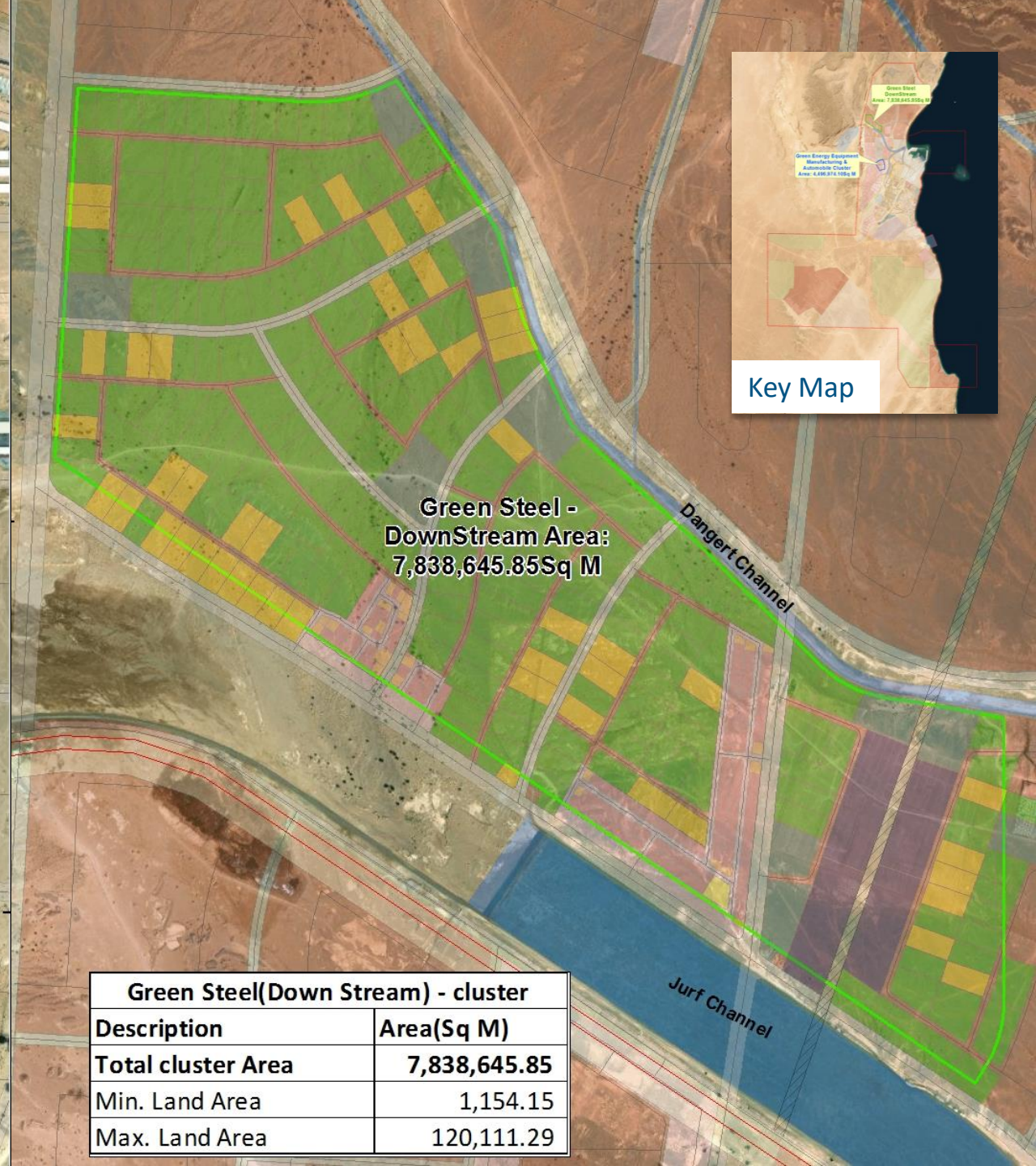


The total area of the Special Economic Zone at Duqm based on the Royal Decree No. 5/2016: is 2000 Sq KM

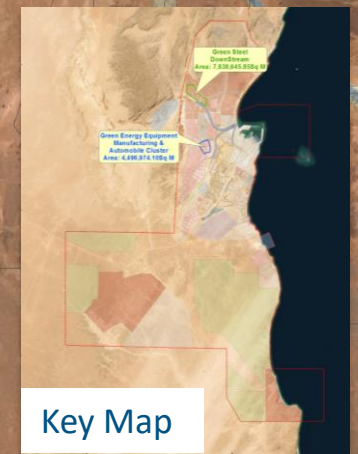
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Green Manufacturing Cluster	
Description	Area (Sq M)
Total cluster Area	4,496,974
Min. Area	1,250
Max. Area	48,895



Green Steel(Down Stream) - cluster	
Description	Area(Sq M)
Total cluster Area	7,838,645.85
Min. Land Area	1,154.15
Max. Land Area	120,111.29



Marubeni



posco



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Public Authority for Special Economic Zones and Free Zones
سلطنة عمان
Sultanate of Oman

