

EVENT REPORT

Duqm Summer Series 2025



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DUQM

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SPECIAL ECONOMIC ZONE
سلطنة عُمان | SULTANATE OF OMAN

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We aspire to deliver impact with every post we make



What Are We Looking to Achieve?

1 Turn global themes into local practice – move beyond theory to concrete steps that firms in Duqm can apply today.

2 Measure culture in hard numbers – show how wellbeing links directly to retention, productivity and profitability.

3 Treat talent as infrastructure – focus the workforce debate on skills, retention and leadership.

4 Embed AI as operating system, not add-on – frame technology as core business infrastructure, not a side project.

5 Rebuild resilience into supply chains – balance cost with reliability when volatility is the norm.

6 Test ideas in real time – use case studies and examples to show what works, what fails and what it costs.

7 Keep sessions short, impact long – favour one focused hour that busy managers can act on, not forget.

8 Anchor Duqm as a hub of adaptability – underline its advantage not only in geography, but in capacity to change.



Duqm Summer Series 2025

The Special Economic Zone at Duqm has been moving at pace. Technologies that once looked peripheral are now reshaping whole industries. Global markets are more connected, yet less predictable and business leaders are learning that adaptability counts for more than rigid planning. Investors have noticed and by the end of 2024 committed cumulative investment reached US\$16.4 billion, up from US\$15.5 billion in 2023.



That momentum set the backdrop for the Duqm Summer Series of four one-hour sessions for its tenant community. The format was deliberately tight - short enough for busy managers but focused on practical application rather than theory.

Covering artificial intelligence, workforce development, global trade, supply chains and workplace culture, the agenda came from tenants themselves. Case studies and debate drew participants from renewables, manufacturing, logistics and fisheries, underlining the breadth of Duqm's business base.

One-on-One



Inside Duqm's Summer Series 2025

Eng. Ahmed Akaak
CEO
SEZAD

Why those four themes for the first Summer Series?

They came straight from tenants. AI and automation were top of the list but the interest was practical. How to apply it, what it costs, what the return looks like. Another requested topic was workforce development. In Duqm, as across the Gulf, finding and keeping skilled people is one of the hardest tasks. Perhaps unsurprisingly after years of disruption, supply chain resilience came up repeatedly. And culture and wellbeing, which once might have been seen as secondary, are now viewed as core to productivity.

AI is everywhere. What made your session different?

We wanted a practitioner, not just a presenter. Someone who is working in AI here in Oman. Saeed Abdul Ghafoor of Star Drones showed how his company used AI to cut aerial data analysis time by 40% and raise accuracy. He walked tenants through each step, from pilot to deployment. The appeal was that tenants could immediately see how to adapt the lessons to their own work in Duqm.



<40%

By using AI, Star Drones cut aerial data analysis time by 40%.



Many companies see AI as a cost centre. Did your tenants discuss the scale of investment?

AI is becoming infrastructure these days. Money spent on it isn't wasted. Tenants were asking whether the digital assets they build should be treated like capital equipment. That sparked a wider discussion on how AI investment translates into balance sheets and future valuations.

AI is also entering HR. Did that come up in your workforce session?

It did. Auf Al Aufi from Development Bank described adaptive training systems that tailor content in real time. That raised a bigger question - if AI is handling coaching or feedback, what remains distinctly human in HR? The consensus was clear. Judgment, empathy and trust still matter. But tenants saw a future where AI supports, rather than replaces, people in HR and training roles.

Workforce development sounds like an old problem. What was new?

The pace. The conversation moved quickly from skills shortages to retention strategies as well as mentoring, clearer career pathways and leadership development. In upcoming cities like Duqm, the issue isn't only how to hire talent but how to keep it.

Duqm's location is often cited as its advantage. Isn't that enough for supply chains?

Geography helps but resilience is what matters. Tariff regimes have been unpredictable. In 2025, the effective U.S. average tariff rate rose to 17.3%. That's the highest since the mid-1930s. Add disruption to Red Sea shipping routes and businesses know they need multiple sourcing strategies. Saad Bait Nasib of ASYAD laid out practical steps to diversify suppliers and manage risk, showing how Duqm's position on global trade routes can balance cost with reliability.

Culture and wellbeing are harder to measure. Why give them equal weight?

Because the costs are measurable. One in three employees globally say they're burned out. Gallup puts the cost of disengagement at US\$8.8 trillion a year. Dr Aziza Al Sawafi from Sultan Qaboos University showed how wellbeing surveys tied to retention and performance can cut turnover by double digits. That is not soft. It's operational.



One hour per session. Was that a risk?

It was a choice. Tenants prefer concise sessions that fit their schedules. An hour forces presenters to focus and makes it easier for participants to take away something practical.

How did you judge whether it worked?

Not just by numbers in the room. We're surveying participants at 30, 60 and 90 days to see what they applied and what results followed. That loop stays open. We'll track outcomes in retention, productivity and supply chain performance to see what sticks.

What did you learn about Duqm's business community from this pilot?

That they want straight talk and practical examples. Attendance matters, but the debates mattered more. Tenants valued hearing what worked, what failed and what it cost. That appetite for detail is what will make future sessions worth running.

What does staying resilient in Duqm mean to you?

For me, it's not about trying to predict every disruption but about building the capacity to adapt. It means investing in people's skills, designing systems that can flex and listening beyond your own sector. Often, the best ideas come from those tackling very different challenges.





US\$16.3bn

5% investment growth in a year. Committed investment in Duqm rose to US\$16.3bn by December 2024.



ESG compliance rising - The EU Corporate Sustainability Reporting Directive (CSRD) requires nearly 50,000 companies - up from 11,000 previously - to report ESG data.

(European Union, CSRD Directive, 2023/2024 rollout)

50,000

Employee burnout - Globally, 1 in 3 employees reports feeling burned out, costing an estimated US\$8.8 trillion annually in lost productivity.

(Gallup, State of the Global Workplace 2023)

US\$8.8tr

Cyberattacks accelerating - GCC businesses faced a 40% year-on-year increase in cyberattacks in 2025.

(Arab Gulf States Institute, Cybersecurity Report, 2025)

40%

Consumers face an overall average effective tariff rate of 18.6%, the highest since 1933.

(The Budget Lab at Yale, State of US Tariffs: 7 August 2025)

18.6%

AI & Automation

Turning Potential into Performance



◆ Saeed Abdul Ghafoor, CEO, Star Drones

Artificial intelligence isn't a lab experiment anymore. It's not a flashy demo at a tech conference. It's here, woven into daily routines. In warehouses AI directs forklifts. In banks it screens loans. In ports it predicts demand before the first container is lifted. The numbers confirm it. McKinsey found in 2024 that 65% of organizations were already using at least one AI tool, up from just 50% in 2020.¹ By 2025 that number rose again with 71% reporting generative AI integrated into core processes.²

McKinsey
& Company

AI & Automation

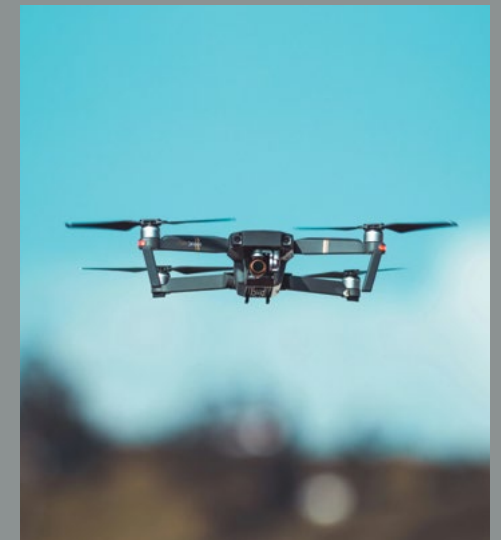
The first Duqm Summer Series session zoomed in on what that means in practice. Saeed Abdul Ghafoor, CEO, Star Drones explained how his company re-engineered drone surveying with AI. Before, the process was slow and repetitive. Flight images were collected, then poured over by analysts who checked for cracks, terrain shifts or structural weaknesses. Accuracy varied, speed was a problem and clients often waited longer than they liked.

That changed when Star Drones introduced computer-vision models trained to spot patterns automatically. Analysis time dropped by about 40%. Accuracy improved which meant fewer repeat flights, quicker reports for clients and less frustration for staff.³

Abdul Ghafoor's conclusion was simple: the model isn't enough on its own. Success came from careful groundwork. His team set data standards, picked the right algorithms, trained staff properly and rolled out in stages.

This story echoes a wider pattern. The International Data Corporation projects investments in AI solutions and services will contribute a cumulative US\$22.3 trillion to global GDP by 2030.⁴ But that windfall won't arrive in one spectacular breakthrough. It will come from firms that identify very specific use cases, prepare data meticulously and scale solutions step-by-step. The reality is sobering. A Deloitte survey showed that only about a third of pilots ever reach production.⁵ Winners are those that treat AI as management practice, not an IT add-on.

The model isn't enough on its own. Success came from careful groundwork. His team set data standards, picked the right algorithms, trained staff properly and rolled out in stages.



Regulation is now unavoidable. The OECD's 2019 AI Principles emphasized transparency, accountability and human oversight in high-risk settings.⁶ They shaped policy across Asia, the Americas and the Middle East. The EU's AI Act, published in 2024, requires providers and deployers of high-risk systems to document training data, monitor risks and report incidents.⁷ For Omani firms that want to export, compliance isn't optional. It's the entry ticket.

Then there's the workforce. As of 2023, about 27% of jobs across OECD countries are considered at high risk of automation.⁸ That doesn't mean mass unemployment. It means job content will change, demanding reskilling at scale. In Duqm, Abdul Ghafoor was clear. His team treated AI as an assistant, not a replacement. Weekly review sessions became a forum to question model performance, examine analyst interpretations and decide where human oversight mattered most.


27%

Of jobs across OECD countries are considered at high risk from automation.

The lesson from Duqm was practical. AI isn't a bolt-on. It belongs inside the firm's operating system. And the advice was direct. Choose a use case that matters to customers, clean your data, train your team, embed governance and then scale carefully. The rewards are tangible - better use of talent, faster turnaround, fewer mistakes. In a world of tight margins and scarce skills, those advantages multiply quickly.



Treated AI as an assistant, not a replacement.

FACTS & FIGURES	71%	AI adoption - 71% of organizations globally integrated generative AI into core processes by 2025, up from 50% in 2020. (McKinsey, State of AI, 2025)
	40%	Star Drones in Duqm - 40% faster aerial data analysis after AI deployment, with measurable accuracy improvements.
	US\$22.3tr	The International Data Corporation projects investments in AI solutions and services will contribute a cumulative US\$22.3 trillion to global GDP by 2030. (IDC, 2025)
	33%	Pilot-to-production challenge - Only about 33% of AI pilots reach scaled deployment. (Deloitte, AI Adoption Survey, 2024)
		In 2025 1 in 4 workers globally are in occupations with some degree of exposure to generative AI. (ilo generative ai & jobs: 2025 update)

The Future-Ready Workforce

Skills, Leadership & Adaptability



◆ Auf Al Afi, Section Head, Talent Management, Development Bank

Jobs aren't disappearing overnight, but the skills inside them are changing at speed. That was the message at the second Duqm Summer Series session led by Auf Al Afi, Section Head, Talent Management, Development Bank. He put it plainly - the real challenge isn't whether technology replaces people, it's whether organizations can redeploy skills quickly enough to keep up with demand.

The Future-Ready Workforce

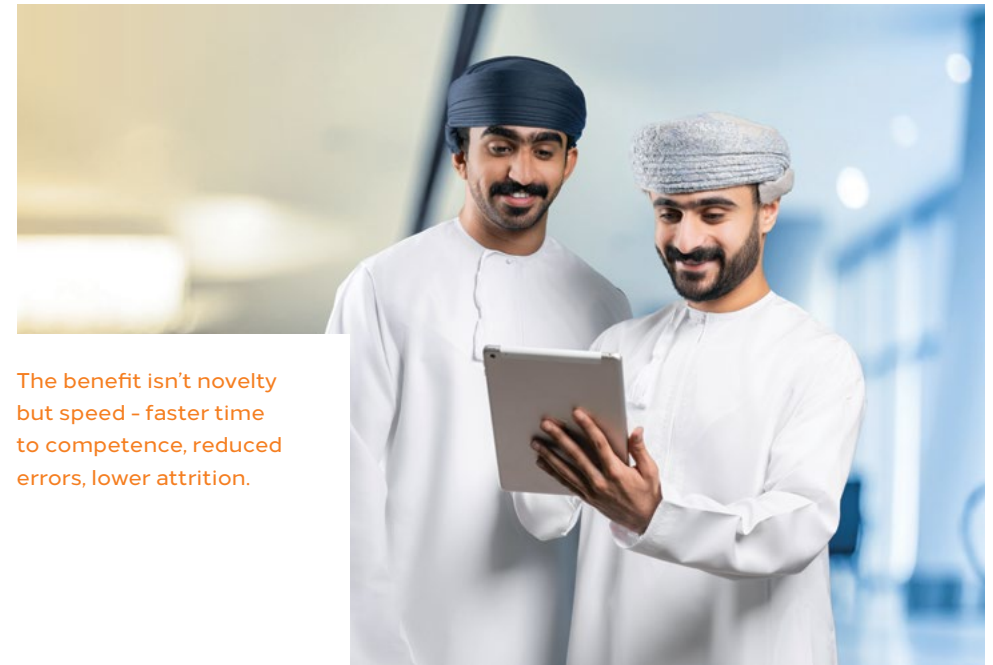
The World Economic Forum has been tracking this. In 2023 it estimated 44% of worker core skills would change within five years.¹ By 2025 the update was even starker - nearly 40% of today's capabilities will be transformed or obsolete by 2030.² The ground is moving and companies can't wait for universities or traditional training cycles to catch up.

40%

Of today's capabilities will be transformed or obsolete by 2030.

The World Economic Forum

Al Afi shared how his team is experimenting with adaptive learning platforms to cut the lag. Instead of week-long seminars detached from the job, employees access short, targeted modules that test abilities and suggest drills.³ A technician can refresh lockout-tagout procedures before entering a site. A relationship manager can run through updated risk assessments before meeting a client. The benefit isn't novelty but speed - faster time to competence, reduced errors, lower attrition.



The benefit isn't novelty but speed - faster time to competence, reduced errors, lower attrition.

Research backs the approach. Deloitte's 2024 Global Human Capital Trends survey showed employees are twice as likely to stay with organizations that invest in continuous learning.⁴ Gallup's long-term studies have tied engaged teams to around 23% higher profitability, lower absenteeism and improved safety.⁵ Yet participation in adult learning across OECD countries averages just 40% annually and smaller firms and older workers are consistently underrepresented.⁶ Closing that gap takes a mix of employer initiative and policy support.



23%

Higher productivity and performance have been linked to engaged teams in organizations that invest in continuous learning.

Gallup's long-term studies

Leadership style is part of the equation. Hierarchies built on oversight don't work well in hybrid or project-based settings. Employees want managers who act as coaches. Al Aufi described how some Omani firms are tying promotions directly to mastery of skills on the job rather than years of service.⁷ The effect is double - loyalty increases and recruitment pools expand when ability trumps tenure.

The Duqm discussion presented a clear playbook. Start with roles under the most pressure. Identify the key skills. Build training that is short, embedded in work and measured in performance terms. Promote internally where possible to lock in loyalty. Widen hiring by focusing on skills rather than background. Reward mastery, not time served.

The risks of ignoring the change are real. Recruitment costs climb, attrition accelerates and companies fall behind. But the opportunity is just as clear. Firms that treat talent as infrastructure - built deliberately, maintained constantly - gain resilience that compounds over time.⁸ That's not HR speak, it's a business model.

40%	Skills turnover - By 2030, nearly 40% of today's skills will be transformed or obsolete. <small>(World Economic Forum, Future of Jobs Report, 2025)</small>	FACTS & FIGURES
2x	Retention through learning - Employees are 2x more likely to stay with firms that invest in continuous learning. <small>(Deloitte, Global Human Capital Trends, 2024)</small>	
23%	Profitability link - Highly engaged teams deliver 23% higher profitability. <small>(Gallup meta-analysis, 2020)</small>	
40%	Adult learning participation - Only 40% of adults in OECD countries engage in structured learning annually. <small>(OECD, Trends in Adult Learning, 2025)</small>	
	Career pathways - Omani firms are experimenting with promotion based on skills mastery not tenure.	

Global Trade & Supply Chains

Building Resilience in Uncertain Times



◆ Saad Bait Nasib, Commercial Director, ASYAD Ports & Free Zones

For years, the logic of global trade was simple - leaner was better. Cut costs, reduce inventory, consolidate suppliers. Then disruption hit and that logic collapsed. The WTO recorded a 1.2% drop in merchandise trade volumes in 2023.¹ By April 2024 it forecast a rebound of 2.6%, and by 2025 a stronger 3.3%.² Later revisions were less optimistic. 2.7% growth in 2024 but a marginal contraction of 0.2% in 2025 as political pressures mounted.³

WORLD TRADE
ORGANIZATION



Global Trade & Supply Chains

In this Duqm Summer Series session, Saad Bait Nasib framed resilience not as a catchphrase but as design. The first rule, diversification. No company should depend on a single supplier for critical inputs. The second, visibility. Real-time data on suppliers, carriers and inventory allows problems to be flagged early and addressed before they become crises. The third, optionality. Contracts that allow flexibility - secondary ports, alternative carriers, backup corridors - give firms a fighting chance when volatility is the norm.⁴

This resilience comes at a cost. McKinsey estimates networks built to absorb shocks run 5-10% higher in steady-state expense.⁵ But those costs are dwarfed by the penalties of failure - lost orders, restart expenses and reputational damage. Several session attendees reported customers are willing to pay a little more for reliability. In tight tenders, resilience itself becomes a competitive edge.

Policy changes add another layer. The Peterson Institute reported that average US tariffs in 2024 were the largest since World War II.⁶ Export controls and local content rules spread across markets. For Gulf exporters serving Europe, Asia and Africa the outcome is more compliance, more scenario planning and more margin pressure. IMF modelling suggests prolonged fragmentation could slice up to 7% from global GDP over time.⁷

US\$33tr

Global Trade in 2024, up 3.7%.
(UNCTAD)

Meanwhile UNCTAD data showed global trade reached US\$33 trillion in 2024, up 3.7%, with services growing faster than goods.⁸ But fragility remains. Energy prices, shipping disruptions and policy uncertainty mean companies must weigh cost against resilience in a way they didn't ten years ago.

The takeaway from the session? Know your exposures. Stress-test your networks. Build credible alternatives. Resilience isn't branding. It's what customers remember when volatility becomes routine. As Saad Bait Nasib put it, reliability isn't a nice-to-have. It's the currency of trust in global trade.



US tariff

Tariff pressures - Average US tariff levels in 2025 are the highest in over a century
(The Budget Lab, Yale)



FACTS & FIGURES

Resilience costs - Supply chains designed for resilience run 5-10% higher costs but save far more during disruptions.
(McKinsey Global Institute, Risk & Resilience in Value Chains, 2020)

5-10%

Trade contraction - WTO forecast a 0.2% contraction in world trade volumes for 2025, after prior rebound expectations.
(WTO, Trade Forecast Update, August 2025)

0.2%

Geoeconomic fragmentation - Could shave up to 7% off global GDP long-term.
(IMF, Geoeconomic Fragmentation Report, 2023)

7%

Global trade value - World trade reached US\$33 trillion in 2024, growing 3.7% year-on-year.
(UNCTAD, Global Trade Update, 2025)

US\$33tr

Workplace Culture & Well-being

Connecting People & Purpose



◆ Dr Aziza Al Sawafi, Assistant Dean for Registration, Sultan Qaboos University

Well-being isn't a fringe issue anymore. It's a line item on the balance sheet. Gallup estimated in 2023 that low engagement costs the world economy US\$8.8 trillion each year.¹ The WHO calculates depression and anxiety alone strip out around US\$1 trillion in productivity annually.² These aren't abstract figures. They show up in absenteeism, turnover, medical claims and projects that stall.

GALLUP

Workplace Culture & Well-being

At the final Duqm Summer Series session, Dr Aziza Al Sawafi argued that well-being must be linked directly to organizational outcomes. Her model starts with short, regular surveys on workload, clarity and inclusion. The results are shared openly with staff, building trust. Then come targeted actions - coaching managers closer to the work, rebalancing overloaded teams, encouraging peer support for new hires.³ These aren't perks they are structural changes tied to metrics leaders already track, such as retention, productivity and safety.

Research reinforces the logic. Gallup's meta-analyses show engaged teams deliver about 23% higher profitability with fewer quality problems and lower absenteeism.⁴ CIPD data showed UK sickness absence in 2023 was the highest in over a decade, averaging 7.8 days per employee per year.⁵ This mirrors international trends as health and workload collide. The WHO estimates every US\$1 invested in mental health returns four dollars in better health and productivity.⁶

23%

Higher profitability in engaged teams report fewer quality issues and lower absenteeism.

Gallup's meta-analyses



Importantly, this doesn't require huge budgets. It requires consistency. Weekly check-ins to remove barriers matter more than a shiny new well-being app. Transparent promotion processes build trust faster than wellness posters. Space to learn without penalty encourages loyalty.⁷ Without these basics, wellness packages are just window dressing. With them, they become real.

The external impact is clear. Customers notice when service teams are stable and responsive. People recommend employers who treated them fairly. Investors track firms where absenteeism falls and errors decline.⁸ Stability translates into performance.

Dr Al Sawafi's session ended on a grounded note. Culture is shaped less by campaigns than by habits. Small, predictable actions like feedback shared, managers listening and workloads adjusted all build credibility. That credibility is the base for any larger program. In competitive labour markets, the firms that treat well-being as infrastructure, not decoration will be the ones whose reputations endure.



FACTS & FIGURES	23%	Profitability of engagement - Engaged teams show 23% higher profitability and lower turnover. (Gallup meta-analysis, 2020)
	US\$1tr	Mental health impact - Depression and anxiety cost US\$1 trillion in lost productivity per year. (WHO, Mental Health at Work, 2024)
	US\$8.8tr	Cost of disengagement - Low engagement costs the global economy US\$8.8 trillion annually. (Gallup, State of the Global Workplace 2023)
	US\$1	ROI on mental health - Every US\$1 invested in treatment yields US\$4 in improved productivity and health. (WHO, Investing in Treatment for Depression & Anxiety, 2016)
	7.8	Sickness absence trend - UK employees averaged 7.8 days of sickness absence in 2023, the highest in over a decade. (CIPD, Health & Wellbeing at Work, 2023)



Final Word

The Duqm Summer Series 2025 was more than a set of workshops. It showed how global themes like AI, skills and resilience can be turned into practical steps in Duqm.

What stood out wasn't slides but attendees swapping notes on what worked, what didn't and what it cost. Lessons firms could act on. Those exchanges also gave a clearer picture of where the real pressures lie.

For SEZAD, the direction is clear - to be a change leader in the GCC. The pitch isn't only about tax terms or land rates. Investors want multilingual talent, dependable access to raw materials and infrastructure where air, road and sea links connect seamlessly. And they want a business friendly environment – one that reduces friction, not adds to it. Duqm offers that combination and with it, a springboard into the fast-growing markets of Asia and Africa.

This is only the beginning. The Duqm Summer Series 2026 will build on that foundation with sessions on cybersecurity as a frontline business issue, sustainability compliance as a driver of competitiveness and the new trade corridors reshaping globalization. Themes that underline how companies in SEZAD are preparing not just to adapt but to lead.

Thanks

The Duqm Summer Series 2025 drew its strength from the people leading the conversations:

- ◆ Saeed Abdul Ghafoor, CEO, Star Drones
- ◆ Auf Al Aufi, Section Head, Talent Management, Development Bank
- ◆ Saad Bait Nasib, Commercial Director, ASYAD Ports & Freezones
- ◆ Dr Aziza Al Sawafi, Assistant Dean for Registration, Sultan Qaboos University

And from the tenant community who added their own experience, sharing what worked, what didn't and what it cost.



To learn more about the Duqm Summer Series or take part in the 2026 season, contact:

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