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Kingdom of Saudi Arabia
Ministry of Energy, Industry & Mineral Resources



The Gulf Intelligence Saudi Arabia Energy Forum 2019

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Under the Patronage of H.E. Khalid Al Falih
Minister of Energy, Industry and Mineral Resources, Kingdom of Saudi Arabia



The Saudi 4.0 Industrial Revolution? *Outlook for Energy, Industry & Minerals*



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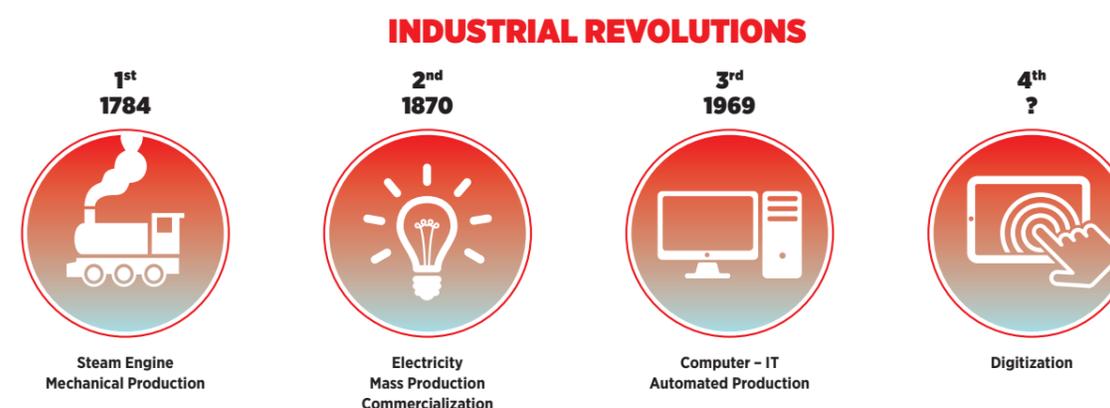
H.E. Khalid Al Falih

Minister of Energy, Industry and Mineral Resources, Kingdom of Saudi Arabia

“Our country is witnessing a giant transformation which requires doubling the size and diversity of the national economy, including the mining sector, to meet the increasing global and domestic demand for energy through the development and diversification of the energy mix, including traditional hydrocarbon sources as well as renewable energy sources and nuclear energy.”

The Saudi 4.0 Industrial Revolution? *Outlook for Energy, Industry & Minerals*

Data Science. Mobile supercomputing. Intelligent robots. Automation. Data Harvesting and Mining. Self-driving cars. Digitization. We stand on the brink of a technological revolution that will fundamentally alter the way we work and how energy markets are structured. In its scale, scope, and complexity, the transformation will be unlike anything humankind has experienced before. We do not yet know just how it will unfold, but one thing is clear: the response to it must be integrated and comprehensive, involving all stakeholders, from the public and private sectors to academia and society.



Source: the economist, World Economic forum

Since the 1970s, in alignment with Moore's law, computer power has doubled every year. More data has been generated over the past two years than in all of previous recorded history. Potential abounds as the 4th Industrial Revolution takes hold. More than \$11 trillion could be generated by combining the physical and digital worlds by 2025, McKinsey estimated in 2015. Operations in the energy industry are faster, safer and more transparent than ever before. BP Outlook forecasts a 54% rise in energy consumption in the Middle East by 2040, while the International Energy Agency (IEA) said global energy demand grew by 2.1% in 2017 alone. Carbon emissions also rose for the first time since 2014 so managing energy security must be able to affordably meet rising demand while also ticking off increasingly ambitious low-carbon targets. This nexus cannot be achieved without leveraging the digital revolution.

Vast waves of technological advancement have been a major contributor to increased prosperity, productivity and job creation. One cannot deny that each industrial transformation gave rise to custom-made challenges. Therefore, it becomes imperative to anticipate and prepare for the current transition. Digitisation, mobility, big data, cloud computing, and analytics, and other drivers of transformation are expected to have a significant impact on jobs, ranging from significant job creation to job displacement, and from heightened labour productivity to widening skills gaps. Today, in many industries worldwide, the most in-demand occupations or specialties did not exist 10 or even five years ago, and the velocity of change is forecast to only quicken. Game-changing technologies such as the Internet of Things (IoT), virtual reality, and machine learning are revolutionary tech tools reshaping global e-commerce and customer experience across all sectors. FinTech and block chain technology are quickly gaining consumer interests and government backing from countries across the Middle East; the UAE particularly. GCC countries have been investing heavily in ports and logistics facilities, with Expo 2020 in Dubai, Saudi Vision 2030, and Oman Vision 2040 viewed as key drivers, and these have caught the attention of international investors, in particular from China. It is the disruptive technologies that are forcing their way into the energy industry: drones, advanced commodities mapping, blockchain and VR & AR are just a few examples, but with these new technologies evolving on a daily basis, which should the energy industry focus on?

Is it embracing innovation that is the biggest challenge ahead for the energy industry in 2019? Those who remain flexible are most likely to float & succeed whilst those who linger on processes of the past can expect to sink. In such a rapidly evolving employment landscape, the ability to anticipate and prepare is increasingly critical for businesses, governments and individuals in order to fully seize the opportunities presented by these trends—and to mitigate undesirable outcomes.



Confirmed Speakers



H.E. Khalid Al Falih
 Minister of Energy, Industry and Mineral Resources, Kingdom of Saudi Arabia



H.E. Dr. Khalid bin Saleh Al Sultan
 President
 King Abdullah City for Atomic and Renewable Energy (KA-CARE)



Darren Davis
 Chief Executive Officer
 Ma'aden



Eng. Khalid Al Salim
 Deputy Minister for Industry
 Ministry of Energy, Industry & Minerals



Adam Sieminski
 President
 King Abdullah Petroleum Studies and Research Center



Mutlaq Al-Morished
 Chief Executive Officer
 TASNEE



Sulaiman M. Ababtain
 President & Chief Executive Officer
 Saudi Aramco Total Refining & Petrochemical Co



Rasheed Al-Shubaili
 VP Communications
 National Industrial Development & Logistics Program (NIDLP)



Mazin Bakhali
 President & CEO
 GE Power Services
 Saudi Arabia & Bahrain



Michael Train
 President, Emerson
 Chairman, Emerson Automation Solutions



Farouk Soussa
 Middle East & North Africa Economist
 Goldman Sachs



Olof Arnman
 Senior Director of Legal, Compliance & Risk Management MENA
 McDermott International



Murhaf Al-Madani
 Vice President, Global IT (CIO)
 SABIC



Ronnie Rahman
 Director - Cyber Security EMEA & APAC
 Honeywell



Peter Terium
 Head of Energy Sector
 NEOM



Christof van Agt
 Energy Analyst
 International Energy Forum (IEF)



Radia Sedaoui
 Chief, Energy Section, Sustainable Development Policies Division
 UNESWCWA



Yousif Al Ali
 Director, Business Growth
 Masdar Clean Energy



Dr. Samiha Khayyat
 Deputy Director for Research and Development Center
 King Abdulaziz University (KAU)



Dr. Anas Al-Hajji
 Managing Partner
 Energy Outlook Advisors, LLC



Knowledge Partner



Affordable, sustainable energy underpins the growth of a country's economy and the wellbeing of its citizens. Yet effective energy policy is one of the greatest challenges for governments and other stakeholders across the globe. KAPSARC was founded as a global non-profit institution for independent research into the economics of energy and understanding its complex intersections with energy policy, technology and the environment with the objective of contributing to societal wellbeing and prosperity.

From our base in one of the world's most important energy-producing regions, KAPSARC develops economic frameworks to reduce the overall costs and environmental impacts of energy supply, to increase the value created from energy consumption and to better understand energy policy such that policy objectives and outcomes are better aligned.

We collaborate with leading international research centers, public policy organizations, and industrial and government institutions through workshops, joint papers and the development of open-source datasets and tools, freely sharing our knowledge, insights and analytical frameworks.

KAPSARC studies topics of global scope with a particular focus on the Kingdom of Saudi Arabia, the GCC, China and India.



Adam Sieminski
President

Adam Sieminski was appointed as the the president of King Abdullah petroleum Studies and Research center (KAPSARC) in April 2018. Before his appointment, Mr. Sieminski held the James R. Schlesinger Chair for Energy and Geopolitics at the Center for Strategic and International Studies (CSIS) and prior to that, he was a nonresident senior adviser to its Energy and National Security Program. He also served as the administrator of the U.S. Energy Information Administration (EIA) from 2012 to 2017, and prior to that, he was the senior director for energy and environment on the staff of the U.S. National Security Council. Earlier in his career, Mr. Sieminski was Deutsche Bank's chief energy economist, as well as the senior energy analyst for NatWest Securities. In 2006, he was appointed to the National Petroleum Council (NPC), where he helped co-author NPC's global oil and gas study.

Mr. Sieminski is also a member of leading policy and research organizations including his role as a senior fellow and former president of the U.S. Association for Energy Economics, and president of the U.S. National Association of Petroleum Investment Analysts. He also served as an advisory board member of the Global Energy and Environment Initiative at Johns Hopkins University's School of Advanced International Studies, was chairman of the Supply-Demand Committee of the Independent Petroleum Association of America, and a member of the Strategic Energy Task Force of the Council on Foreign Relations. He holds the Chartered Financial Analyst (CFA) designation and has received both an undergraduate degree in civil engineering and a master's degree in public administration from Cornell University.

The Gulf Intelligence Saudi Arabia Energy Forum 2019



Forum Structure

THE SAUDI ARABIA ENERGY FORUM – GALA AWARDS DINNER SUNDAY - APRIL 7 th , 2019				
Gala Awards Dinner Hosted by H.E. Khalid Al Falih				7:00pm
THE SAUDI ARABIA ENERGY FORUM - APRIL 8 th , 2019				
Breakfast Briefing 1	Breakfast Briefing 2	Breakfast Briefing 3	Breakfast Briefing 4	
SESSION A:	Keynote Speeches/VIP Feature Interview/Q&A Session			9:00 - 11:00am
	Coffee & Networking			11:00 - 11:30am
ROUNDTABLES	Industry Roundtable 1	Industry Roundtable 2	Industry Roundtable 3	Industry Roundtable 4
	Lunch & Networking			1:00 - 2:00pm
PROFESSIONAL LEARNING SEMINARS	Seminar 1	Seminar 2	Seminar 3	Seminar 4
Close of Forum				

Forum in Numbers



4

Breakfast Briefings



4

Industry Roundtables



4

Professional Learning Seminars



200+

Government & C-Suite Decision Makers



50+

Speakers



24

Hours of Professional Networking



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Forum Producer

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Gulf Intelligence is a strategic communications & research firm effective across the full value-chain of the Middle East Energy Sector. We facilitate knowledge exchange and advance the business interests of national and international stakeholders operational in the regional industry.





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