

GSBM

GERMAN-SAUDI BUSINESS MAGAZINE

June 2023

GESALO News

**INNOVATIVE
SMART CITY
SOLUTIONS**

GESALO News

**2ND SAUDI-GERMAN
ENERGY DAY IN
BERLIN**

Top Stories

**SHAPING THE
NEW ERA OF
ENERGY SUPPLY
IN KSA**

Tourism

**NAJHRAN -
MUD PALACES
AND ROCK ART**

Top Stories

ENERGY DIVERSIFICATION



Delegation der Deutschen Wirtschaft
für Saudi-Arabien, Bahrain und Jemen
German-Saudi Arabian Liaison Office
for Economic Affairs (GESALO)
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EDITORIAL

Dear Business Community, Dear Reader,

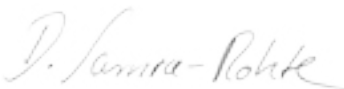
We look back on a busy first half of the year, facilitating delegations both in the Kingdom of Saudi Arabia and Germany, organizing events and succeeding in our core business – **building sustainable business relations**. The guiding thread in our latest activities has been **energy diversification**, given its high importance both in the German Energiewende and the Kingdom's goals to establish a circular economy and to reach climate neutrality in 2060. In order to enrich the energy mix, both countries turn towards hydrogen and renewables.

In this context, GESALO facilitated trips with the **Ministry of Energy, the Ministry of Investment and the National Industrial Development and Logistics Program (NIDLP)** to Germany. The Energy Day in May highlighted the benefit for stakeholders from business and politics to join forces in tackling energy diversification.

Our TOP stories in this issue shed light on how companies like **BASF and Evonik** are moving towards circularity of their products and processes to reduce greenhouse gas emissions and ultimately to achieve climate neutrality. BASF is using new technologies such as electrical heat pumps or electrolysis for CO₂-free production of hydrogen to reach net zero by 2050. Evonik seeks to grow the proportion of its sustainable products from 43% to more than 50% by 2030.

In the first quarter of the year GESALO was organizing several delegations: A delegation from Bavaria visited Saudi Arabia and Bahrain with companies from the MedTech and Energy sector that fostered fruitful exchanges and promising follow-ups. Furthermore, GESALO supported a delegation on Power Generation from Solar & Wind Energy incl. CSP to Riyadh as well as a Smart City Delegation. Participants gained deeper insights in Megaprojects and met with relevant institutions and companies. We share the promising and optimistic outlook with companies operating in the Kingdom – we invite you to take a look at figures from the World Business Outlook Spring 2023.

Sincerely,



Dr. Dalia Samra-Rohte



DR. DALIA SAMRA-ROHTE

Delegate of German Industry & Commerce for Saudi Arabia, Bahrain and Yemen



Sustainable value chains - fueled by renewable energy sources

We are looking at probably the biggest paradigm shift since the industrial revolution and now face the tremendous task to rethink existing infrastructures and build up new sustainable value chains – fueled by renewable energy sources. The core technologies for decarbonizing the industry are available with thyssenkrupp Uhde. Green chemicals: You have the vision, we have the solutions. www.thyssenkrupp-uhde.com

engineering.tomorrow.together.



thyssenkrupp

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SAUDI ARABIA STARTS DECARBONIZING ITS INDUSTRY

The Kingdom focuses primarily on the capture, utilization, and storage of carbon dioxide. There are currently growing activities in this area.

Saudi Arabia wants to be climate-neutral by 2060. The Kingdom's national oil company Saudi Aramco aims to achieve this goal by 2050 already. CCUS (Carbon Capture, Utilization, Storage) technologies are expected to make a significant contribution to decarbonizing the industry. Government representatives underscored the importance of CCUS at the UN Climate Change Conference (COP 27) in Egypt in November 2022. Energy Minister Abdulaziz bin Salman

stated that he wants to achieve a CCUS capacity of 44 million tons of CO₂ annually by 2035.

FIRST CCUS PROJECTS UP AND RUNNING

The largest Saudi Arabian CCUS project is a pilot project by Saudi Aramco at the Hawiyah gas plant. Since 2015, 850,000 cubic meters of CO₂ have been captured here every day and transported to the Uthmaniyah oil field. There, it is injected into the oil reservoir to

increase the feed pressure.

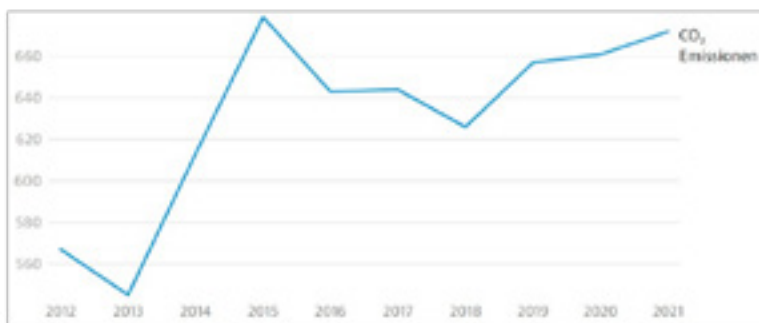
In Jubail, the Saudi Arabian chemical company SABIC commissioned a CO₂-to-chemicals project in 2015. The CO₂ is produced during the production of ethylene glycol. Annually, 500,000 metric tons of CO₂ are used primarily to produce methanol and urea. In liquid form, CO₂ is sold to the food industry.

Rabigh Refining & Petrochemical Company is currently working on a project to capture CO₂ with an annual capacity of 300,000 metric tons. The



Aramco, CCUS Tanajib

Saudi Arabia: Development of CO₂ emissions in 2012 (in million metric tons)



Source: Global Carbon Project, Global Carbon Atlas 2023

plant will cost US\$320 million and is scheduled for completion before the end of 2023. The construction contract was awarded to Dubai-based company Gulf Cryo in 2021.

CCUS HUB PLANNED IN JUBAIL

The construction of a CCUS hub with an annual capacity of 9 million tons is planned within the framework of the large chemical cluster of Jubail. Saudi Aramco, SLB (formerly Schlumberger), and Linde signed an agreement to this effect in November 2022.

“ SABIC, BASF, and Linde cooperate on decarbonization. ”

The following companies have pre-qualified for the construction of the CCUS hub, which is calculated at US\$700 million: GS Engineering & Construction (South Korea), Hyundai E&C, Maire Tecnimont (Italy), Tecnicas Reunidas (Spain), Saipem (Italy), Larsen & Toubro (India) and JGC Corporation

(Japan). The tender is expected to be issued shortly. The Wood Group serves as the FEED (Front End Engineering Design) consultant.

The CCUS hub is scheduled to be operational in 2027. It is part of a strategic cooperation on CCUS projects agreed upon between Linde and SLB in October 2022 to accelerate the decarbonization of industry worldwide. Linde CEO Sanjiv Lamba explained: “We are committed to helping our customers cost-effectively decarbonize their production.”

NUMBER OF CCUS PROJECTS ON THE RISE

The Saudi Arabian Mining Company (Ma’aden) is working on a US\$300 million CCUS project for a phosphate complex in Ras al Khair. A capacity of 300,000 tons of CO₂ is planned. The CO₂ will be used for various industrial processes as well as in oil production (enhanced oil recovery). Ma’aden has signed contracts with Gulf Cryo and the Italian company Tecno Project Industriale to carry out the project. The first phase is scheduled for completion in 2024.

In November 2022, the Saudi Electricity Company agreed to collaborate with King Abdullah University for Science and Technology (KAUST) to build a CO₂ deposition plant for the Duba power plant. The estimated costs of the project are US\$350 million. The Duba power plant is a 565-megawatt facility powered by gas and solar energy. The solar component has a capacity of about 40 megawatts and was built with substantial German participation (sbp sonne/Stuttgart, Flabeg/Cologne).

Saline Water Conversion Corporation (SWCC) signed a letter of intent in January 2023 with Carbonco, part of South Korea's DL Engineering and Construction, for potential CCUS projects to decarbonize gas-fired SWCC power plants. These power plants provide electricity for seawater desalination plants.

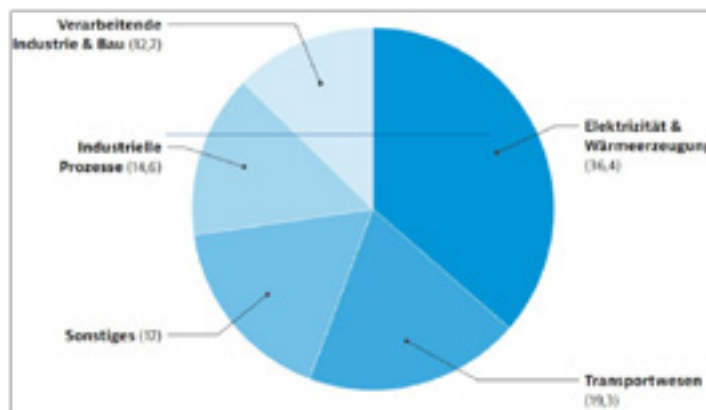
In 2021, Saudi Arabia launched the Circular Carbon Economy National Program. Within this program, a US\$100 million CCUS project is planned. However, details are not yet known.

SABIC, BASF, AND LINDE COOPERATE ON DECARBONIZATION

SABIC, BASF, and Linde have begun construction of a demonstration plant for large-scale electrically heated steam crackers in Ludwigshafen, Germany. BASF says by using electricity from renewable energy instead of natural gas, the technology has the potential to reduce CO₂ emissions from one of the chemical industry's most energy-intensive production processes by at least 90 percent compared to conventional technologies.

BASF and SABIC are jointly investing in the project. BASF is operating the demonstration plant. Linde is a partner for the planning, procurement, and construction and will market the technologies developed. The

Saudi Arabia structure of greenhouse gas emissions by sector in 2019 (shares in %)



Source: Climatewatchdata 2023

project receives €14.8 million in funding from the German Federal Ministry of Economic Affairs and Climate Action as part of the "Decarbonization of Industry" support program.

PRODUCTION OF "LOW CARBON" CONCRETE

According to calculations by the Global Carbon Project, CO₂ emissions from the Saudi Arabian cement industry peaked in the year 2014. In subsequent years, CO₂ levels fell due to declining cement production, but then rose again to 29 million tons by 2021.

In spring 2022, the World Cement Association called on its members in the MENA region (Middle East and North Africa) to take action to decarbonize. However, Saudi Arabia has yet to make substantial progress in reducing CO₂ emissions.

In October 2022, KAUST hosted a workshop on decarbonization in the cement industry. Alternative fuels, the use of secondary raw materials as clinker admixtures, and CCUS processes were discussed.

One KAUST project is concerned with the production of concrete with admixtures of pozzolans and limestone. This process results in lower CO₂ emissions overall.

This article is a translation by the German-Saudi Arabian Liaison Office for Economic Affairs (GESALO). The unabridged original version is in German, published by Germany Trade & Invest, the economic development agency of the Federal Republic of Germany.

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Wind and solar energy are the main energy sources for the 'Energiewende'

GERMANY'S PATH TO CLIMATE NEUTRALITY BY 2045

The 'Energiewende', Germany's long-term energy and climate strategy, is part of the national contribution to limit global warming to 1.5°C.

Germany must be climate neutral by 2045. This means that the biggest transformation of our industry and economy in at least 100 years lies ahead of us.' Olaf Scholz, German Chancellor, 2021.

This transformation, the so-called 'Energiewende', requires the substitution of fossil energies but also a large modernisation of existing industries, infrastructure and buildings. While being a major challenge, the energy transition will create millions of

future-prove jobs, increase energy security diversifying supply, and reduce energy costs for business and households alike.

“ Germany must be climate neutral by 2045. ”

CLIMATE ACTION IN GERMANY

Interim targets towards climate neutrality are essential to stay on track. By 2030, the national greenhouse gas (GHG) emissions are to be reduced by 65%, and by 88% until 2040 compared to 1990. In 2022 GHG emissions were reduced by 40%.

For the energy transition to succeed, Germany has initiated various measures in recent years. The energy sector, the largest emitting sector responsible for a third of the national GHG emissions, started phasing out coal and massively ramping up renewables. The industry sector emitting one-fourth of the German emissions is reducing its impact through climate-friendly production pathways and efficiency measures. Incentives are set through the EU-Emission

Trading System. The transport sector accounts for one-fifth of emissions in Germany. The government is focusing on electric mobility. The aim is to put 15 million electric cars on German roads by 2030.

RENEWABLES HAVE BECOME GERMANY'S NO. 1 SOURCE OF ELECTRICITY

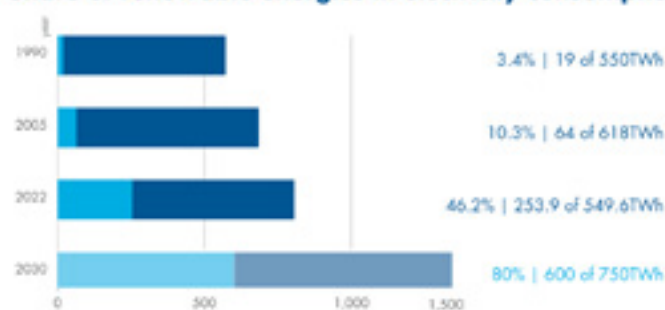
With a share of 46% in 2022, renewable energies have become the most important electricity source in Germany. The aim is to increase the share of renewables to 80% by 2030. Wind and solar energy are the two most important renewable energy producers. The Renewable Energy Sources Act (EEG) introduced an auction system to promote renewable energies in 2017. Since then, prices were significantly reduced. Some offshore wind projects were even awarded without any subsidies. Despite the increasing share of fluctuating renewable electricity, the German power grid remained its stability. The strong interconnection within the EU electricity network plays an important role in this regard.

Since Germany is densely populated the availability of appropriate locations for the expansion of renewable energies is becoming a challenge. Against this backdrop, green energy imports are going to play an essential role in pursuing climate neutrality.

HYDROGEN - THE ENERGY CARRIER OF THE FUTURE

Hydrogen plays an important role as an alternative to fossil fuels in applications that are hard to electrify (e.g. chemical and steel industry). In 2020, the German government published its National Hydrogen Strategy with the long-term goal of establishing a market for green hydrogen and its derivatives in Germany. The strategy is being updated in 2023 and will include guidelines for imports and trade. The national demand is expected to reach 95 to 130 Terawatt hours by 2030, with two-thirds being covered by imports. The German government has launched several funding measures and initiatives to promote the import of green hydrogen from outside of Europe (e.g. projects in Saudi Arabia and Chile) and to strengthen the export opportunities of German technology leaders abroad.

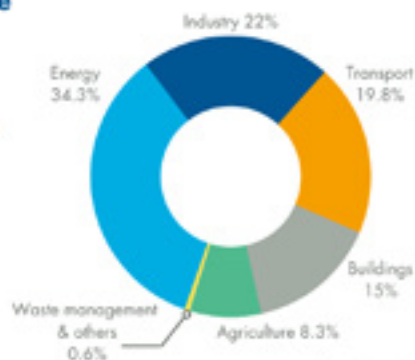
Share of renewable energies in electricity consumption



source: umweltbundesamt.de

Share of greenhouse gas emissions in Germany 2022

Wind and solar energy are the most important renewable energy sources.



source: umweltbundesamt.de

“ With a share of 46% in 2022, renewable energies have become the most important electricity source in Germany. ”

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BASF purchased a 49.5% share in the largest offshore windfarm in the world off the coast of the Netherlands. Power from the windfarm will be used for chemical production at BASF sites in Europe.

BASF'S ROADMAP TO CLIMATE NEUTRALITY

On its journey toward climate neutrality, BASF has set itself ambitious goals and is striving worldwide to achieve net zero CO₂ emissions by 2050¹.

¹The goal includes Scope 1 and Scope 2 emissions. Other greenhouse gases are converted into CO₂ equivalents according to the Greenhouse Gas Protocol.

Based on the most recent progress in developing low-emission and CO₂-free technologies, the company is also significantly raising its medium-term 2030 target for reductions in greenhouse gas emissions.

BASF wants to reduce its greenhouse gas emissions worldwide by 25 percent compared with 2018 – and to achieve this despite targeted growth and the construction of a Verbund site in South China. This means cutting CO₂ emissions in half in the current business by the end of this decade. Overall, BASF plans to invest up to €1 billion by 2025 to reach its new climate target and a further €2 billion to €3 billion by 2030.

“The new climate goals underscore our determination and BASF’s commitment to the Paris Climate Agreement. Climate change is the greatest challenge of the 21st century. In response, we must adapt our

processes and our product portfolio. That is why BASF will increase its use of renewable energies. And we will accelerate the development and deployment of new CO₂-free processes for the production of chemicals. With transparency and offerings to systematically and incrementally reduce the carbon footprint of BASF products throughout the entire value chain, we help our customers in all industries to reduce the carbon footprint of their own products,” said Dr. Martin Brudermüller, Chairman of the Board of Executive Directors of BASF SE.

BASF TO USE NEW TECHNOLOGIES TO REPLACE FOSSIL FUELS

At the heart of the long-term transition toward net zero CO₂ emissions by 2050 is the use of new technologies, which will replace fossil fuels such as natural gas with electricity from



BASF researchers have developed a new reactor concept so that hydrogen can be produced without CO₂ emissions. Hydrogen is needed by the chemical industry in large quantities, for example for ammonia synthesis.

renewable sources. Many of these breakthrough innovations are being pioneered by BASF in collaboration with technology partners.

One of the most important new technologies that BASF is currently developing are electrically heated steam crackers to produce basic chemicals such as ethylene, propylene and butadiene. These chemicals are building blocks for numerous value chains and are essential for chemical production. Hydrogen is another important feedstock for many chemical production processes. To achieve CO₂-free production of hydrogen, BASF is pursuing two processes in parallel: the commercially available water electrolysis and methane pyrolysis, for which BASF has developed a new process technology. Another important lever to increase energy efficiency is the use of electrical heat pumps to produce CO₂-free steam from waste heat. BASF's goal is to work with Siemens Energy to gradually ramp up this technology to industrial scale and use it for waste heat recovery at entire sites.

BASF WORKING ON NUMEROUS FLAGSHIP PROJECTS

In addition to the planned investments in renewable energies, BASF is pursuing a number of specific flagship projects. As one example, together with SABIC and Linde, BASF is working on the realization of a pilot furnace for the world's first electrically heated steam cracker. Compared to conventional crackers, this would enable nearly CO₂-free



Udo Huenger, Vice President and Head of BASF Market Area Middle East, Ahmad Hamad Bin Fahad, CEO of DUBAL Holding LLC and Christian Lach, Chief Commercial Officer of Quantafuel ASA, at the signature ceremony of the agreement on the front-end engineering design for a chemical recycling plant in Dubai.

production of basic chemicals. If the necessary funding is granted, start-up of the pilot plant is slated to begin as early as this year. In addition, BASF is working with numerous partners from universities, research institutes and companies on sustainable solutions for a carbon neutral future.

“ We are convinced that the challenges of climate change can only be mastered together with our partners ”

Dr Udo Huenger,
Vice President,
BASF Middle East & Egypt

BASF'S SUSTAINABILITY FOCUS IN THE MIDDLE EAST.

In line with the company's global targets, BASF in the Middle East is engaged in a number of projects and initiatives that support climate neutrality.

In support of the Kingdom of Saudi Arabia's Vision 2030 program, BASF contributes by providing its latest technology in the field of amine-based gas treatment which aims to reduce the sulphur emissions significantly in both refinery and gas production plants. BASF also provides the OASE® white and OASE® blue technology to syngas and ammonia producers to display low carbon footprint blue hydrogen and blue ammonia as a downstream off-take of the KSA's gas industry.

BASF is also supporting the FEED (Front End Engineering and Design)

study for the first chemical recycling facility for waste plastics in Dubai together with Quantafuel and DUBAL Holding. After a six-month feasibility study where the main design parameters have been defined and the site and feedstock have been secured, the project is now entering the final stage of the FEED study.

“Meeting the challenges of today to ensure that we all have a tomorrow is a journey that we are all on together,” says Dr Udo Huenger, Vice President BASF Middle East & Egypt. “As BASF in the region we are committed to the transition to renewable energy and are supporting our customers with solutions and technical expertise as they transition to green energy generation,” he said. “We are convinced that the challenges of climate change can only be mastered together with our partners.”

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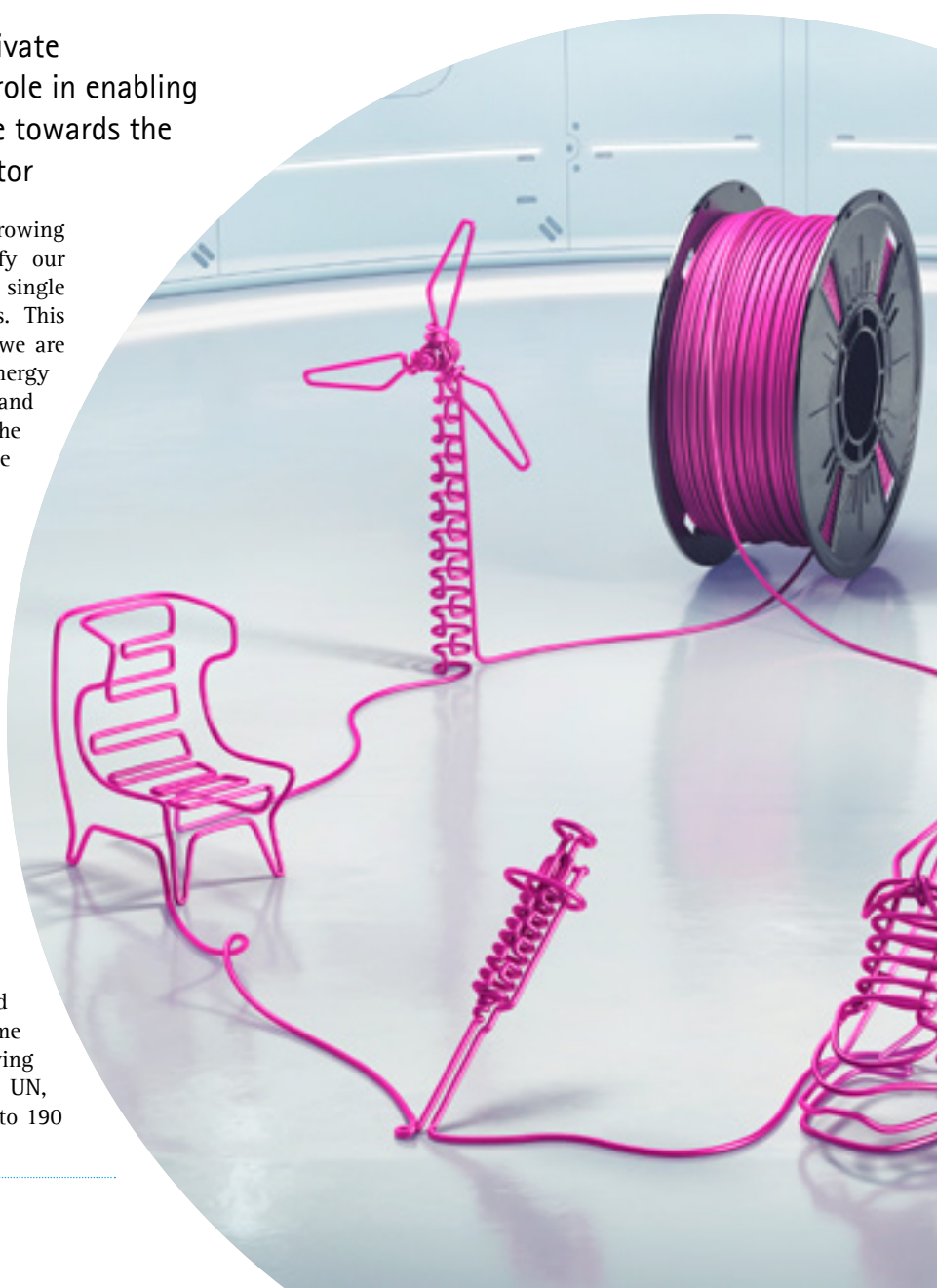
CIRCULARITY AND ENERGY DIVERSIFICATION

A look into circularity, Public-Private Partnerships (PPP) and Evonik's role in enabling a circular economy to contribute towards the diversification of the energy sector

In recent years, there has been a growing concern about the need to diversify our energy sources and shift from a single source reliance such as fossil fuels. This approach has become imperative as we are faced with climate change and now rising energy costs. For the past few decades, the demand for raw materials has multiplied, and the extraction, processing and tonnes of waste disposed heavily contribute to greenhouse gas emissions. Resources are depleting at an accelerated rate, and the fundamental challenge is the linear economy we live in; it's "take, create, use, dispose". Adopting a circular model is now an urgency to act upon immediately. If we want to reach our sustainability goals, without a circular economy this is not possible. A circular economy, which shifts away from linear production processes to circular, regenerative process, can contribute significantly to sustainable development and reduce the pressure on finite resources.

THE CHALLENGES THAT THE ECONOMY CURRENTLY FACES

While the linear economy model has provided significant business prosperity, this has come with a heavy bottleneck of not achieving economic sustainability. According to the UN, by 2060, global material use could double to 190



“ As we grow our Next Gen. Solutions, we aim to invest more than €3 billion by 2030 and increase the proportion of particularly sustainable products and solutions in our portfolio from 43% at present to over 50% by 2030. ”

billion tonnes (from 92 billion), while greenhouse gas emissions could increase by 43%. In the linear model, goods are produced by overusing of natural resources and is thus the reason for the depletion

of such non-renewable resources. As we realize these resources are finite and are becoming scarce, extraction costs and production increases thereby reducing the economic efficiency. Another major challenge we face is climate change, the greenhouse gas emissions from

the heavy use of fossil fuels are a significant contributor to global warming. In general, emerging and developing nations are faced with critical challenges in dealing with a rising population, an increasing consumption of raw materials, and waste generation.

CITY GOVERNMENTS' ROLE TO ENABLE A CIRCULARITY TRANSITION

As countries adopt the principles of a circular economy, the Middle East is already making efforts towards a regional shift in circularity. In the Middle East there is an increased interest in PPP procurement, which is largely driven by the desire to expand waste management services and reduce greenhouse gas emissions. Developing legislative agendas and strategies, along with establishing targets, can stimulate the adoption of circular products and impact business operations as well as the consumer mindset. By transitioning towards a circular economy, city governments can enhance their ability to deliver against public capital

expenditure and upgrade infrastructure and utility services. This, in turn, can exert an influence on how businesses and the consumer mindset operate. City governments can also influence consumer behavior through education and awareness campaigns, providing access to circular products and services, promoting sustainable lifestyles and incentivizing behavior change through rewards and recognition programs.

EVONIK'S CONTRIBUTION TOWARDS A CIRCULAR ECONOMY

Driving circularity is one of Evonik's sustainability focus areas. This quality is taking centre stage when it comes to closing the loops and building circular value chains. Next Generation Evonik incorporates sustainability into a variety of important core processes, including portfolio and innovation management, production and technology, and human resources. Our strategic integration enables us to encourage sustainability across multiple markets and industries. In 2021, Evonik also launched a Circular Plastics Program to pool its circular plastics activities and push towards more sustainable solutions. Our sustainability strategy is focused on three core processes: Next Generation Solutions (market perspective), Next Generation Technologies (asset perspective), and Next Generation Culture (human resources perspective). As we grow our Next Generation Solutions, we aim to invest more than €3 billion by 2030 and increase the proportion of particularly sustainable products and solutions in our portfolio from 43% at present to more than 50% by 2030.

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How we create value for society: Resources and value contributed by Evonik in 2022

Inputs

Financial capital

€6,962 million

Property, plant
and equipment

€856 million

Capital expenditures

Productive capital

€13.6 billion

Procurement volume

> 100

Production sites
worldwide

Intellectual capital

approx. 24,000

Patents

€460 million

R&D expenses

Human capital

34,029

Employees

€79.3 million

Investment in vocational
training and CPD

Social capital

approx. 34,000

Customers

35,000

Suppliers

Natural capital

64.26 petajoules

Energy inputs

approx. 446
million m³

Water intake

^a Outside the scope of the auditor's limited assurance engagement.

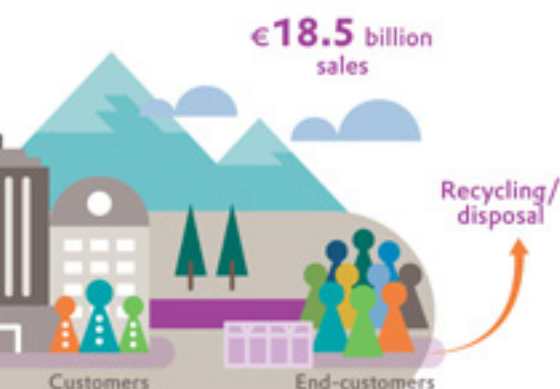
^b Learning time spent by employees with electronic access to LILY (Learning and Individualized Library).

^c TFS assessments of suppliers where annual procurement volume is >€100 thousand.

Our



business



relevance for Evonik:



Output

Financial capital

€2.5 billion

Adj. EBITDA

€785 million

Free cash flow

Productive capital

8.8 million
metric tons

Production output

43%

Sales from
Next Generation Solutions

Intellectual capital

256

New patents

>€600 million

Additional sales in
innovation growth fields^a

Human capital

1.9%

Early
employee turnover

3.5 hours

Average learning time
with LILY^b

Social capital

66%

Suppliers evaluated^c

approx. 1,000

Memberships in
industrial associations
(Evonik and subsidiaries)

Natural capital

5.9 million
metric tons

CO₂ emissions
(scope 1 and 2)

7 million m³

Water consumption^d

SHAPING THE NEW ERA OF ENERGY SUPPLY IN KSA



thyssenkrupp nucera – with a local entity thyssenkrupp nucera Arabia in Riyadh – offers world-leading technologies for high-efficiency electrolysis plants which will be used for the world's largest green hydrogen project in NEOM. This is possible by the company's leading expertise in chlor-alkali electrolysis technology.

Rethinking existing infrastructures and shaping the new era defined by clean energy supply. That's what thyssenkrupp nucera aims to do. The company's green technology of the future is the key: alkaline water electrolysis (AWE). Their AWE solution to produce green hydrogen enables the decarbonization of the industry.

The German company has extensive in-depth knowledge in the engineering, procurement, and construction of electrochemical plants. In addition, thyssenkrupp nucera features a strong track record of more than 600 electrolysis projects with a total rating of over 10 gigawatts already successfully installed.

A MAJOR STEP TOWARDS A CLIMATE-NEUTRALITY

thyssenkrupp nucera has a holistic understanding of the entire electrolysis

value chain. Looking back on 50 years of experience, their proven know-how in chlor-alkali builds the fundament for the scale-up of alkaline water electrolysis. With this technology to produce green hydrogen, the company offers an innovative solution on an industrial scale for green value chains and an industry fueled by clean energy – a major step towards climate-neutrality.

Together with strong strategic partners and global players, thyssenkrupp nucera is able to use renewable power as the energy source

“ The visionary gigawatt NEOM project will serve as the blueprint for Gigawatt green hydrogen production hubs globally. ”

to produce green hydrogen which is a vital material for the decarbonization of our planet and the goal to ensure we achieve carbon neutrality. Currently, technological leaders from all over the world are building together the world's largest green hydrogen project in NEOM in Saudi Arabia which will start hydrogen production in 2026.

This visionary project will serve as the blueprint for green hydrogen globally and ensure that both Saudi Arabia and thyssenkrupp nucera play an important role in ensuring we protect the environment and our planet for generations to come.

The company offers energy and resource efficient technologies not just for the production of green hydrogen but also for chlorine production and recovery. More precisely, it also implemented projects from small facilities to huge chlor-alkali plants with capacities of over 800,000 mt/year of caustic soda. thyssenkrupp

thyssenkrupp nucera,
chlor-alkali electrolysis
technology plant



RECYCLING OF HYDROGEN CHLORIDE

In many chemical processes such as the production of isocyanates hydrogen chloride is a significant by-product that has minimal commercial value. Hence, the use of hydrogen chloride electrolysis for recycling allows to close the loop – as shown successfully since many years in a world scale plant by Sadara. The hydrogen chlorine electrolysis is a method to recycle large quantities of hydrogen chloride, cleanly and efficiently. thyssenkrupp nucera has supported Sadara with the design of plants and supply of materials and equipment. Thus, as an example of an industry best practice, Sadara's ambition and vision of delivering many chemical plants was matched with thyssenkrupp nucera's ambition and ability to provide world leading technology at an unprecedented scale.

Energy and resource efficient technologies for the production of green hydrogen and chlorine, the world's largest green hydrogen project and several other projects with market leading companies – thyssenkrupp nucera, along with its strong and bold partners in the Kingdom, are truly "shaping the new era".



thyssenkrupp nucera electrolysis assembly

nucera's fundamental chlor-alkali technology is a cornerstone for the chemical industry in Saudi Arabia and a starting point for various value chains of day-to-day products.

ADDED VALUE AND COMPLETE PROCESS CHAINS

The large scale, safe and cost effective method of chlor-alkali electrolysis for the production of chlorine, caustic soda and hydrogen has been used extensively in Saudi Arabia by market

leading companies such as Shell. This primary electrochemical process uses salt as the starting material, which is the same salt that is used in your own kitchen, provides the downstream building block for industrially important building materials such as PVC, provides disinfection to give us safe drinking water, is a vital component for the production of soaps and detergents as well as allowing the production of aluminum and other primary products.

AUTHOR



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Signing Ceremony
 Joint Development Agreement: Linde and Aramco
 to Develop Ammonia Cracking Technology
 March 15, 2023
 Dhahran

From left to right:
 (back) Aramco President
 & CEO Amin Nasser and
 Linde CEO Sanjiv Lamba;
 (front) John van der
 Velden, SVP Global Sales
 & Technology, Linde
 Engineering; Khalid Y Al
 Qahtani, SVP and Acting
 CTO, Aramco.

SAUDI ARAMCO & LINDE ENGINEERING TO DEVELOP AMMONIA CRACKING TECHNOLOGY

On March 15, 2023, Aramco, one of the world's leading integrated energy and chemicals companies, and Linde Engineering, a global leader in the production and processing of gases, announced that they have signed an agreement to jointly develop a new ammonia cracking technology.

NEW TECHNOLOGY: AMMONIA CRACKING CATALYST

The collaboration between the two companies will combine Linde Engineering and Aramco's experience and capabilities in industrial research and development, lower-carbon hydrogen, and ammonia cracking technology.

A potential differentiator of this new technology is the ammonia cracking catalyst, jointly developed by Aramco and the King Abdullah University of Science and Technology (KAUST), which will be evaluated against other catalysts.

Through this agreement, Aramco and Linde Engineering plan to build a demonstration plant in northern Germany to showcase this new ammonia cracking technology.

Linde Engineering intends to offer this ammonia cracking technology to current and new customers, creating new commercial opportunities within the global lower-carbon energy supply chain. The emerging lower-carbon ammonia business may prove to be key in bridging the gap between a country's domestic renewable energy production capacity and total energy demand.

JOINED EFFORTS TO DEVELOP NEW TECHNOLOGY

Ahmad Al-Khowaiter, Executive Vice President and Chief Technology Officer at Aramco, said: "This agreement is part of our ongoing technology and business development efforts to establish a commercially viable lower-carbon hydrogen supply chain. We believe the advanced ammonia cracking technology we are co-developing with Linde Engineering will play a key role in realizing our objectives."

John van der Velden, Senior Vice President Global Sales & Technology at Linde Engineering, said: "Effective ammonia cracking technology supports the world's urgent need for decarbonization. By completing the missing link in the export chain, cleaner energy can be shipped from regions with high renewable and clean energy potential to those with more limited resources. We look forward to working closely with Aramco to develop and commercialize this important technology, creating new business opportunities for Linde Engineering and Aramco."

CONTACT



KLAUS OHLIG

*Executive Director Research & Development
 Linde Engineering*

Business Delegation Power Generation from
Solar & Wind Energy incl. CSP in Riyadh.

POWER GENERATION FROM SOLAR AND WIND ENERGY

Saudi Arabia's transformation process is offering great opportunities in the energy sector aiming at contributing 58.7 gigawatts from renewable energies to the energy mix. In February, a German delegation on Power Generation from Solar & Wind Energy incl. CSP visited Riyadh.

Saudi Arabia has been undergoing a transformation process for the past five years, which has resulted in numerous megaprojects and the diversification of the energy sector as part of Vision 2030. By 2030, 58.7 gigawatts of renewable energy will contribute to the energy mix. Mainly the construction of PV solar plants is promoted here. The tenders in the solar sector since July 2019 amount to a capacity of 2.67 gigawatts.

Saudi Arabia has already been working on various RE concepts for 15 years. Nevertheless, there is a high need

for investment. The Kingdom revised its targets to the 27.3-gigawatt mark by the "National Renewable Energy Program," published in 2018. Of these, 20 gigawatts are to be accounted for by PV power plants and 7.0 gigawatts by wind energy. By 2030, the goal is to increase to 58.7 gigawatts (50% renewables) (40 gigawatts PV, 16 gigawatts wind, 2.7 gigawatts CSP).

OPPORTUNITIES FOR THE SOLAR AND WIND ENERGY SECTOR.

The latest milestone underpinning this ambitious goal is a

production plant for green hydrogen as part of the Helios project, in which Thyssen-Krupp and SPG Steiner GmbH are also involved. Four gigawatts to operate the plant are to be generated from solar and wind energy. After commissioning, the NEOM Green Hydrogen Company, a joint venture of the partners ACWA Power, Air Products and NEOM, will own and operate the facility, which will produce hydrogen to be synthesized into carbon-free ammonia for export exclusively by Air Products to the global markets. The start of production is scheduled for 2026. Engineering and procurement activities have commenced. The boom in the hydrogen sector thus offers further market opportunities for the solar and wind energy sectors.

The private sector is to play a central role in the development of the RE sector. This does not only mean the realization of power plants on a Private Public Partnership (PPP) basis, but private domestic and foreign companies should also invest in the entire value chain. Increasing local content is required for solar and wind power plants. International companies are therefore looking for suitable local partners, and Saudi Arabian companies are seeking foreign technology providers.

PV AND CSP PROJECTS

Current capacities were distributed among an estimated 409 megawatts of solar power (359 megawatts PV, 50 megawatts CSP) and 3 megawatts of onshore wind power. German companies are also already involved in the implementation of projects.

“ Numerous megaprojects and the diversification of the energy sector as part of Vision 2030. ”

A subsidiary of Phoenix Solar AG (Sulzemoos near Munich) built a 3.5-megawatt PV plant near Riyadh for Saudi Aramco in 2011, with Naizak Global Engineering Systems involved as the local project partner. The solar park is located on the grounds of the King Abdullah Petroleum Studies and Research Center (KAPSARC).

As the first PV plant connected to the national grid, the 10-megawatt Layla Al Aflaj power plant went into operation in 2020. The project is a cooperation between the Saudi Technology Development and Investment Company (TAQNIA), which is part of the PIF, and the Saudi Electricity Company.

WINDPOWER PROJECTS

In Saudi Arabia, the first large wind turbine was installed in Turaif in 2016. It is a joint project between the national oil company Aramco and General Electric (GE). The US company supplied a 2.75-120 model turbine with a capacity of 2.75 megawatts.

Other projects contributing to the NREP's target of 58.7 gigawatts from RE (of which wind energy accounts for 16 gigawatts) include the Dumat Al-Jandal wind farm. Construction began in August 2019, before the first electricity generated from the plant was fed into the grid two years later in August 2021. The \$500 million project involved French company EDF Renewables (51%) and state-owned Abu Dhabi Future Energy Company Masdar (49%).

The Renewable Energy Project Development Office (REPDO), was established in 2017 and is responsible for 30 percent of the targeted NREP capacity goals. All REPDO



Business Delegation Power Generation from Solar & Wind Energy incl. CSP in Riyadh.

projects are bid out on a BOO basis Build, Own, Operate. In early September 2022, the REPDO program was integrated into the Saudi Power Procurement Company (SPPC), which should result in more and more competitive bidding for projects.

Important national investors in the RE sector are the Public Investment Fund (PIF) and Acwa Power Company, which is 50 percent owned by the PIF. The sovereign wealth fund aims to invest in solar and wind projects with a total capacity of around 40 gigawatts by 2030.

THE DELEGATION VISIT IN FEBRUARY 2023

From February 5th till 9th, we welcomed the German Delegation Power Generation from Solar & Wind Energy incl. CSP in Riyadh.

The Delegation took place within the framework of the Export Initiative Energy of the Federal Ministry of Economic Affairs and Climate Action (BMWK). It was organized by us the German-Saudi Arabian Liaison Office for Economic Affairs (GESALO) in cooperation with The Renewables Academy AG (RENAC) in Germany.

The Delegation started with high-level institutional visits to the Ministry of Energy, PIF (The Public Investment Fund), and the Saudi Power Procurement Company, where the six participating German companies gained deep insights into Saudi Arabia's strategies and objectives in the field of solar and wind energy.

In addition, visits to leading Saudi companies and institutions, such as KACARE (The King Abdullah City for

Atomic and Renewable Energy), Alfanar, ACWA Power, and SABIC, highlighted the rapidly growing market potential in Saudi Arabia. During the discussions, it became clear that the solutions presented by the German companies in the field of power generation from solar and wind energy, including CSP, are very attractive to the Saudi market. Especially the hybrid concept of CSP and photovoltaics presented by the German companies generated significant interest from the Saudi side.

“ Hybrid concept of CSP and photovoltaics by the German companies raised significant interest. ”

SYMPOSIUM – GERMAN COMPANIES REPRESENT LEADING TECHNOLOGY AND SERVICES.

During the scheduled symposium, Germany was able to present itself as a leading technology & product provider and as an expert in the field of power generation from solar and wind energy. B2B meetings with the respective Saudi companies took place immediately after the symposium at

the conference location and on the following days at the companies' headquarters.


German company representatives who traveled to Saudi Arabia for the first time gained a good overview of the sector and the kingdom's potential. In addition, they highly appreciated the direct access to initial contacts on the ground throughout the trip. Participants who knew the market or already had partners could gain a deeper insight and establish high-quality, new business contacts.

The feedback from the participating companies was very positive. Most companies plan to travel to Saudi Arabia again for the next step in negotiations.



Business Delegation Power Generation from Solar & Wind Energy incl. CSP in Riyadh.

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H₂-OFF-TAKER VISIT OF THE SAUDI DELEGATION TO RHEIN-RUHR-AREA

The Ministry of Energy travelled together with representatives from Aramco, SABIC, Maaden, Neom, and PIF.



Dr. Dalia Samra-Rohte and her team facilitated the successful exchange at IHK Düsseldorf.

Mid-February, a high-ranking Saudi delegation travelled to Germany to meet with potential off-takers in the metropolitan area of Düsseldorf. The Ministry of Energy invited several Saudi stakeholders to participate in the B2B meetings and a site-visit to ThyssenKrupp in Duisburg.

ENERGY DIALOGUE INCLUDED B2B MEETINGS

The study tour is part of the Energy Dialogue between the German Federal Ministry of Economic Affairs and Climate Action (BMWK) and the Ministry of Energy of the Kingdom of Saudi Arabia. The dialogue is supported by Guidehouse and GESALO. The trip commenced with a networking dinner at Düsseldorf under participation of the BMWK. The next day, the Saudi Arabian

guests were invited to the Chamber of Industry and Commerce (IHK) in Düsseldorf where they met a variety of German off-taker companies to discuss opportunities for cooperation. The meetings lasted the whole day and were considered as a unique opportunity from both sides.

One highlight was the reception dinner at the Industrie-Klub Düsseldorf upon invitation of NRW Global Business that connected the Saudi Arabian delegation with executives from relevant companies of the energy sector.

SITE VISIT AT THYSSENKRUPP STEEL EUROPE

At the second day, the delegation visited the site of ThyssenKrupp Steel Europe in Duisburg that expands over 10 km² and got a firsthand experience of its steel production. Moreover, the

group was introduced to the first electrolyzer of ThyssenKrupp Nucera, a joint venture focusing on hydrogen production based on renewable energy sources.

GESALO would like to express its gratitude for its partners from the Federal Ministry (BMWK) and Guidehouse for the excellent cooperation as well as NRW Global Business for the kind invitation.



Mr. Zeid Al-Ghareeb: Head of Circular Carbon Economy Program at the Ministry of Energy at Industrie-Klub Düsseldorf.

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Saudi Arabia's development planning, concretized in 2016 through Vision 2030 and the National Transformation Program 2020 (NTP), includes the implementation of smart city strategies as an important goal.

CURRENT MARKET DEVELOPMENTS

In 2017, Saudi Arabia launched a series of "Gigaprojects" that are the flagships of its Vision 2030 development program. These include the \$500 billion project Neom - City of the Future, the Red Sea Project, Diriyah and Qiddiya, all of which are governed by the PIF, one of the largest sovereign wealth funds in the world (Public Investment Fund). Furthermore, projects such as the King Salman Park, the Riyadh Sports Boulevard and Jeddah Downtown are part of the Vision 2030. Another Gigaproject is Roshn, a Saudi real estate developer, also owned by the Public Investment Fund. Roshn is responsible for urban and residential development, setting up a completely new infrastructure.

Riyadh aims to realize an estimated \$1.18 billion project volume by 2030 - about \$147 billion per year. To achieve this goal, until 2025 construction contracts with the value of \$569 billion will need to be awarded. This would be an increase of 230%, from the \$112 billion awarded in the past five years.

In October 2022, the first Integrated Logistic Bonded Zone (ILBZ) opened in Riyadh on the grounds of King Khalid International Airport, aiming to offer attractive company set ups.

THE FIRST SMART CITIES IN KSA

Smart Cities concepts are not new to Saudi Arabia. The first concept was developed north of Jeddah on the Red Sea, King Abdullah Economic City (KAEC), which was already initiated in 2005. The aim is to develop KAEC into a logistic center due to its geostrategic position being close to the Suez Canal. The city is also home to the newly announced automotive cluster with the Saudi brand CEER and LUCID.

Yanbu, an industrial city located on the west coast, calls itself the Kingdom's first Smart City. In 2017, the first phase included installing a broadband network and building cloud capacity.

The second phase, which included

smart control of infrastructure systems, was largely completed in 2018. As a result, by controlling truck traffic (recording weight and speed), road maintenance costs are said to have been significantly reduced. By monitoring the level of garbage containers, waste collection can now be organized more effectively. The introduction of smart street light technologies, for example, have led to a reduction in electricity consumption. A smart parking system now improves parking space utilization. In the ongoing third phase of the Yanbu Smart City program, a digital city management platform, smart community portal, and e-policing system are now being introduced.





Smart City Delegation,
Visit of THE LINE
exhibition in Riyadh

POTENTIAL PARTNERS FOR GERMAN COMPANIES

In the desert province of Tabuk on the Red Sea in the northwest of the Kingdom, the pioneering NEOM megacity development project is under construction, which aims to set new standards for urban living and smart cities, among other things. The US\$500 billion project, unveiled by the Crown Prince in 2017, will cover an area of 25,600 square kilometers.

In January 2021, the Crown Prince announced "The Line" as part of the NEOM project. This is a 170-kilometer-long and 500- meters above sea level "hyper-connected" settlement zone with 9 million inhabitants without roads and cars. Residents will have

access to all facilities within a 5-minute walk, in addition to a high-speed rail with an end-to-end transit of 20 minutes. The cost of the smart infrastructure is calculated at US\$200 billion. The project is to be financed mainly by private domestic and foreign investors. Part of NEOM will be Oxagon, a floating logistics hub and Trojena, a major outdoor skiing destination in the mountain area. Trojena will be home to the Asian Winter Olympics in 2029.

The Royal Commission for Al Ula (RCU), the Royal Commission Riyadh for Riyadh City (RCRC) and the Royal Commission for Jubail and Yanbu (RCJY), have a mandate over urban development and the cooperation is particularly for the introduction of new technology solutions.

To develop the overall smart city infrastructure a total of 50 more initiatives in nine sectors are expected to be launched by 2030.

Initiatives include smart parking and environmental protection, waste management systems, housing and smart community management, land and asset management, urban landscape improvement and urban planning. Government planners see the elimination/reduction of mobility problems as a key element of a smart city.

GERMAN DELEGATION: INNOVATIVE SMART CITY SOLUTIONS WITH A FOCUS ON TRANSPORT INFRASTRUCTURE AND LOGISTICS

From March 5 to 9, 2023, the German-Saudi Arabian Liaison Office for Economic Affairs (GESALO) together with MENA PP and on behalf of the Federal Ministry of Economic Affairs and Climate Action (BMWK), organized a business delegation for German companies operating in the transport

Smart City Delegation, Symposium: German companies present their customized digitization solutions





Smart City Delegation GESALO 2023

infrastructure and logistics sector to Saudi Arabia. Other implementing partners were the Logistics Alliance Germany (LAG) and the German Railway Industry Association (VDB). The aim of the delegation trip was to show the participants concrete business opportunities in the context of individual B2B meetings with potential decision-makers, sales partners, and buyers, as well as in the form of group visits.

GERMAN DIGITALIZATION SOLUTIONS FOR SMART CITIES

The start of the delegation trip was marked by the symposium, which was attended by around 65 participants from Saudi-Arabian companies and institutions. As an integral part of the event, the German companies presented their products and services to the trade audience through individual presentations. Beyond that, they had the opportunity to hold B2B meetings with the participating Saudi representatives.

On the following day group

visits to the Ministry of Municipal, Rural Affairs and Housing (MOMRA) and ROSHN - the largest real estate developer in the Kingdom - took place. In addition, the delegation visited the widely known Red Sea Project in Riyadh, as well as the Qiddiya project. Before flying to Jeddah on March 8, the participants were able to take a private tour to see THE LINE exhibition and visit the NEOM office in Riyadh.

Upon arrival in Jeddah, the King Abdullah Economic City (Emaar Economic City) and the King Abdullah Port were visited. Topics discussed during the group visits ranged from the localization of production and logistics to the customized digitization solutions for smart cities offered by the German companies. For example, automated registration for citizen services in projects such as THE LINE or the Red Sea project. At the end of the delegation trip, meetings with the Jeddah Logistics Committee and a second round of individual B2B meetings took place

at the Jeddah Chamber.

The feedback from the delegation participants was consistently positive. Not only did the delegation participants gain a comprehensive insight into smart city and logistics projects in Saudi Arabia, but they were also able to establish many contacts. Many companies plan to travel to Saudi Arabia again to deepen the business relationships initiated or to continue the talks in digital appointments.

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ENERGY AND MEDTECH DELEGATION TO KSA & BAHRAIN

In February, a Bavarian delegation under the leadership of Ministerial Director Dr. Ulrike Wolf fostered high level meetings between Bavarian and Saudi stakeholders.

Together with the Bavarian Ministry of Economic Affairs, Regional Development & Energy and Bayern International, GESALO facilitated a 5-day delegation to intensify business relations between Bavaria and the Kingdom of Saudi Arabia and Kingdom of Bahrain. The delegation was divided

into two groups: The MedTech companies under the lead of Florian Obermayer and Energy firms lead by Dr. Ulrike Wolf together with Dr. Dalia Samra-Rohte.

VALUABLE INSIGHTS THROUGH INSTITUTIONAL MEETINGS IN RIYADH

In Riyadh, the delegation was kicked-off by a briefing with Ambassador HE Dieter Lamlé and the Delegate of the German Industry as well as Bavarian Representative, Dr. Dalia Samra-Rohte at the Mövenpick Hotel.

The Energy delegation met with the Ministry of Energy and Acwa Power, allowing insights into the current trends and room for cooperation in the Kingdom. The Working Group Meeting of the German-Saudi Dialogue took place at the Ministry and fostered constructive discussions around hydrogen value chain.

The MedTech-Delegation was

The delegation led by Dr. Ulrike Wolf was hosted by Linde in the Eastern Province.



The Bavarian delegation met with both government entities and key stakeholder in the Saudi market.

hosted by the Ministry of Health to receive an overview of the comprehensive transformation of the health care system. Afterwards, the companies were received by the Health Committee of the Riyadh Chamber of Commerce for B2B meetings as Bavaria is home of leading MedTech companies. The first day was concluded by a visit to the exhibition "NEOM-The line experience".

BY TRAIN TO THE EASTERN PROVINCE

After an early train ride to the Eastern province, the two delegations met with Aramco and John Hopkins Hospital respectively. While the Energy delegation profited from a



The Energy and MedTech delegation profited from high-ranking business meetings

Industrial City Modon and at the Linde factory located there. Finally, the German visitors got a firsthand experience of Saudi Founding Day by visiting the festivities at Ithra Cultural Center.

Following their return to Germany, several companies embarked on further conversations with Saudi companies and government entities. Dr. Ulrike Wolf summarized: "Bavarian companies have the right key technologies for the future markets on the Arabian Peninsula."

beneficial exchange at the Aramco Headquarter, the MedTech delegation got an extensive tour on the hospital's grounds and met with the Eastern Province Health Cluster to witness how the transformation is unfolding. During a networking dinner, the participants enjoyed a close exchange with German executives based in the Eastern Province and Bahrain.

“ Bavarian companies have the right key technologies for the future markets on the Arabian Peninsula. ”

EXTENSIVE EXCHANGES IN BAHRAIN

On the third day, the delegation travelled to Bahrain. While the Energy

delegation met with the Ministry of Oil & Environment and Noga Holding, the MedTech Delegation was invited by the RCSI (Royal College of Surgeons in Ireland-Bahrain) and King Hamad

Hospital to be briefed about the current infrastructure and HR outlooks in the healthcare industry.

The visit to Bahrain was concluded with an extensive exchange with the Economic Development Board (EDB).

Returning to the Eastern Province on the last day, the delegation was welcomed to two site-visits at the

CONTACT

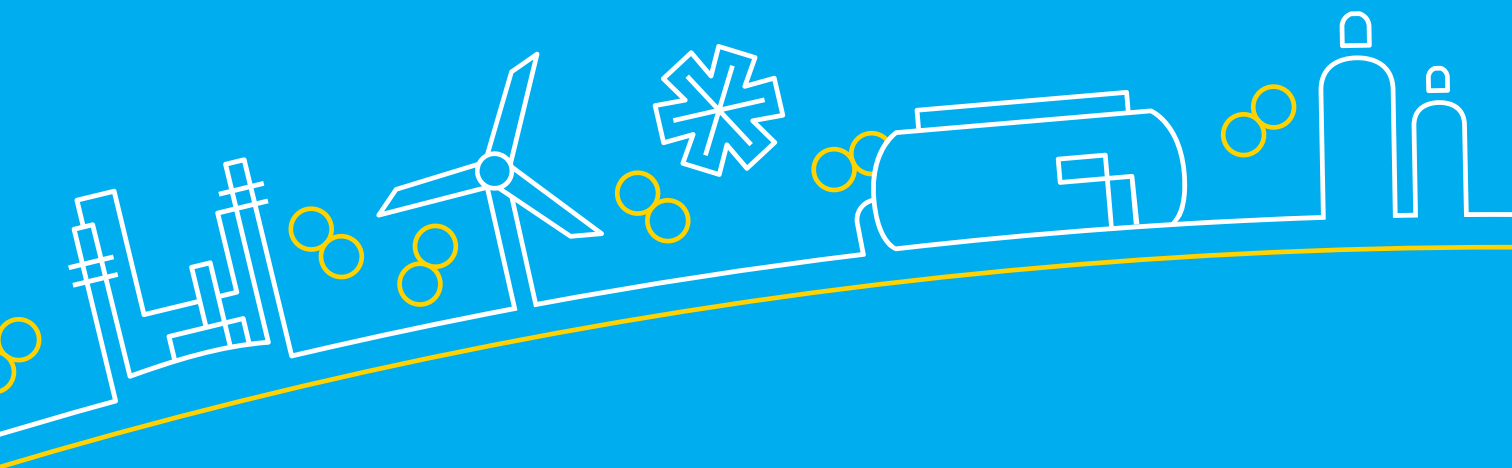


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AHK WORLD BUSINESS OUTLOOK

May 2023

Every year, the AHK World Business Outlook surveys the state of the art of international business activities all over the world. The AHK network together with the DIHK invites the business community to outline reflections and prospects on the economic situation of their company as well as national trends.

More than 5,100 companies worldwide took part in the survey. We are pleased that 84 replies were submitted from companies located in Saudi Arabia and Bahrain. The results of the latest survey from May 2023 can be accessed online:

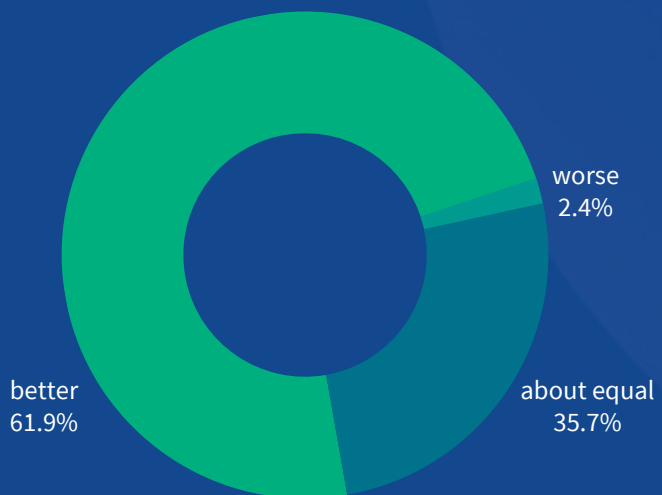


Please find below key figures that capture results for the Kingdom of Saudi Arabia and Bahrain:

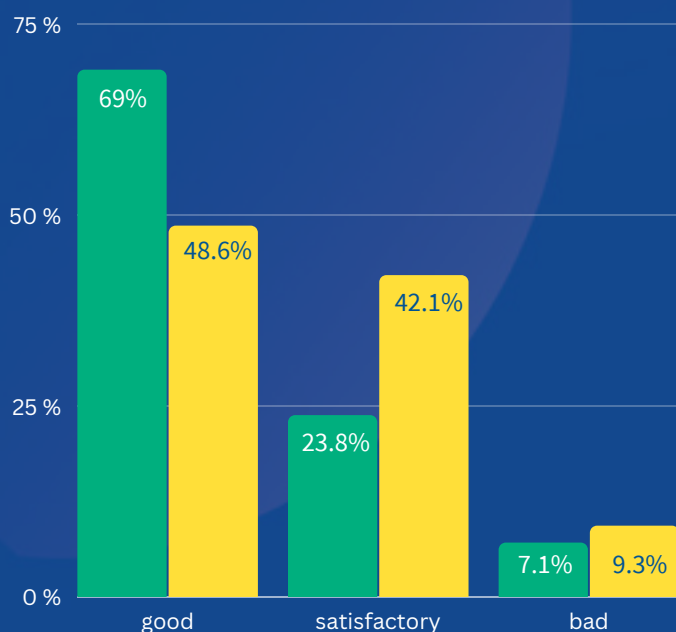
Which business development does your company expect for the next twelve months?

62%

of companies do expect a "better" development in the next twelve months (52 out of 84).

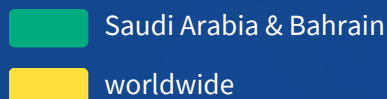


 **Compare:** worldwide 46.6% of the companies expect a "better" development.



How do you assess the current situation of your company?

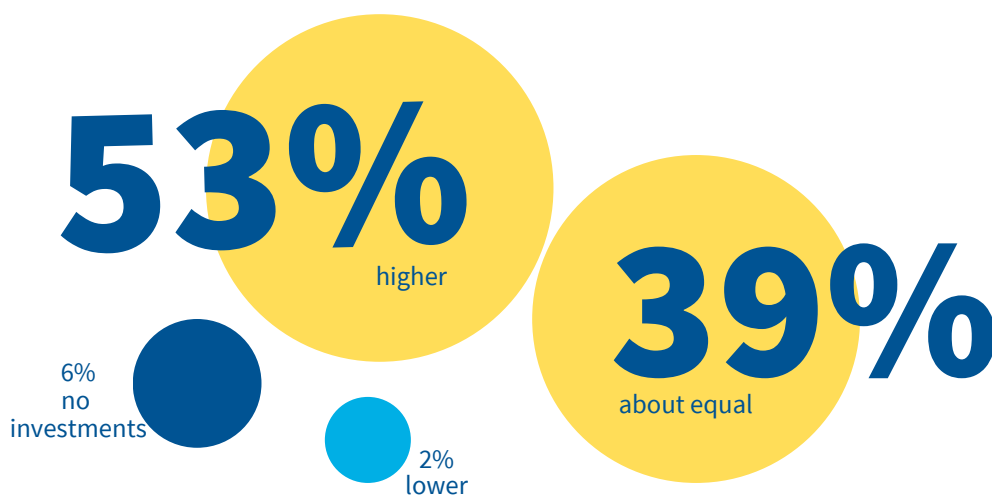
Survey submissions by companies :



93%

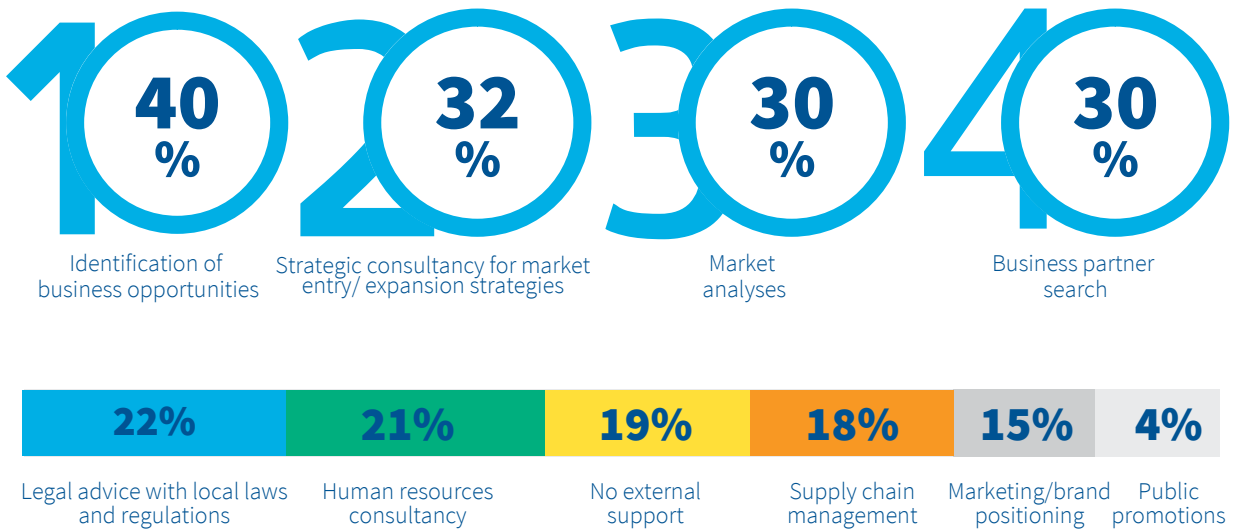
of companies located in Saudi Arabia and Bahrain assess their current situation as good or satisfactory.

How do you think local investments of your company are likely to develop in the next twelve months?



 **Compare:** worldwide 35% of the companies are likely to invest "higher".

What external support do you use or would you like to receive in diversifying your supply chain or entering new markets?



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01



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03



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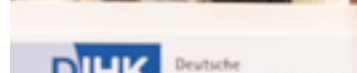
Above:
Minister of Energy
Prince Abdulaziz
bin Salman, &
Dr. Dalia Samra-
Rohte, Delegate of
German Industry
& Commerce for
Saudi Arabia,
Bahrain & Yemen



Gala dinner hosted by His Royal Highness Saudi Arabia's Minister of
Energy, Prince Abdulaziz bin Salman Al Saud

*“ The Energy
Dialogue is
an established
format that
underlines our
common goals. ”*

Dr. Dalia Samra-Rohte,
Delegate GESALO



The participants
profited from
fruitful discussions
among over 80
companies related to
the energy sector.





SUCCESSFUL ENERGY DAY IN BERLIN

The 2nd Saudi-German Energy Day took place on May 2nd featuring key decision makers of both countries.

Leaders of the Energy sector came together to discuss current trends and to exchange best practices and lessons learned about a sustainable energy mix with the focus on Hydrogen.

Company representatives met with decision-makers from the Ministry of Energy and the Federal Ministry for Economic Affairs and Climate Action to outline ways towards a successful energy transition. After the opening by State Secretary Udo Phillipp and Assistant Minister H.E. Eng. Mohammed Albrahim, three panels dealt with hydrogen as a sustainable energy source, supply chain resilience and climate cooperation. Dr. Dalia Samra-Rohte, Delegate of the Germany Industry in Saudi Arabia, discussed during her panel the opportunities Saudi Arabia is offering in order to set up resilient supply chains.

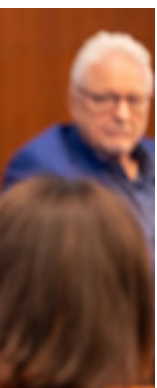
The Energy Day offered valuable insights to over 80 companies that signed up for the event. The event was complemented by a gala dinner hosted by His Royal Highness Prince Abdulaziz bin Salman Minister of Energy of the Kingdom of Saudi Arabia.

Representatives of the German government and CEOs of German companies profited from networking opportunities fostered during the event in a festive atmosphere. The 2nd Energy Day took place in the context of the Saudi- German Energy Dialogue at “Haus der Deutschen Wirtschaft”.

SAUDI-GERMAN ENERGY DIALOGUE

The Saudi-German Energy Dialogue, established in 2019, between the Saudi-Arabian Ministry of Energy (MOE) and the German Federal Ministry for Economic Affairs and Climate Action (BMWK), aims at promoting dialogue between stakeholders from industry and the public sector of both countries. The ultimate goal is to strengthen sustainable energy solutions, to achieve the Paris Agreement goals and to reduce greenhouse gas emissions.

In March 2021 both Ministries have signed an MoU of a Clean Hydrogen Alliance. The Dialogue is supported by Guidehouse and the German-Saudi Arabian Liaison Office for Economic Affairs (GESALO).



Photos: GESALO (9)

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GROWING INTEREST IN SAUDI-GERMAN COOPERATION

NIDL and MISA Delegation to Germany

The interest in the German market is growing as we witnessed during two Saudi-Arabian delegations to Germany:

The National Industrial and Development Program (NIDL) met with several companies in the engineering, logistics and automotive sector. There was a high interest on both sides how to build new business relations and to deepen existing collaboration.



GESALO facilitated a roundtable discussion with the Minister of Investment at DIHK in Berlin.

The Ministry of Investment (MISA) organized with support from GESALO an Investment Forum in Berlin. A roundtable in the premises of German Chamber of Commerce and Industry (DIHK) fostered a lively exchange among H.E. Khalid al-Falih, Minister of Investment and CEOs from various German companies.



NIDL met with innovative companies in the logistics, engineering and automotive industry.



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LESSONS FROM GERMANY'S VOYAGE TO ENERGY DIVERSIFICATION

In 1990, 88% of Germany's power consumption came from fossil fuels, with almost all of the remaining 12% coming from nuclear power. By 2020, the share of renewables had risen to 20%, and fossil fuels had retreated to 74% of the energy mix. Notably, the renewable energy mix was very diverse, with wind, solar, and hydroelectric all making significant contributions.

Bahrain has historically had a near total dependence on fossil fuels, but renewable energies are gradually being integrated into the energy mix, with ambitious targets having been set under the National Renewable Energy Action Plan (20% by 2035). Moreover, during COP26, Bahrain announced its commitment to net-zero emissions by 2060.

Germany's energy experience is full of numerous successes and difficulties, and it therefore contains many useful lessons for Bahrain as it embarks on its voyage to sustainable and clean energies.

KEY ROLE OF RESEARCH AND DEVELOPMENT

The first such lesson is the importance of using homegrown research to overcome seemingly intractable challenges relating to the price of renewable energy. In 1990, it cost almost \$10 (in 2019 \$US) to produce 1 watt of electricity using solar photovoltaic (PV) modules, making it a prohibitively expensive alternative to fossil fuels. Germany's commitment to transitioning toward clean energy drove it to become a world leader in research and development in renewables, building on its proud history of applied research in the natural sciences.

By 2019, the price of solar PV had declined by 95%, and Germany made an important contribution to the requisite scientific advancements. As a result, solar PV has become a highly competitive source of energy. Thus, where Bahrain sees an absence of potential, it must consider using research to create that potential, just as Germany once did.

RESEARCH-BASED POLICYMAKING

The second lesson is the need for research-driven adaptability in energy policy. At the outset of its renewable energy drive, Germany did not know what its energy mix would be like in 2020. It has invested – and continues to invest – in a wide range of renewable energy technologies, and it revises its strategy based on rigorous research.

Notably, that research is not exclusively technical scholarship relating to the physics of electricity generation. It also includes economics research regarding the effect of prices on energy consumption, psychology research on energy consumption habits, and international relations research on the politics of energy security. This allowed Germany to effectively learn from the less successful elements of its policies, and to adapt to unforeseen changes in external circumstances.

Bahrain must integrate local knowledge institutions into its policymaking entities in the energy domain to the greatest extent possible. Universities and think tanks possess valuable insights that can help alert senior officials to new possibilities, while also enabling them to adapt to evolving conditions.

STRIVING TOWARDS THE VISION THROUGH ENDURANCE.

The third lesson is the importance of strategic patience. Various factors have created a pressure to maintain fossil fuel dependence, including the high cost of feed-in tariffs, and the need for low energy costs to maintain the global competitiveness of German industry. However, policymakers were able to largely stick to the long-term vision, and through education and awareness, they were able to maintain high levels of grass roots support.

For Bahrain, the traditionally narrow energy policy must be integrated with other related areas including industrial policy, education policy, and innovation policy, under a unified policy umbrella. Only through a multisectoral mindset can Bahrain maintain the collective pressure needed to realize its ambitious renewable energy targets.

CONTACT



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SAUDI DELEGATION TO IFAT EURASIA TRADE FAIR



Saudi Delegation to IFAT Eurasia

GESALO conducted a 3-day delegation visit to the IFAT Eurasia in Istanbul to explore state-of-the-art technologies in the Waste and Wastewater sector presented by German and Turkish exhibitors

Efficient waste and wastewater management forms the core of Saudi Arabia's Vision2030 of a circular economy. Therefore, the kingdom aims to advance national recycling of its solid waste and wastewater. In line with these ambitions, GESALO led a Saudi Arabian delegation to IFAT Eurasia in Istanbul. From April 27th to 29th, Saudi Arabian government and private actors engaged with exhibitors to discuss business opportunities with exhibitors from the waste and wastewater sector.

RECYCLING WASTE AND WASTEWATER FOR A CIRCULAR ECONOMY

Saudi Arabia is committed to establish a circular economy by 2030. Therefore, the Kingdom is heavily investing in state-of-the-art solutions to generate a sustainable recycling industry of waste and wastewater. While most of the waste goes to landfills today, the country aims at recycling 85% of its waste by 2035. To introduce a successful waste recycling system, the country not only invests in the necessary infrastructure but also launches educational campaigns on separating waste and preserving valuable resources. In addition, the kingdom aims to treat 90% of its wastewater by 2040 to reuse it for national freshwater and agricultural demands.



Business Exchange with German Company

IFAT AS A CONNECTION HUB FOR WASTE AND WASTEWATER TECHNOLOGY

The trade fair IFAT Eurasia is part of a global network of trade fairs conducted by the German brand IFAT on waste and wastewater solutions. As representative of this German trade fair, GESALO regularly hosts delegations for Saudi Arabian companies to visit IFAT trade fairs all over the world and supports Saudi Arabian stakeholders in exhibiting on the fairs. In line with this engagement, GESALO market entry consultant Nora Fath led a delegation of Saudi Arabian government and private actors to IFAT Eurasia to explore business opportunities and understand current market developments. Exhibit at or visit future IFATs, such as IFAT Munich 24, IFAT India 23, IEEexpo China 23, IFAT Africa 23 or IFAT Brasil 24 with GESALO.

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EXHIBIT WITH US



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2023

IFAT AFRICA 23
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JUL 05-07, 2023

IEEXPO CHINA 23
GUANGZHOU
SEP 20-22, 2023

IFAT India 23
MUMBAI
OCT 17-19, 2023

2024

IEEXPO CHINA 24
SHANGHAI
APR 18-20, 2024

IFAT BRAZIL 24
SAO PAULO
APR 24-26, 2024

IFAT Munich 24
Munich
May 13-17, 2024

Contact the GESALO Trade Fair Services Team - the official representative of trade fairs in Germany.

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Ms. Rasha Moslem - Trade Fair Officer
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Food Industry, Agriculture & Horticulture



ABOUT GRÜNE WOCH

CULINARY WORLD TOUR

The Grüne Woche Berlin is one of the most traditional trade fairs nationwide and one of the best-known events in Germany. It is the unique leading international trade fair for food, agriculture and horticulture.

Exhibitors from all over the world present an extensive range of products on ten event days. In addition, the Grüne Woche gives current social issues such as climate protection, circular economy, resource conservation and sustainable land use a stage. The 88th edition of the Grüne Woche will take place in 2024.

The Grüne Woche is the starting point for the Global Forum for Food and Agriculture (GFFA) - leading international conference on key issues for the future of the global agriculture and food industry with more than 70 ministers of agriculture.

FOR EXHIBITORS & VISITORS

AT A GLANCE

FACTS AND FIGURES

- more than 300.00 visitors.
- 1.400 Exhibitors.
- Perfect test market for your products.
- Image enhancement.
- Trend barometer with creatives and entrepreneurs.
- Media Coverage - The Green Week is a media magnet!
- Meeting with trade visitors and networking opportunities



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TRANSPORT LOGISTIC IN MUNICH - A BIG HIT WITH THE INDUSTRY

The number of exhibitors at the leading trade show for logistics, telematics and transport in Munich from Saudi Arabia and Bahrain is increasing tremendously

The transport and logistic sector is the backbone of the Saudi Arabian economy and plays a key role in sustainable development. The National Strategy for Transport and Logistic Services aims on the integration of transport and logistics patterns as part of the Kingdom's Vision 2030. It is committed to connecting the Kingdom with the rest of the world as an international logistics hub. It is aiming for improving the quality of life in Saudi cities, achieving a balance in the public budget, and improving the performance of the governmental institutions.

TRANSPORT AND LOGISTIC – HIGH INVESTMENTS TO BECOME AN INTERNATIONAL LOGISTIC HUB

The medium-term development plan (Vision 2030) envisages high investment in transport infrastructure, the water sector, and renewable energies.

There are ambitious plans for further expansion of the rail infrastructure. The existing rail network has a length of around 4,500 kilometers. With the "Saudi Railway Master Plan" presented in 2010, the rail network is to be expanded to 8,000 kilometers by 2040.

Saudi Arabia wants to develop into an international aviation hub. To this end, investments of US\$100 billion are to be made in airport and fleet expansion by 2030, and annual capacity is to be doubled to 330 million passengers. The number of direct flights to Saudi Arabia is to increase from 100 to 250. Air cargo capacity is targeted at 4.5 million tons per year.

To increase capacity, ten new airports are to be built across the country in addition to the expansion and modernization of existing airports. The largest planned project is a major airport in Riyadh, King

Our Trade Fair Services Consultant Rasha Moslem headed up an extensive group of exhibitors from Saudi Arabia and Bahrain. They showed their products and services and highly appreciated the high level of exchange during the four days.

NIDLP, Ministry of Energy (SA), Ministry of Investment (SA), Ministry of Transport and Logistic Services (SA), MAWANI (SA), General Authority for Civil Aviation (GACA), Transport General Authority (SA), Zakat, Tax and Custom Authority (SA), SAR, Saudi Export Development Authority with their Co-exhibitors: Abdulrahman Al-Otaishan and Sons Logistics Company, Al-Jabri Logistic and Transportation Company, Almajdouie, SMSA Express Transportation Company Ltd. Saudi Arabia, Early arrive, Alod for logistic services, Himmah Group, Mkhdoom LogistichServices, Proceed Healthcare Logistics, SAL Saudi Logistics Services Saudia Airlines Cargo Company, Three Camels Company, Torod. Saudi Global Port Company, Saudia Airlines Cargo Company, The National Shipping Company of Saudi Arabia (Bahri) and Bahrain Airport company.



"Saudi Global Ports Company" at the fair



Saudi Ports Authority (Mawani)

Salman International Airport. This is to become the home airport of the second national carrier, Riyadh International Airlines (RIA). It was founded in 2022

TRANSPORT LOGISTIC WITH VISITORS FROM OVER 120 COUNTRIES

From May 9th until 12th, 2023 transport logistic, the international industry trade fair for logistics, mobility, IT and supply chain management took place at the exhibition center in Munich. The trade show brought together industry experts and investment decision makers from all over the world -

*“ Next transport
logistic trade fair:
Jun 2-5, 2025
Exhibit with us! ”*

2,320 exhibitors from 67 countries and 75,000 visitors from over 120 countries. It is a comprehensive platform where the most important

industry topics are discussed and where innovation potential is brought to light.

It was a great pleasure to welcome so many visitors and

to connect them with the key players in the Saudi and Bahrain market. We hope to see you at the next transport logistic in June 2025.

GESALO is the official representative of the most renowned German trade fair companies. We support your company from Saudi

Arabia, Bahrain, and Yemen to exhibit your products and services and thereby to establish and strengthen business connections.

CONTACT

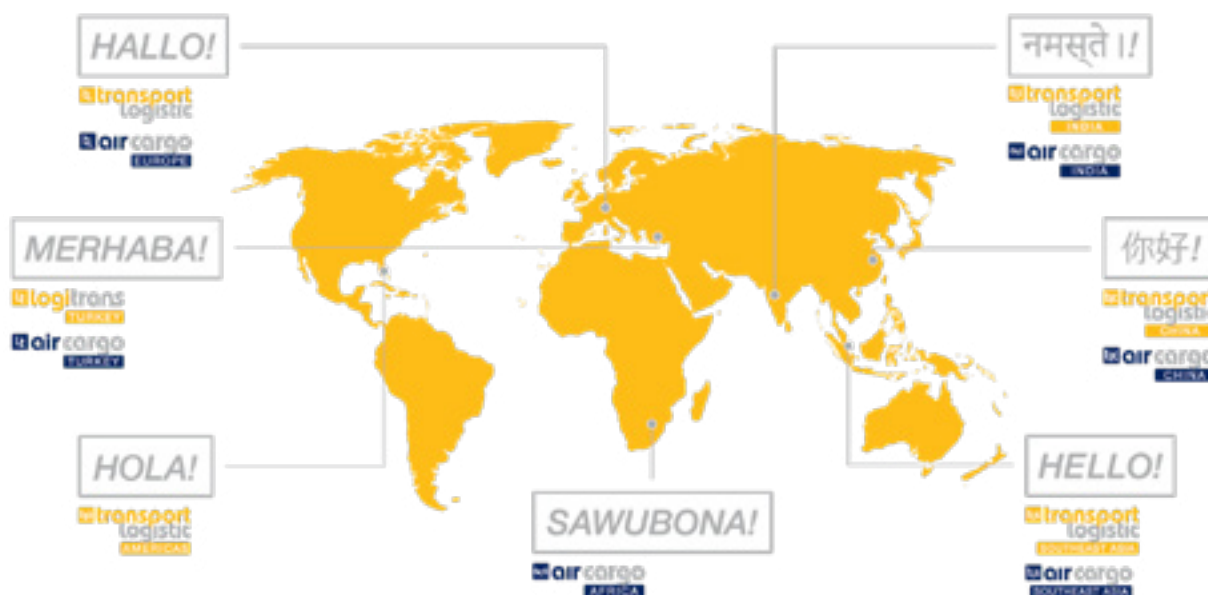


RASHA MOSLEM

Trade Fair Officer
GESALO

moslem@ahk-arabia.com

JOIN THE GLOBAL TRADE SHOW NETWORK for transport logistic and air cargo.





Meeting Mr Sanjay Choudhary (left) and Mr Varun Sanghi (right) at their booth at interpack 2023



See you at interpack 2026

INTERPACK 2023:

PRODUCT PACKAGING AND PROCESSING

After 6 years of absence, finally the product packaging and processing business world met again face to face from May 4th to 10th at the leading trade show interpack in Dusseldorf.

Interpack connects the industry on a global level and acts as both - a marketplace and content hub. With visitors from 155 countries and 2,807 exhibitors showcasing their technologies and solutions for the packaging industry, interpack 2023 exceeded all expectations.

The show focussed on four Hot Topics: Circular Economy, Resource Management, Digital Technologies and Product Safety - considering current market developments, the enormous challenges but also the

even bigger opportunities. The need to automate, the will to act sustainably and changed consumption habits are all expressions of transformation.

The trade fair proved again to be the key cornerstone in the innovation cycle of the packaging industry and related process industries.

SUSTAINABLE PACKAGING TECHNOLOGIES - #SaudiMade

Amongst all exhibitors from around the world were two innovative companies from Saudi Arabia: Gulf Packaging

from Dammam and Tahweel Integrated Company from Jeddah.

As the official representatives of Messe Dusseldorf, it is our pleasure to support Saudi Companies exhibiting at German trade fairs.

Saudi Arabia is quickly emerging as one of the key markets in the Middle Eastern area for the plastic packaging sector. The Kingdom has a sizable consumer base and a broad range of industrial pursuits. This contributes to a rapid annual increase in demand for packaging.

However, consumers in Saudi Arabia are moving toward sustainable packaging. An increased awareness of the environmental effect of single-use plastic have led to a demand for



Meeting Mr Barroso
from Tahweel
Integrated Company
at interpack 2023



interpack 2023 Messe Dusseldorf

products with less environmental impact. Therefore, recyclable plastic packaging is expected to gain traction in the industry.

Gulf Packaging Industries Co. is the leading BOPP & CPP films manufacturer in the Middle East region. With state-of-the-art manufacturing in Saudi Arabia, sales offices in 9 countries and clients in over 75 countries, their films are widely used. With the focus on sustainability, Gulf Packaging offers customized solutions to their clients. Their latest innovation is the 100% biodegradable BOPP films, primarily used for monolayer pouches for bakery goods.

Tahweel Integrated Company on the other hand is one of the key players in the Cast Pallet Warp stretch Film market. With a state-of-the-art industrial plant in Saudi Arabia

*“ High quality
of visitors and
exhibitors from all
over the world. ”*

(Rabigh), Tahweel provides quality-driven, cost-effective, and innovative tailor-made industrial solutions to Asian and European countries.

NEXT INTERPACK 2026

The next interpack will be held in Düsseldorf from May 7 to 13, 2026.

Contact our Trade Fair Services team for further information.

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FOR EXHIBITORS & VISITORS

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As the world's leading trade fair for industry, HANNOVER MESSE is the showcase for international industrial transformation year after year - with groundbreaking innovations and products. From development to production, logistics, energy supply and services: HANNOVER MESSE showcases cross-industry solutions and interface technologies for the entire industrial ecosystem.

HANNOVER MESSE hosts more than 4,000 exhibiting companies from all over the world, including global enterprises. Well-known research institutes such as Fraunhofer and Karlsruhe Institute for Technology (KIT) sketch industrial solutions for the future and more than 300 startups from various technology fields show innovations with disruptive potential.

FOR EXHIBITORS & VISITORS

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TARGET AUDIENCE

- Automation, Motion & Drives,
- Digital Ecosystems, Energy Solutions,
- Engineered Parts & Solutions,
- Future Hub, Compressed Air & Vacuum,
- Global Business & Markets,
- CO2-neutral production, Industrie 4.0,
- Artificial intelligence, IT security,
- Logistics 4.0, circular economy,
- Hydrogen and fuel cells.



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Germany is the world's No. 1 trade fair location. GESALO is the official representative of some of the most renowned German trade fair companies exhibiting in Germany and worldwide. We help your company from Saudi Arabia, Bahrain and Yemen to exhibit your products and services. Please note important trade fairs and their registration deadlines for 2023/24.

BERLIN

2024

JAN 19-28 **INTERNATIONAL GREEN WEEK**
gruenewoche.de/en
Exhibitor Reg start: May 2023

FEB 07-09 **FRUIT LOGISTICA** fruitlogistica.com
Exhibitor Reg start: early May 2023

SEP 24-27 **INNOTRANS** innotrans.de/en
Exhibitor Reg open until: Sep 22nd, 2023

DUESSELDORF

2023

JUN 12-16 **BRIGHT WORLD OF METALS (GMTN)**
METEC metec-tradefair.com
THERMPROCESS thermproces-online.com
NEWCAST newcast.com
GIFA gifa.com

OCT 24-27 **A+A** aplusa-online.com

NOV 13-17 **MEDICA** medica-tradefair.com

2024

MAY 28- **DRUPA** drupa.com
JUN 07 Exhibitor Registration is open

HANOVER

2024

JAN 11-14 **DOMOTEX** domotex.de
Exhibitor Reg is open: until Jul 31st, 2023

MUNICH

2023

SEP 05-10 **IAA MOBILITY** iaa-mobility.com

2024

MAY 13-17 **IFAT** ifat.de/en
Exhibitor Reg is open: until Apr 30th, 2023
Please contact us if you like to exhibit.

NUREMBERG

2023

OCT 11-13 **INSIGHT-X** insights-x.com/en
Exhibitor Reg is open: until Jul 31st, 2023

2024

JAN 30 - **SPIELWARENMESSE**
FEB 03 spielwarenmesse.de
Exhibitor Reg start: Mar 15th, 2023

ASIA

Organized by "Messe Berlin"

2023

SEP 06-08 **ASIA FRUIT LOGISTICA**
asiafruitlogistica.com
WHERE Hong Kong

OCT 25-27 **ITB ASIA** itb-asia.com
WHERE Singapore

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TRADE FAIRS GERMANY



DRUPA 2024 | DUESSELDORF

The leading trade fair for printing & packaging



VENUE
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WHEN
May 28 - Jun 7, 2024



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- Multichannel
- 3D printing
- Industrial applications
- Marketing/agencies/brand owner
- Industrial & functional printing
- Future technologies/ start-ups
- IT, Research and development.



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OUR GESAlaw NETWORK

2023

The GESAlaw - Legal Network by GESALO: organization of regular events for the local business community, publication of articles and strategy papers regarding the legal landscape in Saudi Arabia and Bahrain, and partnerships with legal experts of the region.



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GESAlaw
Network

NEW SAUDI DATA PROTECTION LAW

After amendments and postponement, the new Saudi Personal Data Protection Law Saudi Arabia is scheduled to enter into force on 14 September 2023.

Organizations have until 13 September 2024 to ensure compliance. The law applies to any processing of personal data of Saudi residents or conducted in the Kingdom, regardless of whether the data collector offers goods or service in the Kingdom. Thus, foreign entity collecting data on or processing data of Saudi residents—even if they do not do business in Saudi Arabia—are subject to law.

TO WHOM DOES THE PERSONAL DATA PROTECTION LAW APPLIES TO?

In principle, data collectors require the prior approval of the data subject to do so. Still, unlike under the initial version of the law, registration with Saudi Data & AI Authority (SDAIA) is not required for data collectors under the current version. Also, after the amendments companies now may rely on 'legitimate interests' as a legal basis for collecting and processing data, unless such data is 'sensitive' or collecting and processing it would contravene rights granted under the law.

Under the original draft of the law data breaches had to be notified immediately to SDAIA. After the amendments notification to SDAIA must be made without undue delay and data subjects must be notified of a breach if the breach would cause them harm or contravene their interests.

“ The Saudi Data Protection Law comes into force on September 14, 2023 ”

DATA STORAGE AND PROCESSING

A major point of critique on the law was the requirement that data had to be stored and processed in Saudi Arabia. Transfer of data abroad required

prior approval of SDAIA. This provision was eased with the amendments. Data may now be transferred abroad, provided the country where data is transferred provides appropriate data protection.

SANCTIONS FOR VIOLATING THE LAW

Criminal sanctions for violating the data protection regime, which were introduced with the original, were largely removed. Only one criminal offence relating to unlawful disclosure of sensitive personal data remains. All other violations may incur an official warning or fines of up to SAR 5,000,000. Fines may be doubled in case of repeat offences.

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KSA'S EVOLVING REGIONAL HEADQUARTER REQUIREMENTS

In February 2021, the Kingdom of Saudi Arabia (KSA) presented an initiative to prohibit the conclusion of government contracts for enterprises without a Regional Headquarter (RHQ) starting from 2024.

The Ministry of Investment in KSA (MISA) has further developed the conditions for obtaining an RHQ license along with Cabinet Decision 377/1444 (Decision) to regulate government agencies contracting with companies without an RHQ or related parties, effective from January 1, 2024. The Decision addresses cases in which Government Agencies (GAs) are excluded from the prohibition to contract with companies without an RHQ.

“ The Decision prohibits GAs from contracting with NRHQs or their related parties.. ”

REQUIREMENT OF REGIONAL HEADQUARTERS

The Decision prohibits GAs which include ministries, government bodies, public institutions, etc. from contracting with companies or their related parties that are not fulfilling the RHQ requirements (NRHQ).

It remains to be clarified to what extent government owned private enterprises such as ARAMCO, SABIC, etc., are subject to the Decision & would be treated like GAs.

However, private entities such as contractors of government procured projects are generally not

subject to the Decision. Hence, sub-contracting would not require RHQ for the sub-contractor.

NRHQs & RELATED PARTIES

To be classified as NRHQ in KSA, a multinational company must have RHQ in the MENA region but outside of KSA and be listed in the NRHQ list.

MISA will set up, maintain and update a list of NRHQs in KSA, which will be published on the unified electronic portal for government procurement. The NRHQ list would not only include the multinational companies without an RHQ in KSA but also their related parties which would especially include agents, distributors, branches etc.

In addition, exceptions to the prohibition for GAs to contract with NRHQs, may apply for specific tender situations (e.g. in case of price advantages, lack of domestic supplies and/or emergencies) or when transactions are executed outside KSA.

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INPUT TAX REFUND APPLICATIONS CAN FINALLY BE FILED IN KSA

This article serves to inform you about VAT refund mechanisms in the Kingdom of Saudi Arabia. Analogous to Section 18 (9) of the German Value Added Tax Act, it is also possible for foreign companies to obtain a refund of VAT paid.

This article serves to inform you about VAT refund mechanisms in the Kingdom of Saudi Arabia. Analogous to Section 18 (9) of the German Value Added Tax Act, it is also possible for foreign companies to obtain a refund of VAT paid.

Since 1 January 2018, taxes have been imposed in Saudi Arabia for the first time (except for consumer taxes). As in most tax systems, the first step was the introduction of VAT. The VAT rate was initially set at 5%. On July 01st, 2020, the VAT rate was increased to 15%.

Foreign companies are entitled to apply for a refund of VAT under Article 67 of the GCC VAT Framework Law, provided that the taxable supplies were obtained within the scope of the company.

For Saudi Arabia, the mechanism and procedure for submitting claims for refunds was unclear until now.

The time has finally come for foreign companies that have an input tax burden in Saudi Arabia as part of their business activities to have this refunded under certain conditions.

According to Article 72 of the VAT Implementing Regulation of Saudi Arabia, foreign companies doing business outside Saudi Arabia and not required to register for VAT in Saudi

APPLYING CONDITIONS

- Only "Eligible Persons" will receive a refund. An entity shall be deemed to be an Eligible Person for the purposes of this paragraph in the following cases:
- the person is a resident of another country and is registered there for VAT purposes,
- the country in which the person is resident and registered for VAT also has a VAT system,
- the country in which the person is resident and registered for sales tax provides a similar mechanism for refunding taxes to Saudi Arabia residents.
- the requested refund amount is at least SAR 1,000.

“ Submit applications by 30 June. ”

Arabia are offered the opportunity to obtain a refund of input tax paid in Saudi Arabia on the supply of goods or services.

Provided a company meets all the requirements, it can benefit from the

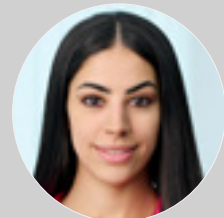
VAT refund procedure, on condition that documents such as invoices, proof of payment, etc. are available.

Companies wishing to make use of the input tax refund procedure must first submit an application for recognition as an authorized person. After receiving this confirmation, an application for the refund of input tax can then be submitted.

Applications must be submitted by June 30 following the end of the year in which the input tax was paid.

We will be happy to assist you in obtaining "eligible person" status and subsequently submitting claims for reimbursement.

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SPECIAL ECONOMIC ZONES

The ambition is to create a network of competitive zones to strengthen the investment environment in a variety of sectors, build regional competitiveness and global reach for the Kingdom.

In addition to the country's extensive economic law innovations, Saudi Arabia has now announced the establishment of four new Special Economic Zones (SEZs) in different regions of the country on April 14, 2023. These new SEZs are intended to provide competitive incentives for companies investing in these zones.

The Economic Cities and Special Zones Authority (ECZA) stands as the overarching administrative authority for the special zones, coordinating access to the entire SEZ network and individual special zones. Investors are guided through a well-defined application and approval process to meet the administrative requirements of each free trade zone. These are subject to specific trade regulations developed in accordance with local law. Companies to be established shall be able to be wholly owned by a foreign investor.

The following free trade zones can be distinguished:

KING ABDULLAH ECONOMIC CITY (KAEC SEZ).

King Abdullah Economic Zone aims to create a strategic location for global value chain anchored by a full-fledged commercial port, King Abdullah Port. With its bulk and general cargo handling facilities, the port can efficiently meet wide-ranging business needs.

RAS AL-KHAIR SPECIAL ECONOMIC ZONE

Special Economic Zone designed to provide access to advanced maritime infrastructure and as well as access to cutting-edge technologies such as AI, biometrics and IoT.

JAZAN SPECIAL ECONOMIC ZONE

Located within the Jazan City for Primary and Downstream Industries (JCPDI) on the Red Sea, it is adjacent to the region's largest port and provides easy landing point for the local industrial as well as infrastructure project as well as the emerging African market.

CLOUD COMPUTING SPECIAL ECONOMIC ZONE

Corresponds to an innovative hybrid zone and offers data centers and cloud computing infrastructure. Its attractiveness also lies in the absence of a central location. Available operational offices are located in King Abdulaziz City for Science and Technology (KACST), and branches can be located anywhere in the Kingdom.

SPECIAL INTEGRATED LOGISTICS ZONE (SILZ)

SILZ is a special economic zone for companies in the logistics sector that was announced by the Saudi government back in 2021 and promulgated by law in October 2022.

The pace of reforms and the creation of new investment opportunities

are strengthening the country's competitiveness. Administrative practices must now support the planned facilitation of investment.

Investment incentives are as follows:

- 5% Corporate Income Tax for up to 20 years
- 0% withholding tax permanently for repatriation of profits from SEZs abroad
- 0% duty deferral for goods within SEZs
- Flexible and supportive arrangements for foreign talents during the first 5 years
- Operating tax exemption for workers & their families within SEZs
- 50-year tax holiday period

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SAUDI ARABIA IMPLEMENTS THE APOSTILLE CONVENTION

The 1961 Hague Convention Abolishing Legalization of Foreign Public Documents – the Apostille Convention – is now fully implemented in KSA, streamlining the cross-border legalization process.

Since January, consular missions are no longer involved when preparing official documents abroad for use in Saudi Arabia. Under the Apostille treaty, a standardized certificate known as the apostille is attached to the public documents and provides verification by itself.

Saudi Arabia joined the Convention in April 2022. Full implementation was secured in January, when an MoJ circular came to remove the last technical hurdle. Regarding documents from Germany, the process now involves the German notary, the regional court, and in Saudi Arabia the MoJ.

UAE HASN'T JOINED THE TREATY YET

Documents emanating from non-treaty countries must still undergo the old six-step procedure which in some cases can be expensive. For instance, legalizing UAE documents comes at a price tag of over 3,000 AED each.

The Apostille Convention applies to 'public documents'. The treaty defines

the scope as follows: "documents issued by the courts, public prosecution, or police; administrative documents; notarized contracts; affidavits; and signature approvals included in customary contracts" and then provides two exclusions: "documents issued by diplomatic agents; and administrative documents for commercial or customs transactions."

CONCLUSION

The implementation of the Apostille Convention in Saudi Arabia marks another remarkable milestone on Saudi Arabia's Vision 2030 journey. Incidentally, it also enhances the credibility of KSA-issued documents abroad. Regarding documents from Germany there is, however, still room for improvement as the Kingdom is already using a QR code system, whereas the Federal Republic (like most other EU countries) currently isn't. Therefore, the MoJ certification in KSA involves some time-consuming manual stamping, which takes much longer than certifying documents from Bahrain for example.

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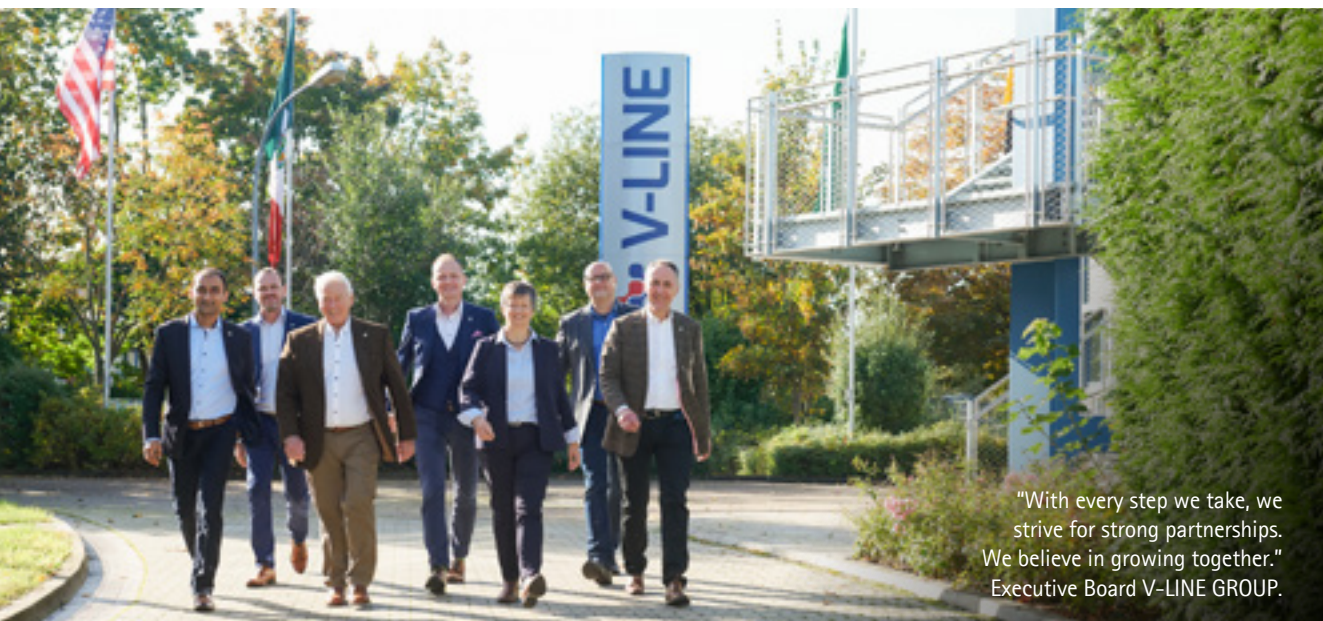
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A CATALYST FOR ENERGY DIVERSIFICATION IN THE KINGDOM

"For big projects, you need strong reliable partners; partners that support you fulfilling your mission. V-LINE is such a partner and has been so for the Kingdom for more than 40 years," states Hasnain Jamil, CEO of V-LINE MIDDLE EAST.



"With every step we take, we strive for strong partnerships. We believe in growing together."
Executive Board V-LINE GROUP.

DECADES-LONG CONNECTION WITH SAUDI ARABIA

The MRO (Maintenance, Repair and Operations) supply chain solution provider has indeed a decades-long connection with the industrial development of Saudi Arabia. Having

started with procuring and delivering the right spare parts for desalination plants of SWCC more than forty years ago, more clients from across various industries such as oil and gas, energy, water, food and more recognized the value add and followed. "We have

established our presence in various industry sectors and are also providing value-added services specific to our key customers in conventional energy and water sectors like SEC, SWCC, NWC and NOMAC", says Jamil.

"V-LINE understands regional

challenges and supply chain complexities, and how to serve our Saudi customers best. We are committed to the Kingdom's growth and contribute towards achieving Saudi Vision 2030 goals." The Saudi Arabian entity V-LINE MIDDLE EAST in Jubail has a full trading license and is the biggest of the other global locations of the V-LINE GROUP. It is headquartered in Germany who is the world leader in creating innovative solutions in sustainable ecosystem, and on a firm journey towards climate neutrality. The country is working on various initiatives on national and international levels in their attempt to accelerate the energy transition. This has facilitated many of the technological developments on energy diversification. The V-LINE GROUP, through its strategic partnerships with industry bodies and other associate partners, has leveraged its influence to help its customers in their energy diversification initiatives.

ACCELERATING ENERGY DIVERSIFICATION PROJECTS

Also Saudi Arabia is well on course to be the leader of energy transition in the MENA region by creating opportunities and projects which can develop, produce, and scale low-carbon energy to achieve energy transition goals. Current geopolitical developments have influenced the decision of both Germany and Saudi Arabia to accelerate their energy diversification projects to reduce dependency on conventional and traditional energy sources.

Due to these developments, there are new opportunities between the two countries to create value through partnerships between organizations. The Second Saudi-German Energy Forum that has happened beginning of May in Berlin and where the V-LINE GROUP was also taking part,

“ V-LINE understands regional challenges and supply chain complexities, and how to serve our Saudi customers best. ”

Hasnain Jamil,
CEO of V-LINE MIDDLE EAST

is an example for this. Mubeen Navaz, Business Development Manager at V-LINE MIDDLE EAST, explains: “We have emphasized on developing our strengths in diversified energy segments like renewables, green hydrogen, electric mobility and more over the last few years. We are now serving customers in these segments and are helping them set up new greenfield projects with a mission to get parts provisioning being done “first time-right”. We have learnt from our experiences on the challenges involved on parts provisioning in general, and MRO spare parts in specific.” Jamil adds: “With us as a partner, our clients can leave MRO complexities to us. We already serve key customers on new technologies in Europe and US and can thus transfer this knowledge to Saudi Arabian clients. With our global strength and local presence, we can cater the needs of our clients best.”

FULFIL THE MISSION TOWARDS ENERGY TRANSITION

V-LINE is also proudly associated with

various localization initiatives of both government & private sectors. Jamil explains: “We are strategic partners to corporate entities in Saudi Arabia looking to attract foreign direct investments into the kingdom. We facilitate OEMs and SME manufacturers from European origin to help them establish local manufacturing facilities in Saudi Arabia. As Saudi Arabia continues its journey towards diversification of energy supply, V-LINE is firmly placed to be the catalyst in helping our customers fulfil their mission towards energy transition.”

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Detlef Daves, founder and chairman of the V-LINE GROUP, taking part in Second Saudi-German Energy Day in Berlin, May 2023.

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BETWEEN CULTURES - A WORLD OF ITS OWN

A talk with the German-Saudi writer Rasha Khayat, Saudi writer Hadeel Alshobeili and Rasha Moslem.



Between Cultures: Exchange of experienced females growing up between different cultures



Left: Rasha Moslem, right: Rasha Khayat, with her book "Weil wir längst woanders sind"



Wonderful event in Enchanted Art Centre in Riyadh

The cultural event took place at the wonderful Enchanted Art Centre in Riyadh. The talk was about what it means to be brought up between two different cultures. The German-Saudi writer Rasha Khayat, Saudi writer Hadeel Alshobeili and Rasha Moslem engaged in a discussion with the audience about the wonders, the privileges, and their experiences of their mixed-background worlds in addition to the opportunities and challenges as someone who is raised between two cultures.

Rasha Khayat, is a writer, translator, and editor. She grew up in Jeddah, eventually moving back to Germany with her family. She studied comparative literature, German Studies and philosophy in Bonn. Her first novel "Weil wir längst woanders sind" tells the story of a pair of Saudi-German siblings, who after living many years in Germany return to their homeland Saudi-Arabia.

Hadeel Alshobeili is a script writer, novelist, and entrepreneur in tourism. Over a career surpassing 9 years, Hadeel worked as a script writer and content creator on everything from simple skits to experimental theater. This career saw her working with the likes of Telfaz11 Studios, Empty Quarter Entertainment, Al Ula's "Winter at Tantoura" and many more. Hadeel wrote her first novel ROVAN, which was written across 9 cities worldwide, starting in Makkah and ending in Berlin. She was inspired by her grandfather - a traditional Meccan

merchant - who catered to pilgrims from across the globe.

Rasha Moslem, panelist at the event and Trade Fair Officer at GESALO, has Saudi and German roots, was raised in both cultures, and is blessed with all the opportunities she got in her life. She was lucky to get the opportunity to live and study in both cultures which guided her back to her Saudi roots where she lives with her little family. She has worked for several German institutions in Riyadh as an interpreter, relationship manager and a trade fair officer.

"I think we shouldn't judge anyone for where they come from or for who we might think they are.", Rasha highlighted during the panel.

We would like to thank the German Embassy in Riyadh for the great cooperation and the welcoming atmosphere!

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NAJLAN - MUD PALACES AND ROCK ART

Development in culture and tourism is picking up speed. Special attractions include renovated palaces, multi-story Yemeni mud houses and archaeological sites. A travel journal by Barbara Schumacher, German Travel Journalist.

*“ Hima area, a
UNESCO World Heritage
Site since 2021 ”*

VISIT TO AMARAH PALACE

Since 1934 the province of Najran belongs to Saudi Arabia. Built 10 years later, the palace is the largest historical building in the province and therefore my first destination in the city of Najran. "Good choice", says my guide Abdulrahman, "you will be amazed". Indeed, the historic city center with the old souq is completely renovated and in the middle of the souq, but at a due distance, is the impressive complex of buildings of the restored former governor's palace, one of the most architecturally beautiful in the kingdom. Today it is open to visitors as a museum. The former governor used the palace as a private residence and workplace, which explains the 65 rooms. Some rooms are used for exhibitions. After visiting the governor's majlis, in the courtyard we discover the house of the palace guards, the house for the former TV and radio station, the large fountain and the mosque with unusual minaret. Everything is accessible; we climb up to the roof of the mosque and the watchtower and from the top enjoy the magnificent architecture with the typical white crenellations and the view of the surrounding souq against the backdrop of the farms and mountains surrounding the city.

INCENSE BURNERS AND DAGGERS IN THE TRADITIONAL SOUQ

Just a few steps away, the huge traditional market begins. There is the smell of incense being burned in the stone vessels that are common here. Stone tableware is also piled up in the stores. "It all comes from Yemen, the trade routes close to the border always work," says one merchant. "You can prepare meat dishes in these heavy vessels, for example, and cook them in an open fire for an hour." We do not have to search long for the dagger souq; we follow the sound of hammering.

The daggers are produced here - complete with ornately embroidered dagger belts - on the spot. The souq has a large textile section, a sector for household goods, for honey, and much more. - In other words, you can find everything here.

DESTINATION: AL MUNAJJIM VILLAGE

We drive into a farm landscape at the foot of the mountains. Between the farms we see uninhabited, multi-story Yemeni mud houses, most of which have been renovated with financial assistance from the government. Some owners raise the funds for the renovation themselves, like Rashid Al Munajjim. The entire village is named after his family. The two largest and most beautiful houses face each other. The entrance gates are closed. However, Rashid is already approaching. He opens the gate of the larger house, which has mud walls 40 cm thick. "The first floor was where the horses were kept; the best horse had its own stable. On the walls, you can still see the brackets to tie down the horses. The family members lived on the upper floors," he says as we climb the mud steps. Everything in the house is made of mud; there is not a single flat surface. The rooms have windows, are carpeted and some of the walls are decorated with colored triangles. Once on the roof, the view goes to the neighboring house. "This is my parents' house, I was born there and lived there until I was 10," Rashid says. It turns out that he is the owner



Hima rock engravings



Amarah Palace

of the nearby new house and the surrounding farms. As a gift, he gives me a 10 kg box. "Inside are dates from my farm," he says, getting into his car and waving us good-bye.

AL AAN PALACE

The drive to the famous renovated Al Aan Palace on Al Aan Mountain leads west through a farm area along the wide and long Wadi Najran. The renovation of the high protective wall with towers around this magnificent architectural gem has also been completed. We are welcomed with coffee, tea and dates in the huge guest majlis opposite, which would also be suitable for state visits, and are warmly greeted by Sheikh Hussein Abdullah Hassan Al Makrami, the owner of the palace. On the way to the palace entrance, Sheikh Hussein tells us, "The four-story palace was built in 1688 by the Makrami family. Since then, there have been several renovations, the last and most extensive being in 2018. I was born in the palace. Throughout the year we receive official, scientific and tourist delegations." Sheikh Hussein gives us a personal tour of the palace, which is furnished with traditional furniture and many traditional handicrafts. We carefully walk up the somewhat uneven steps. I admire the beautiful stained glass windows in the bright rooms. No two are alike. Once on the roof, the panoramic view of the city of Najran in the far distance, the surrounding farms and mountains and of the Wadi Najran on a clear day is almost overwhelming. I learn that after heavy rains the wadi turns into a raging

river. On the top of the rock on the opposite side of the wadi is the ruin of a castle. "This is Raoom Castle, 200 years old. We were once fired on from there by Yemeni soldiers. I used to go up there several times, and today there are even guided trekking tours there." Back at the bottom, I am allowed to sign the guest book and Sheikh Hussein announces, "When you come back, there will be many new things to see".

ON THE TRAIL OF THE ARCHAEOLOGISTS IN AL UKHDOD

Like many other provinces, Najran is rich in archaeological sites. Among the most famous is Al Ukhdood, which is over 2,000 years old and is only about 5 km from Amarah Palace. The guide at the entrance greets us in a friendly manner and tells us, "In October 2022, the international archaeologists, led by Saudi archaeologist Awad Alzahrani, finished for the time being the excavation work that has been going on since 1997. They have discovered many Islamic monuments and many tombs from the B.C. period. The artifacts found include calligraphy, hieroglyphics, as well as Kufic inscriptions from the early Islamic period. Drawings of animals as well as handicrafts have also been unearthed. The recent discoveries show that several ancient civilizations existed in the region. The archaeologists found inscriptions dating from 7000 B.C. to 1000 B.C. There are new excavation areas with Byzantine, Umayyad and Abbasid roots, also, for example, the remains of a mosque." Among the most famous stone engravings are a human hand, a horse, a camel and snakes. Al



Customer in the dagger souq



Rashid Al Munajjim

Ukhdood is also mentioned in the Quran with this gruesome story: 2,000 years ago, the Jewish king of Himyar Dhu Nuwas decided to take revenge on the Christians of Najran because they refused to convert to Judaism. Twenty thousand Christians were burned alive at that time. - Unfortunately, the adjacent new museum building is not yet open.

UNESCO WORLD HERITAGE SITE HIMA

The Hima area, a UNESCO World Heritage Site since 2021, covers 175 square kilometers and is located about 200 kilometers northeast of the city of Najran. Abdulrahman says, "The Hima area is located on one of the ancient caravan routes of the Arabian Peninsula and contains an extensive collection of rock carvings dating back thousands of years. Travelers and armies who camped here over the millennia left behind a wealth of well-preserved rock inscriptions and petroglyphs. Depicted are animals, like lions, cheetahs, ostriches, oryx antelopes, ibexes and giraffes, as well as people - including tattooed women, warriors with lances, hunters with prey, shepherds with herds, camel riders, dancers, as well as entire battle scenes. The inscriptions are written in various scripts, including Sabaean, Musnad, South Arabic, Thamudic, Nabataean, Greek and Arabic. They were discovered by several famous European explorers, including the Briton Harry St. John Philby, who

had advised King Abdulaziz in the negotiations concerning Najran." - First destination are the over 3,000 year old wells of Bir Hima, all renovated. I climb a small hill, which is closed by a rock wall, to see the five wells from above. In the process, I discover a wealth of petroglyphs and inscriptions. - Rashid joins us. The Bedouin lives in the area and gives us a ride in his Toyota Pick-up. Thanks to his knowledge of the area, we reach Jabal Al-Mawaqi, where in the middle of the desert a several meters high rock with a large camel drawing is the attraction. Archaeologists date the rock engraving to 1,500 B.C. - The third destination is Aan Jamal. "This rock formation was on the caravan route and archaeologists suspect that the caravans stopped here", says Rashid. We discover about 300 clearly visible rock inscriptions and petroglyphs in best condition. Deeply impressed we thank Rashid, who drives us back to our meeting point, where our "city car" with the patient driver is waiting for us and with "Shailah"- Bedouin music from the car radio - we go back to Najran.

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P.O. Box 246370 Riyadh
Kingdom of Saudi Arabia

DIGITAL EDITION

[saudiArabien.ahk.de/
publications](http://saudiArabien.ahk.de/publications)

LAYOUT

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NEXT ISSUE

December 2023

EDITORIAL DEADLINE

October 2023

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