### PROGRAM

**Day 0: Tuesday, 3 December 2019**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>08:00 – 17:00</td>
<td>Registration and exhibition</td>
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<tr>
<td></td>
<td>Welcome refreshments</td>
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<tr>
<td></td>
<td><strong>GPCA Leaders of Tomorrow program (students only)</strong></td>
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<tr>
<td>08:00 – 12:30</td>
<td>Under the theme ‘Empowering Future Leaders', the Leaders of Tomorrow (LoT) program will focus on creating an engaging and exciting environment for STEM students with interest in the chemical and petrochemical field. The LoT program is a GPCA initiative which falls under its advocacy pillar and aims to bridge the gap between academia and the industry.</td>
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<tr>
<td>08:30 – 09:30</td>
<td>Masterclass 1: Economic impact assessment of the GCC chemical industry</td>
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</table>

**Masterclasses**

**Economic impact assessment of the GCC chemical industry**

Oxford Economics will be presenting the results of an economic impact study of the chemical sector in GCC countries in an interactive masterclass which aims to present a comprehensive assessment of the value the industry creates and supports, analyze the key megatrends that will shape economic growth and identify how chemical firms can best place themselves to take advantage of these shifts.

- Understand the magnitude of the footprint of the chemical sector in the GCC region, and the multiplicative, socio-economic effects it triggers
- Understand which sectors benefit the most from the chemical industry’s activities, either via supply chain channels, or via consumer spending effects
- Gain key insight on how regional and global megatrends will affect the chemical sector in the GCC
- Receive the general economic outlook for the six GCC countries drawing from forecast produced with Oxford Economics’ Global Economic Model, the world’s most widely used commercial macroeconomic model

**Hamilton Galloway, Head of Consultancy, Americas, Oxford Economics**

**Colin Ward, Interim Program Director Markets and Industrial Development, King Abdullah Petroleum Studies and Research Center (KAPSARC)**

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PROGRAM

Moderated by: Scott Livermore, MD, Macro Consulting, Oxford Economics

09:30 – 09:45

Business networking at the exhibition

Sponsored by: Royal Commission for Jubail & Yanbu

09:45 – 10:45

Masterclass 2:

The future of work: Rethinking the workforce model for high-performing companies of tomorrow

Technological innovation, underpinned by the ongoing integration of global economies, has brought unprecedented transformation to jobs, businesses and markets. The question of how to the opportunities it offers is preoccupying individuals, companies, institutions, governments and entire societies. How should you adapt your business model to manage and cater to the workforce of the future?

- Review the state of the global workforce
- Learn how high-performing companies are addressing talent issues
- Establish a system customized to the needs and expectations of millennials
- Anticipate the skills needed in the future so your organization is best positioned for growth, including through partnerships with academia
- Understand how digitalization is reshaping the makeup of the future workforce and how technology enhances rather than threatens core competencies

Matthias Thorns, Deputy Secretary-General, International Organization of Employers (IOE)

Gianmario Pisanu, MD - Management Consulting Lead - Middle East and Turkey, Accenture

Moderated by: Aseel Humoodi, SVP, Human Capital and Administration, Borouge

10:45 – 11:00

Business networking at the exhibition

Sponsored by: Royal Commission for Jubail & Yanbu

11:00 – 12:00

Masterclass 3:

Crude oil-to-chemicals (COTC): An industry gamechanger?

Crude oil-to-chemicals (COTC) technology is having a significant impact on the chemical industry. COTC plants are in operation in China and are likely to occur in Saudi Arabia in the next decade. This signals a shifting landscape of global competition.

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## PROGRAM

- How COTC projects are not all equal: different configurations, products and CAPEX
- How COTC technologies could be cost competitive relative to existing producers
- How COTC will disrupt markets and trade flows
- How existing producers could mitigate the risk posed by these new technologies

**Ahmad Al Khowaiter**, **Chief Technology Officer**, **Saudi Aramco**

**Dr. Fahad Al-Khodairi**, **Corporate Fellow, Polymer Speciality Technology and Innovation**, **SABIC**

**Juhan Robberts**, **VP, Basic Chemicals**, **ExxonMobil Chemicals**

Moderated by: **Richard Charlesworth**, **Executive Director, Oil, Midstream, Downstream and Chemicals**, **IHS Markit**

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<tr>
<th>Time</th>
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<tr>
<td>12:00 – 14:15</td>
<td>Delegate networking lunch in the pre-function area</td>
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<tr>
<td>12:45 – 14:15</td>
<td>VIP networking lunch in the VIP networking tent</td>
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<tr>
<td>14:15 – 15:00</td>
<td>State of the global energy and chemical industries: Positioning for what comes next</td>
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</table>

2019 has seen slower growth and near-term market volatility as energy markets see supply-side uncertainty and a significant surge in new capacity. This seminar will look at key factors and signposts to look for in energy and feedstock markets.

- Peak oil demand scenario and implications for energy markets and chemical feedstocks
- Petrochemical demand growth assumptions and capacity increases
- Global supply and demand balances for major base chemical markets – update on petrochemical profit cycle
- Megatrends in energy and chemical markets that will impact refining and chemicals during the decade of the 2020s

**Kurt Barrow**, **VP, Global Energy Insights, Oil Markets, Midstream, Downstream, IHS Markit**

**Mark Eramo**, **VP, Global Business Development, Oil Markets, Midstream, Downstream and Chemicals, IHS Markit**

Moderated by: **Lyn Tattum**, **VP, IHS Markit**

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**Program**

15:00 – 15:45

**The future of plastics: Trends and disruptions shaping this cornerstone of the Middle East petrochemicals industry**

McKinsey & Company will be sharing a perspective on key megatrends in the petrochemicals sector, their implications and opportunities they create for Middle East players, how best to navigate these trends and effectively respond in a time of accelerating change.

- Global feedstock shifts (unconventionals, crude-to-chemicals) and their impact on long term competitiveness and trade-flows in the plastics value chain
- Impact of the ongoing transition to a more circular economy and recycling on plastic demand along the value chain
- The opportunities for growing the use of plastics beyond the current application window, especially in industries with low adoption e.g. construction

*Theo Jan Simons, Global Petrochemicals Practice Group Leader, McKinsey & Company*

Moderated by: *Udit Arora, Head of Committees Affairs, GPCA*

15:45 – 16:00

**Business networking at the exhibition**

Sponsored by: *هيئة الملكية للجبيل وينبع*

16:00 – 16:45

**The opportunities / threats of the fast evolving circular economy for plastics**

The commercial success of plastics has elevated critical sustainability challenges. There is a growing threat to virgin investments from plastics bans and increased recycling. The industry is changing and responding, consumers are more aware and more demanding and meanwhile bans and other legislative mandates are developing. Therefore, refiners, plastics producers, and brands need to adapt their business model to avoid overall exclusion of plastics from value chains. This seminar led by Wood Mackenzie will look to answer some of these key questions and more.

- What are the opportunities and threats of the fast evolving circular economy for plastics?
- What impact does plastics recycling have on petrochemical feedstocks demand growth?
- How can the industry use chemical recycling as a means to enhance recycling rates and quality?

*Steve Jenkins, VP – Consulting, Wood Mackenzie*

*John Stewart, Principal Analyst, EMEA, Wood Mackenzie*

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16:45 – 17:30

**Winning the 20s in chemicals – Digital at the core**

Digital is not only a critical driver of growth, but a necessary defensive move. Increased competition from ‘old’ competitors and news players is challenging the existing industry structure and creating new business models. This session will shed light on key digital trends in the 2020s, and the bottom-line impact for chemical players going digital.

- Debunking digital myths, and clarifying misperceptions about digital
- ‘Why now?’ for digital in chemicals
- Concrete case studies of how digital can create value in manufacturing, supply chain, and marketing and sales
- Beyond the core: How chemical players are making ‘bets’ on new business ventures
- Concrete steps for chemical players to start the journey

**Alex de Mur, MD and Partner, BCG**

**Mirko Rubeis, MD and Partner, BCG – Middle East**

Moderated by: **Udit Arora, Head of Committees Affairs, GPCA**

19:00 – 22:30

**Welcome dinner**

Sponsored by: **ExxonMobil**
## PROGRAM

### Day 1: Wednesday, 4 December 2019

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<tr>
<th>Time</th>
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<tr>
<td>08:00 – 17:00</td>
<td>Registration and exhibition</td>
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<td>Sponsored by:</td>
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<td>Sipchem</td>
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<td>Welcome refreshments</td>
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<td>Sponsored by:</td>
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<td>Royal Commission for Jubail &amp; Yanbu</td>
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<td></td>
<td>Master of ceremonies: Dyala Sabbagh, Partner and COO, The Gulf Intelligence</td>
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<tr>
<td>09:00 – 09:15</td>
<td>Welcome address</td>
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<td>H.E. Yousef Al-Benyan, Vice Chairman and CEO, SABIC and Chairman, GPCA</td>
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<tr>
<td>09:15 – 09:35</td>
<td>Inaugural address</td>
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<td>H.E. Dr. Mohammed bin Hamad Al Rumhi, Minister of Oil and Gas, Oman</td>
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<tr>
<td>09:35 – 09:55</td>
<td>Keynote address: Capturing opportunity – Global megatrends and the future of petrochemicals</td>
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<td>- Insights on the U.S. feedstock advantage</td>
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<td>- Considerations for regional investment</td>
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<td>- How the plastic waste debate is transforming public perception</td>
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<td></td>
<td>Bhavesh (Bob) Patel, CEO, LyondellBasell and President, International Council of Chemical Associations (ICCA)</td>
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<tr>
<td>09:55 – 10:10</td>
<td>Panel discussion and Q&amp;A</td>
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<tr>
<td>10:10 – 10:25</td>
<td>GPCA Legacy Awards ceremony</td>
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<td>10:25 – 11:00</td>
<td>Inauguration of exhibition and morning refreshments</td>
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<td></td>
<td>Session: Partnering to deliver value</td>
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<tr>
<td>11:00 – 11:20</td>
<td>Meeting future change through strategic partnership</td>
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<td></td>
<td>Karen McKee, President, ExxonMobil Chemical Company</td>
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<tr>
<td>11:20 – 11:40</td>
<td>From shareholder value to system value: A collaborative model for generating sustainable growth</td>
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<td>- How BASF collaborates with partners and stakeholders for a future-oriented approach to business steering and reporting</td>
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PROGRAM

- How this new initiative will be established, developed, and introduced
- Dissecting the shortcomings of established management concepts to tackle current and future challenges
- A new perspective for making investment decisions and optimizing system value

Saori Dubourg, Member of the Board of Executive Directors, BASF SE

11:40 – 12:00 Capturing growth and maximizing value through partnerships across value chain

- Learnings from setting up, building and operating industrial terminals with partners in the oil and gas and chemicals sectors
- Developing digital technology to deliver better, safe and cost-effective operations and service
- Explore how growth, sustainability and digitalization can reinforce each other
- Partnership models that enable diverse organizations to work together to govern complex processes

Eelco Hoekstra, Chairman Executive Board and CEO, Royal Vopak

12:00 – 12:30 Panel discussion and Q&A

13:00 – 14:30 Networking lunch

Sponsored by:

Seminar: Chemical value parks: An enabler of economic competitiveness and value creation

14:30 – 15:30 Building value parks and the development of clusters

The session will discuss and examine the composition and performance of economies, how industry clusters and value parks develop, how clusters affect a region’s economic future, and how a region can establish strategies and actions to drive its economy, clusters, and value parks forward.

Introduction and opening remarks

Elan Habib, Head of Thought Leadership and Strategic Research, GPCA

Inaugural speech

H.E. Eng, Abdallah bin Ibrahim Al-Saadan, President, Royal Commission for Jubail and Yanbu (RCJY)

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The vital role chemical value parks play in creating a vibrant downstream industry

- The ability of successful value parks to create industry and jobs
- The factors most important to success in a highly competitive world
- How certain key chemicals can create added value clusters

John Page, VP Global Consulting, Upstream, Oil, Mid-Downstream and Chemicals, IHS Markit

Panel discussion

Dr. Udo Huenger, VP Middle East, BASF
Jim McIlvenny, CEO, JM Consultancy Ltd and Past President, Dow Asia Pacific

Moderated by: Lyn Tattum, VP, IHS Markit

15:30 – 16:30

Regional foundations and the role of downstream value parks in driving economic growth in the Arabian Gulf

The session will discuss and demonstrate the importance of industry clusters and value parks to regional competitiveness, critical success factors, challenges and opportunities to drive future regional success.

Opening remarks

Olivier Thorel, Executive Director Chemicals, Saudi Aramco

Opportunities and challenges in developing sustainable downstream industry in the region

- The factors critical for successful development of regional downstream industry and value parks
- Regional advantages in supporting development of downstream industry
- Structural challenges in developing downstream industry

Sanjay Sharma, VP – Middle East and India, IHS Markit

Panel discussion

Olivier Thorel, Executive Director Chemicals, Saudi Aramco
Samir Chaturvedi, CEO, Khalifa Industrial Zone Abu Dhabi (KIZAD)
Eng. Fuad Mohammed Mosa, VP, Local Content and Business Development, SABIC

Moderated by: Lyn Tattum, VP, IHS Markit

16:30 – 17:30

Business networking at the exhibition

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<tbody>
<tr>
<td>19:00 – 22:30</td>
<td>Gala dinner</td>
<td>Royal Commission for Jubail &amp; Yanbu</td>
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#### Day 2: Thursday, 5 December 2019

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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>08.00 – 15:30</td>
<td><strong>Registration and exhibition</strong>&lt;br&gt;<strong>Welcome refreshments</strong>&lt;br&gt;Sponsored by: <strong>Sipchem</strong>&lt;br&gt;Sponsored by: <strong>Royal Commission for Jubail &amp; Yanbu</strong></td>
</tr>
<tr>
<td>09:10 – 09:20</td>
<td><strong>Welcome and recap of day one</strong>&lt;br&gt;Dyala Sabbagh, Partner and COO, The Gulf Intelligence</td>
</tr>
<tr>
<td>09:20 – 09:40</td>
<td><strong>Keynote address</strong>&lt;br&gt;Mirek Dusek, Deputy Head of the Centre for Geopolitical and Regional Affairs, Member of the Executive Committee, World Economic Forum</td>
</tr>
<tr>
<td>09:40 – 10:00</td>
<td><strong>On stage dialogue and Q&amp;A</strong>&lt;br&gt;Mirek Dusek, Deputy Head of the Centre for Geopolitical and Regional Affairs, Member of the Executive Committee, World Economic Forum&lt;br&gt;Fernando J. Gómez, Head, Chemical and Advanced Materials Industry, World Economic Forum</td>
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<tr>
<td>10:00 – 10:15</td>
<td><strong>Recognition of ex-members of the GPCA Board of Directors</strong></td>
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<tr>
<td>10:15 – 10:35</td>
<td><strong>Session: Building critical mass in the Arabian Gulf chemical industry</strong>&lt;br&gt;<strong>In the spotlight: Oman Oil and Orpic Group’s journey towards an integrated energy company</strong>&lt;br&gt;- Managing the people side of the transformational journey&lt;br&gt;- How to design a business that’s optimal for today’s environment, prepared for tomorrow’s potential disruption and set for international markets&lt;br&gt;- The biggest inherent challenges and how can they best be tackled&lt;br&gt;- Managing integration so disruptions are minimized, and potential is maximized&lt;br&gt;- The impact of increasing integration and the related value chain reconfigurations&lt;br&gt;Musab Al-Mahruqi, Group CEO, Oman Oil and Orpic Group</td>
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<tr>
<td>10:35 – 10:55</td>
<td><strong>Merger of equals: Capturing the full potential of the Sipchem merger</strong></td>
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- Equity story and shareholder value creation
- Translating the deal into a clear strategic vision
- Capitalizing on growth opportunities for the new combined company
- Plans for further acquisitions and JV
- Integration roadmap and critical phases
- The meaning of this merger to the petrochemical sector in Saudi Arabia

**Saleh Bahamdan, CEO, Sahara International Petrochemical Company (Sipchem)**

10:55 – 11:15  
**Ma’aden 2030: Building and strengthening channels for local and international growth**

- Ensuring an efficient route to key growth markets
- Prospects for further growth in Saudi Arabia
- Ambitions for international growth in Latin America, India and other countries
- The role that existing and new partnerships will play in the next phase of growth
- How Vision 2030 impacts the company’s growth strategy

**Darren Davis, CEO, Ma’aden**

11:15 – 11:35  
Panel discussion and Q&A

11:35 – 11:55  
**Business networking at the exhibition**

Sponsored by:  
[Logo]

**Session: Creating synergies through innovative partnerships**

11:55 – 12:15  
**Growth and value creation through strategic portfolio development and M&A**

- Managing key risks and challenges so value is continuously generated
- Defined growth engines and developing them by organic growth and M&A
- Proven approaches to capture the full value creation potential of M&As
- Using digital innovation to optimize processes and benefit customers

**Christian Kullmann, Chairman of the Executive Board, Evonik Industries AG**

12:15 – 12:35  
**Project Amiral: Building a successful model of industry partnership**

- Where is the project as of today?
- Evolving the Saudi Aramco-Total buyer-seller relationship to a fully aligned partnership
- Investor business models and approaches to partnership

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- Governance structures and supporting frameworks that encourage integration
- Project financing approaches and options

**Jean-Jacques Mosconi**, SVP, Refining and Petrochemicals – Amiral Project, Total

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<tr>
<td>12:35 – 12:55</td>
<td>Panel discussion and Q&amp;A</td>
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<tr>
<td>12:55 – 13:10</td>
<td><strong>Closing remarks</strong></td>
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<td></td>
<td>Dr. Abdulwahab Al-Sadoun, Secretary General, GPCA</td>
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<tr>
<td>13:10 – 15:00</td>
<td><strong>Networking lunch</strong></td>
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