

**TÜRKİYE ODALAR VE BORSALAR BİRLİĞİ**

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(Genel Sekreterlik)**

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İlgide kayıtlı yazıda, Bahreyn'in Ankara Büyükelçiliği tarafından iletilen bir Nota'ya atfen, 20-24 Kasım 2022 tarihleri arasında, gayrimenkul hizmetleri sektörüne ilişkin olarak "Cityscape" fuarının düzenleneceği ve detaylı bilgi için www.cityscapebahrain.com web sayfasının ziyaret edilebileceği belirtilmektedir.

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e-imza

Cengiz DELİBAŞ
Genel Sekreter Yardımcısı

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Cityscape Intelligence Report: What you should know about investing in Bahrain





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INTRODUCTION

What you should know about investing in Bahrain

Bahrain is the smallest of the Gulf states, but it is no less important as a real estate investment destination.

The tiny kingdom boasts a hospitable investment environment, a healthy real estate landscape, and growing tourism and hospitality sectors. It also has strong links to Saudi Arabia – both literal, via the King Fahd Causeway, and figurative, via its economic and financial connections – the region's largest economy.

Bahrain, therefore, has become a popular destination for international real estate investors, particularly from the wider Gulf region, but also from Europe and Asia. The Bahraini government is encouraging this, with economic initiatives aimed to boosting investment from within and without the country.

Like many of its neighbours, it has adopted an economic diversification plan to transition its economy away from hydrocarbons. Launched in the wake of the COVID-19 pandemic, this National Economic Recovery Plan aims to grow Bahrain's economy by investing more than USD 30 billion in five main pillars: infrastructure, industrial, housing, tourism, and healthcare.

In particular, it aims to strengthen the connections between the public and private sectors to stimulate development and economic growth.



The government also launched a four-year National Real Estate Plan in 2021 in order to promote real estate investment. This five-pillar plan, created by the relatively recently founded Real Estate Regulatory Authority, seeks to implement international practices, preserve the rights of stakeholders, and a develop a regulatory framework under the key themes of sustainability, innovation, transparency and cohesion.

Even though the plan is still in its early days, Bahrain's real estate sector certainly appears to be in rude health. Over the course of 2021, real estate transactions in the kingdom rose by 46% to USD2.8 billion, compared to USD1.9 billion in 2020. According to Bahrain's Survey and Land Registration Board, total real estate transactions in 2021 reached 26,136, an increase of 35% on the 19,405 transactions in 2020.

A mark of the Bahraini government's commitment to real estate isn't just visible in its regulatory efforts – the country is actually seeking to physical increase the space available for residential and commercial development through land reclamation projects.

CHAPTER 1

Residential

The National Economic Recovery Plan's housing element is particularly important for real estate investors. It includes the "Sharaka" programme, which allows private developers to bid for contracts for government land. Over the next few years, it aims to build more than 16,000 housing units – a potential goldmine for the canny investor.

Residential real estate growth has been particularly healthy in the luxury segment. Market research firm Mordor Intelligence predicts a CAGR of greater than five per cent between 2022 and 2027, driven by increasing rental values and speculative activity – chiefly from Saudi and Kuwaiti investors.

Bahrain is witnessing an enormous amount of luxury developments across the kingdom. 4,322 luxury units are expected to be delivered over the next few years from major projects such as the Golden Gate Towers, Oryx Bahrain Bay, Paramount Tower, Harbour Row, and Amwaj Gateway.

The rental market is particularly important. According to Property Finder, the total rental market in Bahrain is worth approximately USD1.2 billion per annum, with foreign renters accounting for more than 70% of the total value. This is significant as, out of the total Bahraini population, just 27% are renters.



CHAPTER 3

Commercial

Bahrain is regarded as one of the very best locations in the Gulf region for investing in office space. A CBRE survey revealed around 60 per cent of respondents preferred to work in the office rather than remotely, demonstrating healthy demand for office space compared to over countries.

The CBRE report also recommended portfolio optimisation and a "well-managed" remote working strategy to improve the performance of office space investments. It also noted increased demand for Bahraini technology and fintech start-ups – a consequence of government support for the sector.

However, there is still an amount of uncertainty in the office sector. In 2021, office sales prices dropped by around 2.9%, while mid-end office rents experienced an average decrease of 13.3%. This is due to tenants seeking cheaper, less risky alternatives, or seeking more competitive higher-end office spaces.

scheduled to open later in 2022, Bahrain Bay Beach, Galali Beach, and the diving park.

This is a serious statement of intent and a welcome vote of confidence in Bahrain's tourism sector, a vote of confidence borne out in the rapid growth in visitor numbers seen this year. In Q2 2022, arrivals in Bahrain increased by 38% in compared to Q1, with tourism revenues reaching USD871 million.

CHAPTER 4

Tourism and Hospitality

Tourism and hospitality is also seeing a lot of activity, with a number of new developments ongoing across the kingdom, including the new Bahrain International Exhibition and Convention Centre in Sakhir, which is



CHAPTER 5

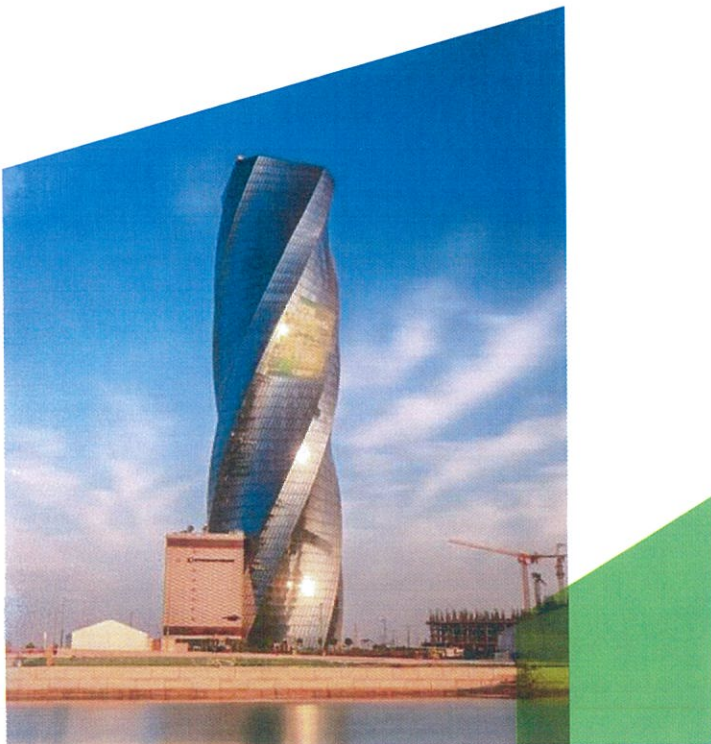
Retail

The beginning of 2022 saw retail visitation dip compared to Q4 2021, raising questions about the health of Bahrain's retail real estate segment.

Although landlords took care to protect retail tenants during the COVID-19 restrictions, the pandemic drove a growth in online shopping that has left a lasting impact on the sector. Retail has thus been forced to adopt "omnichannel strategies" to remain competitive and maintain its post-pandemic recovery.

However, increasing pipeline supply is set to maintain the downward pressure on retail rents. The CBRE report predicts that landlords with flexible lease terms and shopping centres with flexible spaces will generate more interest from retailers as they seek to reduce costs and become more efficient. Drive-throughs are also expected to remain popular.

Although there is less certainty in the retail space, it is still a potentially lucrative choice for real estate investors, although they will have to be smart and watch market trends closely to make the right investment decisions.



CHAPTER 6

Golden visa

Bahrain is putting its money where its mouth is when it comes to attracting international investors. Like most of its neighbours, it has introduced a golden visa scheme to make it easier for high net worth individuals to live, work, and invest in the kingdom.

In order to qualify for the golden visa, existing expatriate residents must have resided in Bahrain for no less than five years and earned a monthly basic salary of at least BD2,000 (USD5,300) during that time.

Other qualifying criteria for the Golden Visa include:

- own one or more properties valued at least at BD200,000 (USD530,000);
- Be a retiree with a monthly income of at least BD4,000 (US\$10,600);
- Be a "highly talented" individual such as an artist, athlete, or healthcare worker.

The golden visa grants the holder the indefinite right to reside in Bahrain, the ability to hire domestic servants, the right to work, and the ability to obtain visas for family members and dependents.

The visa is renewed indefinitely after ten years, provided the holder continues to meet the relevant criteria.

It gives individuals the ability to work and invest in Bahrain unhindered, allowing them the flexibility and security to conduct the kind of business the Bahraini government is keen to encourage. In that way, it is intended to benefit not just property investors, but the national economy as a whole.



**Cityscape, the
region's largest
real estate summit
and exhibition, is
coming to Bahrain**

 20th to 24th November 2022

 Bahrain New Exhibition & Convention Centre

Trust in real estate. Trust in Cityscape.





Who are we?

Cityscape is the region's largest and most prestigious real estate event series attracting thousands of investors and homebuyers to its summits and exhibitions.

Connecting developers, architects, designers, service providers as well as government bodies and industry associations, Cityscape has played an integral part in shaping the region's skylines for more than 20 years.





Organised by

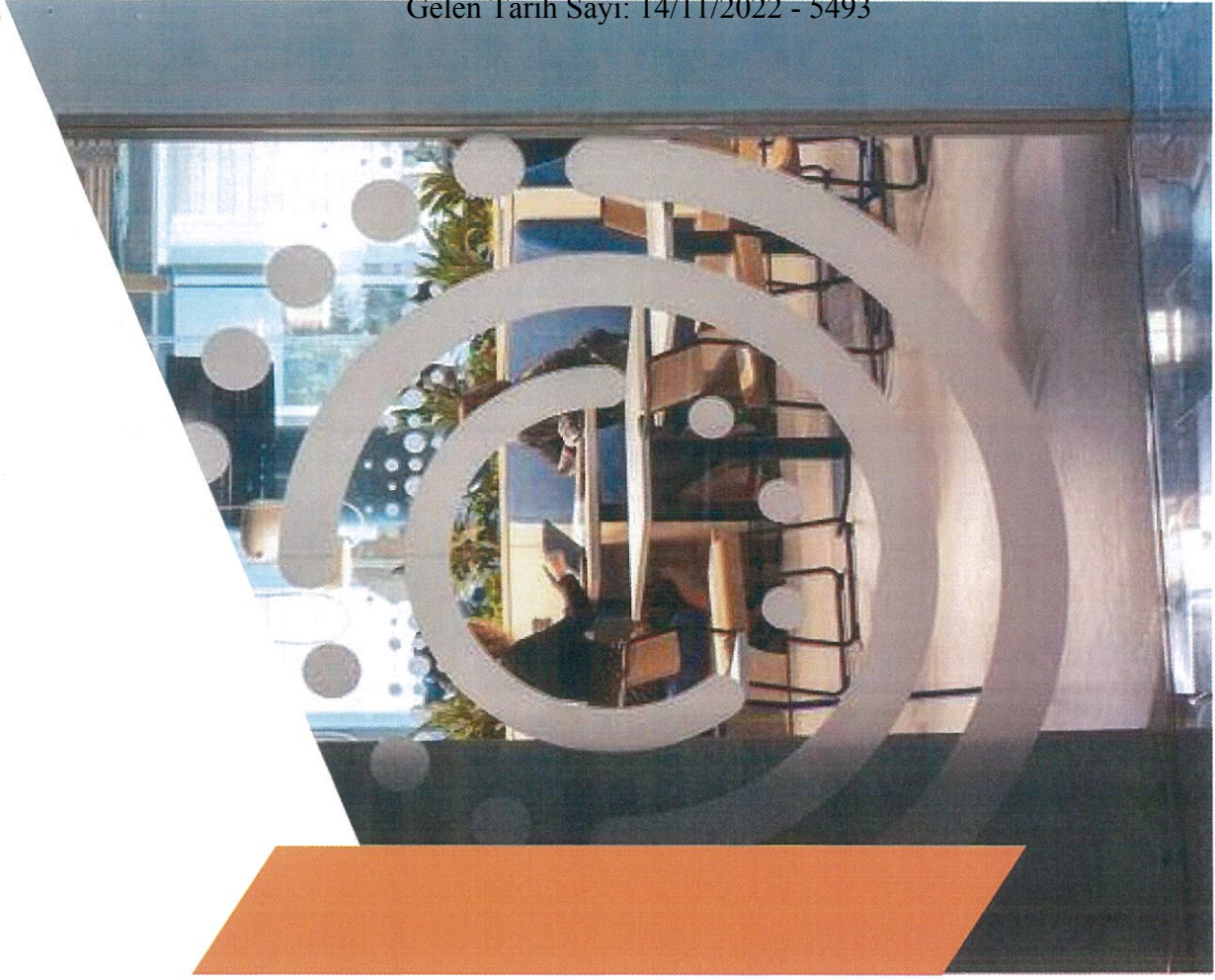


informa

Founded in 1998, Informa is a leading international intelligence, events and scholarly research group. We are the largest event organiser in the region and in Bahrain hosting exhibitions such as Jewellery Arabia and the Autumn Fair.

No. 1 **FTSE 100** **30+**
exhibition **member** **countries**
organiser

1,000s **10,000+**
of events **colleagues**

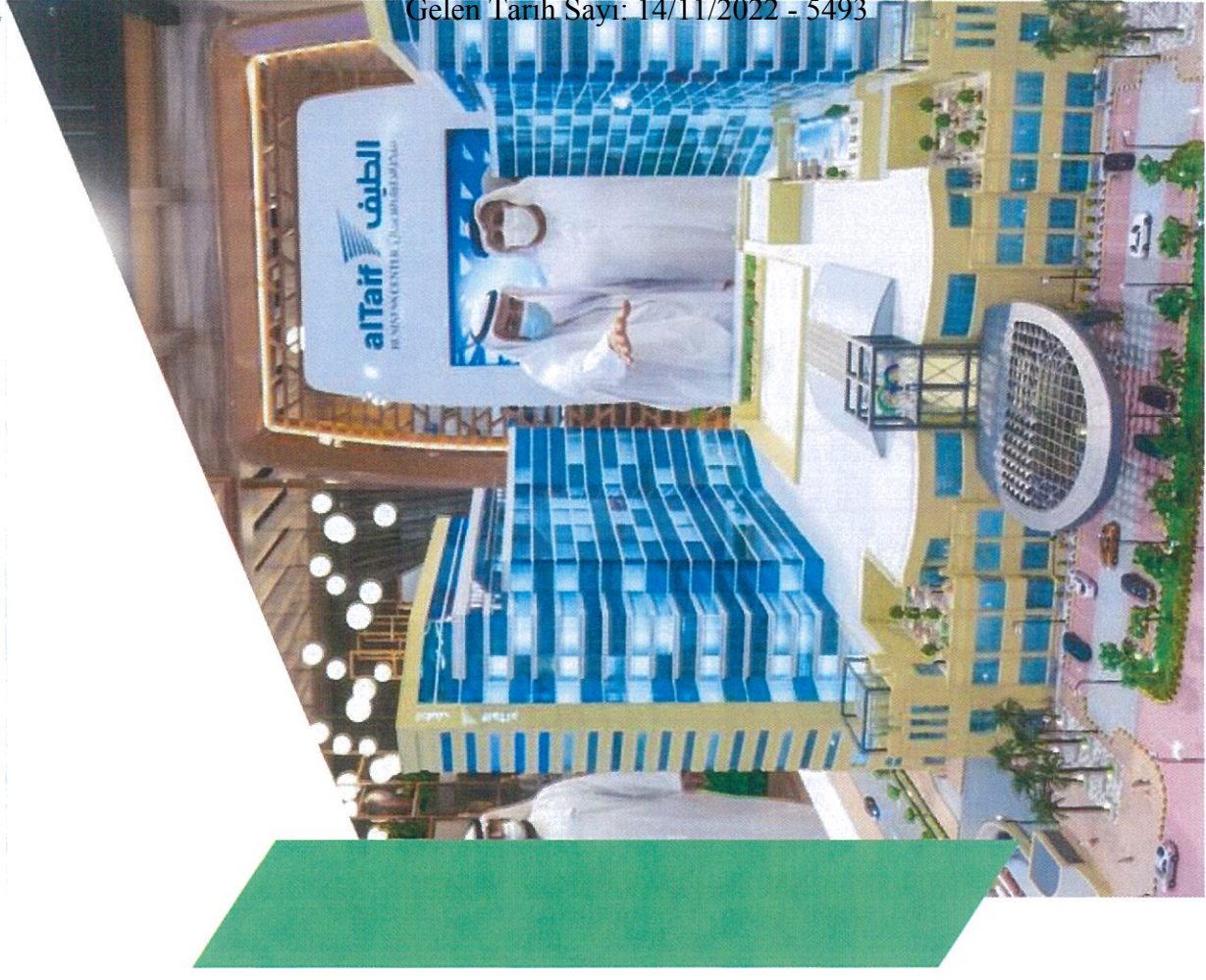




Why Bahrain?

Our vision is to position Bahrain as the premier destination for real estate investment both regionally and globally.

Bahrain is an innovative equity market and gateway to the trillion USD Gulf market. Situated in the heart of the Arabian Gulf and boasting direct access to Saudi Arabia, the region's largest market and economy, it provides an ideal access point to regional investment.



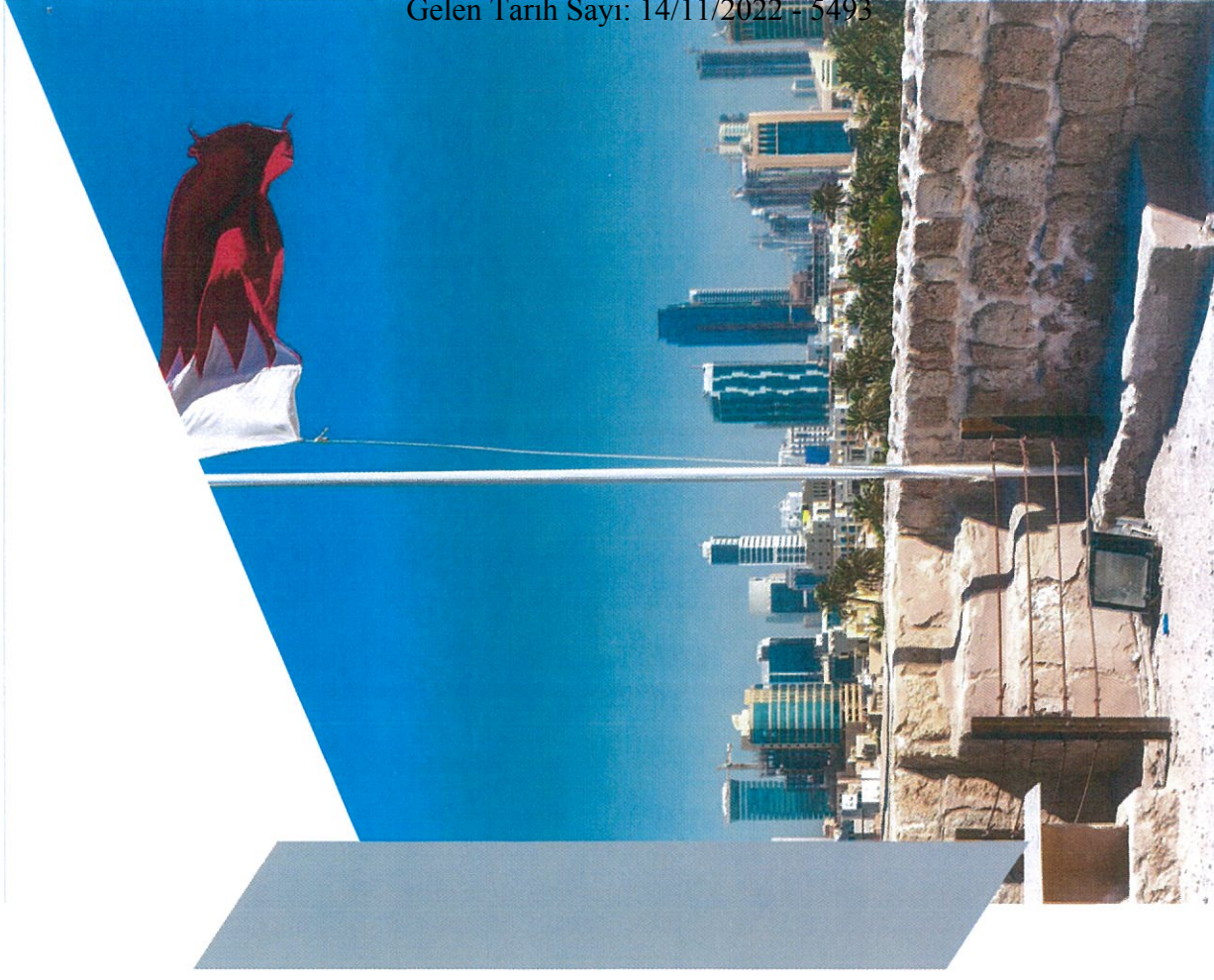


Invest in Bahrain

In 2021, Bahrain announced the launch of a total of 22 new mega projects that support the country's sustained long-term growth strategy.

- Home to 114 multinational
- GDP \$38.4B (2019), GDP per capita is \$23,443 (2020)
- Population 1.7m (Growing at 3.6% per year)
- 100% foreign business ownership / register your business within 1 minute

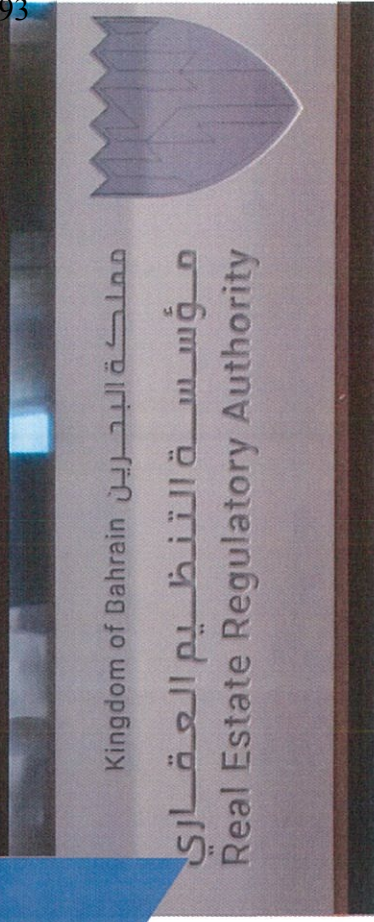
Key exports include: aluminium alloys, Oil & Gas, chemical products, electrical equipment





Supported by

Cityscape is regionally and internationally supported by industry leading organisations, government and regulatory bodies and enjoys the patronage of sheikhs and ministers on each event attracting much media attention.





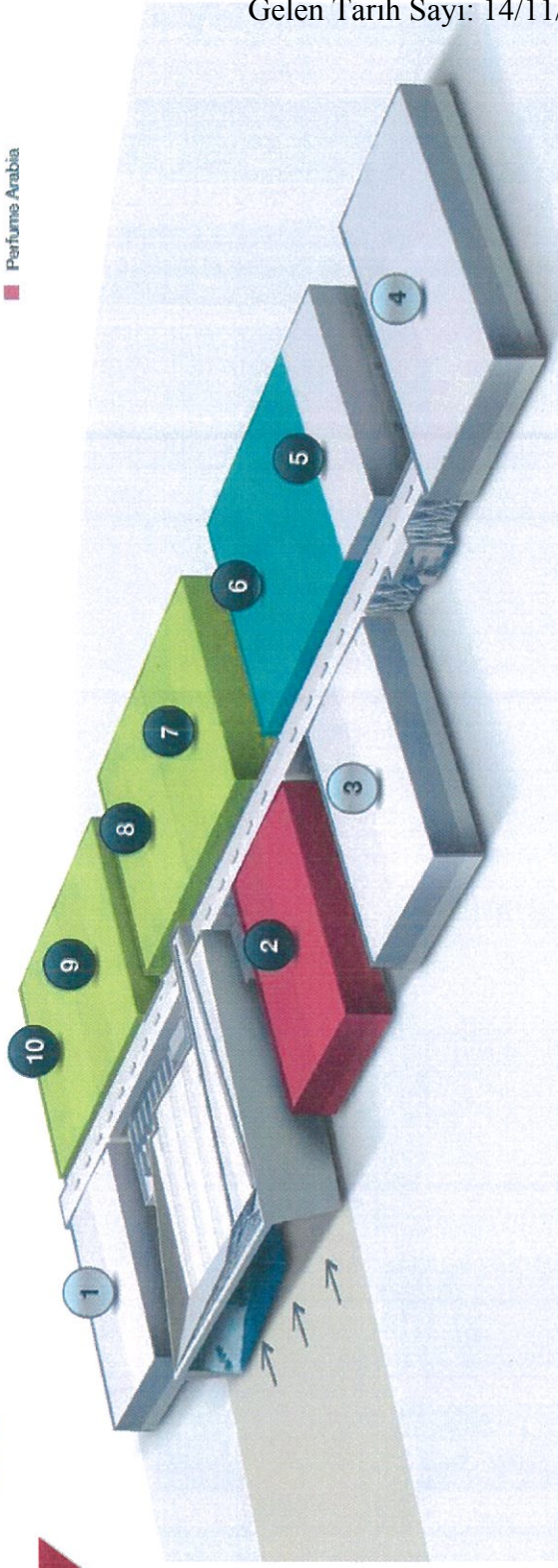
Show information

Business to Business		Business to Investor		
Monday 20 th November	Tuesday 21 st November	Wednesday 22 nd November	Thursday 23 rd November	Friday 24 th November
Day 1	Day 2	Day 3	Day 4	Day 5
Opening Ceremony Official opening with VVIP	Breakout Focus group Dedicated meeting to focus on obstacles and opportunities	Exhibition 3 days trade show promoting special offers and driving direct sales		
PropTech Summit An internationally attended conference discussing how PropTech will change the real estate sector		Cityscape Talks - Industry focus Area on the show floor where government and financial institutes can present regulation and security		
PropTech Incubator pitch A breakout area where investors and entrepreneurs can present their solutions to a panel of investors		Investor dinner By invitation only hosted dinner	Industry Awards Developer & Architect industry awards	Closing Ceremony Exclusive celebration of Bahrain



Co-location
2022

- Jewellery Arabia 2021
- Cityscape
- Perfumes Arabia



Strategic co-location



Jewellery Arabia has established itself as a must attend exhibition for HNWI and UHNWI in the region. The opportunity to purchase exclusive high-end jewellery attracts an affluent, wealthy audience.

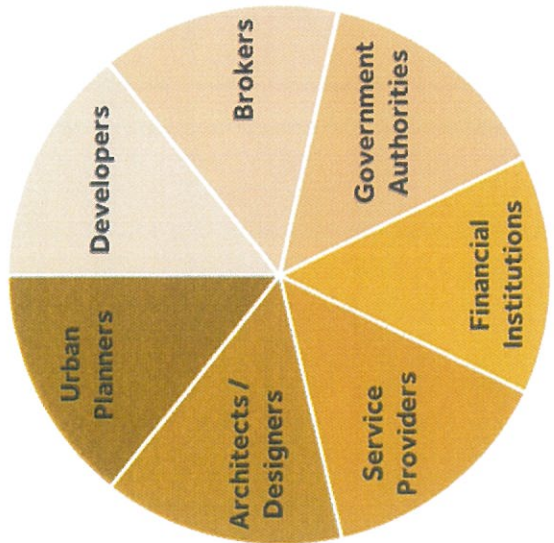
While Cityscape will bring together some of the industries leaders, it will also allow real estate developers to promote and drive new investors into launch and existing projects.

Allowing these audience to cross freely between two events is mutually beneficial by the nature of their marketing campaigns and increase footfall and dwelling time at both events.

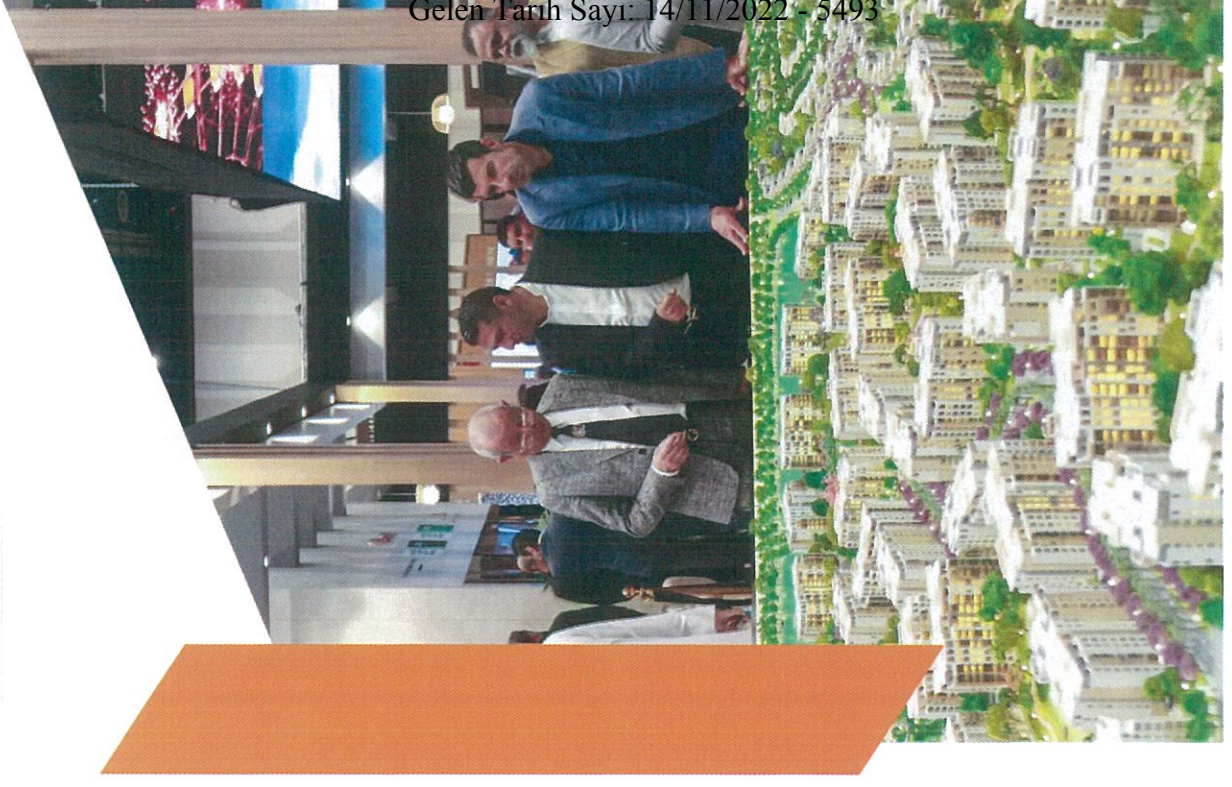
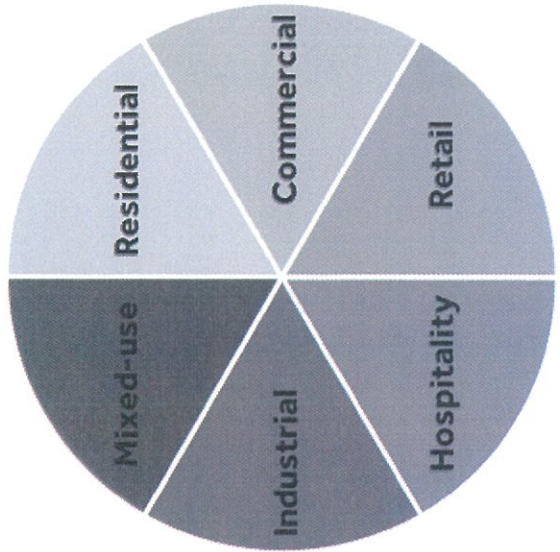


Exhibitor Profiles

Who exhibits at Cityscape?



What industry sectors?





Why exhibit?

- Meet new international investors & re-establish existing relationships
- Launch new developments to a targeted audience
- Support the growth ambitions of Bahrain
- Be part of an extensive international marketing campaign & gain invaluable brand exposure





Benefits of exhibiting:



Increase your brand awareness, generate new leads



Connect with customers face-to-face



Unparalleled networking opportunities



Grow your sales pipeline, buyer & B2B databases



Meet buyers, investors and HNWI



Discover the latest trends & developments regionally & globally





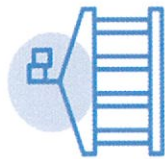
Visitor Profile



Investors



Homebuyers



Government Bodies
& Associations



Financial Services



Architects /
Designers



C-Suite
Executives





Reasons for attending



Learn about market trends



Compare properties and projects



Meet with a specific developer



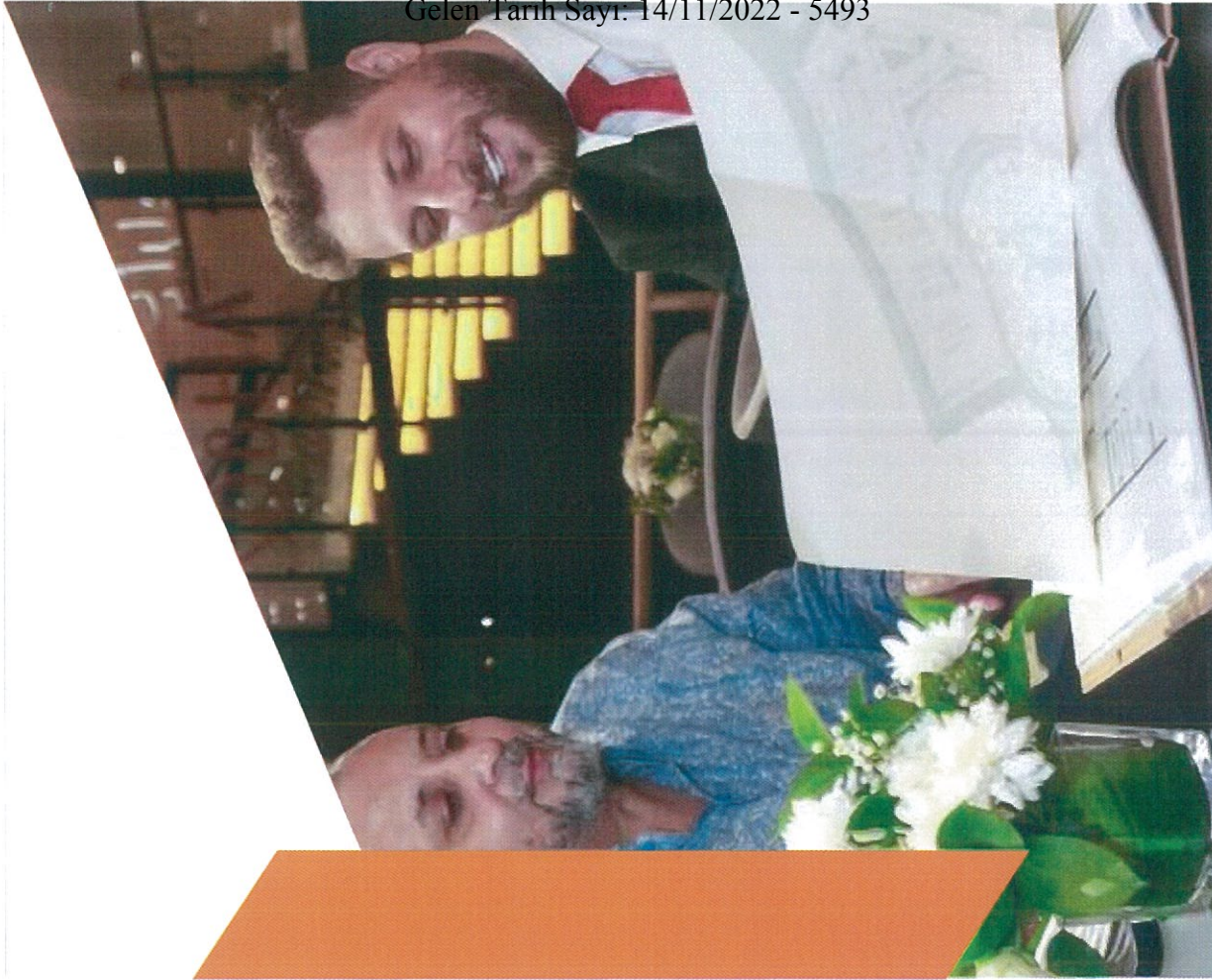
Source investment opportunities



See a particular project launch



Buy a property or make a transaction onsite





Fully Integrated Marketing Campaign to Reach Buyers and Investors

OUTDOOR

- ✓ Billboard ads in key locations across Bahrain and Saudi
- ✓ Radio ads at popular stations during peak commuter times
- ✓ Place-based media ads to target specific visitor target audiences
- ✓ Ad placement in industry publications and popular news titles (both digital and print)
- ✓ Elevator advertising

DIGITAL

- ✓ Data build via third party vendors
- ✓ Persona-specific targeted email campaigns with relevant USPs
- ✓ Data rent and emails with property portals, online publications and trade associations
- ✓ Programmatic advertising
- ✓ Paid advertising (Google and social media) for local & International investors
- ✓ Dedicated social media campaign
- ✓ Visitor prospecting on Facebook, Twitter and LinkedIn

OTHERS

- ✓ SMS/WhatsApp campaigns
- ✓ Media partnerships
- ✓ Exhibitor promotional material
- ✓ Speaker promotional material
- ✓ Influencer marketing
- ✓ Geo-fencing (competitor events and key locations)
- ✓ Persona-based ad creative in strategic locations



How do we reach our visitors?



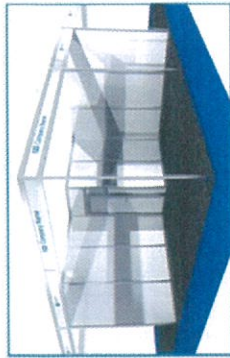
Our marketing team has developed an integrated 360 marketing approach that covers a variety of digital and offline channels to market Cityscape in Bahrain.



LET'S TALK!

Don't hesitate to contact us and be part of the region's most exciting real estate launch event.

PRICES



SHELL SCHEME
\$650/SQM



SPACE ONLY
\$550/SQM

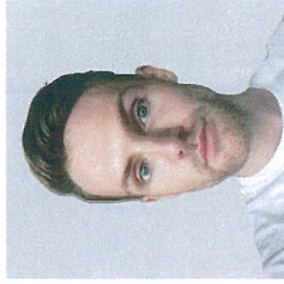
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