

Dubai

A Congested Emirate



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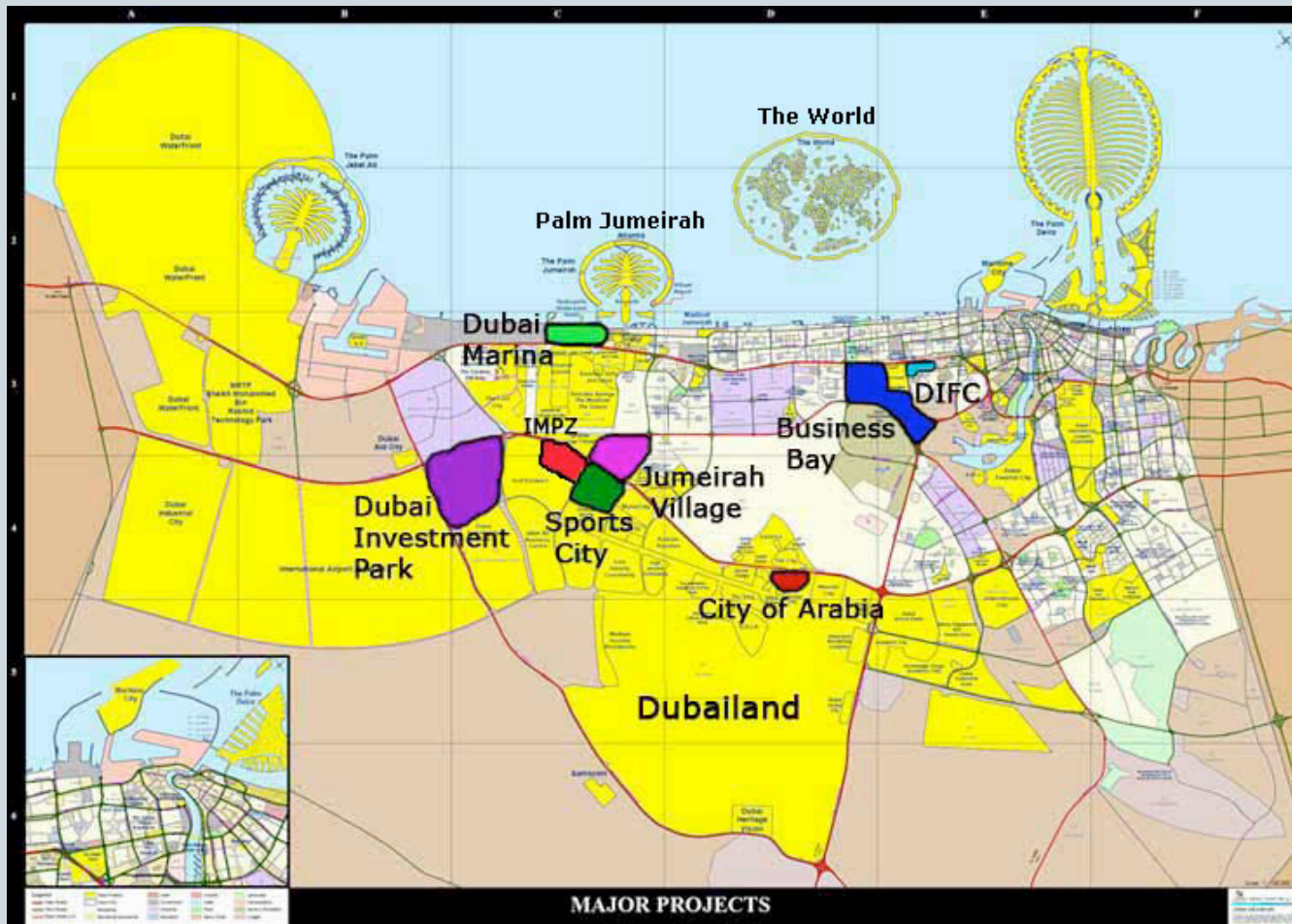
What a mess!



The Middle East

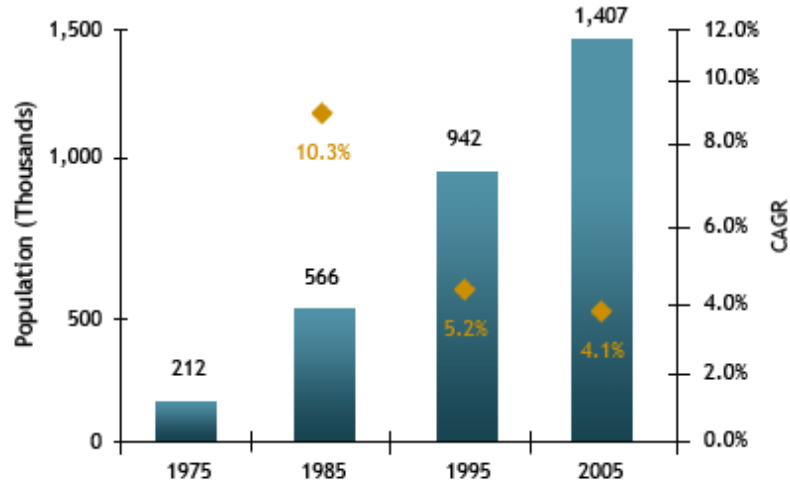


Dubai



The Movement of the UEA

Abu Dhabi Population CAGR*, 1975-2005¹



* Compound Annual Growth Rate
1 2005 preliminary results of Census
Source: Ministry of Statistics, 2006

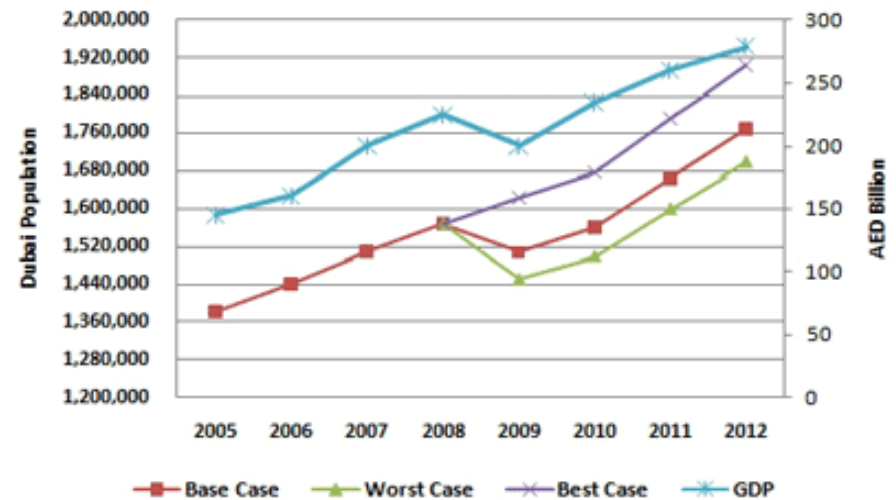
■ Population
◆ CAGAR Over 10 Year Period

Rapid growth

Forecasted Growth



Forecasted Growth

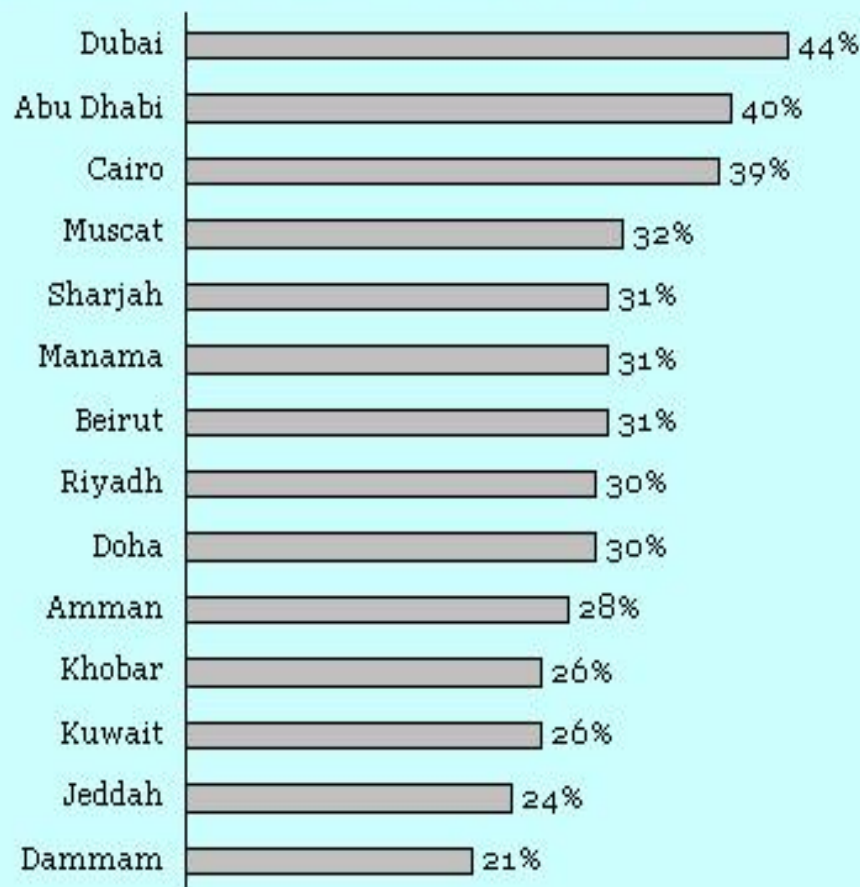


Source: IB Research

Going to work shouldn't be this hard!

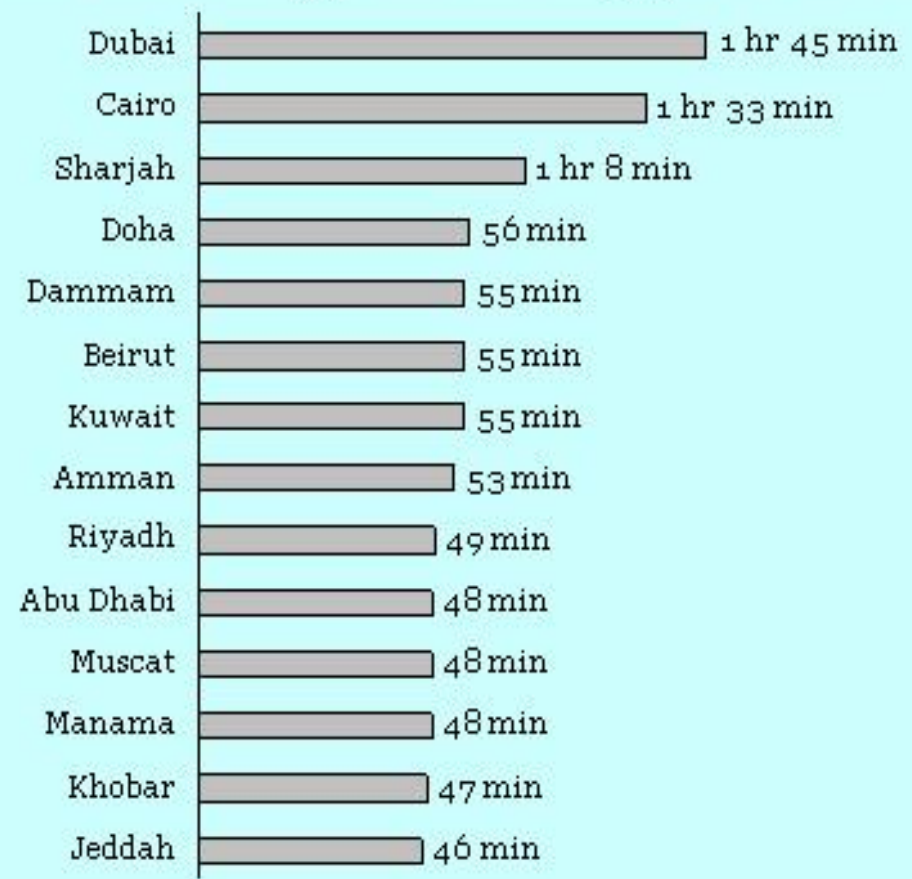


Employees Facing Shortage of Parking Space as percentage of professionals driving to work



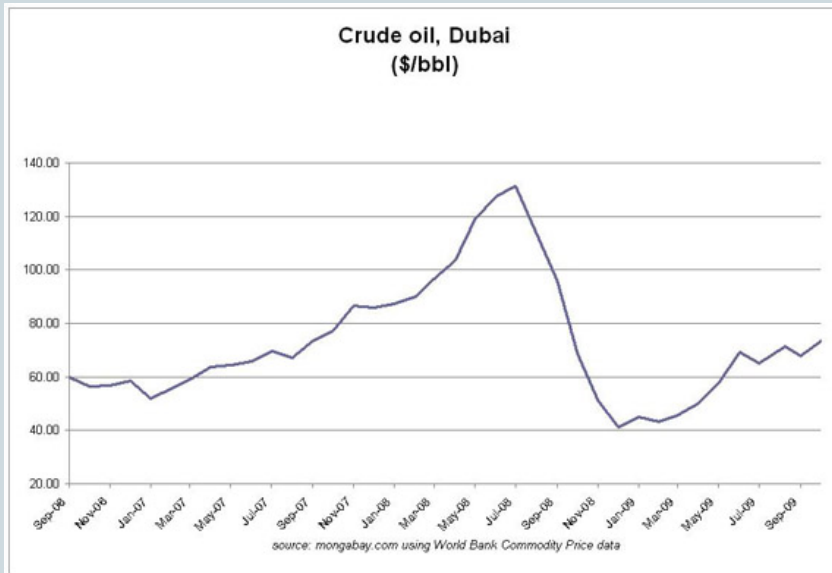
Source: GulfTalent.com Survey

Average Commute Time per Day Total Return Journey (To and From work) by Place of Work



Source: GulfTalent.com Survey

Problems add up



Cheap oil keeps
private
transportation alive

It's expensive
Let's commute



Improvements make things worse



The rapid increase in traffic is
outpacing construction

THE ISSUES ARE EVERYWHERE



Roads, Bridges and Tolls



- RTA
- Two Major Highways 'E' and 'D'
- Road Traffic Deaths
- The Sixth Crossing
- Automated Fare Collection



Buses and Cars



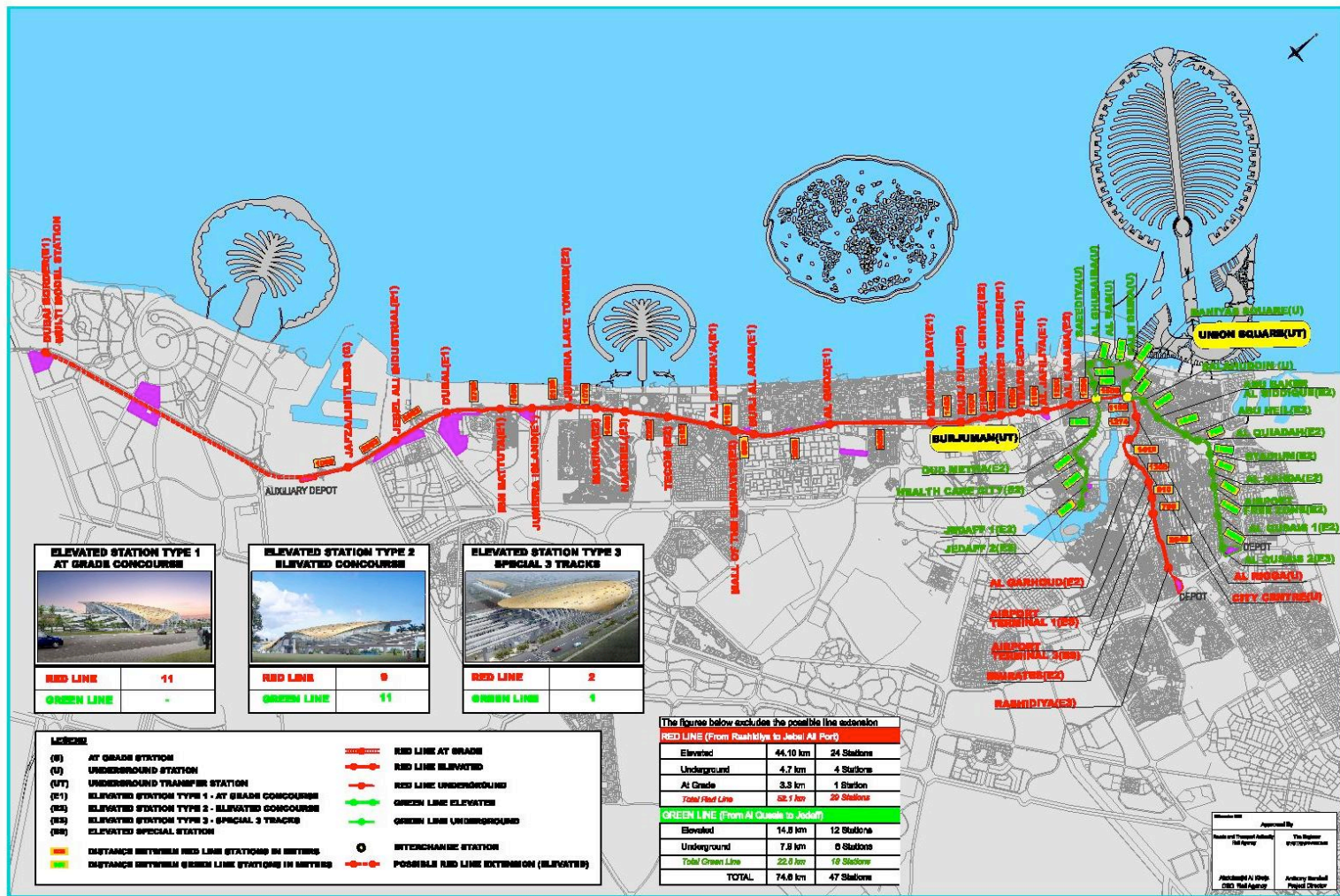
- 1.44 Million Residents
- 250,000 Riders per day
- Automated Vehicle Management
- NOL Card
- 541 cars per 1,000
- Automated Fair Collection-SALIK
- Fatalities down 27%



Metro



- Opened in 2009
- Single longest automatic driverless system in the world
- Red (2009) and Green Line (2010)
- 87 Trains
- 74,000 people per day
- 650 Million riders per year by 2020



هيئة الطرق و المواصلات
ROADS & TRANSPORT AUTHORITY



DM001 - DUBAI METRO PROJECT DUBAI METRO NETWORK



Tram



- Completion of Phase One -April 2011
- 1.09 Billion Dollars
- Interconnect with Red Line
- 19 Stations
- 180,000 residents per day



Taxis

- Most common form of transportation in Dubai
- Dependant on Traffic Volume
- Government Taxis
- Private Sector Taxis
- Pushing for all DTC vehicles to be hybrid by 2012



Marine Transport

- Water taxis called Abras
- Old method of transportation across Dubai creek for merchants
- Now used by commuter passengers
- Used to avoid congested bridges and tunnel

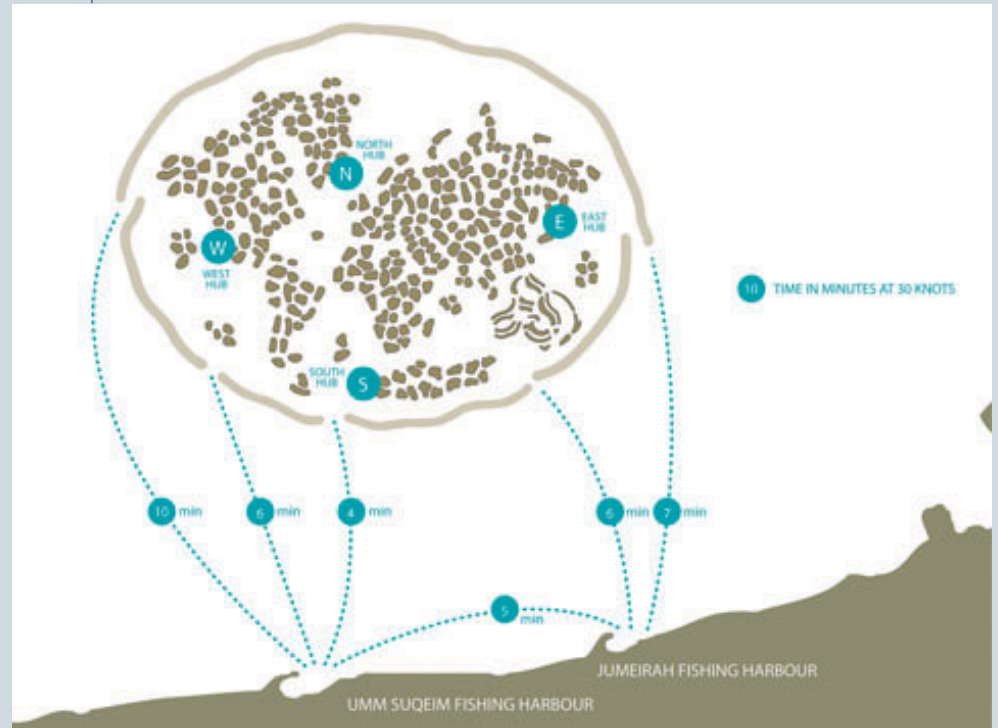


The World

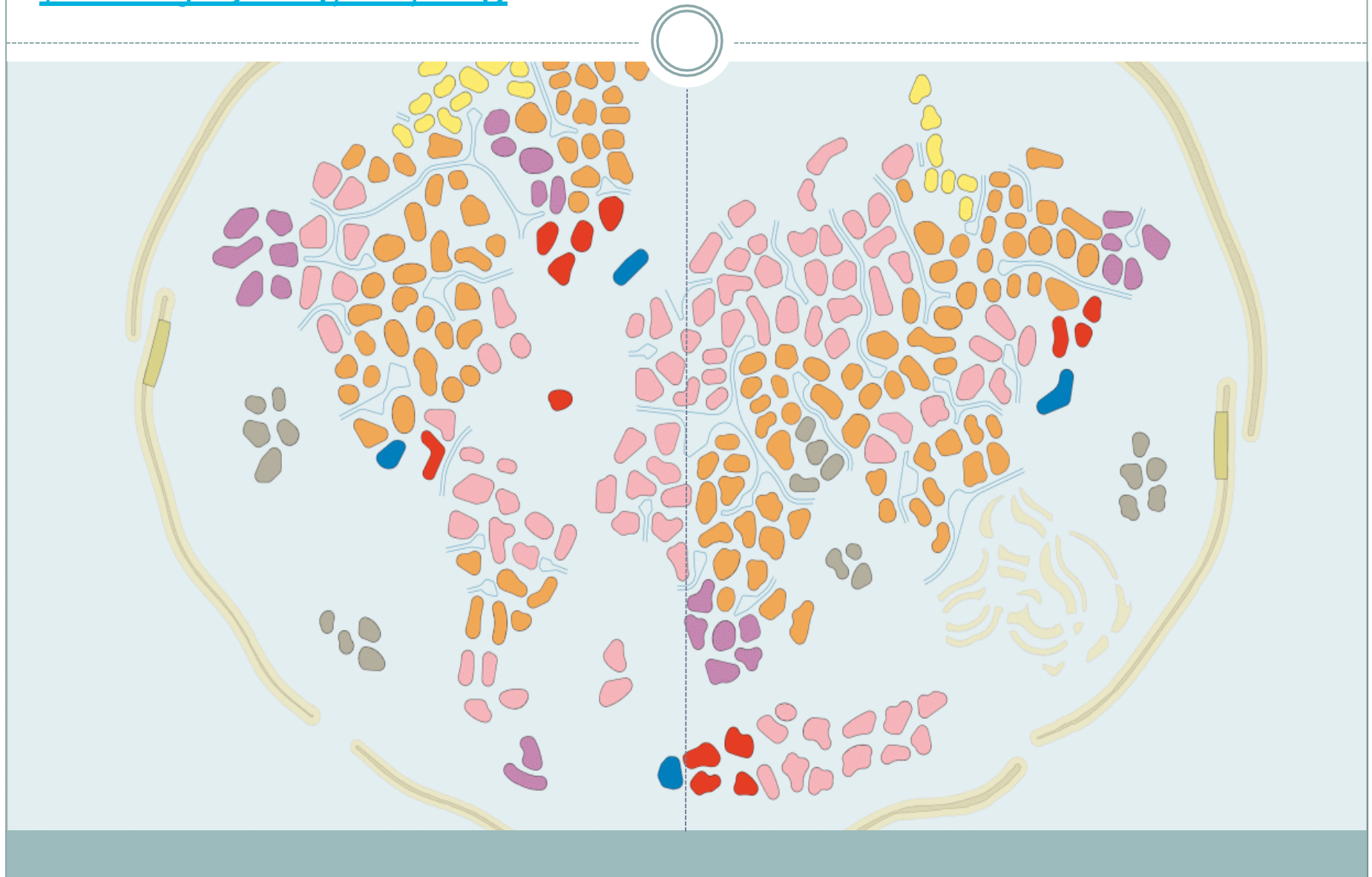


Logistics and Transportation

- Four main island hubs
- Network of channels to connect islands
- The four hubs were designated based on detailed time and travel studies



- <http://splicd.com/7eUcRjo9Yv4/62/125>



What's Happening



- Global Economic Crisis
 - Expatriate jobs cut
 - Overcongestion
- Dubai World's Debt
 - Slowed expansion
 - Abu Dhabi Bailout

Negatives

- Low Housing Prices:
 - Fallen 50%
 - Influx of Investors
- Delay/Cancellation of Projects
 - Metro on Track
 - Burj Dubai Tower (commercial & residential)



Positives & Future



- **Migrant workers laid off**
 - Reasons: Bank lending & Country Pride
 - Relaxing Congestion
- **Complex, Unpredictable situation**
 - Global Economy will rebound
 - Debt crisis not expected to spread far
 - Weather storm and have a plan to invest after