Dubai
A Congested Emirate
What a mess!
The Middle East
The Movement of the UEA

Abu Dhabi Population CAGR*, 1975-2005†

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

Forecasted Growth

Rapid growth

Source: IB Research
### Employees Facing Shortage of Parking Space

<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dubai</td>
<td>44%</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>40%</td>
</tr>
<tr>
<td>Cairo</td>
<td>39%</td>
</tr>
<tr>
<td>Muscat</td>
<td>32%</td>
</tr>
<tr>
<td>Sharjah</td>
<td>31%</td>
</tr>
<tr>
<td>Manama</td>
<td>31%</td>
</tr>
<tr>
<td>Beirut</td>
<td>31%</td>
</tr>
<tr>
<td>Riyadh</td>
<td>30%</td>
</tr>
<tr>
<td>Doha</td>
<td>30%</td>
</tr>
<tr>
<td>Amman</td>
<td>28%</td>
</tr>
<tr>
<td>Khobar</td>
<td>26%</td>
</tr>
<tr>
<td>Kuwait</td>
<td>26%</td>
</tr>
<tr>
<td>Jeddah</td>
<td>24%</td>
</tr>
<tr>
<td>Dammam</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: GulfTalent.com Survey

### Average Commute Time per Day

<table>
<thead>
<tr>
<th>Place</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dubai</td>
<td>1 hr 45 min</td>
</tr>
<tr>
<td>Cairo</td>
<td>1 hr 33 min</td>
</tr>
<tr>
<td>Sharjah</td>
<td>1 hr 8 min</td>
</tr>
<tr>
<td>Doha</td>
<td>56 min</td>
</tr>
<tr>
<td>Dammam</td>
<td>55 min</td>
</tr>
<tr>
<td>Beirut</td>
<td>55 min</td>
</tr>
<tr>
<td>Kuwait</td>
<td>55 min</td>
</tr>
<tr>
<td>Amman</td>
<td>53 min</td>
</tr>
<tr>
<td>Riyadh</td>
<td>49 min</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>48 min</td>
</tr>
<tr>
<td>Muscat</td>
<td>48 min</td>
</tr>
<tr>
<td>Manama</td>
<td>48 min</td>
</tr>
<tr>
<td>Khobar</td>
<td>47 min</td>
</tr>
<tr>
<td>Jeddah</td>
<td>46 min</td>
</tr>
</tbody>
</table>

Source: GulfTalent.com Survey
Problems add up

It’s expensive
Let’s commute

Cheap oil keeps private transportation alive
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
- 87 Trains
- 74,000 people per day
- 650 Million riders per year by 2020
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
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