

Al Gharbia
Abu Dhabi الغربية



Al Gharbia Investment Roadmap



مجلس تنمية المنطقة الغربية
WESTERN REGION DEVELOPMENT COUNCIL

www.algharbia.ae



Contents

Leadership commitment	04
About Al Gharbia	06
Introducing WRDC	11
Business opportunities	18
Guidance and support	12

Leadership commitment



His Highness Sheikh Hamdan Bin Zayed Al Nahyan, Ruler's Representative in the Western Region

As an integral part of Abu Dhabi Emirate, Al Gharbia is being developed under the vision of His Highness Sheikh Khalifa Bin Zayed Al Nahyan, President of the UAE. The region is also strongly supported by His Highness Sheikh Mohammed Bin Zayed Al Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces and is under the direction of His Highness Sheikh Hamdan Bin Zayed Al Nahyan, Ruler's Representative for the Western Region.

Vision 2030: Towards a Brighter Future

- Plan Al Gharbia 2030 has been developed to lead Al Gharbia towards a brighter future through managed and responsible growth.
- The overall strategic plan targets economic development, social health promotion, the preservation of cultural identity and environmental protection. It strives to promote the region's economic growth while valuing and maintaining its historical, cultural and ecological significance for the benefit of many generations to come.
- The Western Region Development Council (WRDC) together with their strategic partners are transforming Al Gharbia into a unique destination for thriving and promising opportunities to ensure providing best services to residents, investors and visitors.

الغربية 2030
Al Gharbia



Fast facts

Al Gharbia

A unique opportunity, waiting to be discovered

Al Gharbia, the Western Region of Abu Dhabi, is quite simply the largest investment opportunity in the UAE. Located in the United Arab Emirates, the region covers a staggering 40,000 square kilometres, which equates to 60% of the total land mass of Abu Dhabi Emirate.

Al Gharbia is appropriately named, meaning “Western” in Arabic and was the name commonly used by Arabic speakers in the country due to its geographical location within the UAE before being officially re-named in 2008. The region is home to seven main cities; Liwa, Madinat Zayed, Ghayathi, Ruwais, Mirfa, Sila and Dalma Island. It boasts of undulating deserts and approximately 350 kilometres of pristine and untouched coastline;

best described as ‘where the desert meets the sea’. Location-wise, the region is close to the borders of Saudi Arabia and Qatar – and is known as the main land access gateway to the UAE.

Al Gharbia is as big an investment opportunity as you are willing to make it.



Al Gharbia, a growing market of world-class opportunities

<p>60% of Abu Dhabi's land mass</p>	<p>9% of Abu Dhabi's total population</p>		<p>First Nuclear power project in the Middle East</p>
<p>350km of pristine coastline</p>		<p>Largest and most fertile farms in Abu Dhabi</p>	<p>7.1% of the World's oil reserves and the largest oil refinery</p>
<p>Biggest solar power plant in the world (2012)</p>	<p>UAE has 3.2% of the World's proven gas reserves and, Al Gharbia has the majority of the UAE's gas fields</p>		<p>Largest Petro - Chemicals facility in the world (2014)</p>

“To achieve sustainable development, we encourage business diversification to enhance the investment environment in Al Gharbia and support productivity improvement.”

H.E. Mohamed Hamad bin Azzan Al Mazrouei,
Director General, Western Region Development Council



World class businesses already in Al Gharbia

Why invest in Al Gharbia?

Top competitive advantages

Strategic location and geographic advantage

Al Gharbia is close to the borders of Saudi Arabia and Qatar. The Region is also seen as one of the main gateways to the Middle East. With its vast geographic scope and low density population, Al Gharbia offers a huge untapped land area just waiting to be explored.

Booming investments

Investments are consistently growing, with AED 240 billion* being invested in development projects in key areas such as: Oil & Gas (AED 120 billion), Power Generation (AED 62 billion), Infrastructure & Transportation (AED 54 billion) and Tourism (AED 4 billion).

Solid support services

Apart from implementing investor-friendly regulations, the local government also provides potential investors with full support from the start of a project until the final set-up. One-stop service providers called TAMM Centers are strategically located throughout the region.

Business-friendly environment

As part of Abu Dhabi Emirate, Al Gharbia offers a tax-free environment, economic stability, no foreign exchange controls and trade barriers, high purchasing power, low interest and borrowing rates, consistent favourable returns, efficient workforce of varied specializations at competitive wages and a lot more.

Bustling industries

The main industries in Al Gharbia's cities are oil and gas upstream and downstream, power generation, chemicals, agriculture, tourism and construction. Al Gharbia generates 40% of Abu Dhabi's total yearly GDP, over AED 115 billion (\$31bn).



Which sector?

Ranging in size across all of the seven cities of Al Gharbia each sector has many opportunities directly or indirectly.

Oil and Gas	Manufacturing	Logistics	Agriculture & Food Processing
Commercial Real Estate	Tourism	Healthcare	Retail

* Figures detailed are estimated costs for both ongoing and announced projects

Introducing WRDC



WRDC's vision

To lead Al Gharbia, the Western Region of Abu Dhabi into becoming a model of sustainable economic and social development by setting the standard of excellence in the development of people, enhancement of infrastructure and improvement of enterprises.

The Western Region Development Council (WRDC) works with its strategic partners, businesses, investors and its community to drive the economic development and long term sustainability for the region. The council is committed to high value investments for the region and its people, whether this is the creation of small to medium enterprises or large scale industries, they are on hand to support, assist and offer direction. Working at a local, regional and international level

to actively promote Al Gharbia, they aim to attract inward investment and to help businesses reach their full capabilities.

By supporting a wide range of initiatives to encourage enterprise, maximise productivity and improve local workforce skills, WRDC wants to allow those already living, working, and investing in the region to benefit from its economic prosperity.

For more information
on WRDC, please visit
www.wrdc.ae

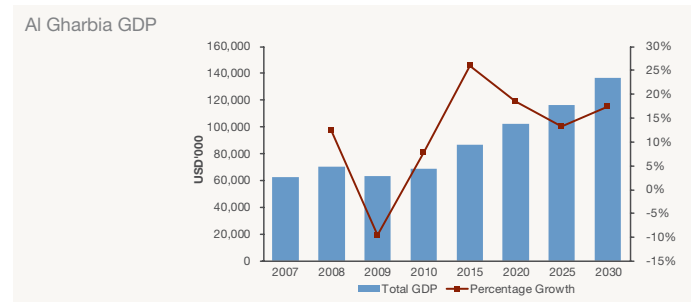


WRDC will help with guidance and support

WRDC will help with research analysis and guidance necessary to unlock success

Plan Al Gharbia 2030

- Guide investors and developers with the overall strategic plan of 2030 to ensure that project and plans are aligned

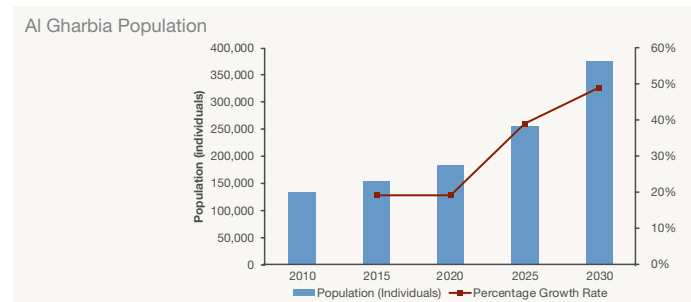


Business planning and financial advice

- High level evaluation of business plans
- Advice on financing
- Potential linkage to local investors

Regional data

- Provide available sector / regional data
- Analyse demand size and growth
- Assess margins and competition to understand the underlying regional statistics



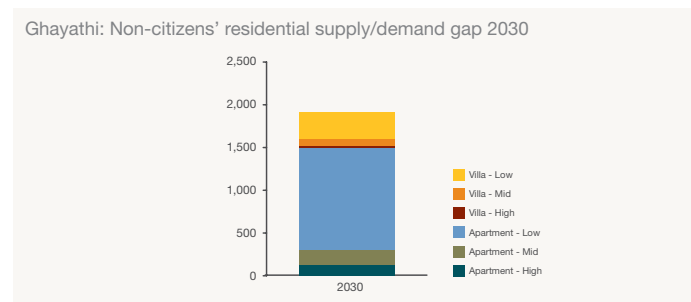
Integration with other activities

- Assessment of market forces and roadblocks that may influence the project
- Location identification
- Estishara scheme - affordable access to business consulting



Market testing

- Share available information on market gaps and benchmark analysis
- Analyse results from commissioned research



Guidance with authorities

- Assistance with statutory controls, regulations and guidelines
- Communication assistance with relevant government entities





Examples of how WRDC has assisted entrepreneurs

Special programmes to lower the costs of entry

The Estishara Programme is a joint initiative led by a taskforce that includes members from the Western Region Development Council (WRDC), the Urban Planning Council (UPC) and the Western Region Municipality (WRM) to assist the Al Gharbia community in taking an effective role in the process of implementing the 'Al Gharbia 2030 plan'. The program enables a coordinated approach to support developers by collaborating specialists within the WRDC, UPC and WRM and other private sector consultants who are committed to this initiative.

The services include providing technical assistance on following:

- Development of pre concept design
- Obtaining preliminary design approvals
- Demand gathering
- Development of feasibility studies



مجلس تنمية المنطقة الغربية
WESTERN REGION DEVELOPMENT COUNCIL



مجلس أبوظبي للتخطيط العمراني
ABU DHABI URBAN PLANNING COUNCIL



Emirates Of Abu Dhabi
Dept. of Municipal Affairs
Western Region Municipality

إمارة أبوظبي
وزارة الشؤون البلدية
بلدية المنطقة الغربية

Mixed Use Community Developments – Madinat Zayed

A newly agreed scheme for a mixed use development with a private sector developer (NTCC) in the heart of Madinat Zayed for 21,000 sqm of space with 100 apartments, 4,500 sqm of retail & F&B, 2000 sqm of office and 4,000 sqm of healthcare with a construction cost of circa AED 90m.



Tourism - Desert Camp

Assessment of a new eco-tourism desert hospitality attraction in Liwa. Review and assistance with the feasibility and business plan, concept planning, development strategy and financing opportunities through the Khalifa Fund.



Agriculture - Poultry Farm

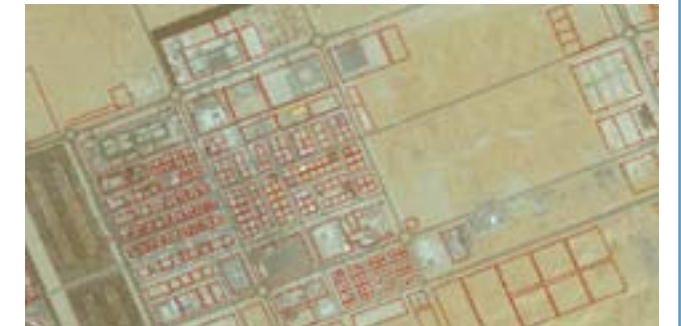
Assistance with the assessment of the business plan and development of the concept, development strategy and further assistance with Khalifa Funding finance.



Industrial – Sandwich Panel Manufacturing Unit Factory

Sandwich Panel Manufacturing Unit Factory for prefabricated building components, form insulated wall and ceiling panels etc.

WRDC support with technical assistance for developing project report and feasibility, Identifying possible land options for the project, alignment with Plan Al Gharbia 2030 and recommendations for implementation.



Diversity of projects in Al Gharbia

Selected recent and planned economic development projects

1 Madinat Zayed

Real estate
Al Dhafra Ranches AED 1bn
Main Court Residential AED 20m

Power
Masdar Solar plant AED 2bn

2 Liwa

Tourism
Qasr Al Sarab Desert Resort
AED 700m

Government
Police stations AED 88m

Oil and gas
Shah Sour Gas Project AED 40bn

3 Ghayathi

Real estate
786 villas AED 1.5bn

Education
Schools, AED 29m

Healthcare
New Hospital

4 Ruwais

Oil and gas
Ruwais refinery expansions
AED 16bn
Gasco plants and expansions
AED 29bn

Transport
Ethiad Railway - Union Railway
Project AED 40bn

Chemicals
ChemaWEyaat complex and
Bourouge expansion AED 40bn

Power
Shuweihaat S2 and S3 AED 20bn

5 Mirfa

Community Services
Recreation centers AED 516m

Education
High schools AED 93m

6 Sila

Real estate
430 villas AED 1.5bn

Government
Border control upgrade AED 193m

Power
ENEC Nuclear plants AED 40bn

7 Dalma Island

Healthcare
Hospital upgrade AED 15m

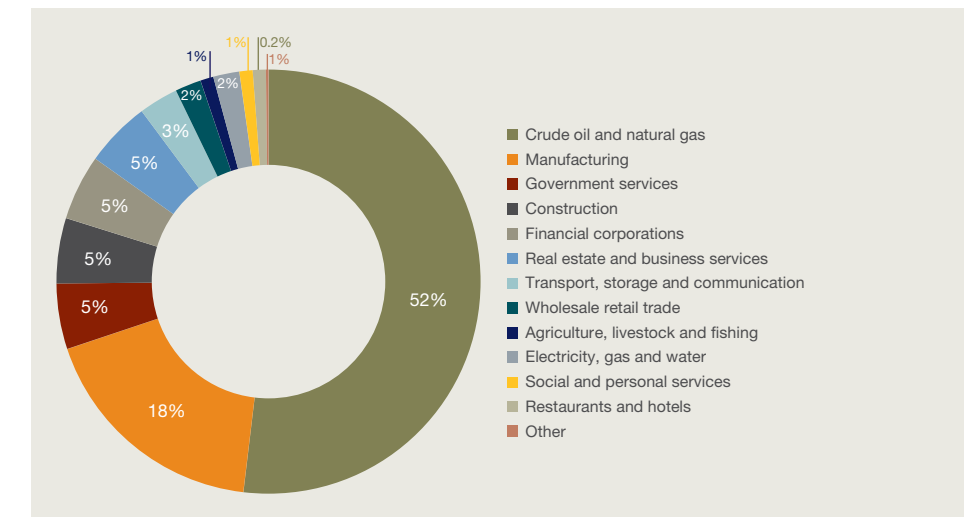
Tourism
Desert Islands projects AED 3.3bn



Developing the energy future

Sector priorities

- Development of Sour Gas fields at Shah by ADNOC and Occidental, a \$40bn investment over 10 years
- UAE will build 4 nuclear power reactors (near Silaa) and plans to generate 25% of power needs from nuclear energy by 2020
- Current target to produce 7% of electricity needs from renewable sources (solar and wind) by 2020

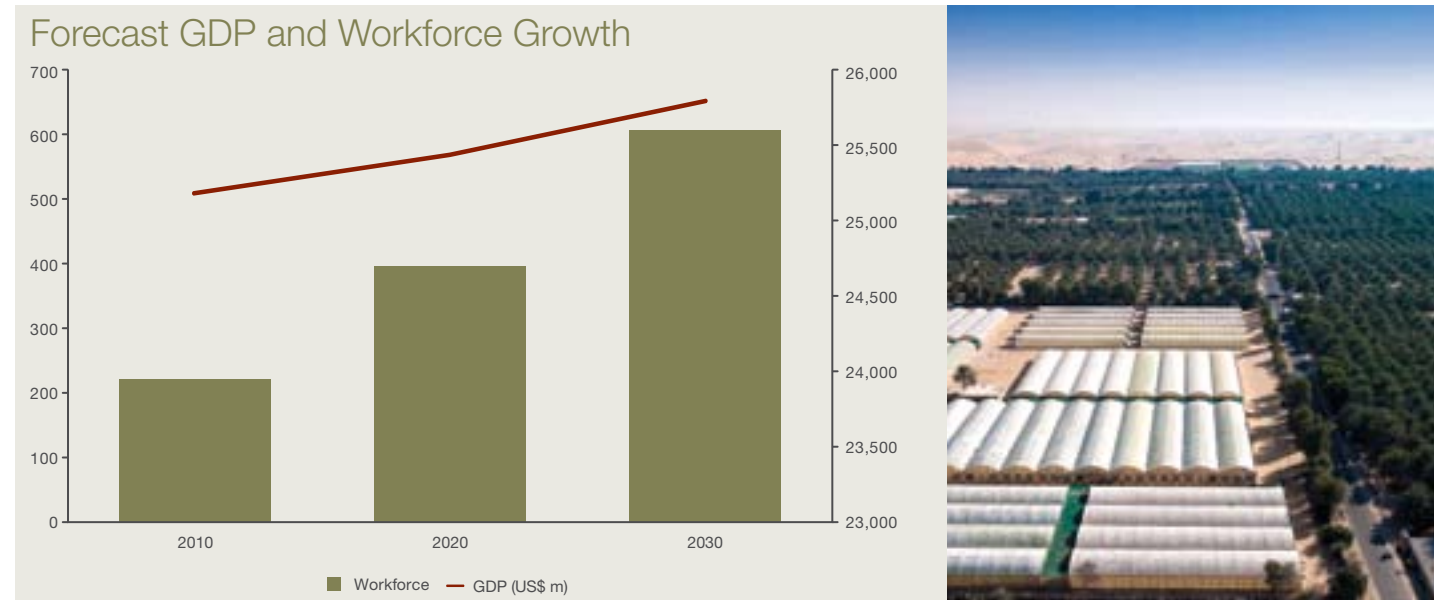


Potential investment opportunities

<p>Oil and gas</p> <p>Oil field services in many areas including equipment rental, logistics support, etc.</p>	<p>Nuclear</p> <p>Numerous opportunities in construction, support services, etc.</p>	<p>Solar energy</p> <p>Support to the emerging photovoltaic and Concentrated Solar Power industries</p>	<p>Downstream</p> <p>Significant logistics and support services opportunities in all sectors</p>
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Vibrant food and agriculture sector

An emerging tourism destination



Potential investment opportunities

- Dates**
Dates and confectionery
- Camels**
Milk products and woollen products
- Fish farming**
Fresh fish, fish farming supplies, equipment and training
- Vegetable**
Hydroponics equipment supply, organic farms, tomato and vegetable processing
- Other**
Storage, distribution and logistics

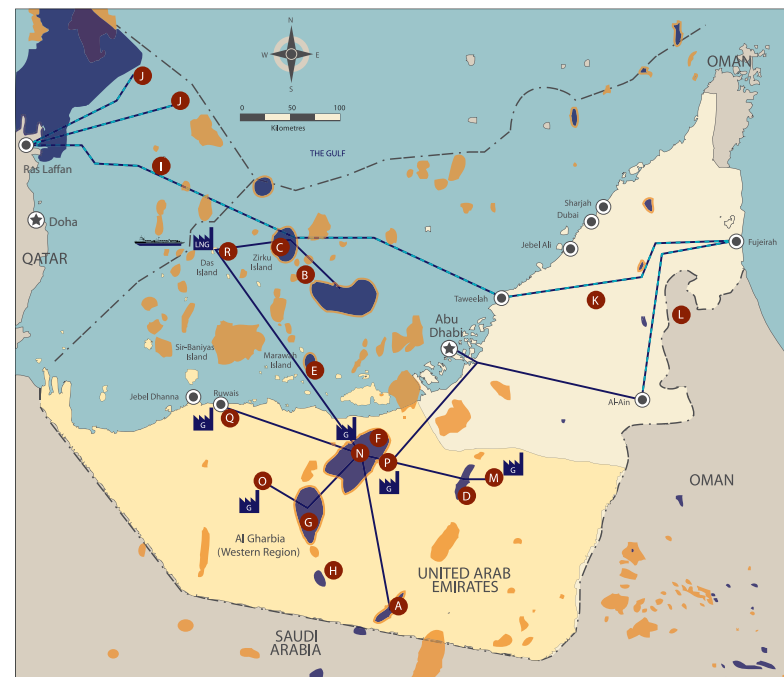
Potential investment opportunities

- Accommodation**
Resorts, leisure and business hotels, motels, boarding houses and camp / sports sites
- Hotel supplies**
Industrial kitchens, laundries, hotel supplies and logistics
- Activities**
Culture/Heritage tourism, desert and water activities and corporate events
- Retail**
Restaurants, coffee shops, souvenir/traditional products and handicrafts
- Other**
Designing, printing and publishing of tourist brochures; vehicle hire

Current oil field and facility developments

Where to invest

Abu Dhabi's onshore and offshore fields



RESOURCES

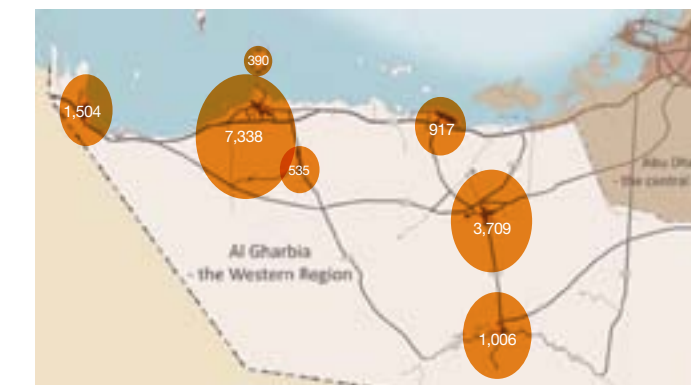
- A SHAH:** The Shah gas field has been Abu Dhabi's leading upstream gas project since the first engineering, procurement and construction packages were awarded in early 2010, making it ADNOC's first sour gas development. At total cost of \$ 10 billion, Shah is expected to yield 28.3 mcm (1 bcf) of sour gas, or 15.3 mcm (540 mcf) of network gas per day by 2015.
- B KHUFF RESERVOIR:** the Permian Khuff reservoir exists in the same geological zone as Qatar's North Field and has been under development since 1994 from the nearby Umm Shaif, Abu Al Boukhoosh and upper Zakum field's production facilities. The reservoirs total sour gas output of 34 mcm (1.2 bcf) per day is piped to Das Island for processing. The integrated gas development will increase production from the Khuff reservoir at Umm Shaif by 255 mcm (900 mcf) per day by autumn 2013.
- C UMM SHAIFF:** Associated gas is produced from ADMA-OPCO's Umm Shaif field from two 4.2 mcm (150 mcf) per day wellhead platforms and two producer/injector platforms connected to the Umm Shaif Supercomplex.
- D ASAB:** The ASAB oil field and to a lesser extent the neighbouring Sahil oil field produce a total of 8.5 mcm (300mcf) per day of associated gas, which is processed at Asab's gas processing facility. The ongoing Asab 3 project is expected to increase production to 12.7 mcm (450 mcf) per day by fall 2012.
- E HAIL:** GASCO plans to produce 14.2 mcm (500 mcf) per day of sour gas from the Hail field when ongoing development operation is completed in 2015.
- F BAB:** Associated gas has long been produced at the Bab field, Abu Dhabi's largest onshore oil field. Ongoing redevelopments should increase gas production to 36.6 mcm (1.3 bcf) per day by 2015.
- G BUHASA:** ADCO's oil field produces up to 15.3 mcm (540 mcf) per day of associated gas, which is then processed in the nearby Bu Hasa natural gas liquids (NGL) extraction plant.
- H L-11-B:** This directionally drilled appraisal well produces 850,000 cubic meters (30 mcf) per day of non-associated gas, and bodes well for efforts to develop the surroundings block L8a, L8b and L11b that is straddles.
- I DOLPHIN PIPELINE:** Dolphin Energy's flagship project has the capacity to transport 90.6 mcm (3.2 bcf) per day from the company's production facilities above Qatar's North Field to Abu Dhabi's power generation centre at Taweelah, a distance of 364 kilometres.
- J DOLPHIN PRODUCTION PLATFORMS (DOL-1 and DOL-1):** Each operates 12 wells and produces 36.8 mcm (1.3 bcf) of gas per day that is piped to Ras Laffan for processing before transportation to Taweelah through the Dolphin Pipeline.
- K DOLPHIN'S TAWEELAH-FUJAIRAH PIPELINE:** This 48-inch, 240 kilometre pipeline is set to transport Dolphin gas from Taweelah's receiving facilities for use in Fujairah's power generation and desalination plants when it is commissioned in late 2010.
- L DOLPHIN'S AL AIN-FUJAIRAH PIPELINE:** Dolphin Energy's first project was the construction of a 24-inch, 182-kilometre gas pipeline from Al Ain to Fujairah in 2004, which today transports to 3.8 mcm (135 mcf) per day to Qidfa's power station.

GAS PROCESSING FACILITIES

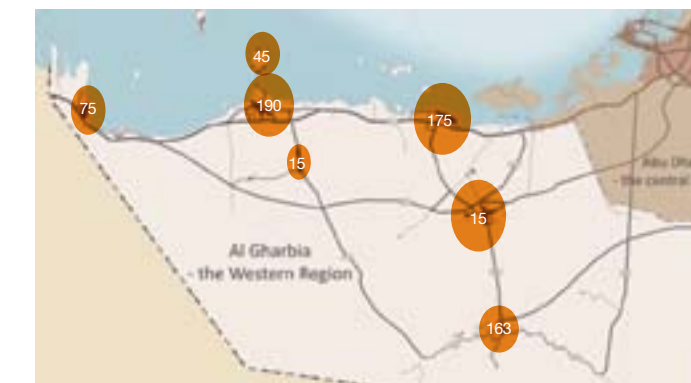
- M ASAB NATIONAL GAS LIQUIDS PLANT AND ASAB GAS PLANTS:** These facilities receive associated gas and condensate from ADCO's nearby Sahil, Assab and Shah Fields. Gas is liquefied and sent to the Ruwais facility for fractionation, while condensate is transported to TAKREER's Ruwais refinery.
- N HABSHAN GAS PLANT:** Originally built in 1983, facilities have been vastly expanded to cope with increasing gas processing needs. Most recently, a fifth plant is being built as part of the Integrated Gas Development project are at a cost of \$ 4.7 billion, which will increase the Habshan complex's total processing capacity to 198.2 mcm (7 bcf) per day. Processed gas, condensate and liquid sulphur is then transported to the Ruwais Fractionation plant, Takreer, Fertil, Borouge and Dubai's Jebel Ali Power station.
- O BUHASA NGL EXTRACTION PLANT:** Two processing trains process up to 15.3mcm (540 mcf) per day of associated sour gas from ADCO's nearby Bu Hasa oil field. Gas is then transported via a 50-kilometre pipeline for further processing at Habshan.
- P BAB GAS PLANT:** A single NGL extraction gas process 4.5 mcm (160 mcf) per day of associated gas from the Bab oil field. Acidic gas is sent to Habshan to be converted to liquid sulphur, while NGL is pipe to GASCO's Ruwais Fractionation Plant.
- Q RUWAIS DEFRACTIONATION PLANT:** Gas is pumped from across Abu Dhabi to GASCO's Ruwais facility, where the NGL feed is fractionated into ethane, propane, butane, and naphtha, which are in turn either exported or used as feedstock in neighbouring petro chemicals production facilities. Three NGL fractionation trains give the plant capacity of 48,000 tonnes per day.
- R DAS ISLAND:** This heavily industrialised 3 kilometre oil and gas processing complex is where ADGAS performs most of its processing storage and export operations. Das Islands LNG and LPG storage facilities have a total capacity of 440,000 cubic metres (15.5 mcf) while sophisticated loading facilities located 700 metres offshore load ADGAS's fleet of LNG carriers that transport products to Japan and other Far Eastern export markets.

Note: Coloured areas on each map represent the demand size - Source: Oil & Gas Magazine

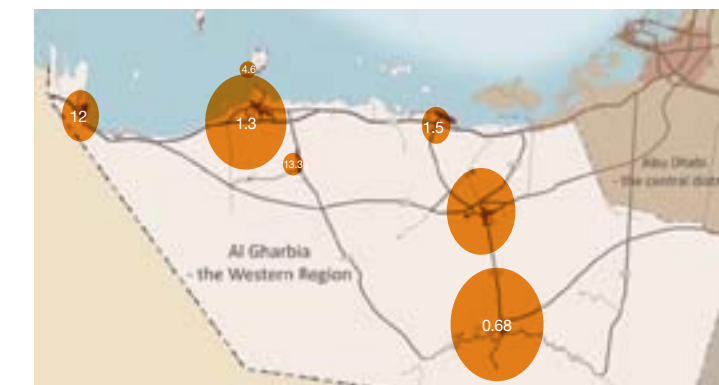
Residential Demand for over 15,000 units



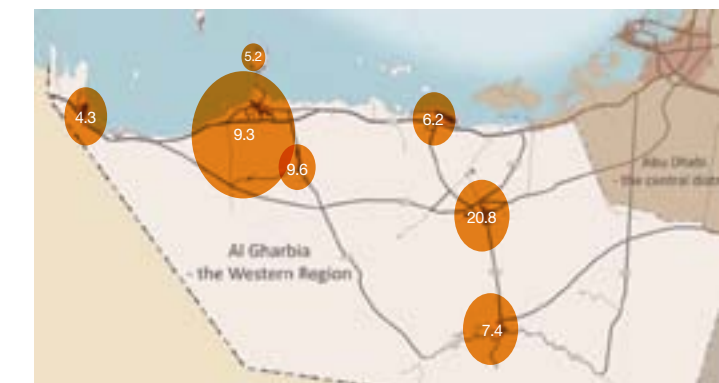
Hotels and leisure Demand for 680 hotel rooms and serviced apartments



Commercial / Office Demand for 77,000 sqm



Retail Demand for 63,000 sqm



Al Gharbia statistics and projections



Regional statistics

Sila

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
9,300	17,500	3.1 88%

Regional residential demand

2010-2015		2015-2020	
Villa	33	Villa	24
TH	585	TH	417
Apart	886	Apart	631

Regional office demand
000s sqm GLA

2010	2020
12.0	18.0

Regional retail demand
000s sqm GLA

2010	2020
4.3	17.0

Regional hospitality demand
Rooms

2010	2020
75	228

Regional industrial demand
000s sqm GLA

2010	2020
36.9	302

Dalma

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
5,500	8,300	2 51%

Regional residential demand

2010-2015		2015-2020	
Villa	8	Villa	6
TH	141	TH	106
Apart	241	Apart	161

Regional office demand
000s sqm GLA

2010	2020
4.6	6.9

Regional retail demand
000s sqm GLA

2010	2020
5.2	8.5

Regional hospitality demand
Rooms

2010	2020
45	72

Regional industrial demand
000s sqm GLA

2010	2020
13.0	108.3

Ghayathi

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
14,000	21,000	2 50%

Regional residential demand

2010-2015		2015-2020	
Villa	12	Villa	6
TH	208	TH	97
Apart	315	Apart	147

Regional office demand
000s sqm GLA

2010	2020
13.3	19.0

Regional retail demand
000s sqm GLA

2010	2020
9.6	21.1

Regional hospitality demand
Rooms

2010	2020
15	24

Regional industrial demand
000s sqm GLA

2010	2020
41.8	321

Ruwais

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
28,900	130,000	7.2 350%

Regional residential demand

2010-2015		2015-2020	
Villa	233	Villa	132
TH	2,826	TH	2,307
Apart	4,279	Apart	3,493

Regional office demand
000s sqm GLA

2010	2020
1.3	26.4

Regional retail demand
000s sqm GLA

2010	2020
9.3	18.8

Regional hospitality demand
Rooms

2010	2020
190	204

Regional industrial demand
000s sqm GLA

2010	2020
202.9	290.3

Mirfa

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
17,300	75,000	7.0 333%

Regional residential demand

2010-2015		2015-2020	
Villa	20	Villa	15
TH	357	TH	260
Apart	540	Apart	393

Regional office demand
000s sqm GLA

2010	2020
1.5	34.3

Regional retail demand
000s sqm GLA

2010	2020
6.2	23.6

Regional hospitality demand
Rooms

2010	2020
175	291

Regional industrial demand
000s sqm GLA

2010	2020
10.1	68.2

Madinat Zayed

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
33,900	61,000	2.9 80%

Regional residential demand

2010-2015		2015-2020	
Villa	83	Villa	18
TH	1,442	TH	309
Apart	2,184	Apart	468

Regional office demand
000s sqm GLA

2010	2020
43.3	65.0

Regional retail demand
000s sqm GLA

2010	2020
20.8	55.2

Regional hospitality demand
Rooms

2010	2020
15	24

Regional industrial demand
000s sqm GLA

2010	2020
133	1,017.4

Liwa

Regional population
Current and projected for 2030

2010-2030	CAGR	Uplift
24,900	65,000	4.7 161%

Regional residential demand

2010-2015		2015-2020	
Villa	22	Villa	13
TH	391	TH	229
Apart	593	Apart	347

Regional office demand
000s sqm GLA

2010	2020
0.68	50.4

Regional retail demand
000s sqm GLA

2010	2020
7.4	21.0

Regional hospitality demand
Rooms

2010	2020
163	257

Regional industrial demand
000s sqm GLA

2010	2020
90.4	119.5



Committed leadership support

A word from the Director General of the Western Region Development Council.

Spanning over 60,000 square kilometres, Al Gharbia, the Western Region of Abu Dhabi Emirate is a unique part of the UAE; home to some of the tallest sands dunes in the world, together with over 350 kilometres of untouched coastline containing a spectacular array of marine life. It is where the desert meets the sea and is also one of the main gateways to the UAE being close to the borders of Saudi Arabia and Qatar.

As an integral part of the Abu Dhabi Emirate, Al Gharbia is highly supported by His Highness Sheikh Khalifa Bin Zayed Al Nahyan, President of the UAE, His Highness Sheikh Mohammed Bin Zayed Al Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces and has the direction of His Highness Sheikh Hamdan Bin Zayed Al Nahyan, Ruler's Representative for the Western Region.

Here at WRDC we are on hand to help potential investors, developers and visitors to the region that want to discover its unique opportunities. The council also strives to support the oil and gas sector while working towards diversifying the economic activities in the region.

Already, with various initiatives and projects we are demonstrating the strong and proven determination that we have for our region and our commitment to achieving the vision expressed by our Leadership.

Side-by-side, we are taking bold steps towards our goal.

H.E. Mohamed Hamad Bin Azzan Al Mazrouei
Director General
Western Region Development Council



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WESTERN REGION DEVELOPMENT COUNCIL



JONES LANG
LASALLE

CAPITA SYMONDS

WRDC working in partnership with world class organisations