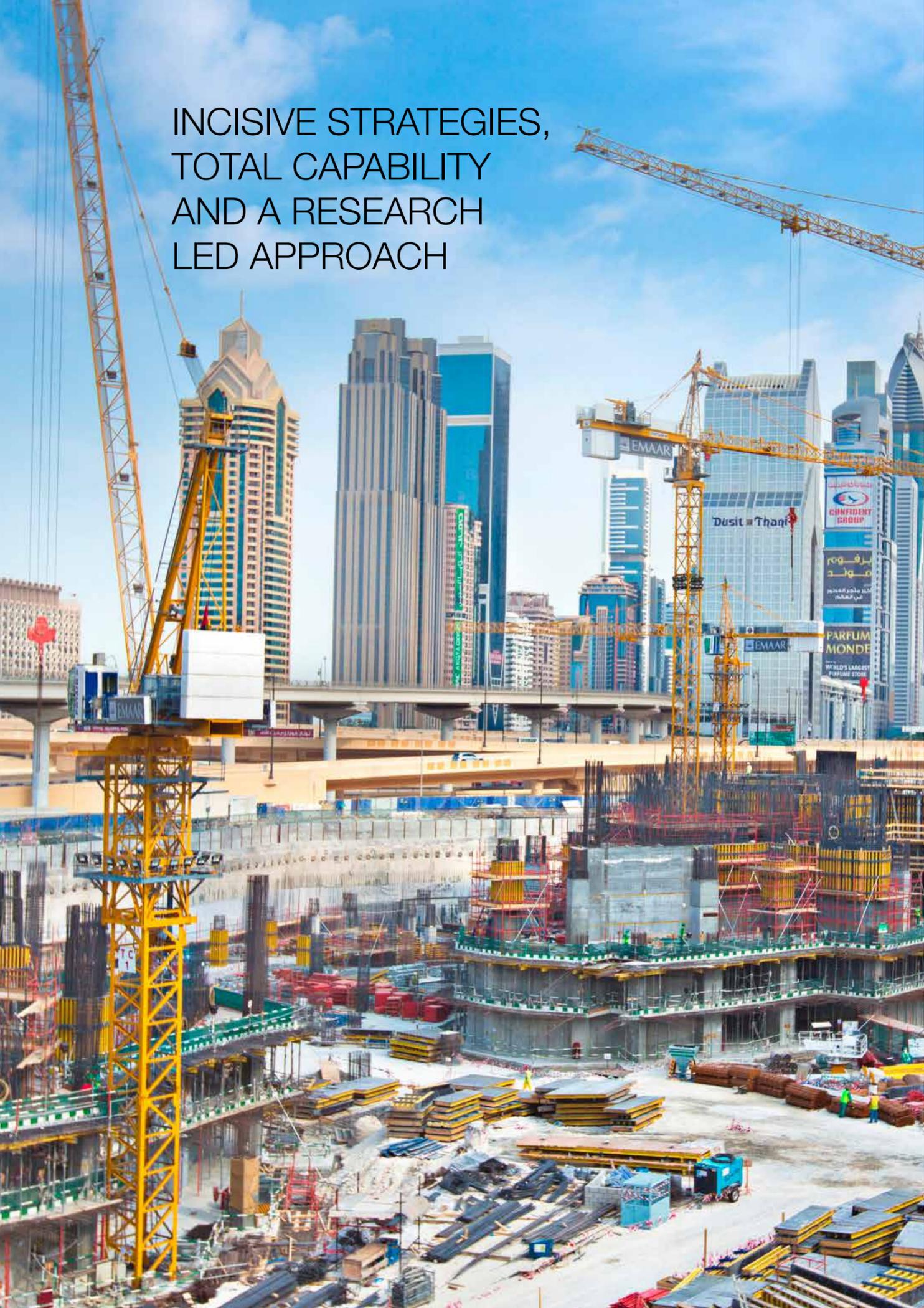


DEVELOPMENT CONSULTANCY & RESEARCH



INCISIVE STRATEGIES, TOTAL CAPABILITY AND A RESEARCH LED APPROACH



Building a strong personal relationship is at the heart of what we do

Our development consultancy and research team takes a multi-disciplinary approach to assist investors, owners, developers, financiers and occupiers at the pre-concept phase, while maximising returns on investment.

Our teams have advised on some of the most high-profile residential, commercial and mixed-use developments across the MENA region. Our goal is to derive maximum gain from real estate development while anticipating, analysing and highlighting potential risks.



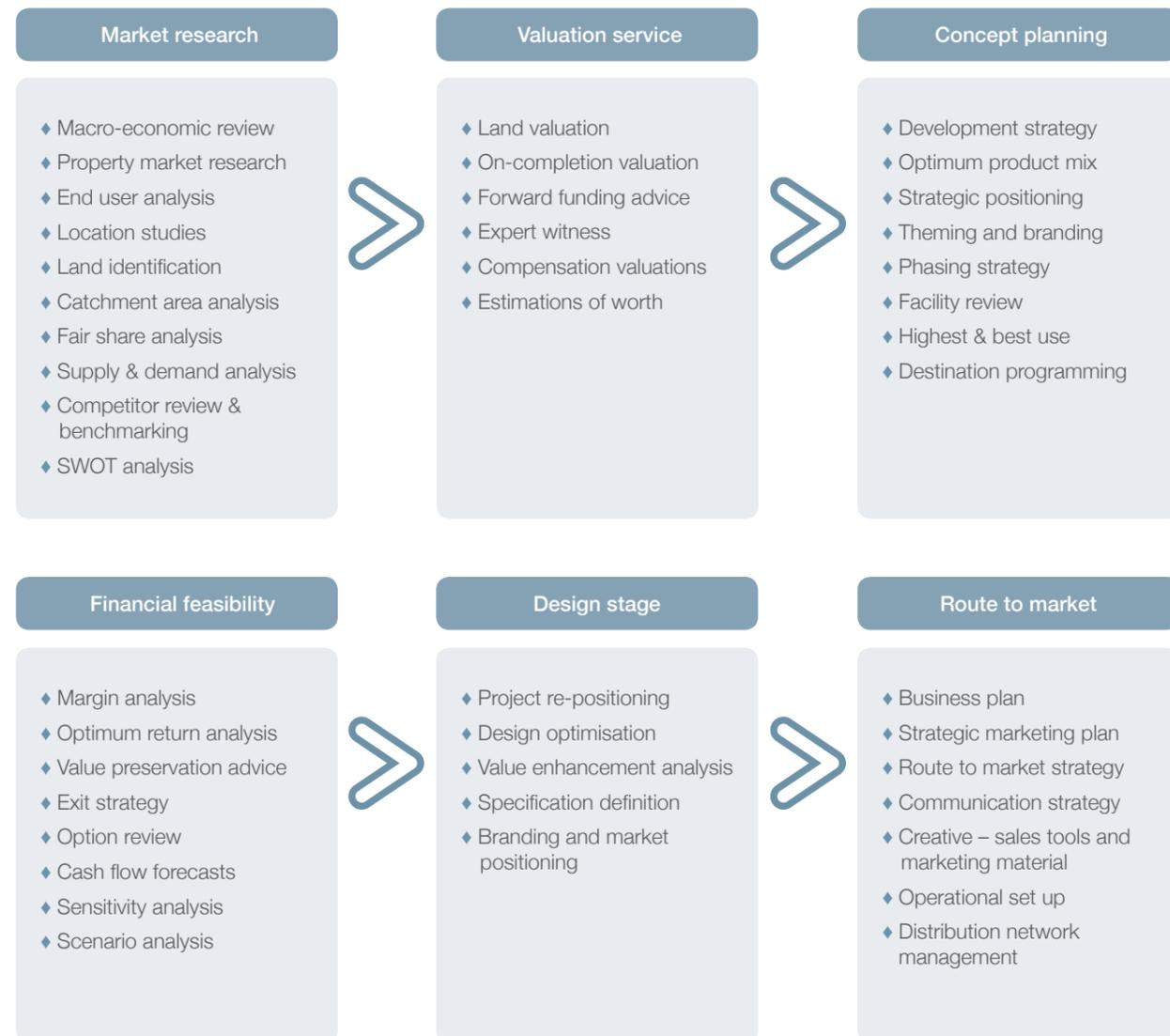
SECTORS COVERED

RESIDENTIAL	HOSPITALITY	OFFICE	RETAIL	INDUSTRIAL
DEMAND DRIVERS				
<ul style="list-style-type: none"> ◆ Interest rates ◆ Population ◆ Employment ◆ Household incomes ◆ Household sizes ◆ Govt. regulations 	<ul style="list-style-type: none"> ◆ Global economy ◆ Passenger arrivals ◆ Demand generators ◆ Access to destination 	<ul style="list-style-type: none"> ◆ GDP ◆ Employment¹ ◆ Population ◆ Education 	<ul style="list-style-type: none"> ◆ Discretionary income ◆ Household wealth ◆ Consumer confidence ◆ Passenger arrivals ◆ Consumer credit 	<ul style="list-style-type: none"> ◆ Employment² ◆ Manufacturing output ◆ Trade ◆ Airfreight volume ◆ Rail & truck volume

1 - Related to Finance, Insurance, Real Estate, Business, Legal & Professional Services
2 - Related to Manufacturing and Transportation

OUR KNOWLEDGE-BASED APPROACH

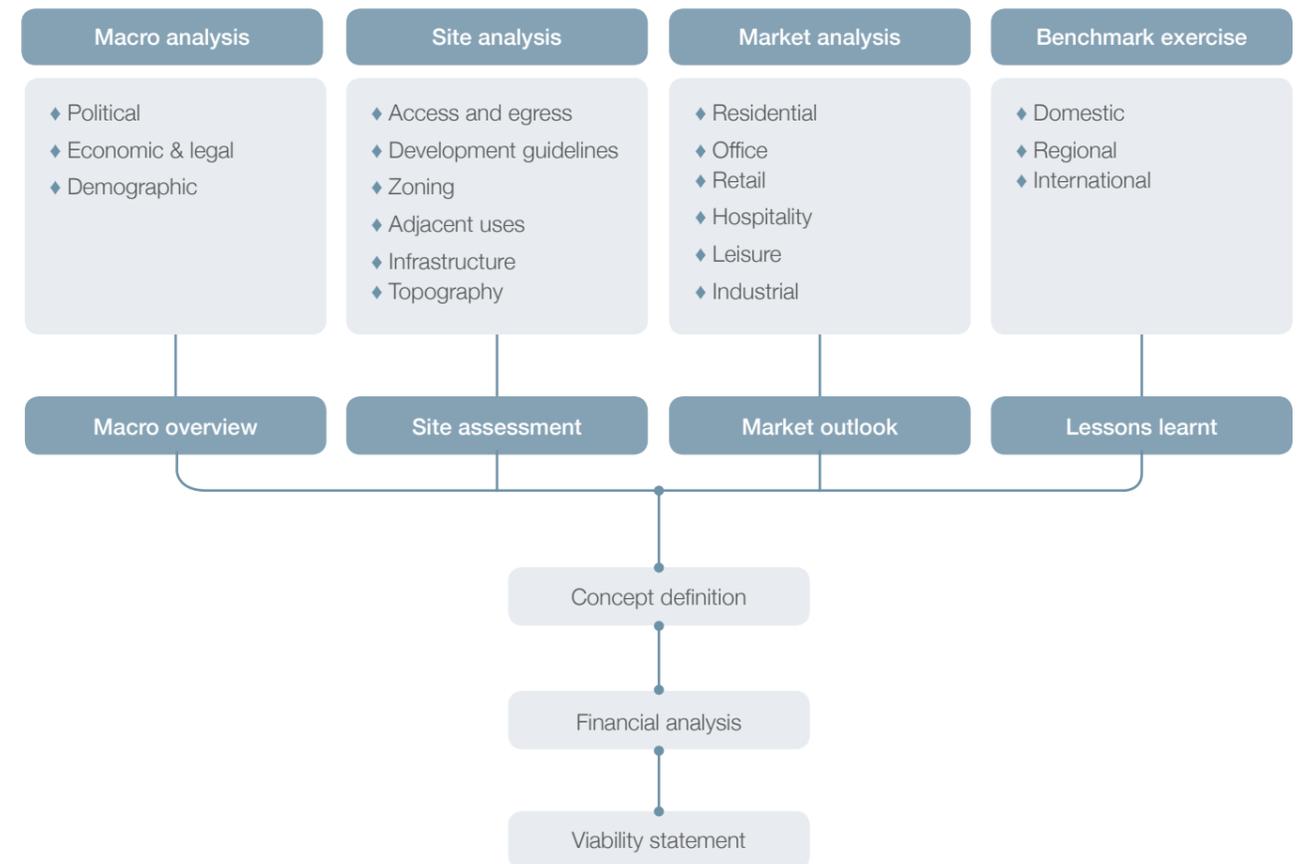
We integrate our sector specialist capabilities to advise on each stage of the development process.



CONSULTANCY PROCESS

We provide comprehensive planning, pre-concept and feasibility advice to developers, stakeholders and funding institutions on the residential and commercial sectors across the Middle East.

Our systematic and analytical approach delivers solutions to navigate complex real estate markets.



TRACK RECORD



1 Kingdom Tower

Jeddah, KSA

The client required Knight Frank to provide a comprehensive review of competitive residential projects for the proposed world's tallest tower, assessing supply and demand dynamics.

Our role

We were able to provide a detailed sales strategy including sales phasing programmes, pricing and anticipated absorption rates. Detailed definitions of target markets and a marketing campaign with budget were also set.



2



3

2 Light Industrial

Jeddah, KSA

The client was the owner of a large tract of land located along the northern periphery of Jeddah. The undeveloped site lacked most of the required infrastructure. The intended use for the land was predominantly for warehousing and showrooms.

Our role

The client required a financial feasibility study to demonstrate to potential investors the viability of the project. The intent of the project was to rezone the land from residential to industrial use, subdivide the land, have the infrastructure in place and sell off the plots to individual investors.

3 ADS Project

Abu Dhabi, UAE

Located 45 km from Abu Dhabi Corniche, the client's vision for the site was to promote the UAE's rich equestrian heritage and create an environmentally sustainable and integrated resort including leisure facilities appealing to families and groups.

Our role

We were instructed to provide detailed business and strategic development advisory services to realise their vision of developing a world-class equestrian themed destination.



4



5



6



7

4 Mixed-use Jeddah, KSA

The client was looking to develop a tract of land located in the heart of the commercial district of Jeddah which was envisaged to include high-end retail, residential, office, hotel and serviced apartment components.

Our role

After assessing the state of the relevant real estate sectors and the expected synergies, a number of development options were presented to the client. Taking into consideration the site's development regulations and client's feedback, the final mix was agreed upon.

5 Al Mouj (The Wave) Muscat, Oman

A unique public-private venture between the Oman Government and MAF. This mixed-use community comprises luxury residential properties, retail, dining facilities, marina and golf course.

Our role

The proposed hospitality components were reviewed and the hotels were repositioned in a way that allowed for a more diversified hospitality offering that avoided the cannibalisation of demand. Moreover, a room count reduction was proposed to enhance profitability.

6 Union Oasis Deira, Dubai, UAE

The client required concept definition and financial evaluation of the first mixed use Transport Oriented Development (TOD) in the country, that was to be developed on a Build, Operate and Transfer (BOT) basis.

Our role

Knight Frank worked with the client and architects to develop a scheme that was in line with future market dynamics given the anticipated regeneration of the micro market. Based on inputs from Knight Frank, the existing component mix was adjusted in order to increase profitability, reduce project risk and better leverage from the integrated transport links.

7 Heart of Sharjah Sharjah, UAE

Located on the west side of Sharjah Creek, the project aims to link Sharjah's heritage areas, transforming it into a tourist and trade destination. Completion is in accordance with the principles of sustainable development

Our role

Market research and analyses covering hospitality, retail, offices, residential and "heritage". Concept design review in terms of unit numbers, sizes and component mix based on market research findings, benchmarking and financial viability.



8



9



10

8 The Royal Atlantis
Palm Jumeirah, Dubai, UAE
Knight Frank was awarded the global project marketing mandate to provide residential development consultancy and sales execution for the 231 residential units.

Our role
Knight Frank was involved with all design aspects including a complete architectural review, unit mix analysis, unit layout planning, amenity programming, interior specification and building management. The scope of works also included detailed pricing and cash flow analysis, plus an international sales & marketing strategy for the project.

9 Failaka Island
Kuwait
We were instructed as part of a wider consortium to provide real estate research and consultancy advice in respect of a 48 sq km island off the coast of Kuwait called Failaka Island for the Partnerships Technical Bureau (part of the Government of Kuwait).

Our role
We acted as real estate advisor to the consortium which was advising the government on the master planning, development and feasibility of the tourism, heritage and hospitality themed island under a build operate transfer basis.

10 Manara
Bahrain
The light industrial masterplanned development was located off shore on a reclaimed island and in close proximity to Bahrain's International Airport.

Our role
Knight Frank conducted market research on the light industrial sector and provided a highest and best use study in relation to a bonded logistics hub.

WITH
413
OFFICES
IN
60
COUNTRIES

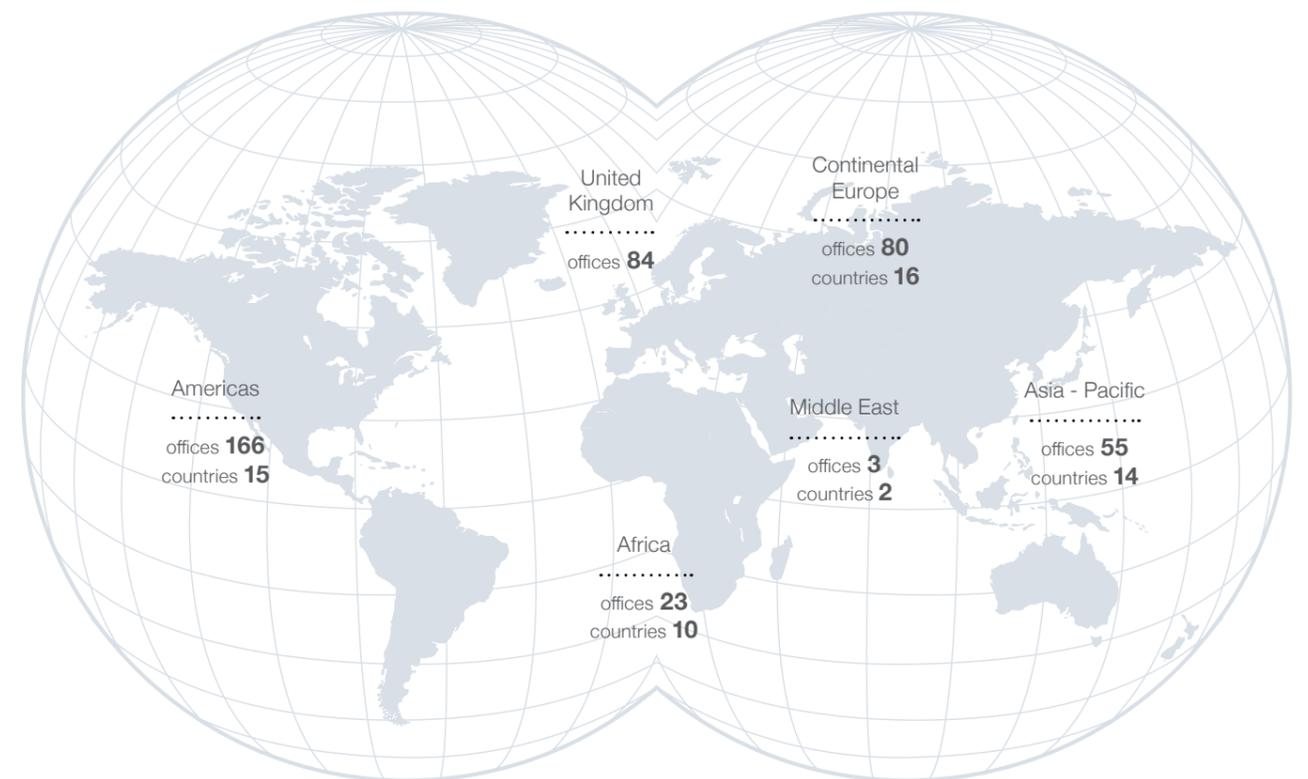
The four ingredients which set Knight Frank apart are our independence, our global network and our commercial and residential platforms.

Headquartered in London, Knight Frank has more than 14,000 people operating from over 400 offices across 60 countries. These figures include Newmark Grubb Knight Frank in the Americas, and Douglas Elliman Fine Homes in the USA.

Being a partnership allows us to put our clients first, we focus on giving them the best advice and putting long term relationships before short term wins. Trust and integrity are everything.

Working with private individuals, developers, investors, banks, corporate occupiers and public sector bodies we provide a range of agency, investment and professional consultancy services which are supported by our dedicated market research teams.

The combination of our people, research and technology has helped us grow our enviable track record and that's why clients come back to us for their personal and professional property requirements.



OUR PEOPLE

Knight Frank employs professionals who are experts in their respective real estate sectors. Depending on the nature and scope of the assignment, the relevant expertise is brought into the consulting team.

Great care is taken to maintain cultural and practical synergies with regards to standards, ethics, resources and risk management.

DEVELOPMENT CONSULTANCY & RESEARCH

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OUR SERVICES

Residential Transactional Services

- ◆ International Residential Sales
- ◆ Residential Project Marketing
- ◆ UAE Residential Sales

Commercial Transactional Services

- ◆ Capital Markets and Investments
- ◆ Commercial Leasing
- ◆ Industrial and Logistics
- ◆ Retail Advisory & Consultancy

Advisory Services

- ◆ Development Consultancy & Research
- ◆ Hospitality Consultancy
- ◆ Project Monitoring
- ◆ Property Asset Management
- ◆ Valuation

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