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Market Special Gulf States - Airports

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1 Introduction

The rapid rate of airport development in the Gulf region presents tremendous opportunities for international consultants, contractors and other suppliers to the regional aviation sector.

EVD, the Agency for International Business and Cooperation, part of the Ministry of Economic Affairs in The Netherlands, promotes the international presence of Dutch companies in foreign markets. EVD has prepared this market special report on developments in the airport sector in the Gulf States of Saudi Arabia, United Arab Emirates, Kuwait and Oman, to identify business opportunities and prospects for the Dutch trade and industry, particularly SMEs.

Based on secondary and primary research, the market report provides the Dutch market players with an understanding of the current and new upcoming projects in the airports sector, the specific development plans in each country, and the key players in the marketplace. It also provides practical information to support entry into the airports such as: identification of decision making authorities, local partners, tendering process etc.

The overall aim of the market special is to strengthen Dutch companies in select Gulf nations within the airport sector, by improving the information services for development of the sector. This would help Dutch companies to be better positioned to win contracts and work in this sector.

This report focuses on airport developments in four Gulf markets - Saudi Arabia, United Arab Emirates, Kuwait and Oman.

2 Overview - Airport Projects in the Gulf Region

It is estimated that over US\$60 billion worth of airport-related projects are currently under way in the Gulf Aviation industry. With 39 airports being constructed or modernized, the region offers business opportunities for suppliers across the value chain of airport development and operations.

In a statement released for the Dubai Airport Show's 2009 edition, the Chairman of Dubai Airports and Chief Executive and Chairman of The Emirates Group His Highness Sheikh Ahmed Bin Saeed Al Maktoum said, "As regional civil aviations continue to construct brand new terminals, concourses and runways, and upgrade their existing facilities in preparation for the next generation of super-jumbos, this pace of modernization creates outstanding opportunities for airport suppliers and contractors."¹

The ten biggest airport projects within the Gulf countries that offer business opportunities for Dutch companies are as follows:

Airport	Project	City	Country	Value (US\$)	Start	Completion
King Abdul Aziz International Airport	Expansion	Jeddah	Saudi Arabia	11.3 billion	2003	2010
New Doha International Airport	New	Doha	Qatar	11.0 billion	2007	2010 ²
Al Maktoum International Airport	New	Dubai	UAE	8.2 billion	2004	2015
Abu Dhabi International Airport	Expansion	Abu Dhabi	UAE	6.8 billion	2005	2012
Bahrain International Airport	Expansion	Manama	Bahrain	4.7 billion	2008	2010
Dubai International Airport	Expansion	Dubai	UAE	4.1 billion ¹	2002	2018
Muscat (Al-Seeb) International Airport	Expansion	Muscat	Oman	2.5 billion	2009	2012 ³
Prince Mohammad Bin Abdul Aziz Airport	Expansion	Medina	Saudi Arabia	2.4 billion	2010	2014
Kuwait International Airport	Expansion	Kuwait	Kuwait	2.1 billion	2010 ⁴	2014
Ajman International Airport	New	Ajman	UAE	1.5 billion	2010 ⁵	2014

Source: www.arabianbusiness.com; www.airport-technology.com

¹ Currently, building the new concourse 3 (part of overall project) at value of US\$ 1.3 billion.

² All phases complete by 2020

³ All phases complete by 2050

⁴ Kuwait Parliament is discussing the possibility of a new airport rather than expansion of the existing airport. There is also talk of privatizing operation of the airport.

⁵ Ajman Airport Project start date is not confirmed. It has been given to a Spanish consortium; no signs of start yet. Even the Spanish Commercial Office in the UAE is unable to provide any additional information. This is the only major development that seems impacted by the financial situation.

Apart from development of international airports, there is scope for involvement in a number of expansion projects in domestic airports and greenfield projects in new sites.

The following sections provide country-wise data and information on key projects and associated opportunities for Dutch companies in four Gulf countries – Saudi Arabia, UAE, Kuwait and Oman.

¹ www.dubaichronicle.com/business/aviation/airport-show-to-showcase-growth-opportunities-in-region%E2%80%99s-aed-220-billion-airport-infrastructure-projects-7577

3 Saudi Arabia

The Kingdom of Saudi Arabia, the largest country in the Gulf region with a population of 28.7 million, has 3 international airports and 24 domestic/regional airports serving civilians. As part of the nation's overall economic development, air transport infrastructure and development including upgrading and expansion of airports is a major priority for the Kingdom's Government.

3.1 Airport Expansion & Development Plans

International Airports

- King Khaled International Airport (KKIA), Riyadh

KKIA, in operation since 1983, serves as the gateway to Saudi Arabia's largest city, the Kingdom's capital Riyadh. It has four terminals, one of the world's tallest air control towers, a mosque and two parallel runways each 4,200 metre long. In addition to the passenger terminals, it has a Royal Pavilion and a cargo terminal. The airport is operated by the international airport management company Fraport AG of Germany.

In August 2008, the General Authority of Civil Aviation (GACA) of Saudi Arabia signed a consultancy contract with the Dutch airport consultancy firm Netherlands Airports Consultants BV (NACO) to help update the Master Plan for KKIA to enable increasing capacity at the airport from 14 million passengers a year currently to about 40 million passengers by 2038.² The project is currently at the planning stage.

- King Abdulaziz International Airport (KAIA), Jeddah

KAIA, in operation since 1981, is the busiest airport in the Kingdom and is located 17.6 kilometers outside Jeddah. The closest international airport to the two holy cities - Mecca and Medina, KAIA is recognized as the gateway to Saudi Arabia. Under a Master Plan developed by NACO, KAIA is currently undergoing major redevelopment.

The KAIA Development Project (KADP), valued at US\$11.3 billion, includes the development of a series of interconnected terminal buildings, new commercial, logistics and cargo areas, new transport infrastructure and support facilities alongside renovation of the existing South and North Terminals and upgrades to the existing runway and airfield systems to accommodate the Airbus A380.

The expansion project is being developed in three phases: Phase 1 is expected to be completed in 2012; Phase 2 is expected to be completed in 2020 and Phase 3 is scheduled for completion in 2035. Once completed, the airport will have an annual capacity of 80 million passengers.

Phase 1 involves overhaul and construction of 2 passenger terminals (north and south), construction of a General Aviation terminal, construction of a desalination plant and other facilities that include: Geo-technical Investigation Package, Topographic Survey Package, Site Logistic Package, The Main Designer package, Mass Earth Work Package, General Aviation Package, Infra-structures / Utilities Package, Main Terminal Building (Foundation/Structural/Finishes) including baggage handling system and passenger bridges, Elevated Roads / Interchanges and Bridges (Landside), New Aircrafts Control Tower, Art Work Package, Landscaping Works, Airside Taxiways / Roads Packages, Buildings Relocated / Removed Package, Deportee Terminal Package, Railway station and Multi-storey car park.

Companies involved with various aspects of the airport project include: Aeroports de Paris Ingenierie (ADPi) for engineering services, Dar Al Handasah Shair and Partners as PMC & Construction Manager and Al-Mabani General Contractors Co as the General Contractor. Site preparation earthworks contract has been awarded to local companies Saudi Binladen Group and Al-Mabani. Airport Operations will be managed by Fraport AG from Germany under a six-year contract.

² www.airport-technology.com/projects/king-khaled

- **King Fahd International Airport (KFIA), Dammam**
KFIA is the largest airport in Saudi Arabia and is located 18 miles outside the city of Dammam. The airport has been in operation since 1999 and has two 4,000 metre runways. It has a single passenger terminal and a cargo terminal.

The Master Plan is currently under review with NACO. BAE Systems has been appointed as the consultant to look into the commercial aspects of KFIA. Airport operations will be managed by Singapore's Changi Airports International under a six-year contract signed with the Ministry of Defence and Aviation in November 2008.

In addition to the current three international airports, the airport at Medina will be upgraded to international standard.

- **Prince Mohammad Bin Abdul Aziz Airport, Medina**
In July 2009, plans to award a build-operate-transfer contract to expand the Prince Muhammad bin Abdul-Aziz International Airport, an airport in the city of Medina, were announced. The project is part of the development of a new Knowledge Economic City project to the east of Medina. The total investment in the new city is estimated to be US\$ 6 billion.

The Master Plan for the proposed development is being prepared by the German company Dorsch. With an estimated budget of US\$ 2.4 billion, the project will be DBOT under the guidance of the International Financial Company.

The overall expansion will be undertaken in three phases that will include refurbishment of the existing runway, development of new terminals, development of a new runway and additional infrastructure.

Phase 1 expected to commence by end of 2009, will involve refurbishment of the existing runway and development of a new terminal with a capacity of 12 million passengers, up from its current capacity to handle 3 million passengers each year. It is expected to be completed within a maximum of four years (up to 2014).³

The project is being led by the Saudi Arabian General Investment Authority (SAGIA) with investment led by the local Savola Group.

Future Development

A further development announced by GACA is that the three main international airports will be turned into 'airport cities' with plans for huge commercial offices, malls, hotels, conference halls, and service agencies to be established inside the airport. Each airport would be a separate city where people can live, shop, study, and attend international conferences, in addition to enjoying many other services. GACA is reportedly already looking at proposals by up to 30 private aviation firms to develop the airports and the land around them.⁴

Regional / Domestic Airports

Upgrade facilities at 13 of the Kingdom's domestic airports are also planned. NACO has been assigned to work on providing an integrated plan for the massive project. Although the full details of which airports are being upgraded are as yet unclear; work at the Najran and Sharurah facilities – which are both in the far south of the Kingdom – is anticipated to be completed in three years time at a cost of US\$80 million. Development at these two airports will include the addition of new runways and an expansion of airport buildings and cargo terminals. Additionally, it is planned that some of the Kingdom's airports neighboring its borders will be run as 'regional international' hubs. Jazan airport will receive international flights coming from Yemen.

New regional airports are also being developed in the Kingdom.

- **Prince Taif Domestic Airport Development**
A new regional airport in Taif Province will be built at a cost of US\$500 million. The prospective 57 sq. kilometer airport will be located 30 km northeast of Taif, 70 km from Makkah, and 160 km from

³ [www.business24-7.ae/Articles/2009/7/Pages/Saudiplans\\$24bnMedinaairportexpansionreport.aspx?FORM=ZZNR](http://www.business24-7.ae/Articles/2009/7/Pages/Saudiplans$24bnMedinaairportexpansionreport.aspx?FORM=ZZNR)

⁴ www.saudiqazette.com.sa/index.cfm?method=home.regcon&contentID=2009102052064

Jeddah. Work is underway to execute design studies.⁵ The joint venture of Saudi's Adham Group and Scott Wilson Kirkpatrick & Company is the consultant for the initial plan of the airport.

- **Prince Abdulmajeed Airport in Al Ola**

A new airport, at a cost of US\$38 million, is being built in Al Ola, near the heritage site at Madain Saleh. It includes construction of a main terminal, runway, an aircraft yard, two service buildings, residential campus, and a building used for switchgear, substations and chillers. The airport is designed to serve 100,000 people (both tourists and local residents) annually.

Almabani General Contractors was awarded the main construction contract in the end of 2007. Construction started in early 2008 and the project is expected to be finished by early 2010.

3.2 Decision Making for Airport Projects

General Authority for Civil Aviation (GACA)

Control of airports, air traffic management and the regulation of air transport is the responsibility of the General Authority for Civil Aviation (GACA) of the Kingdom of Saudi Arabia. The GACA (earlier known as the Presidency of Civil Aviation) has been set up as an independent authority to develop the air transport sector on a commercial basis, with the target of achieving financial self-sufficiency by the year 2016.

All airports in Saudi Arabia are owned by GACA whose responsibilities include the construction, management and operation of the Kingdom's civil airports, as also encouraging investment in them.⁶

The GACA is managed by a President and a Board of Directors. GACA's President is Abdullah Bin Mohammed Noor Rehaimi. GACA has separate business units for Air Navigation Services, the three international airports and domestic airports. Each business unit is headed by a Vice President. It also has an internal department called the Programme Management Office (PMO) that assesses the viability of each project and reports via a Steering Committee to the President. Further, it oversees the implementation of approved projects.

Contact details for GACA are provided in Appendix A.

Saudi Arabian General Investment Authority (SAGIA)

SAGIA oversees investment affairs in the Kingdom, including foreign investments. SAGIA is focused on promoting three areas for investment: energy and its sub-sectors, transportation (including aviation), and information and communication technologies (ICT). Foreign companies can get a license from SAGIA to set up an industrial or a non-industrial project in Saudi Arabia and/or to open a sales / marketing office to complement their project.⁷

SAGIA is governed by the Governor and a Board of Directors constituted of representatives from different Ministries. The Authority operates under the umbrella of the Supreme Economic Council and is headed by SAGIA Governor Amr Al Dabbagh.

The DBOT project for the Medina airport is led by SAGIA.

Contact details for SAGIA are provided in Appendix A.

Tendering for Government Procurement Business

Foreign firms can bid for government contracts. Tenders for airport projects are floated by GACA directly, as there is no central tenders' board in Saudi Arabia. Foreign companies can bid for projects directly although a number of projects may be reserved for qualified local companies only or those with prior experience working in the country.

⁵ www.eturboneews.com/6160/new-airport-taif

⁶ Details of GACA's key responsibilities can be found on its website www.gaca.gov.sa.

⁷ Details on SAGIA's key responsibilities and activities can be accessed from its website www.sagia.gov.sa.

In most cases, government contracts awarded to foreign companies require 30% of the total work to be subcontracted to a Saudi Arabian contractor. This is specifically applicable for 'public works contracts' such as construction contracts generally, as well as maintenance and operations contracts. Such contracts won by a foreign contractor or any Saudi-foreign joint venture prime contractor (with less than 51% Saudi capital), must be sub-contracted to contractors who are at least 51% Saudi owned and sponsor their own workers.

Tenders are announced in the Official Gazette, in any two local newspapers⁸ and by electronic means of advertisement. Works or projects of special nature for which no supplier or contractor is available in the Kingdom are also likely to be announced abroad. It is to be noted that contracts, their documents and annexes are typically drafted in Arabic. Another language beside Arabic may be used, provided that Arabic is the prevailing language for interpretation and execution of the contract as well as for determination of its specifications, plans and communications relating thereto.⁹

A Bid Examination Committee (BEC) examines the bids and submits its recommendations in accordance with the provisions of the Law and its Implementing Regulations; it may support its recommendations with a report by specialized technicians. GACA's BEC would typically include the GACA President, members from its Business Units and the PMO, and the project consultants.

GACA's website (www.gaca.gov.sa) lists tenders open for bids under the e-services section.

A useful resource is the subscription-based web portal – www.SaudiTenders.com that provides the latest business information on projects, tenders, enquiries and business deals across business sectors, including airports, in the Kingdom of Saudi Arabia.

⁸ Main newspapers in Saudi Arabia are: Saudi Gazette, Asharq Al-Awsat, Al Watan, Arab News, Okaz and Al-Riyadh

⁹ www.mof.gov.sa/en/docs/rules/Doc/Government%20Tender%20and%20Procurement%20Law-%204%20Dec%202007.doc

4 United Arab Emirates

The United Arab Emirates is a confederation of seven Emirates, each of which operates with its own independent development plans. Five of the Emirates currently have at least one airport; almost all have plans to develop and/or expand their airport infrastructure.

4.1 Airport Expansion and Development Plans

Dubai International Airport (DIA), Dubai

Opened in 1960, Dubai International Airport (DIA) is a major aviation hub in the Middle East and is the main airport of Dubai. It is the home base of Dubai's international airline, Emirates and Emirates SkyCargo and the low-cost carrier, Flydubai. As of June 2009, there are over 5,600 weekly flights operated by nearly 100 airlines to over 200 destinations across all six continents.

Under the DIA Master plan, major expansion is under way at the airport since 2002. Phase 1 and part of Phase 2 of the expansion involving reassessment of the runway system and development of the taxiways, construction of a new terminal building - Terminal 3, and Concourse 2 have been completed.

The next stage of the Phase 2 development, which includes the construction of Concourse 3, is currently in progress. Concourse 3 will be connected to the two major public levels of Terminal 3 via an automated people mover in addition to the vehicular and baggage handling system utility tunnels. The building, which follows the characteristic shape of Concourse 2, will be 645m long, 90m wide and 42m high in the centre from the apron level. It will accommodate 20 aircraft stands, 18 of which will accommodate Airbus' new A380 aircrafts.

The project is valued at US\$ 1.3 billion (total DIA expansion project valued at US\$ 4.1 billion). Construction is expected to be completed within two years, with plans to open by 2012.

The local firm Al Jaber Engineering and Contracting has been awarded the main construction contract. The mechanical, electrical and plumbing (MEP) contract is with ETA Ascon, another local company.

A Cargo Mega Terminal is also to be built which will have the capacity to handle 3 million tonnes of cargo a year. Completion for the Mega terminal is expected to be no later than 2018.

Upon completion of the full expansion program, DIA will have three terminals and three concourses, two cargo mega terminals, an airport free zone, an expo centre with three large exhibition halls, a major aircraft maintenance hub and a flower centre to handle perishable goods.

Al Maktoum International Airport, Jebel Ali, Dubai

Dubai's government is also constructing a new airport in Jebel Ali named Al Maktoum International Airport that is expected to be the fourth largest airport in the world in terms of physical size. The airport is part of Dubai World Central (DWC), a 140 square kilometre urban aviation community centered around it (www.dwc.ae).

The project scope includes the construction of six parallel runways, which are each 4.5km in length, three passenger terminals including two luxury facilities, multiple concourses, 16 cargo terminals, executive and royal jet centres, hotels and shopping malls, and over 100,000 parking spaces for airport staff and passengers. Upon completion, the airport will have capacity to cater to 120 million passengers annually and handle 12 million tonnes of cargo.

Construction of the first of its 16 cargo terminals has been completed. The first passenger terminal is 80% complete with MEP works ongoing. Construction of the Middle East's tallest free standing Air Traffic Control (ATC) tower has been completed. Currently, the tower is being fitted with all navigational aids. Construction on all related infrastructure works is in progress.¹⁰

¹⁰ www.dwc.ae/site/DubaiWorldCentraltoGolivein2010SheikhAhmed.html

The project is valued at US\$ 8.2 billion. It is expected to be completed by 2017, with the first passenger terminal expected to open in 2010. It is owned by Dubai Aviation City Corporation that incorporates both Dubai World Central and Dubai Airports Company.¹¹

Abu Dhabi International Airport, Abu Dhabi

A US\$ 6.8 billion expansion plan is under way at the Abu Dhabi International Airport since 2004. A new third terminal is already operational, and the soft-launch of the CAT III (B) second runway was introduced in October of 2008. An air traffic control tower and a new Midfield Terminal Complex are planned as part of the overall expansion plan.

The project is owned by the Abu Dhabi Airport Company (ADAC). In December 2006 Changi Airport of Singapore was awarded a management and operations contract for Abu Dhabi International Airport. In January 2007 Changi was also retained as a consultant to advise ADAC on its ongoing expansion plan at the airport.

The project is planned in two phases; Phase 1 to be completed in 2011, and Phase 2 by 2012. The master plan has been developed by Kohn Pederson Fox. Halcrow, the engineering consultancy firm from UK, is the designer of the new runway. Thales (France) has been awarded the contract for building the new 20-storey air traffic control complex. Other contractors for the project include the Belgian Besix Group (general construction) and its subsidiary Six Construct in the UAE, and the local Al Jaber Energy Services.¹²

Al Bateen Executive Airport, Abu Dhabi

In Abu Dhabi, ADAC also manages Al Bateen Executive Airport, the only exclusive luxury business jet airport in the Middle East and North Africa (MENA). The airport secured full aerodrome certification from the General Civil Aviation Authority in June 2009 in recognition of its high standards in all areas of operations, marking the completion of the airport's transformation from a military airbase to a private and corporate jet airport.

The airport is undergoing a US\$ 55 million upgrade of facilities that will include creating new airside, landside, and facility space on additional airport land. ADAC will manage upgrade of the airfield, acquiring new equipment, improving the terminal as well as landside access and parking.

Al Jaber Aviation (www.ajaprivatejets.com), part of the Abu Dhabi-based Al Jaber Group, began operations as a VIP charter operator from the airport with a fleet of two aircrafts in mid-2009. It has a fleet of 21 aircraft on order, and targets to be a global leader in the VIP charter market.

Other charter flight operators from the airport are Falcon Aviation Services (www.falconaviation.ae) and Prestige Jet (www.prestige-jet.com).

Al Ain International Airport, Al Ain, Abu Dhabi

Al Ain International Airport was opened in 1994, as Abu Dhabi's second international airport. It has recently undergone developments that included the expansion of the main terminal building, a new cargo terminal, and a catering building. The Airport has a 4,000-metre runway and a parallel 4,000 metre taxiway.

New developments include the construction of the Al Ain Aerospace Cluster adjacent to the airport, for the production of aero-structures for Airbus Industries as well as offering support to other aircraft manufacturers or aeronautical-related businesses. The facility will have its own supply chain requirements which will be provided, in part, by SMEs from within the Cluster.

ADAC is also committed to the development of Al Ain International Airport as a hub for low cost carriers and dedicated air cargo freighters. It has signed a joint venture with industrial property developer Helios SinoGulf (www.sinogulf.com) to create world class facilities supporting the air cargo business of Al Ain airport. A Business and Logistics Park, catering to the needs of air cargo, aerospace, and other related industries, is envisaged. It will have 650,000 square metres of office space, distribution centres, light industrial units, freight forwarding stations and supporting facilities. The park will also cater to the demand of the high tech industry and aircraft Maintenance and Repair Operations activities poised to take place in Al Ain airport.

¹¹ Airport City is being designed as a one-stop centre for all aviation related operations

¹² www.airport-technology.com/projects/abu_dhabi/

The first phase of development, representing an investment of over US \$250 million, is scheduled for completion end-2010.

Sharjah International Airport, Sharjah

Sharjah International Airport opened on January 1, 1977, with an annual capacity of two million passengers. It is an important cargo airport and home base of the low-cost carrier Air Arabia. A Master plan has been developed for the airport detailing the expansion as a four-fold project until 2015. By end of 2009, the first stage of the plan will see additional parking positions for passenger aircraft and cargo aircraft, plus four parking positions for general aviation. The airport will also have parking facilities for 800 vehicles.

Further expansion for terminal capacity has a concentration on the commercial activities within the airport, involving increased number of restaurants, hotels and health clubs. New departure and arrival lounges, a bigger duty free area, seating, coffee shops and a food court – as well as prayer areas for males and females, are planned.

The initial budget for the project was US\$60 million, later revised with an additional budget of US\$135 million. GHD Group was awarded the contract for the project design solution. A recent announcement by Sharjah International Airport authorities suggests a plan to build a new \$354 million terminal to meet the growth in demand from passengers. The plan of the new terminal is under development.¹³

Ajman International Airport, Ajman

The project, valued at US\$ 1.5 billion, involves construction of a new airport in a 5 square kilometer area. It includes a 4000 meter runway, two taxiways, hangars and a royal lounge. The airport is projected to handle 1 million passengers a year and a minimum of 400, 000 tonnes of cargo. It also includes tourism, commercial, industrial facilities and 20 plane stations that will host 20 sites.

The design of the airport and the feasibility study was done by Booz Allen Hamilton and the Dutch company ICTS International N.V. The construction will be done by Grupo Inmobiliario Whitelake.¹⁴

The airport will be built in two phases, from 2009-2015. The 18-month first phase will comprise the terminal buildings for arrivals and departures, runway, cargo complex and aircraft maintenance workshop, while the 36-month phase will cover the related facilities. However, construction expected to start end-2009 appears to be on hold at present.

Ras Al Khaimah International Airport, Ras Al Khaimah (RAK)

The Ras Al Khaimah International Airport was opened in 1976 and is 18km south of the city center. The airport serves 27 airlines linking it to destinations in the Middle and Far East, Central Asia, the Indian subcontinent and Africa.

A 20 year master plan for the development of the airport has been prepared. A renovation and expansion project worth US\$16 million is planned, which includes two new terminals, a VIP lounge, automated passenger and baggage handling facilities, and a cargo collection center.

Fujairah International Airport

Fujairah International Airport, located just 1 km from the city centre, is well known for its cargo handling capabilities. It's fully automated cargo handling system serves as a break bulk center, takes in input from the Emirate's seaport and sees it on board cargo flights. Further, the Emirate's Free Trade Zone, which has been established in the port vicinity, is generating an even broader base of export cargo.

To consolidate on its advantageous twin-port position, the Fujairah Government has planned for expansion of the airport at a cost of US\$ 30 million. The scope of the expansion project involves redesigning the structure of the airport departments and creating a new area for quality control and safety; construction of over 100 offices for the airlines, a new tarmac area, a new passenger catering facility and a new tower for air traffic control.¹⁵

¹³ www.arabianbusiness.com/540100-354mn-new-terminal-plan-for-sharjah-airport

¹⁴ <http://gulfnews.com/business/aviation/more-details-of-ajman-international-airport-unveiled-1.103560>

¹⁵ <http://www.arabianbusiness.com/519979?tmpl=print&page=>

Europe Aviation, the airframe MRO company (part of the Vallière Aviation Group) is building the airport's new maintenance facility. The hangar would be supported by aviation software systems from AD Software. Construction has begun and the project is expected to be completed by end-2010.

4.2 Decision Making for Airport Projects

Dubai

The Dubai Civil Aviation Authority (DCA), Government of Dubai and Dubai International Airport are the sponsors of the Dubai International Airport expansion project. In 2006-2007, DCA's organizational restructuring was carried out whereupon Dubai Airports Company was set up to develop the airports as a separate commercial business. Under the new structure, the organization comprises Dubai Civil Aviation Authority, Dubai Airports, Air Traffic Services, and Engineering Projects, among other units. With the launch of Dubai World Central and the new Al Maktoum International Airport, it has since been realigned as Dubai Aviation City Corporation that incorporates both Dubai World Central and Dubai Airports Company.

Dubai Aviation City Corporation (DACC) owns and manages the operation and development of both of Dubai's airports – Dubai International Airport as well as the upcoming Al Maktoum International Airport. The chairman of DACC is Sheikh Ahmed bin Saeed Al Maktoum, who is also the chairman and chief executive of the Emirates Group. Contracts for airport tenders are awarded by DACC.

In addition, Dubai Aerospace Enterprise (DAE), an investment vehicle has been set up to channel US\$15 billion into creating a global aerospace manufacturing and services corporation (www.dubaiaerospace.com). DAE is currently made up of three divisions: DAE Capital - offering tailored aircraft leasing solutions and expert financial consulting services; DAE Engineering - providing aviation maintenance, repair and overhaul (MRO) operations, as well as aircraft completions and conversions; DAE Services - airport solutions provider offering technology-based optimization products and services to airlines and airport operators on a global basis.

Purchases for upgrade, replacement, maintenance work at Dubai International Airport are undertaken by its Procurement Department. This may be through tendering, or directly with appropriate suppliers depending on the nature of work.

Purchasing for new projects - expansion work at Dubai International Airport and the new airport in Jebel Ali - are undertaken by the Engineering Projects Section. These projects are undertaken through contracts awarded by the Engineering Projects Section, through its Procurement Division.

Prequalification is essential, to work with the Engineering Projects Section. A prequalification request form must be obtained from the section, and the supplier's details would then be registered, along with details on specialization. The Procurement Department could send emails/letters inviting selected suppliers to tender on certain projects, or it could offer tenders publicly particularly for competitive projects where there are a large number of suppliers in the market.

Abu Dhabi

In Abu Dhabi, the Department of Civil Aviation in conjunction with the Supervision Committee for the Expansion of Abu Dhabi International Airport (SCADIA) began, in 2004, to work on the expansion plan to transform Abu Dhabi International Airport into a major transport hub for the Middle East for both cargo and passengers.

In August 2006 Abu Dhabi International, along with all other airports in the emirate were privatized and placed under the auspices of the Abu Dhabi Airports Company (ADAC), established to spearhead the redevelopment of Abu Dhabi's aviation industry. ADAC now oversees all of the work relating to the new midfield terminal development and further expansion of airport facilities.

Contracts for airport tenders are awarded by ADAC. All project work is undertaken by the Supervision Committee for the expansion of Abu Dhabi International Airport, SCADIA, including tendering contracts. For general enquiries relating to Expressions of Interest, contact is to be established with Senior Program Director, SCADIA (contact details provided in Appendix).

Abu Dhabi has also set up an investment corporation called Mubadala Development Company (Mubadala) that manages a multi-billion dollar portfolio of local, regional and international investments and project initiatives. Mubadala is creating a new global aerospace industry for Abu Dhabi, focused on an integrated approach including manufacturing, maintenance, repair and overhaul facilities.

It has announced the construction of its new Abu Dhabi Composites plant called Strata that will be operational in 2010. Phase one will include the development of a state of the art 21,600m² facility, with the manufacturing of advanced composite aerostructures beginning in the last quarter of 2010. Subsequent phases of expansion are planned to provide a total facility in excess of 60,000m² over the next few years. Strata has formed industrial partnerships with leading aerospace companies EADS, Airbus, FACC and Alenia Aeronautica (a Finmeccanica company) through which composite aerostructure manufacturing programs will be established in the new plant. Initial contracts with these partners carrying a total value in excess of US\$2 billion have already been finalized.¹⁶ (Mubadala contact details provided in Appendix).

Sharjah

The Sharjah Airport Authority owns and manages the Sharjah International Airport. The Department of Civil Aviation and the Sharjah Airport Authority are responsible for airport investments and development projects.

Ajman

The planned new airport is under the ownership of the Government of Ajman.

Ras Al Khaimah

The Ras Al Khaimah Department of Civil Aviation is the regulatory authority for all civil air transport activities in the Emirate of Ras Al Khaimah. It also operates and maintains Ras Al Khaimah International Airport and controls the RAK Flight Information Region (FIR). Its Chairman is Engr. Salem Bin Sultan Al Qasimi.

In 2006, all the departments of RAK International Airport were transferred to the RAK Airport Company under a new privatization plan.

Fujairah

The Fujairah International Airport is owned by the Government of Fujairah. Its Director General is Dr Khaled Al Mazrouei.

Tendering for Government Procurement Business in the UAE

For airport sector procurements, tenders are floated by the individual Emirate Governments or the owning company for airports management, operations and development such as SCADIA in Abu Dhabi.

UAE federal government procurement is governed by the Public Tenders Law. Only U.A.E. nationals, foreign entities represented by a U.A.E. agent, or foreign entities with U.A.E. partners may bid for public sector tenders for the supply of goods and public works projects that are governed by the Public Tenders Law. As a result, foreign entities wishing to perform public sector contracts for federal government procurement are generally required to have some level of U.A.E. national participation.

On the other hand, applicable tender laws for public sector procurement vary by Emirate. For example, in Dubai, the required qualifications, specializations and other terms and conditions for participation vary according to the project and the authority concerned. Certain tenders are offered internationally but where local tenders are involved only those companies licensed and registered with the department concerned are eligible to bid. In order to qualify to participate in a tender one or more of the following may apply:

- The tenderer shall be a firm wholly owned by UAE nationals. In the case of a partnership, at least 51% of the equity must be owned by UAE nationals. A foreign party may only tender if it has a UAE representative or agent with the necessary documents

¹⁶ www.mubadala.ae/en/media/press-releases/abu-dhabi-to-start-composite-aerostructure-manufacturing-in-2010.html

- The tenderer should hold a valid licence from the Economic Development Department
- The tenderer must be a member of the Dubai Chamber of Commerce and Industry

The general requirement for U.A.E. national participation is not uniformly observed by all government agencies in the context of certain direct sales to the public sector or private tenders in which the government solicits bids directly from relevant manufacturers, particularly in cases in which the goods or services are specialized or not widely available. These “exceptions” arise on a case-by-case basis.

It is advised that details on tender laws applicable for individual Emirates be obtained from a legal firm in the Emirate.

A useful resource for keeping abreast of government tenders is the subscription-based web portal – www.EmiratesTenders.com that provides the latest business information on projects, tenders, enquiries and business deals in the airports sector in the UAE. It provides e-mail notification on areas of business, and a newsletter listing opportunities for new contracts.

The complex set of local and international firms that are contracted and subcontracted on projects is evident from the case of the Dubai International Airport Terminal 3 project:

- Aéroports de Paris International was contracted as project design consultant. Regional design group Dar Al-Handasah Consultants were contracted to design the Concourse 3 part of the project.
- The retail areas have been designed by CIL of London in conjunction with Retail Concepts of Dubai.
- Structural engineering of the Terminal 3 facade was carried out by Knippers Helbig KHing GmbH. General Electric Security provided explosive detection systems, and QinetiQ its Tarsier Radar system for the detection of debris on the runways.
- Al Naboodah Engineering Services, in collaboration with its sister M&E contracting company, Messrs Trans Gulf Electro Mechanical, were contracted for the expansion of storm water facilities. It subcontracted to Blackburn Starling for the supply of the pump station motor control equipment.
- Al Naboodah Contracting was awarded the civil engineering contract for the Terminal 3 and Concourse projects. Cleveland Bridge and Engineering ME were responsible for the structural steel work.
- Preston Aviation Solutions of Australia, a subsidiary of Boeing, was contracted to perform a simulation study on Dubai Airport to determine, visualize and analyze the risk in the future expansion of the airport.
- Siemens was awarded the contract for the complete airfield lighting and airfield lighting control system for the expansion project.
- ARINC Inc was awarded the IT contract, and supplied advanced passenger check-in equipment and critical electronic systems at the airport. ARINC is also part of a consortium led by Thermo LLC, also including ALCATEL and LinkForce, which had the MEP contract for the terminal.
- APW Enclosure Solutions was awarded the contract for all electronic enclosures for data networks and communications systems.
- Joint venture partners Al Habtoor Engineering of Dubai and Murray & Roberts of South Africa, along with Takenaka, were awarded a contract for completion of Terminal 3, Concourse 2 and the car park at Dubai International Airport.

5 Sultanate of Oman

The Sultanate of Oman's main gateway is Muscat International Airport (formerly Al-Seeb International Airport) in Muscat, the nation's capital. It is the hub base for the national airline Oman Air. Salalah Airport is the second gateway, located in Salalah in the southern region of Dhofar. The airport handles international schedule and charter flights all year round.

In September 2007, the Oman Government announced plans to invest more than US\$ 3 billion in its airports sector, including upgrades to its existing facilities at Muscat International Airport and Salalah Airport, as well as the construction of six greenfield airport projects in the country.

5.1 Airport Expansion and Development Plans

Muscat International Airport

The expansion project for Muscat International Airport is aimed at increasing its annual passenger capacity from 5 million to 48 million (expected to be reached in 2050). It includes expansion of the existing terminal and the construction of a new terminal.

The airport expansion project consists of three phases / packages: Phase 1 (Package MC1) includes a new runway, roads, interchanges and bridges. Phase 2 (Package MC2) includes an Air Traffic Control tower, an air traffic management center, data center and a cargo terminal with a capacity of 200,000 tonnes of cargo per year. Phase 3 (Package MC3) includes a passenger terminal, shopping arcades, a 40 bed hotel and catering facilities. Phase 1 is expected to be completed in 2012. In 2015, the project is expected to be completed. The project value is estimated at USD 2.5 billion.

A partnership of Denmark's COWI and Larsen Architects & Consulting Engineers (India) is the project consultant. The joint venture of National Engineering Services of Pakistan & Partners (NESPAK) and France's Aeroports de Paris Ingenierie (ADPI) is the PMC.

In May 2009, a US\$ 1.17 billion contract was awarded to a joint venture owned by Consolidated Contractors (CCC) of Greece and TAV Insat of Turkey to take up civil works at the airport. The contract includes the future construction of a new runway, taxiway, apron parking, land development and access roads to the airport, ground improvement works, electrical substations, chiller plants, fuel hydrant system and all electromechanical works.

Salalah Airport

Salalah Airport has been conceived as a new international gateway to Dhofar Governorate. It will also serve as an international and domestic hub for sea cargo in conjunction with the Port of Salalah and Salalah Free Zone. Salalah airport's initial stage of expansion will result in capacity enhancement to accommodate 2 million passengers per year. Once the airport has been fully expanded, the airport will be able to handle 10 million passengers.

The scope of the initial expansion phase includes a new terminal, expansion of the arrivals area; additional baggage claim conveyor belts; additional immigration counters; additional toilets. The project also includes upgrading the existing runway and taxiway system which will be able to accommodate large aircraft types such as the Airbus A380, as well as all the accompanying installations. The new passenger terminal will have a floor area of 35,000 sq. metres and 8 passenger boarding air bridges. The terminal will also have a car park capacity of 1,900. A key feature of the modernization plan for Salalah includes an air cargo terminal equipped to handle 100,000 tons per year in the first phase, rising to 400,000 tons in future expansions.

Initial stage of expansion is scheduled for completion in November 2011. The complete expansion project is targeted to be accomplished by 2015. The project owners are: Government of the Sultanate of Oman, Ministry of Transport & Communication and Oman Airports Management Company.

Development of the facility is envisaged in three distinct packages. Egypt-based engineering consultancy group Hamza Associates is the design consultant for the project. Hamza Associates is supported by U.S.-based engineering, architecture and planning specialists Robert & Company and Burgess & Niple in the design of the facility.

Strabag Oman has been awarded the \$97 million contract for the first phase of the civil works package. Bids have been invited for the second package that involves work on the airfield infrastructure. The passenger and cargo terminals, as well as associated buildings, will be constructed as part of the third package of works.

New Airports

Six Greenfield airport sites - Sohar, Al Duqm, Ras Al Hadd, Adam, Haima and Shaleem – are in various stages of planning and development. After the construction is completed and once these airports are fully operational, they will be managed and operated by Oman Airports Management Company. ADPI has been awarded the contract to manage the construction of the six regional airports in Oman.

The contract for the first phase of the construction of the Duqm airport - worth \$71 million - was awarded to a local contractor Desert Line Projects. Companies bidding for the US\$ 100 million phase 2 airfield infrastructure works tender include: Consolidated Contractors Company, Strabag Oman, Larsen & Toubro (Oman), Hanjin Heavy Industries & Construction, Desert Line Projects, and Galfar Engineering & Contracting. The ministry has retained the services of Parsons International Limited to provide Programme Management and Consultancy Services.¹⁷

Bids are currently being evaluated from the same firms to build the Ras Al Hadd airport. Tender invitations have also been released for the airport at Sohar.

The new Sohar, Al Duqm and Ras Al Hadd airports will have a capacity of 500,000 passengers per year. Adam, Haima and Shalim airports will be able to receive 250,000 passengers per year.¹⁸

5.2 Decision Making for Airport Projects

Oman Airports Management Company S.A.O.C. (OAMC) is a fully owned entity of the Government of the Sultanate of Oman. It is responsible for all airports in the country. Its key functions include managing, maintaining, operating the airports and developing the airport facilities and infrastructure.¹⁹

The Board of Directors of OAMC is constituted of Ministers and Director Generals from the Ministry of Transport and Communications, Ministry of Finance, Ministry of Tourism and the Ministry of National Economy. The Chairman is H.E. Dr. Khamis bin Mubarak Al Alawi, Minister of Transport and Communications. The management team is headed by the Chief Executive Officer. More details can be accessed on: <http://www.omanairports.com/oamcdir.asp>

Tendering for Government Procurement Business

Contracts are floated by the Ministry of Transport and Communication. The Public Tenders Law governs public procurements in the Sultanate. There is a Tender Board that awards the contracts (www.tenderboard.gov.om).

The Tender Board reviews the technical specifications provided by government units for their projects, and verifies the adequacy and may draw on expertise from state officials and other professionals - Omanis or foreigners inside and outside Oman. It accepts offers only from indigenous contractors or agents of foreign parties accredited to the Sultanate. In the case of international tenders, the bidder must make a commitment to register with the Tender Board as per the regulations in force in the Sultanate during the month of tender.

Companies can register with the Tender Board under the following four categories depending on their activities:

- Contractors
- Consultancy Offices and Companies
- Supplies or Supply Companies
- Training Institutes

¹⁷ www.zawya.com/printstory.cfm?storyid=ZAWYA20090824031140&I=031100090824

¹⁸ www.bi-me.com/main.php?id=39173&t=1&c=23&cg=3&mset=1031

¹⁹ More details on OAMC responsibilities and key functions can be accessed from its website www.omanairports.com

In exceptional cases, the law provides that, upon meeting certain criteria, Ministries may form their own internal tenders committees, contract directly with the supplier, or sole source.

Tenders are announced on the Tender Board website, and can also be accessed on the web portal www.OmanProjects.com.

6 Kuwait

Kuwait International Airport is located 16 kilometers south of Kuwait city. It handles more than 100 flights a day in the busy summer season. The airport is a hub for the national carrier Kuwait Airways and the low-fare airline Jazeera Airways. Its current capacity is for six million passengers a year and it is undergoing an expansion scheme.

6.1 Airport Expansion and Development Plans

Expansion plans are underway for Kuwait International Airport to increase its current capacity of 7 million passengers a year to 20 million passengers a year.

The US\$ 750 million expansion project involves the construction of a new terminal building that will be connected to the existing terminal building via a tunnel. The two existing runways will be extended up to 600 meters. The work includes construction of a third runway, airplanes hangars, roads, substations and other airport related facilities.

The project consultant is Beirut-based Dar al-Handasah Consultants (Shair & Partners). Kuwait's Directorate General of Civil Aviation (DGCA) has invited international consultants to submit designs for the new terminal by the end of November 2009.²⁰

Meanwhile, thirteen local firms have pre-qualified for a project construction package worth US\$ 100 million to upgrade the infrastructure for the existing airport. The firms include Combined Group Company, Ahmadiyah Contracting & Trading Company, Mushrif Trading & Contracting Company, Mohammed Abdulmohsin al-Kharafi & Sons, and Copri Construction Company. Known as package one, it covers construction work across the runway, taxiways, aprons, roads and utilities. The electrical infrastructure contract has been awarded to Siemens and is expected to be completed in January 2011. Package two will cover the construction of a number of buildings at the airport including two new fire stations. The entire project is expected to be completed in the second quarter of 2014.²¹ Updates on the project schedule may be tracked on the airport website (www.kuwait-airport.com.kw) or other online sources.²²

6.2 Decision Making for Airport Projects

The Civil Aviation Department of Kuwait was renamed as the Directorate General of Civil Aviation (DGCA) in 1975, after restructuring. It is headed by the President of Civil Aviation.

The DGCA develops, regulates, licenses and monitors the air transport industry in Kuwait and also manages the Kuwait International Airport, duty free and their affiliated companies. The DGCA is in charge of the Kuwait International Airport expansion project.²³

Tendering for Government Procurement Business

Public sector contracting in Kuwait is undertaken by way of an independently administered tendering process.

Tendering procedures for most public institutions are administered by the Central Tenders Committee (CTC), though the client body (i.e. the public body requiring the service) draws up the specification and particular conditions it requires, reviews pre-qualifying companies, and evaluates bids technically. Though some public institutions may have their own tendering procedures, the procedures are in essence the same as the CTC procedure, and all activities relating to public tenders, such as tender announcements, invitations to pre-quality, pre-tender meetings, and amendments to conditions and specifications, are only published in Al-Kuwait Al-Youm, the gazette.

²⁰ www.airports.org/aci/aci/file/ADN%20-%20Mombberger/2009/ACI-July.pdf

²¹ www.constructionweekonline.com/article-5153-top_10_kuwait_projects/1/print/

²² www.menafn.com; <http://www.constructionweekonline.com>; www.airport-technology.com

²³ Details of DGCA's key responsibilities can be accessed from its website www.kuwait-airport.com.kw

Funding for major projects is normally provided by the government. In recent years other forms of financing, such as credit facilities supported by export credit agencies (ECAs) and build-own-transfer (BOT) types of schemes, have been tried.²⁴

A tenderer for a public contract must be a Kuwaiti merchant who is (a) registered with the Kuwait Chamber of Commerce and Industry, and (b) registered as an approved supplier or contractor. The CTC also maintains lists of approved contractors for works. Before getting on these lists a contractor must be classified according to the size of projects he is deemed capable of undertaking. Foreign companies are not classified as they must prequalify each time they bid for public sector contracts.

Pre-Qualification

Participation in some public tenders is restricted to firms who have been pre-qualified, i.e. judged capable of undertaking the particular project. To prequalify, a firm submits a standard set of documents outlining its financial and technical capabilities to the CTC. Foreign firms must prequalify each time they bid for a public contract. Their applications may only be submitted by their Kuwaiti agent and must be accompanied by an authenticated copy of the agency agreement.

Bidding Procedures

Forthcoming tenders are announced in Al-Kuwait Al-Youm as invitations to bid. To collect the documents, a written request in Arabic plus the fee is needed. A foreign firm must show an authenticated copy of the agreement with its local agent.

Firms who have purchased the documents may be invited to pre-tender meetings with the client body. Sometimes these are mandatory and bidders who do not attend find themselves excluded from the tender. The scope of work may be amended after the tender documents have been issued or after a pre-tender meeting. When this happens the administering committee issues a formal addendum which can only be collected on production of the original receipt for the tender documents. Notice of pre-tender meetings and tender amendments are announced in Al-Kuwait Al-Youm and tenderers are seldom advised directly.²⁵

Tenders are announced on the CTC website (www.ctc.gov.kw), and can also be accessed on the subscription-based web portal www.KuwaitTenders.com.

²⁴ www.kuwaitiah.net/business.html

²⁵ www.kuwaitpocketguide.com/businesskwit.asp

7 Public Private Partnerships in the Gulf Region

While most Gulf States are investing heavily in their airport infrastructure to ensure that capacity is sufficient to facilitate future growth, there are nonetheless a few roadblocks being faced:

- Shortage of liquidity together with a reduced appetite for risk in the current economic scenario has resulted in a general shortage of lending for transport and other infrastructure projects
- This is coupled with increased budgetary pressures brought on by the drop in oil prices

In this context, the upgrade of Saudi Arabia's King Abdulaziz International Airport is a significant development in the use of Public Private Partnerships (PPP) in the airport sector in the GCC region. With government concerns regarding private sector access to strategic national assets, and a requirement for a Sharia-compliant financing structure, this PPP project was a particular groundbreaker in the region.

The project was procured on a Build-Transfer-Operate (BTO) basis whereby the concession rights to the terminal and other intangible assets were sold to the lenders and then leased back using an Ijara (Islamic) financing structure. The significance of this deal is that it was the first airport BTO in Saudi Arabia, a country which is traditionally opposed to allowing private sector participation in its infrastructure assets, and also the first time such a structure has been used in a Sharia-compliant manner.

IFC, the private sector arm of the World Bank Group, advised and assisted the General Authority of Civil Aviation in structuring its first public-private partnership transaction, with the private sector partner chosen through a competitive bidding process.

Of the five Saudi and international groups who participated in the bidding process, the consortium led by Saudi Binladen Group in association with Aeroports de Paris Management was selected as the preferred bidder, based on the combined scores of the evaluated technical and financial proposals submitted by the bidders.²⁶

Commenting on this PPP, DLA Piper partner David Harley stated, in a press interview that "it (the PPP) offers a model for other GCC countries who wish to retain ownership of their strategic airport infrastructure and desire an Islamic law compliant financing structure, while drawing on the benefits of the PPP method of procurement."

Apart from Saudi Arabia, Abu Dhabi has also shown interest in PPP. For the new Midfield Terminal at Abu Dhabi International Airport, ADAC is in the process of deciding how the public-private partnership (PPP) contract for this will be structured, whereby private companies will jointly fund and operate the facilities.²⁷

The PPP structure is already being used by the Abu Dhabi government in the power, water and education sectors and in the development of the Industrial City of Abu Dhabi (ICAD) Special Economic Zone by Zonescorp (<http://www.zonescorp.com>).²⁸

Zonescorp's development of the ICAD is a successful PPP project in Abu Dhabi. The corporation was established by government decree and entered into project arrangements in a joint venture with Abu Dhabi Commercial Bank (ADCB) and Macquarie Group UAE, member of the Australian group. Zonescorp provided the concession to the joint venture to develop areas of the ICAD, with a fund owned jointly by ADCB, Macquarie and Zonescorp as a true PPP project whereby the equity interest and risk is shared between the parties. The relationship between the three parties is strong and well balanced - ADCB brings local knowledge, Macquarie has significant experience in PPP infrastructure developments, and Zonescorp is a well organized government entity.

With the success of the ICAD the government and the developers in Abu Dhabi can look to the PPP model for these and future projects. The structure of a PPP in the airports sector will vary

²⁶ www.ifc.org/ifcext/mena.nsf/Content/SelectedPR?OpenDocument&UNID=5BB85AD18BB77D5F852572510056E541

²⁷ www.thenational.ae/article/20090108/BUSINESS/276098943/1040/SPORT

²⁸ www.zawya.com/story.cfm/sidZAWYA20061228100954

depending on the amount of risk allocated to the private sector. The government is clear on the benefits of a PPP:

- The use of funds other than only public funds to complete a project
- The project is taken off the government balance sheet
- Performance and risk is shared by the private sector
- Strategic control is shared with the private sector
- Services are expected to be delivered more efficiently and more effectively

The interest of local government in such PPPs is that given the considerable size of the infrastructure development projects pending in Abu Dhabi and the complexity of the development of the projects, the public sector has the opportunity to take advantage of the experience of the private sector globally in developing these first class facilities. There are no known set guidelines on what attributes the government seeks in PPP partners.

It is learnt that investment projects in Kuwait International Airport are also planned to be executed with private parties on a BOT basis, though no details are understood to have been finalized.²⁹

With a large number of airport expansion plans set to proceed and despite the current uncertainty in the financial markets, PPPs are likely to play an important role in the region's success in the long-term. Equally, other massive infrastructure development projects such as rail projects involve heavy expenditure. These deals typically involve private contractors taking on some of the project risk by financing the construction themselves before transferring it to government clients.

²⁹ www.menafn.com/qn_news_story_s.asp?StoryId=1093247988

8 Sustainable Products in the Gulf Region

Increasingly, governments in the Middle East region are placing importance on sustainable products and products with sustainable characteristics. According to international trade body, International Air Transport Association (IATA), significant savings have been achieved in the Middle East North Africa (MENA) region since 2006, including US\$40 million by shortening routes and US\$374 million by improving fuel efficiency with Green Teams.

A wide range of environment-friendly solutions for airports as well as initiatives to enhance sustainability in airport operations and development were highlighted at the 9th Airport Show held in Dubai in May 2009. Among the projects showcased was the King Abdul Aziz International Airport Development Project (KAIA) in Saudi Arabia. High environmental standards are integral to the development and upon completion, the project will be the largest Airport in the world to be Silver LEED certified.³⁰

Some of the exhibitors showcasing innovative 'green' products at the Show are highlighted below:

- US-based Armstrong : innovative, environmentally friendly 'green' ceiling concepts
- Crisplant from Denmark: RampMate baggage handling system with ultra-low carbon dioxide emissions, with 75% reduction in power consumption
- UAE-based Bond Group: Trikke uPT personal transporter that is 100 percent emission free
- atg from the UK: taxiway light fittings with LED technology that use only 10 watts of power
- NANO Energy GmbH from Germany: SVPS (Small Vehicle Power System) that runs solely on a battery retrofitted with a fuel cell supply
- Switzerland-headquartered Cavotec: advanced solutions that enable aircrafts to switch off their APUs (Auxiliary Power Units) while on the ground
- Siemens, Germany: new CoF Conveyor Belts which reduce friction by 30% and new high efficiency motors to reduce energy consumption
- Dubai-based Pacific Controls: range of technologies which deliver carbon reduction

Clearly, stakeholders within the Airports Sector have a growing awareness of the environmental benefits of using sustainable products or products with sustainable characteristics.

At the Government level, specific departments / committees within Ministries are involved in the development of policy and standards for sustainability and green initiatives.

- In Saudi Arabia: Meteorology and Environmental Protection Administration (MEPA) reporting to the Ministerial Committee on Environment (MCE)
- In Oman: Ministry of National Economy reporting to the Ministry of Development
- In Kuwait: General Department of Technical Cooperation in the Ministry of Planning, Environment Protection Council
- In the UAE, at the Federal level, the Ministry of Environment and Water is leading the efforts in environment protection. Independently, the Emirates of Dubai and Abu Dhabi are at the forefront of sustainability development and green initiatives. Dubai has established the Emirates Environmental Group; Abu Dhabi has formed the Environment Agency of Abu Dhabi to contribute to the advancement of sustainable development in the nation
- Notably, Masdar City is being developed close to Abu Dhabi airport as the world's first carbon-neutral city, powered entirely by renewable energy

The Environment, Health and Safety regulatory arm of Dubai World has established the Middle East Centre for Sustainable Development (MCSD) - www.mecsd.com, a policy certification and research institution to facilitate development of 'green buildings'. The Centre aims to be a focal point for sustainable development in the Middle East, including in the transportation sector. International firms offering innovative, sustainable products can expect strong business potential in the Gulf region.

³⁰ www.uaetoday.com/mee_dtls.asp?pid=6568

9 Opportunities for Dutch Companies

The market for airport business in the Gulf region has traditionally been dominated by companies from North America and Europe. However, in recent years, it has become extremely competitive with suppliers from the Asia-Pacific and South Asia regions vying for business and offering competitive (price) advantage. Many local companies too have the resources and expertise to undertake large projects, alone or as part of a consortium with international firms.

With so many new airport developments and expansion projects planned and underway, there are substantial business opportunities for Dutch companies. Several are long-term projects with potential for business over longer periods of time; others offer opportunities immediately, across a wide range of equipment and services. These include:

- Architectural & Construction Services
- Logistics Management
- Civil Engineering and Project Management
- Safety and Security equipment
- Health and Fire systems
- Airport Terminal Buildings
- Apron and Runways
- Passenger Services and retail
- Ground support equipment and passenger transport systems
- Air navigation facility & systems
- Luggage handling systems
- Control Tower, Air Traffic Control
- Instrument Landing Systems
- Surveillance / communication equipment & systems
- Cargo transportation facility
- Infrastructure and support facility for drainage, sewerage and storm-water disposal
- Construction of hotels, passenger car parking
- Catering equipment and kitchen equipment

Details of foreign company contracts provided throughout the report provide a good reference for the types of contracting and sub-contracting that is done in the Gulf region.

A number of Dutch companies have been active in the Gulf airport sector in the areas of consulting, construction & engineering services and equipment supplies. These include NACO (master planning), NKI Group BV (integrated airport solutions: signage, check-in control systems), HITT NV (traffic technology: radar systems), Aviavox BV (intelligent artificial voice systems: PA system), BTI (airport lighting), SACO (cargo handling) and Vanderlande Industries BV (baggage handling systems).

To gain insights on how best (other) Dutch companies, particularly SMEs, can gain entry into the lucrative airport market, a series of interviews were conducted with key players in the airport sector, including Dutch companies, in the Gulf countries. Netherlands Airport Technology group (NAT) and Dutch Consulate were also contacted. The list of companies contacted is provided in the Appendix.

Presented below is a synopsis of the discussions held with these key players.

Awareness and Perception of Dutch Companies

Local consultancies and contracting companies appeared to have limited awareness of and dealings with Dutch companies offering products/equipments and services catering to airport sector projects. Top of mind recollection is of German, British and French companies.

Representatives of Dutch firms present in the local markets held the perception that, despite offering flexible state-of-art solutions with a worldwide reputation, Dutch companies have not kept pace with changing demands in the Middle East airports sector in respect of price and quality.

Examples:

- Price: Passenger loading bridges provided by Aveo Bridge; the category now sees the presence of German and Chinese companies (the latter with strong price advantage)
- Quality: Specialist niche players have made strong inroads – Scandinavia in apron systems, USA in aircraft systems and pre-conditioned air systems, Germany generally seen to have a strong industry with R&D, UK and France with engineering/MEP products and services. Where a Dutch company has stayed ahead on quality, it has continued to thrive such as NACO and Philips.

It is felt that Dutch companies need to have greater focus on marketing in the region. They need to spend more time on the ground in the region or appoint agents to represent their interests, participate in trade events, better understand their competition, and be flexible and competitive on price.

Routes to Airport Business for Dutch Companies

Dutch firms interested in doing business in the Gulf countries are advised to establish initial contact with government authorities, prominent consultants and contractors through the Dutch consulate or industry associations. Visiting the region as part of a business delegation to showcase Dutch equipments and services to key players including Civil Aviation authorities would also be very useful.

Competitor companies from the rest of Europe, USA are seen to have a greater on-the-ground presence, as noted later in this section, with greater participation in trade shows, and a local presence with a branch office (mostly in UAE) as a base to cover the region which is an increasingly important market for suppliers in the airport sector.

According to local consultants and contractors, competition is intense and Dutch companies should be willing to invest time and effort in this market. Regular market visits (at least 2-3 visits each year), and frequent contact with key players through phone and email are deemed essential in order to maintain and grow business relationships with market players.

Contact details of Government authorities and some of the main contractors and sub-contractors are provided in the Appendix.

Consultants and contractors have highlighted a number of ways for Dutch companies to be successful in gaining business in the airport sector in the Gulf region:

- Participate in local/regional trade shows and events to showcase products and services

Trade shows are extremely important in the context of the Gulf region as potential buyers visit from across the region to learn of new products and suppliers, with the intent to buy. The Airport Show in Dubai, for example, is till date the only event of its kind in the region, and attracts buyers from Saudi Arabia, Kuwait, Oman and the rest of the Gulf (and in fact the rest of the Middle East, and Asia). These shows, therefore, offer a good opportunity to meet potential buyers across the region, expose them to Dutch products and services, and start a relationship that could then be followed up with visits to these buyers. At the same time, competitors tend to be present in large numbers, sometimes accompanied by ministerial delegations, so the presence of a Dutch contingent is essential to inform potential buyers of Dutch interest in the region's airport sector.

As mentioned, the most important event in the region is the annual Airport Show (www.theairportshow.com) in Dubai devoted exclusively to airport construction, operations, technology and services. The show is the ideal entry point to the airport market, providing an opportunity to meet potential buyers and decision makers under one roof, while also providing business networking opportunities for exhibitors and visitors. The 2009 edition drew 210 exhibitors from 30 countries and over its three days was attended by 4,710 people from 61 countries.

The Airport Show has seen relatively low participation from Dutch companies – there were only three exhibitors in the 2009 show: Twentsche Kabelfabriek BV, Transoft Solutions and Vanderlande Industries BV. In contrast, the show had strong representation from other European countries such as UK and Germany (28 and 27 exhibitors respectively).

Another important trade show is the Dubai Air Show (<http://dubaiairshow.aero>), held in Dubai every two years. Major business deals are struck at such events that are well attended by government officials and civil aviation authorities from many countries.

- Supply through Main Contractors

Dutch companies can benefit from regular contact with the main local contracting firms, and provide them with detailed product and services information. Suppliers and sub-contractors can also register online with some of these firms and bid on tenders floated by them directly. This could particularly benefit Dutch companies offering specialist, 'niche' products, including sustainable products.

It is also possible to set up joint ventures or representative agency agreements with local firms, especially for any specialist or innovative products and technologies that Dutch companies offer. Bidding for Government tenders often is undertaken by a consortium of local and foreign consultants and contractors; Dutch companies can explore this route.

- Market through Other Local Companies or Agent

Dutch firms can appoint other companies (suppliers / sub-contractors) that cater to the airport sector as their representatives.

It is also possible to explore business opportunities by appointing a local national citizen as a representative or agent who keeps in touch with the government authorities, consultants, contractors etc, and keeps the company informed of developments including new tenders, that are often informed only locally. It is also useful to have such a person to collect tender documents (to be received locally on payment of fees), register the company with the tendering authority and submit the bid documents.

Such an arrangement is not uncommon, with several fee arrangements possible – a lump-sum fee, success fee or commission on sales, etc. BAES in UAE and Al Dastur in Oman have been identified as companies interested to represent foreign firms in this manner; contact details are in the Appendix.

- Setting up a Local / Regional Office

Dutch companies can also consider setting up a local / regional sales and marketing office whose mandate would be to develop relationships and explore business opportunities with key players in the aviation sector including, government authorities, consultants, contractors and local suppliers. As an example, ALES of Czech and Slovak origin (air traffic control systems), AMC Protection of Swedish origin (concrete protection and treatment), Armstrong of US origin (floors, ceilings, cabinets), Avicorp ME of US origin (cable services), Efaflex Door & Safety GmbH of German origin (safe high-speed doors), Smith's Detection ME of UK origin (x-ray and trace detection equipment) and Tensator FZE of UK origin (queue management solutions) are all seen to be operating locally. Dutch company Ooms International Holding is successful with its recently formed joint venture with the Al Jaber Group in the UAE - Al Jaber Bitumen-Ooms, offering polymer modified bitumen.

Local presence is also useful when dealing with the public sector / their consultants, as requirements often necessitate frequent interactions e.g. re-bids, re-negotiations, change of specifications, requests for extended warranties etc.

Although government organizations and prime contractors do deal with overseas companies based in foreign locations, there is a preference for dealing with companies based locally. In fact, some government tenders are reserved for 'local' companies or those with a local presence.

It should be noted that rules for market entry vary by country; legal advice should be sought when planned to set up an overseas office. A good referral website for doing business in the individual Gulf countries is www.mideastlaw.com.

Appendix

Useful Contacts

Government Contacts for Airport Projects

General Authority of Civil Aviation (GACA)

P O Box 887 Jeddah 21165, Kingdom of Saudi Arabia
 Tel: +966-2-6405000 Ext. 2337-3368; Fax: +966-2-6401477
 Email: gaca-info@gaca.gov.sa; Website: www.gaca.gov.sa
 Adnan A Zuhairy, Director KAIA Development Project
 Engr. Mohammed A. Al-Salmi, Vice President, Air Navigation Services
 Engr. Fayez O. Halawani, Strategic Planning Manager, Email: falhalawani@gaca.gov.sa

Airport City Project: Public-Private Partnership

General Authority of Civil Aviation

Bani Malik District
 Business Development & Properties Management Domestic Airports
 Second Floor, Room # 357, P O Box 887, Jeddah, 21421, Kingdom of Saudi Arabia
 Fax: +966-2-6402660; Website: www.saudiairportcities.org
 Eng. Ali Al-hunaiti, Tel: +966-26405000, Email: alhunaitiah@yahoo.com
 Eng. Alaa Samman, Tel: +966 264 050 00, Email: alaa.gaca@hotmail.com

International Finance Corporation (IFC) – Lead Advisor

IFC Advisory Services - Infrastructure
 DIFC The Gate, 10th Floor West, P O Box 118071, Dubai, United Arab Emirates
 Fax: +971 4 360 10 10; Web: www.ifc.org/ifcext/psa.nsf
 Muneer Ferozie, Senior Team Leader, MENA Region, Tel: +971 4 360 10 00, Email: mferozie@ifc.org
 Aurélien Boyer, Associate Investment Officer, Tel: +971 4 360 10 00, Email: aboyer1@ifc.org

Consulting Companies

Dar Al Handasah Shair and Partners

6,500 employees in 111 offices across 42 countries; headquartered in Beirut, Lebanon
 P O Box 910, Jeddah 21421, Kingdom of Saudi Arabia
 Tel: +966 2 653 34 16; Fax: +966 2 653 33 64
 P O Box 612, Riyadh 11421, Kingdom of Saudi Arabia
 Tel: +966 1 201 30 01; Fax: +966 1 201 28 27
 P O Box 182, Al-Khobar 31952, Kingdom of Saudi Arabia
 Tel: +966-3-8960599; Fax: +966-3-8961612
 Website: www.dargroup.com
 Talal Shair, Chairman

Saudi Dutch Consultants (Netherlands Airport Consultants B.V)

P O Box 2320, Jeddah 21451, Kingdom of Saudi Arabia
 Tel: +966-2-6679071; Fax: +966-2-6679052
 Email: info@naco-jeddah.com.sa, Website: www.2.dhv.com/default.aspx
 Kjell Kloosterziel, Manager of Master Planning and Studies
 Eng. Hussein Abdullah Al-Dabbagh, Managing Director – SADECO, P O Box 1039, Jeddah 21431, Saudi Arabia
 Tel: +966 2 669 72 20; Fax: + 966 2 669 61 84

Contracting & Engineering Companies

Almabani General Contractors

Almabani Building, Hail Street, Ruwais District
 P O Box 2781, Jeddah 21461, Kingdom of Saudi Arabia
 Tel: +966 2 651 67 72 / 67 76; Fax: +966 2 651 91 80 / 9184

Email: postmaster@almabani.com.sa, Website: www.almabani.com.sa

Joseph Abinader, CEO, JAbinader@almabani.com.sa; Pierre Mourani, Senior Executive Vice-President – Contracting, PMourani@almabani.com.sa; Joseph Daher, Executive Vice-President – Operations, JKDaher@almabani.com.sa

Saudi Binladin Group

Public Buildings & Airport Division
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Public Buildings & Airport Division
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Bakr Mohammed Awad bin Laden, Chairman; Omar Mohammed Awad Binladin, CEO; Saad Mohammed Awad Binladin, Deputy General Manager – Architecture; Hassan Mohammed Awad Binladin, Executive Senior Vice President - International Projects

El-Seif Engineering Contracting Establishment

Khalid Bin Al-Waleed Street, Al-Hamra Area
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Branches in Qatar, UAE & Lebanon

Khaled Musesed Al Seif, President & CEO; Ziad Al-Bataineh, Project Manager, ziad@el-seif.com.sa

Saudi Oger Ltd

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Saadeddine Rafic Hariri, GM; Ali Kolaghassi, Vice President; Bilal Ansari, General Projects Construction Division; Georges Hage, Corporate Executive Director

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Al Khobar
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Riyadh
Tel: +966-1-2771884; Fax: +966 1 278 06 07
Also in UAE and Qatar

Arabian Consulting Engineering Centre (ACEC)

P O Box 3790, Al-Khobar 31952, Kingdom of Saudi Arabia
Tel: +966-3-8958210; Fax: +966-3-8825452

Email: email@acec-sa.com, Website: www.acec-sa.com

Dr. Mohammed F.R. Sammur, MD; Andy S. Encomienda, Manager of Projects; Noel L. Parker, Engineering Manager

Saudi Consulting Services (SAUDCONSULT)

P O Box 2341, Riyadh 11454, Saudi Arabia

Tel: +966 1 465 99 75; Fax: +966 1 464 75 40; Website: www.saudconsult.com

Dr. Tarek Al-Shawaf, Chairman; Fahad Tamimi, President; Khurram Kamarat, VP, Business Development; Assem Al-Azem, VP- Finance & Administration

Altatweer Consulting Engineers

P O Box 103358, Riyadh 11695, Kingdom of Saudi Arabia
Tel: +966 1 248 79 94; Fax: +966 1 278 59 58

Email: alsuhail@altatweergroup.com, Website: www.altatweergroup.com

Eng. Abdulaziz Alsuhaile, General Manager

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P O Box 3594, Al Khobar 31952, Kingdom of Saudi Arabia

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Email: info@amcde.com, Website: www.amcde.com

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Abalkhain Consulting Engineers

P O Box 4074, Riyadh 11491, Kingdom of Saudi Arabia

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Email: aaa@abalkhail.com.sa, Website: www.abalkhail.com.sa

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Arabian Bemco Contracting Company Ltd

P O Box 3143, Jeddah 21471, Kingdom of Saudi Arabia

Tel: +966 2 667 00 92; Fax: +966 2 660 94 32

Email: arabian@bemco-ipp.com, Website: www.arabianbemco.com

Branches in Saudi Arabia, UAE and Qatar

Henry M. Sarkissian, CEO; Emad Ghandourah, Director, Projects Development; Dr. George Aboufadel, Director, Proposals & Procurement; Youssef Abbas, Director, Civil Projects

Al Harbi Trading & Contracting Co. Ltd

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P O Box 3229

Riyadh 5750, Saudi Arabia

Jeddah 21471, Saudi Arabia

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Tel: 966 2 694 30 00

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Website: www.alharbi.com.sa

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Abdullah O. Al Harbi, CEO; Eng. Naif Al Harbi, GM; Fayez Abdullah Al Harbi, Executive Manager

Turner Saudi Arabia

Turner International Middle East (TIME)

P O Box 13036, Dubai, UAE

Tel: +971 4 337 09 90; Fax: +971 4 334 82 16

Email: aodeh@tcco.com, Website: www.turnerconstruction.com

Dar Al-Riyadh

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Website: www.daralriyadh.com

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Al Suwaiket Trading & Contracting

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Website: www.alsuwaiket.com

International Companies

Geiger Berger Associates

Geiger Engineers, P.C. NY Office

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Oliver's Yard, London, EC1Y 1HH, United Kingdom

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Kent Jackson, Design Director; Daniel R. Ringelstein, Director, Urban Design and Planning

Others

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Saudi Arabian General Investment Authority

P O Box 5927, Riyadh 11432, Kingdom of Saudi Arabia
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Email: marketing_dept@sagia.gov.sa, Website: www.sagia.gov.sa
Saud Saleh Alsaleh, General Manager

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United Arab Emirates

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Al Jaber Group has coalition with Construtora Norberto Odebrecht, Brazil, largest construction company in Latin America

Al Jaber L.E.G.T. Engineering & Contracting (ALEC)

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Al Naboodah Group

Diversified group with a portfolio of companies that provide construction and engineering services, electro-mechanical services, mechanical, electrical and plumbing (MEP) services and construction products.

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Jules Janssen, General Manager, Construction, Besix Group Belgium

Al Habtoor Construction Co

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Lorne Proudlock, Senior Vice President - Operations

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International Companies

UNITECHNIK ICM FZCO

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Hans Christian Ettengruber

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Kohn Pedersen Fox

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David Niles, Marketing Manager

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Lee Seow Hiang, Chief Executive Officer

Others

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Dr. Omar Bin Sulaiman, Managing Director

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5th Floor, RBS/ABN-AMRO Bank Building, Khalid Bin Waleed Street
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Doing Business in UAE

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Sultanate of Oman

Contacts for Airport Projects

Oman Airports Management Company

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Trade Events and Publications

Trade Events		Publications	
The Airport Show	www.theairportshow.com	MEED	www.meed.com
Dubai Air Show	http://dubaiairshow.aero	Aviation Business	www.arabiansupplychain.com
TransOman Exhibition & Conference	www.trans-oman.com	Airport Middle East	www.arabianbusiness.com
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		Aviation Middle East	www.aviationmiddleeast.com