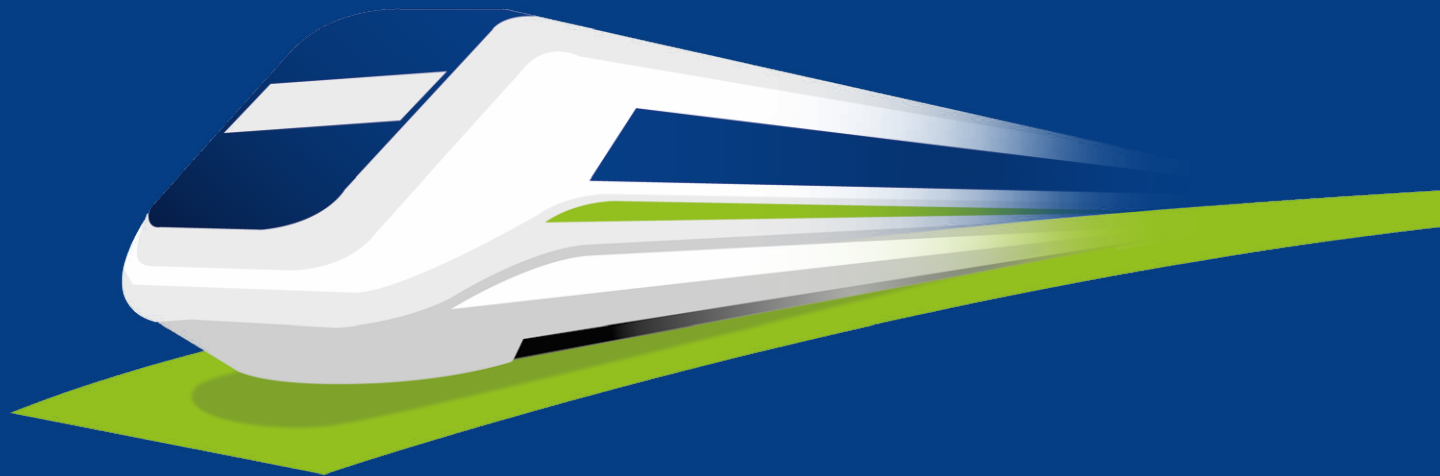


Middle East Rail Projects Report

A must have guide for anyone looking to
access the Middle East Rail industry



created by

terrapinn
use your brain

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Building for the future

Investment, investment, investment! The Middle East is fast shedding the traditional image of rolling sand dunes and meandering camel rides and replacing it with gleaming golden metro stations and high speed trains powering through the desert.

Within the next 10 years we will see a complete reform of mobility within the Middle East. Currently in the GCC there are a handful of operational rail lines, however, in the next decade almost every major city will host a state of the art metro and each country will have a functioning national rail network.

Expansion on this scale, in this time span has never been seen before and the rich opportunities for innovation will no doubt attract attention from across the globe.

The following market report has been compiled using data collected during the 7th annual Middle East Rail Show, held in Dubai in February 2013 and a series of interviews with regional rail executives. The report is designed to give detailed country and project specific information for upcoming and ongoing rail projects in the region.



Chloe Higman
Conference Producer
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Current outlook for Middle East Rail infrastructure investment



Country name: Syria
Current/Proposed Investment: \$1.8bn
Key Projects: Damascus Metro



Country name: Jordan
Current/Proposed Investment: (All on hold)
Key Projects: Amman-Zarqa Light Rail System, Amman Metro



Country name: Kuwait
Current/Proposed Investment: \$7bn
Key Projects: Kuwait Metropolitan Rapid Transit System



Country name: Saudi Arabia
Current/Proposed Investment: \$44.8bn
Key Projects: Saudi Bahrain Rail Link, Jeddah Metro Landbridge, Haramain High-Speed rail, North south, Riyadh Metro, Mecca Metro



Country name: Iraq
Current/Proposed Investment: \$10.8bn
Key Projects: Baghdad Railway Line, Baghdad Monorail, Baghdad Metro, Najaf - Iran Border



Country name: Iran
Current/Proposed Investment: \$28.6bn
Key Projects: Iran-Armenia railway, Qom Monorail, Tehran Metro Expansion, Chabahar-Zahedan-Mashhad railway, Tehran-Khosravi Rail Link



Country name: Bahrain
Current/Proposed Investment: \$7.9bn
Key Projects: Bahrain Rapid Transport



Country name: Qatar
Current/Proposed Investment: \$36.8bn
Key Projects: Qatar Regional Passenger Rail, Light Rail Transit (LRT), West Bay People Mover, Doha metro



Country name: UAE
Current/Proposed Investment: \$22.4bn
Key Projects: UAE National Network, Abu Dhabi Metro, Abu Dhabi Light Rail, Dubai Metro, Al Sufouh Tramway



Country name: Oman
Current/Proposed Investment: \$15.5bn
Key Projects: National Railway System

Executive Summary

The Middle East has allocated over \$250bn to various railway projects over the next decade, which will result in 67,000km of railway tracks throughout the region.

Current investment in ongoing rail projects reached over \$180bn in early 2013 and the most recent estimates for completed tracks suggest the region has just less than 34,000km at the time of this report.

The region has a virtually blank canvas to build the world's most advanced mechanised passenger and freight transport systems.

The immense investment planned is driven by congested urban roads, increasing populations, a greater appreciation for rail as a sustainable means of transport and a wish to propel the economic development of the region.

Although regional governments have ambitious expansion plans, there are a number of obstacles facing new rail projects.

Project finance and operational structures have yet to be defined, regional conditions such as sand and harsh summer weather have always been a deterrent for public transport and last, but certainly not least, the regional reliance and preference for the car.

Country Focus

Saudi Arabia – With over 6,000km of tracks planned and \$44.8bn committed to the full spectrum of rail projects including building a metro for every major city, the Middle East's first high speed rail track and the regions premier functioning freight line, Saudi Arabia is the market everyone is looking to access in 2013.

See page 4 for full details on the main Saudi projects

Qatar – With a deadline of 2022, Qatar features the region's largest rail investment plans and strictest deadlines, making it one of the region's most exciting rail industries. With an estimated \$17bn worth of infrastructure projects still yet to be tendered and 20,000 people expected to work on the Qatar Integrated Transport Project daily until 2016, Qatar is still booming!

See page 8 for full details on the main Qatar projects

UAE – Already operating one of the world's most advanced metros, the UAE has no intention of stopping there. 2012 saw the long delayed Al Sufouh tram construction spring into action and 2013 will see the first train run on the National Rail Network. With over 22km being added to Dubai metro and 3 new lines in the feasibility stage, not to mention the 471km Abu Dhabi master plan which is back on track, we expect to see a lot more interest in the UAE in 2013.

See page 11 for full details on the main the UAE's new projects

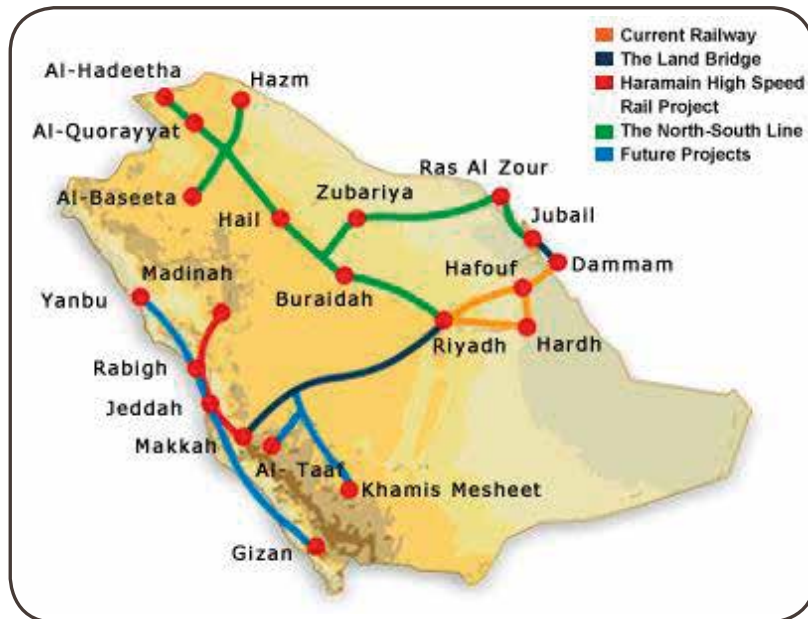


Saudi Arabia

Saudi Arabia is the uncontested regional leader when it comes to infrastructure investment, with a gigantic \$44.8bn worth of proposed investment to date.

After waiting almost 40 years to add to its rail industry, projects in Saudi Arabia have suddenly been propelled into action.

With recent plans released for new metro systems in Makkah, Jeddah and Riyadh, the Landbridge project back on track and Haramain High Speed line due for completion in 2014, the Saudi government remains committed to building a comprehensive public transport infrastructure.



Key Projects

Riyadh Metro

One of the most anticipated metro systems in the region has recently prequalified four international consortia for the main contract. Out of 38 top international bids, the four consortia leaders chosen were Vinci Construction, Bombardier, FCC Construction and Strabag.

The next step will be to shortlist the prequalified companies to bid for the opportunity to design and build lines 1, 2 and 3.

- **Company:** ArRiyadh Development Authority
- **Investment:** \$8bn
- **Key Stats:** 6 main routes, 175km long, 132 stations, 6 lines
- **Tender plans:** The consolidated design and build package for lines 4, 5 and 6 will be tendered in the next 16 months. Each package will include the supply of rolling stock

North South Railway Line

The GCC's first active freight line, which also promises passenger capabilities within three years, has been servicing the regional commodities industry for over a year now. The network begins in Riyadh and reaches Hudaiitha, connecting Sudair, Qassim, Hail and Al Jouf. The line also connects the large Phosphate and Bauxite mines in Al Jouf and Jelamaid with important harbor cities and industrial centres Jubail, Dammam and Ras Al Kair.

- **Company:** Saudi Railway Company
- **Investment:** \$3.2bn
- **Key Stats:** 2,750km (1,418km passenger line from Riyadh to Al-Haditha and 1,486km mineral line from Al-Zubirah to Ras Az Zwar), 22 camel crossings, 9 bridges
- **Tender plans:** The project is over 86% complete now.

Haramain High-Speed Rail

This will be the regions first high-speed rail line with operations beginning in 2014. The line will have the capacity to carry over 30,000 people a day and the authorities believe the network will carry over 3 million passengers a year. Haramain will connect the holy cities of Makkah and Madinah via Jeddah and is designed to reduce congestion between these hubs. This project was originally due to be a PPP scheme, however, due to the problems encountered on the Landbridge project it was restructured into a private scheme.

- **Company:** Saudi Railways Organisation
- **Investment:** \$13.7bn
- **Key Stats:** 450km (372km Jeddah-Madinah Section and 72km Jeddah-Mecca section), 7 stations, 25 bridges
- **Tender plans:** Phase Two is currently underway

Landbridge

After an entire decade of delays, ministers have given approval for this troublesome project. The management consultancy contract was recently awarded to US Engineering firm Fluor Corporation and the project is now firmly underway. The line will run from Jeddah Islamic Port to Riyadh and connect to the Riyadh-Dammam line and a new route will link Jubail to Dammam.

- **Company:** Saudi Railway Company
- **Investment:** \$7bn
- **Key Stats:** 945km
- **Tender plans:** PMC Contract won by Flour Corporation early 2013. Main tenders expected early 2014.

Jeddah Metro

The new metro plans said to resemble Dubai's futuristic design will be inviting interested parties to bid throughout 2013. The metro will consist of three lines. Line 1 will run from Old Makkah Road to downtown, before finishing at Sari Road. Line 2 will run along Prince Majed Street from King Abdul Aziz International Airport, while Line 3 will run along Palestine Road. Recently naming municipality official Ibrahim Katabkhana, the metro CEO, the project is officially underway.

- **Company:** Saudi Arabia Ministry of Transport/Jeddah Municipality
- **Investment:** \$9.4bn
- **Key Stats:** 3 lines (Green, Orange and Blue), 108km long, 46 stations, featuring integrated bus route of 816 buses
- **Tender plans:** As preliminary design work is nearing completion, we would expect the first tenders to be issued by Q2 2013. The tender for the project management contract is expected to be issued in April 2013.

Saudi Bahrain Rail Link

Currently the feasibility study is underway for the route, which would run parallel to the King Fahd Causeway that connects Manama and Alkhobar. The route would be a key part of the planned GCC network and reduce congestion on the Causeway.

- **Company:** Gulf Cooperation Council
- **Investment:** \$4.2bn
- **Key Stats:** 90km
- **Tender plans:** Current options being considered include a BOT option, feasibility studies should be concluded by 2014. First tenders to be issued April 2013 according to World Bank officials.



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Conclusion

The projects above show Saudi Arabia to be the most ambitious rail market in the Middle East; however the market still faces many of the traditional challenges. The main issue that has caused Saudi projects to be delayed time and time again is the complex procurement and organisation structures that were originally selected for key projects. Choosing between private and public funding has delayed projects in the past, which is why the majority of projects have now chosen to opt for private funding to allow them to move forward.

For Saudi Arabia, safety and security are paramount in the effort to convince commuters to move from road to rail. After the 2012 crash on the 60 year old Dammam-Riyadh line, Saudi Railway Organisation has been receiving criticism for poor maintenance and unsafe lines. On completion of the key projects over the next few years, we would expect to see comprehensive operational packages included in tenders to ensure the safety and reputation of the rail lines.

Over the next few years we will also see new information about the proposed GCC railway network, with lines between Batha at the UAE Border - Hofuf and Jubail - Ras Al Khair - Kuwait Border, as well to Qatar and Bahrain.



A chat with.....



Hamad Bin Yousef
Civil and Track Director
Saudi Railway Company

What are the key drivers for the extensive railway plans in Saudi Arabia?

The main drivers are the clients and the bulk goods industry that we have. Saudi Arabia is a huge country and there is a big opportunity to serve the mining industries and the needs of separate industrial cities. These are the key drivers for expanding the network, purchasing new rolling stock and improving the network in general. These factors resulted in the construction of the North South Railway Project, which to my knowledge is the longest railway construction to date.

In your opinion, which are the most exciting projects you are going to be working on over the next year?

We are now involved in designing a couple of branch lines within the North South Project; the Jubail network, the north line servicing and extra branch lines to further the mining industries with Ma'aden. Also the most interesting project, which is getting a lot of media attention, would be the Saudi Landbridge, it is a huge link that will basically link the Red Sea to The Gulf. The link will save a lot of time for cargo ships, which would usually travel round the peninsula; they will unload on the red sea side of Saudi Arabia and transport the cargo by land. It is a very lucrative business for the freight markets.

“The tenders that we foresee are for the Jubail line, the Landbridge project and the branch lines on the North South Railway”

What have been the biggest challenges for Saudi Railway Company over the past 12 months?

When discussing the biggest challenges you need to consider the phases, you have initiation, design and securing funds and then the implementation. The first phase is very challenging as you need to have the right people ready at the right time and my advice for anyone participating in such a big project is to spend a lot of time in the pre-project phase. Events such as design and fund allocation are essential for the success of a project, if one of the project partners is not secure it will risk the whole project.

What are the key successes you have had in the last year at Saudi Railway Company?

The biggest success for Saudi Railway Company in the last year has been operating the North South Railway Line, over the last year we have transported over 2 million tons of Phosphate and we are very proud of this. We are also in the mist of constructing our stations and new headquarters, so there is a lot of exciting projects happening for Saudi Railway Company.

Which key tenders should global companies be expecting from Saudi Railway Company over the next year?

As I stated previously, the tenders that we foresee are for the Jubail line, the Landbridge project and the branch lines on the North South Railway. These will be just for civil and track work; we will also see complementing tenders such as stations.

As the North South Railway has been a key topic of conversation today, can you please give us a status update on this?

The North South Railway is designed for passenger and freight, with 300-400km of shared lines. For this line we are at 85% completion, our stations are under construction with delivery in 2014 and our rolling stock is procured. So, we are hoping to be operational and for passengers to be using the system in 2015.

Qatar

With an impressive \$36.8bn worth of projects planned and underway in Qatar, it may come as a shock that this is only a small part of Qatar's incredible infrastructure investment plans to re-invent Doha in time for the 2022 Fifa World Cup and the 2020 Olympic games.

This comes hand in hand with the renewed appreciation for the impact an efficient and sustainable transport industry can have on increasing tourism and diversifying the economy.



Key Projects

Doha metro

A metro consisting of four metro lines will connect the Doha suburbs with city centre and key business districts to ease congestion and decrease journey times during large scale events. The metro will be built in two phases and include four lines (Red Line, Green Line, Gold Line and Blue Line), with phase 1 being completed in 2019, phase 2 due for completion in 2026.

- **Company:** Qatar Railway Company
- **Investment:** No full budget available
- **Key Stats:** 92 Stations, 231km long, total underground 100km, total elevated 101km, total at grade 30km
- **Tender plans:** Enabling Works/ PMCs 2012-2013, 5 U/G Packages Award Q2 2013, 3 E/L Packages Award Q4 2013, Rolling Stock (inc. Depots) Q1 2014, Systems Q1 2014, Operation & Maintenance Q4 2015, Track Work Q2 2014, Testing & Commissioning Q2 2017

West Bay People Mover

In an attempt to reduce congestion in the West Bay area, this 9km track will provide a feeder line for the west bay area, currently there is still debate over whether this line will be underground or not as Qatar Rail would like to avoid the heavy cost burdens of tunneling.

- **Company:** Qatar Railway Company
- **Investment:** \$450m
- **Key Stats:** 9km, 1 line, 15 stations
- **Tender plans:** Project in progress

Light Rail Transit (LRT)

This light rail network will connect various districts within Lusail city and link to the Doha Metro. The project is currently live and the main network will feature four key tram lines with both underground and over ground sections.

- **Company:** Qatar Railway Company
- **Investment:** \$1.2bn
- **Key Stats:** 48km, 4km, 38 stations, 1 depot
- **Tender plans:** Project in progress under design and build contract

Qatar Regional Passenger Railway

The plans for Qatar's long distance passenger lines are slightly behind the main urban development program. Currently Qatar Rail is in the process of obtaining land approvals and coordinating and implementing GCC requirements. The first tender for the civil design consultant package has 25 interested parties and the project will be built in three phases.

- **Company:** Qatar Railway Company
- **Investment:** Budget not yet decided
- **Key Stats:** 400km, 7 stations, 5 freight yards, 5 freight depots, 1 intermodal yards
- **Tender plans:** Currently tendering civil design consultants contract

Key Industry Contacts

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Conclusion

For Qatar's government, the biggest challenge is the immovable deadlines set by the 2020 world cup, so it is no surprise that the country will be tendering over \$17bn worth of projects in the next few years.

The main steps Qatar will be taking in 2013 to achieve this vision will be the following; approval of key architectural branding, finalising the main civil and underground tender evaluations, appointing design and build contractors and issuing electrical packages.

Qatar's Integrated Railway Project is a plan of immense size and in order to achieve this Qatar Rail will be employing approximately 20,000 people in the run up to 2016. Therefore, recruitment is posing the biggest challenge for projects in Qatar and across the region to date.



A chat with.....



Saad Al Muhannadi
Chief Executive Officer
Qatar Rail

So, Qatar Railway currently has a number of different projects taking place, please give us an overview of the type of projects being implemented and the current phases underway?

We have three main projects underway at the moment, the metro, long distance freight network and the light rail project. Regarding the metro we have already floated the tender for the technical and commercial valuation for the underground package. This is the most important tender for us and that is why it is our first priority, we would expect to award this tender by Q2 2013. For the other remaining metro packages, we will be issuing the tenders later this year, these will include; systems, rolling stock, track works and elevated and these should be awarded in the Q1 2014 or Q2 2014.

Regarding the long distance freight and passenger line, we have floated the tender for the detailed design for the civil construction and we expect to receive the offers from the market in early 2013. In the near future, we will be rewarding this to the selected and preferred consultant.

Regarding the light rail project we have the Lusail project, which is currently live and we have completed 100% of the tunneling and around 45% of the stations. We will now be looking to select the systems provider and this should be done by the end of April 2013.

I would expect we will be very busy this year as we intend to award the most important packages for all aspects of the projects.

Once Qatar Railway is fully functional how will this improve and develop transportation logistics in Doha?

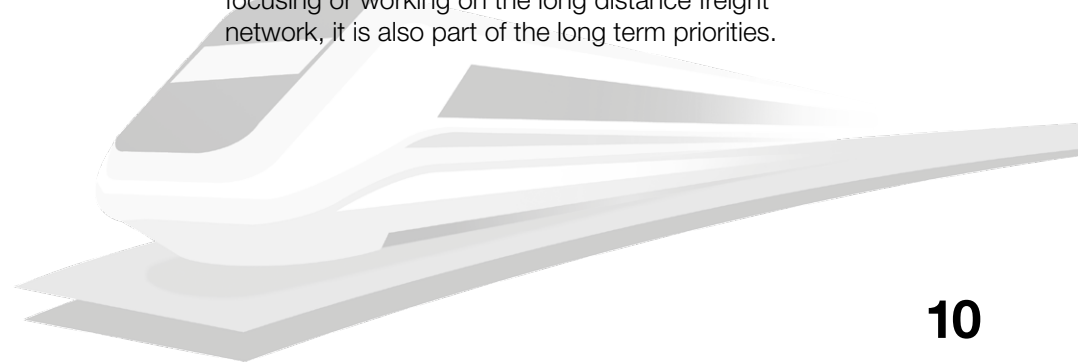
As you know, Doha is a small city and 75% of the citizens concentrate in an area which is near to the corniche and Doha Bay. Within the city there are limitations on expanding the road system, so the metro was the solution chosen to connect Doha city. We believe this solution will improve the quality of life in Doha, the environment and reduce the heavy traffic and commuting times.

Regarding the logistics from a freight perspective there will be a connection between Qatar and Saudi Arabia. This will be much better for the environment as it will reduce the carbon emissions compared to the trucks which have been used previously, it will also speed up the delivery of goods from Qatar to the other GCC countries.

“I would expect we will be very busy this year as we intend to award the most important packages for all aspects of the projects.”

What is the main aim/priority for Qatar's rail projects?

The main aim at Qatar Rail now is to build the Doha metro to connect Doha city. In the long term the vision is to provide a modern public transport system for the citizens of Doha and that is our first priority. However, this does not mean we are not focusing or working on the long distance freight network, it is also part of the long term priorities.



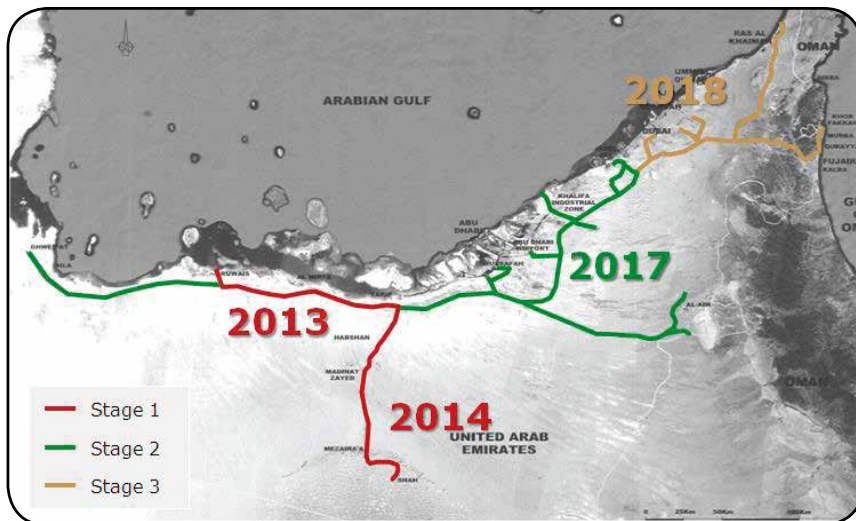
United Arab Emirates

The most developed GCC rail industry to date, including Dubai's extensive public transport system and the regional rail network currently under construction.

This is complemented by Abu Dhabi's dense urban transport plans, which after being given the green light will be one of the most efficient urban systems in the region.

The Etihad rail network is currently in the first phase and has signed up a number of key clients to use its freight services to date.

The regions first tram, Al Sufouh in Dubai has encountered many problems, mainly related to project financing, however the tram is now on track and should be completed by 2014.



Key Projects

UAE National Network

- **Company:** Etihad Rail
- **Investment:** \$11bn
- **Key Stats:** 1200km long, 10 tunnels, three stages, the first stage will be operational by the end of 2013 and phase 2 by the end of 2014
- **Tender plans:** Stage II is currently being tendered inc; Package A - 137km line from Ruwais to Ghuwaifat, Package B - 190km line from Liwa Junction to Al Ain, Package C - 186km line from Al Ain to Jebel Ali. Also includes a branch to Khalifa Port, Package D – railway integration and systems, Package F - 78km line from Industrial City Abu Dhabi to Mussafah

Abu Dhabi Metro

The long awaited public transport overhaul in Abu Dhabi has once again been given the green light, in order to ease the congestion in the main commercial areas. The Department of Transport is developing a \$7bn plan to develop a metro and light rail railway in Abu Dhabi. The full scope of the metro and tram network will connect the main commercial areas with with Al Maryah Island, Reem Island, Saadiyat Island, Yas Island, the airport, Masdar, the exhibition centre and a series of other important parts of the city.

- **Company:** Abu Dhabi Department of Transport
- **Investment:** \$7bn(shared with tram)
- **Key Stats:** 131km
- **Tender plans:** Expect the main contract tenders in 2014 and the first stage completed by 2017

Abu Dhabi Light Rail

In addition to the metro system the DOT is planning to construct a 340km light rail system. The project will have 3 lines connecting major business and residential areas and key venues such as the airport.

- **Company:** Abu Dhabi Department of Transport
- **Investment:** \$7.8bn (shared with metro)
- **Key Stats:** 340km, 3 lines
- **Tender plans:** The main tenders are expected in 2013, project is still in design stage, due to be completed 2017

Dubai Metro

The Roads and Transport Authority, Dubai announced in January the massive expansion plans for the Dubai metro system, including extensions for the red and green lines, three new lines added and connections to the UAE national network. The new lines will be completed by 2030 and increase mobility across the major residential areas in Dubai.

- **Company:** Roads and Transport Authority, Dubai
- **Investment:** \$807m (for extensions – new line spend unknown)
- **Key Stats:** 12km extension to red line, 10km extension to green line, 3 new lines will extend the metro to 421km long with 197 stations
- **Tender plans:** Three new metro lines; Blue, Gold and Purple and a Jumeirah tram will be completed by 2030, with the schedule as follows. 2020 — 24km — 12 stations, 2025 — 91km — 58 stations, 2030 — 221km — 69 stations

Al Sufouh Tramway

With over 52% of the overall project completed and the delivery for the first vehicle scheduled for December 11th 2013, the project is on track for the completion target of Q4 2014.

- **Company:** Roads and Transport Authority, Dubai
- **Investment:** \$1.8bn
- **Key Stats:** 14.6km, 17 stations
- **Tender plans:** Stage II of the project to be reviewed when Stage I is complete in Q1 2014



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Conclusion

After a slow 2012, the UAE is striving to reclaim its title as the leading railway industry in the GCC. Using the past experience gained from Dubai metro's construction the UAE has managed to overcome some of the key issues faced by the fast moving Saudi and Qatar markets.

For service providers, the UAE offers many opportunities for large scale tenders in almost every space over the next decade. Although fruitful for global service providers, expansion on this scale will create one key issue – the talent battle. The UAE is throwing its hat in the ring against Qatar, Saudi Arabia, Oman, Kuwait, Bahrain and many more to be the destination of choice and the projects of choice for the world's rail professionals.



A chat with.....



Graeme Overall
Director of Business
Development
Etihad Rail

Please give us a brief update on the status of the UAE National network?

We are doing lots of things here in the UAE; this is partly about building the physical assets that will form the railway. It is also about building a company, building a service, building customer relationships and building institutions to sustain the industry. However, let me concentrate here on our physical progress. We divided the development of our network into three stages; the first is the 266km from Shah to Ruwais in the Western Region, initially providing a service for a single customer, ADNOC, moving granulated sulphur from Shah and Habshan to Ruwais.

The development of this is really exciting; if you go to Mirfa you will find that we have built a sleeper factory that is producing sleepers in very large quantities to support construction of the railway. You will also find we have the first temporary track being laid forming the rail head for our contractors. The rails are already being delivered in large quantities. There are already quite impressive earthworks that you can see in Tarif, including a 6m high embankment and large numbers of earth movers working at various points along the route of the railway. So, it is really taking shape now.

“The railway is a part of the story of economic growth and economic diversification in the UAE.”

For Stage Two, we are out to tender for most of the work. This is the remainder of the network in the emirate of Abu Dhabi, so from Ghweifat to Ruwais Junction to join up with Stage One and then from Liwa Junction near Tarif, right up to Jebel Ali and Al Ain. Most of the packages for Stage Two are now under tender, and these include various civil packages, and a systems package. For Stage Three, which is north of Jebel Ali Junction (running north round the back of Dubai to Fujairah and serving quarries in the northern emirates) we have a concept design for the network and we are approaching the preliminary engineering stage.

What are the key drivers for building a UAE national freight network?

There are a number of drivers, but let's start with the most important. The railway is a part of the story of economic growth and economic diversification in the UAE. So, it sustains the industries that the country is developing as it moves up the value chain, particularly the heavy end steel and petro chemical industries.

It also benefits the multiplicity of small businesses that will profit from the ability to send smaller consignments, usually in containers by train in the future.

So, economic growth and economic diversification are the top drivers. However, there are a lot of other benefits the UAE economy and society will derive from the national network. The alleviation of road congestion and with that the reduction of road accidents, which will ensure safety and environmental benefits. These will both derive from the modal shift as we move away from the energy intensive high impact use of road transport that is currently used for moving almost everything inland.

We have efficient long trains, which in the case of bulk freight can move very significant quantities. For example, our sulphur trains in the Western Region will carry up to 11,000 tons, more than 300 Lorries worth in one train, controlled by one person. It is much more efficient in environmental terms; we also expect the regions of the UAE to benefit from the accessibility to markets that the railway will develop for products created outside the densely-populated areas along the gulf coast.

In your opinion, what are the key challenges operators will need to be aware of when constructing new freight networks in the Middle East?

There are many obvious challenges that arise from the environment we are in and many that arise because the railway is a new business to the region. So, in environmental terms there is the obvious issues of temperature and the sometimes barren environment, but the environment is not always as barren as it looks, so we have to be careful not to disrupt the fragile ecosystems that you find in the desert areas.

We are making sure for example, as we run through some of the more sensitive areas in the Western Region that we protect wildlife such as rare reptiles; we move them very carefully as we build the railway. We are building a lot of animal crossings to make sure the impact of rail is minimised. Other challenges arise from the fact that rail is new to the region, it has come at a later stage in the economic development of this region than it has in Europe and North America in the 19th century.

So, we tend to find we have to cross highways and not vice versa, this is a challenge in engineering terms and obviously it gets more difficult to take the railway into areas where urban development has already occurred and we make sure we are doing whatever we can to be good neighbours. So there are lots of challenges relating to the fact the railway is new and it is not just the railway you need, but the institutions around it pulling together in partnership to deliver something that everyone recognises as a benefit to the economy.

Please outline one of the recent successes for the UAE National network?

Well, clearly getting construction started is something to be proud of. If you look around the world there are always lots of bright ideas, however only the best of these ideas come into fruition and our railway is now coming to fruition and we are immensely proud of this. To mention a couple of other things, we at Etihad Rail are always keen to build the right relationships with the institutions around us and we work with all the emirates to make sure the railway gives them the best benefits and fits with their plans. Recently we hosted a meeting of the representatives of several local and federal government entities to plan and focus Stage Three of the network.

“For Stage Three, which is north of Jebel Ali Junction we have a concept design for the network and we are approaching the preliminary engineering stage.”

We are very proud of the successful government relationships we have built. We have talked already about customers; but we are really delighted with our new relationships and recent MOUs, as well as our relationships with port organisations like DP World. These partnerships give us the opportunity to listen to what customers expect of the railway. We believe these

relationships are just as important when building a successful transport network as laying tracks on the ground.

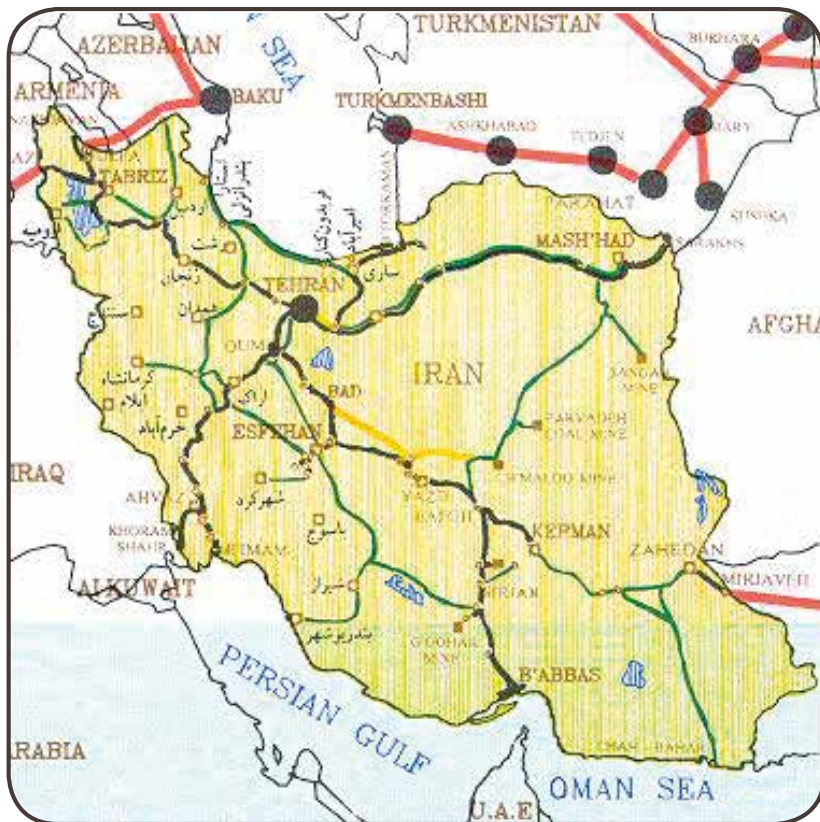


Iran

With over \$28.6bn committed to railway investment, Iran is one of the only countries in the Middle East to have vast experience in building and operating different types of railway systems.

Iran's recent plans to revitalise the rail industry makes it an attractive market for rail investment.

It is estimated that Iran currently has over 11,000km of railway lines under construction and many more plans in the feasibility stage.



Key Projects

Tehran Metro Expansion

- **Company:** Tehran Urban & Suburban Railway Company (TUSRC)
- **Investment:** \$19bn (Whole metro project)
- **Key Stats:** Phase II - 102km, 68 stations. Project is moving slowly due to financial constraints

Iran-Armenia Railway

- **Company:** Ministry of Roads & Urban Development
- **Investment:** \$2bn
- **Key Stats:** 540km (60km on Iranian soil and 480km in Armenia), project is in the early stages and considering finance options

Qom Monorail

- **Company:** Qom Urban Railway Organisation
- **Investment:** \$1.8bn
- **Key Stats:** 18.5km, 20 stations, phase II of the project is about to commence

Key Industry Contacts

Islamic Republic of Iran Railways

Taleb Zare

Acting President & Board Member
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Ministry of Roads & Urban Development

Ali Nikzad

Minister of Road and Urban Development
Contact Tel: +98 21 88646130-4

Tehran Urban & Suburban Railway Company (TUSRC)

Hubble Dervish

Chief Executive Officer
H_Darvishi@tehranmetro.com

Qom Urban Railway Organisation

Abbas Zakerian

Project In-Charge

Oman

In 2008 Oman launched its first feasibility study to examine the potential benefit for the country from freight, long distance passenger and urban transport.

The details are still relatively sparse; however the recent tenders for the national line indicated the plans will include an integrated multimodal transport network that will encompass ports, airports and highways.

Key Projects

- **Company:** Ministry of Transport and Communications/National Railway Company
- **Investment:** \$15.5bn
- **Key Stats:** 1,061km long, Four divisions, 6km tunnels, 17km viaducts, 15km wadi bridges, the government is currently tendering for the preliminary consultant design contract and the project management consultancy package will be tendered by July 2013.



Key Industry Contacts

Ministry of Transport & Communication

Abdulrahman al Hatmi

Director Railway Projects

Contact Tel: +968 24-685000



Bahrain

After years of delays in the feasibility stage, Bahrain has put aside \$7.8bn to transform transport in the country.

As the project is still in the study phase details have not been finalised, however current plans indicated the lines will run from Muharraq to Alba, passing through Manama, Seef and Isa Town.

The planned four phase construction will see the full system completed by 2025. Bahrain is also a key player in the planned GCC network, the Saudi Bahrain Causeway, for which the first tenders are due to be issued in Q4 2013.



Key Projects

Bahrain Rapid Transport Network

- **Company:** Ministry of Transport
- **Investment:** \$7.9bn
- **Key Stats:** 140km, 4-phased, Phase I includes LRT line and Tramway. Project is still in the study phase and the main contract is expected to be issued in June 2015.

Saudi Bahrain Rail Link

- **Company:** Gulf Cooperation Council
- **Investment:** \$4.2bn
- **Key Stats:** 90km
- **Tender plans:** Current options being considered include a BOT option, feasibility studies should be concluded by 2014. First tenders to be issued April 2013 according to World Bank officials.

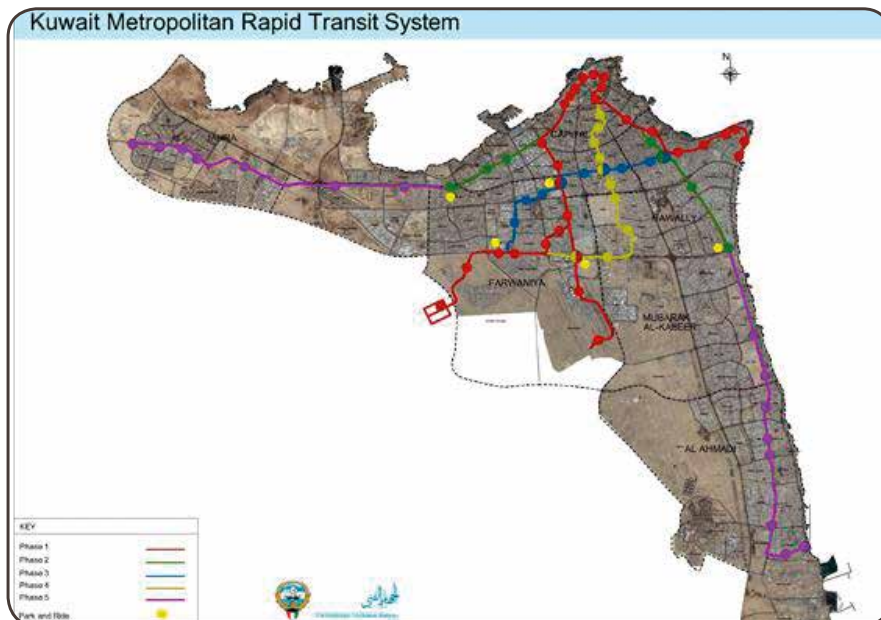
Key Industry Contacts

Ministry of Transport
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Director of Road Transport
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Kuwait

In early 2013 the Kuwait City Metropolitan Rapid Transit and the Kuwait National Rail Network were put on hold while the government considered taking back ownership of the projects from the PTB and moving away from a PPP model altogether.

However, recent reports from the PTB indicate the plans are now going ahead to tender the KMRT in April 2013.



Key Projects

Kuwait City Metropolitan Rapid Transit

- **Company:** Partnerships Technical Bureau
- **Investment:** \$7bn
- **Key Stats:** Four railway lines, 171km long, 72 stations, 65% above ground, 35% underground. PTB has invited contractors to express an interest to develop rolling stock and systems for the project.

Kuwait National Rail Network

- **Company:** Partnerships Technical Bureau
- **Investment:** \$10bn
- **Key Stats:** 505km, first phase will be a 245km line connecting Umm Qasr in Iraq to Qasr on the Saudi Arabia border

Key Industry Contacts

Partnerships Technical Bureau

Adel Mohammad Al-Roumi

President

Contact Tel: + 965 2496 5900

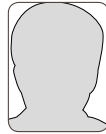


Top 8 Influencers in Middle East Rail



H.E. Mattar Al Tayer
Chairman of the Board and
Executive Director
Roads & Transport Authority, Dubai

H.E. Al Tayer is most well known as the man who built Dubai Metro, however he is an iconic figure across many major infrastructure sectors. The inspiration behind the new lines for Dubai metro and the Al Sufouh Tram and he also holds the position of Vice Chairman on the board of Etihad Rail for the UAE National Network.



Ibrahim Kutubkhana
Chief Executive Officer
Jeddah Metro

Previously the Deputy Mayor for Construction & Projects at Jeddah Municipality, it was recently announced Kutubkhana will be the new CEO for a dedicated transport company, established to oversee the construction of Jeddah Metro. This new position has swiftly made Kutubkhana one of the most important men in the Saudi railway industry.



H.E. Kamal bin Ahmed Mohammed
Minister of Transportation
Bahrain

H.E. Kamal was appointed in 2012 and many people hope he will be the one to ensure the delays and problems with the Bahrain rail plans are a thing of the past. Both H.E. Kamal and Bahrain are new to the railway business but it seems the ambition and drive will see the projects come into fruition.



Saad Al Muhannadi
Chief Executive Officer
Qatar Rail

The man of the hour for Middle East rail! As the head of the region's largest rail investment program, Saad has a lot on his plate this year. He is a well respected member the regional rail industry and he will without a doubt lead Qatar all the way to the 2022 vision.



Nasser Saif Al-Mansoori
Chief Executive Officer
Etihad Rail

Dr Al-Mansoori is the new man in charge of Etihad Rail's extensive rail projects in the Middle East. Previously the Director-General for the National Transport Authority, UAE, Al-Mansoori brings a wealth of knowledge to his new role.



Adel Al-Roumi
President
**Partnerships Technical Bureau,
Kuwait**

In an attempt to relieve congestion in Kuwait City, the large scale transport plans are officially underway. Al-Roumi will be playing a crucial role in choosing who will get a piece of the \$7bn urban investment plans, not to mention the proposed \$20bn national network.



Rumaih Al Rumaih
Chief Executive Officer
Saudi Railway Company

As the head honcho for SAR, Al Rumaih is currently in charge the country's biggest project the North-South line. He also plays a senior role on the board of the Riyadh metro project, one of the region's most exciting metro proposals. Joining in 2008 as a Deputy CEO, Rumaih Al Rumaih has moved up fast and we would expect Al Rumaih and SAR to gain more responsibility for regional projects over the coming years.



H.E. Dr. Ahmed Mohammed Salem Al-Futaisi
Minister of Transport & Communications
Oman

The man behind the Omani railway vision is the Minister of Transport & Communications H.E. Al Futaisi. The minister has recently established a government owned company which will be in charge of the day to day plans for the network; however he will still be playing a crucial part in overseeing the entire project.



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