DEVELOPMENT CONSULTANCY & RESEARCH
INCISIVE STRATEGIES, TOTAL CAPABILITY AND A RESEARCH LED APPROACH

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

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

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

SECTORS COVERED

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<th>RESIDENTIAL</th>
<th>HOSPITALITY</th>
<th>OFFICE</th>
<th>RETAIL</th>
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<td>• Global economy</td>
<td>• GDP</td>
<td>• Discretionary income</td>
<td>• Employment1</td>
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<td>• Population</td>
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<td>• Household wealth</td>
<td>• Manufacturing output</td>
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<td>• Employment</td>
<td>• Demand generators</td>
<td>• Population</td>
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<td>• Household incomes</td>
<td>• Access to destination</td>
<td>• Education</td>
<td>• Passenger arrivals</td>
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<td>• Household sizes</td>
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<td>• Consumer credit</td>
<td>• Rail &amp; truck volume</td>
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<td>• Govt. regulations</td>
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1 - Related to Finance, Insurance, Real Estate, Business, Legal & Professional Services
2 - Related to Manufacturing and Transportation
OUR KNOWLEDGE-BASED APPROACH
We integrate our sector specialist capabilities to advise on each stage of the development process.

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

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

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**Market research**
- Macro-economic review
- Property market research
- End user analysis
- Location studies
- Land identification
- Catchment area analysis
- Fair share analysis
- Supply & demand analysis
- Competitor review & benchmarking
- SWOT analysis

**Valuation service**
- Land valuation
- On-completion valuation
- Forward funding advice
- Expert witness
- Compensation valuations
- Estimations of worth

**Concept planning**
- Development strategy
- Optimum product mix
- Strategic positioning
- Theming and branding
- Phasing strategy
- Facility review
- Highest & best use
- Destination programming

**Financial feasibility**
- Margin analysis
- Optimum return analysis
- Value preservation advice
- Exit strategy
- Option review
- Cash flow forecasts
- Sensitivity analysis
- Scenario analysis

**Design stage**
- Project re-positioning
- Design optimisation
- Value enhancement analysis
- Specification definition
- Branding and market positioning

**Route to market**
- Business plan
- Strategic marketing plan
- Route to market strategy
- Communication strategy
- Creative – sales tools and marketing material
- Operational set up
- Distribution network management

**Macro analysis**
- Political
- Economic & legal
- Demographic

**Site analysis**
- Access and egress
- Development guidelines
- Zoning
- Adjacent uses
- Infrastructure
- Topography

**Market analysis**
- Residential
- Office
- Retail
- Hospitality
- Leisure
- Industrial

**Benchmark exercise**
- Domestic
- Regional
- International

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**Macro overview**
- Concept definition

**Site assessment**
- Financial analysis

**Market outlook**
- Viability statement
Kingdom Tower
Jeddah, KSA
The client required Knight Frank to provide a comprehensive review of competitive residential projects for the proposed world’s tallest tower, assessing supply and demand dynamics.

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

Jeddah Waterfront Project
Jeddah, KSA
A leisure oriented mixed-use project with a total area of 3.6 million sq.m. The components include hospitality, retail, office, residential, entertainment and a marina.

Our role
Knight Frank conducted market research and provided development recommendations for the retail and entertainment sectors.

Gated Residential Community
Jeddah, KSA
A low density gated community anchored by a large lagoon. The residential development is planned to contain various recreational activities catering to the resident population.

Our role
Knight Frank provided a highest and best-use study of the land and assessed the financial feasibility of the project and its proposed components.

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

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

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

Our role
Knight Frank conducted market research to identify demand generators and target customer segments based on income brackets, travel behaviour to formulate a development strategy. We also recommended a suitable phasing strategy encompassing theme parks, resorts, hotels, second homes, entertainment, recreation, and retail.

Entertainment City
Riyadh, KSA
A proposed leisure oriented district in Riyadh anchored by a cluster of theme parks. The first phase of the 334 sq.km development includes a total built-up area of 14 million sq.m.

Our role
Knight Frank conducted market research to identify demand generators and target customer segments based on income brackets, travel behaviour to formulate a development strategy.

1 Kingdom Tower
2 Jeddah Waterfront Project
3 Gated Residential Community
4 Mixed-use
5 Light Industrial
6 Entertainment City
Failaka Island
Kuwait
We were instructed as part of a wider consortium to provide real estate research and consultancy advice in respect of a 48 sq km island off the coast of Kuwait called Failaka Island for the Partnerships Technical Bureau (part of the Government of Kuwait).

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

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

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

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

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

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

Our role
Knight Frank worked with the client and architects to develop a scheme that was in line with future market dynamics given the anticipated regeneration of the micro market. Based on inputs from Knight Frank, the existing component mix was adjusted in order to increase profitability, reduce project risk and better leverage from the integrated transport links.
There's a human element in the world of property that is too easily overlooked.

At Knight Frank we build long-term relationships, which allow us to provide personalised, clear and considered advice on all areas of property in all key markets. We believe personal interaction is a crucial part of ensuring every client is matched to the property that suits their needs best – be it commercial or residential.

Operating in locations where our clients need us to be, we provide a worldwide service that’s locally expert and globally connected.

We believe that inspired teams naturally provide excellent and dedicated client service. Therefore, we’ve created a workplace where opinions are respected, where everyone is invited to contribute to the success of our business and where they’re rewarded for excellence. The result is that our people are more motivated, ensuring your experience with us is the best that it can be.
Knight Frank employs professionals who are experts in their respective real estate sectors. Depending on the nature and scope of the assignment, the relevant expertise is brought into the consulting team. Great care is taken to maintain cultural and practical synergies with regards to standards, ethics, resources and risk management.

**OUR PEOPLE**

Knight Frank Middle East
KnightFrankME
Knight Frank UAE

**OUR SERVICES**

Residential Transactional Services
- International Residential Sales
- Residential Project Marketing
- UAE Residential Sales

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

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

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