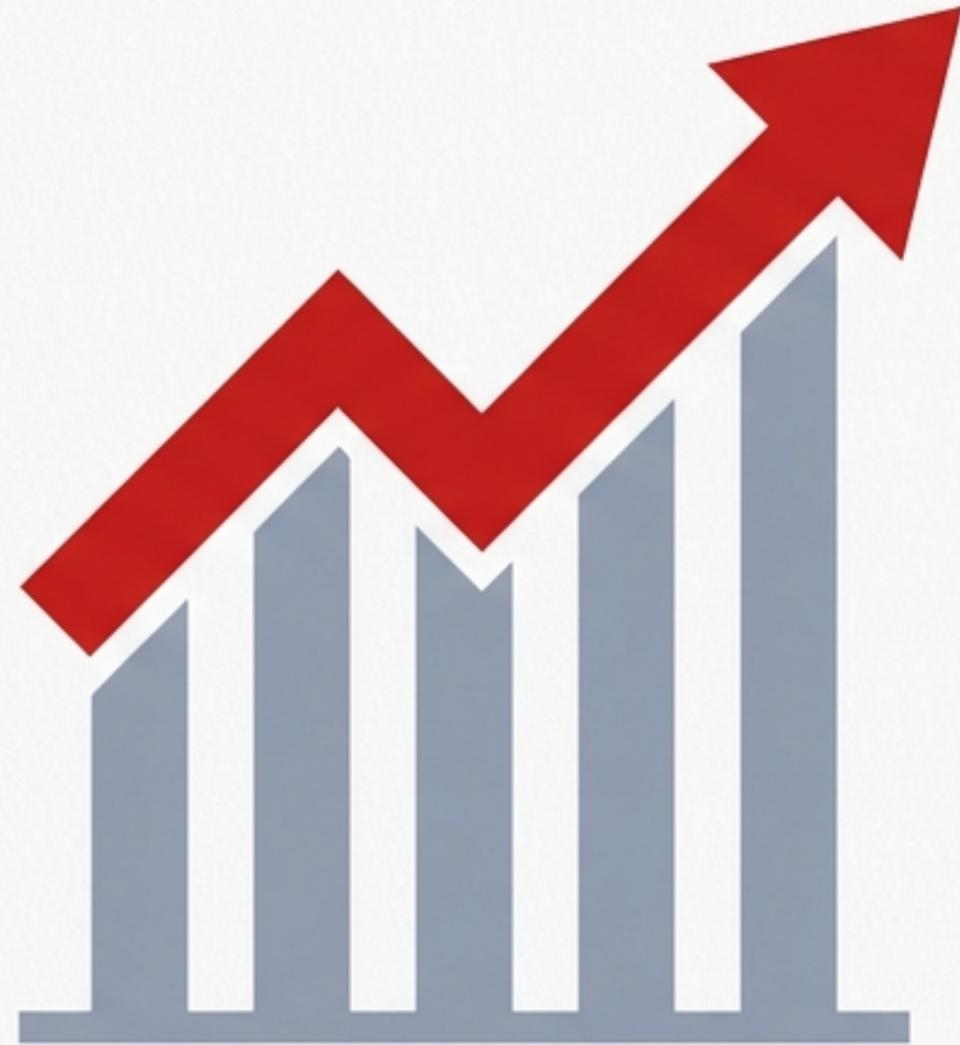




The UAE's Engineered Future: Five Pillars of Growth and Real Estate Value

Human-led intelligence supported by AI precision.





A Blueprint for a Future-Proof Economy

The UAE's strategic vision is built on five interconnected pillars that de-risk investment and create unprecedented value. This is not a speculative boom; it is a meticulously engineered future, with real estate as the foundational asset class that captures this growth.

This presentation examines each pillar, its national impact, and its direct relevance to real estate investors.

- 1. Nuclear Energy:** Decarbonising Base-Load Power
- 2. Artificial Intelligence:** National Play, Local Ecosystems
- 3. Sustainability:** Net Zero Pathways & Emirate Programs
- 4. "New Tourism" & Culture:** Demand Flywheels
- 5. Outbound Investments:** Reinforcing Domestic Strength

Pillar 1

18.1 Nuclear Energy

Decarbonising Base-Load Power



18.1 Nuclear Energy

Status & Impact

The Barakah Nuclear Energy Plant in Al Dhafra, Abu Dhabi, is the first multi-unit nuclear station in the Arab world. With four APR-1400 units in operation, it supplies a large share of the UAE's clean base-load electricity, providing emissions avoidance, grid stability, and power cost visibility.

Why it Matters

- Supplies up to **25%** of UAE electricity (5.6GW), reducing reliance on gas.
- Stabilizes long-term utility pricing, lowering inflationary pressure.
- Positions UAE in the **top 10 countries** globally for civilian nuclear energy.

Relevance to Real Estate

- Guarantees stable long-term energy for residential, industrial, and smart-city projects.
- Creates a unique 'clean-energy real estate' offering for ESG-driven international investors.
- Enables low-carbon communities (Hudayriyat, Masdar, Sustainable Cities).
- Benefits industrial & data-centre developers with guaranteed grid capacity.

Pillar 2

18.2 Artificial Intelligence

National Play, Local Ecosystems



18.2 Artificial Intelligence: Emirate Ecosystems

Abu Dhabi

A deep AI stack: MBZUAI talent pipeline; Hub71+ AI programs; ATRC/TII model ecosystem (Falcon family); and new platform ventures (AI71) driving proptech, digital twins, and building-operations AI.

Ras Al Khaimah

Autonomous mobility pilots launched by RAKTA with WeRide (Robotaxi/Robobus), moving toward commercial operations in 2026—a catalyst on Al Marjan Island (Wynn area).

Dubai

The Dubai Universal AI Blueprint anchors city-scale adoption. Digital Dubai tracks sector programs with spillovers into valuation, e-transactions, and city ops, benefiting real estate and facility management.

Sharjah & Northern Emirates

SRTIP/university clusters and digital agendas channel AI into logistics, education, and energy-efficiency programs relevant to industrial parks.

18.2 Artificial Intelligence: National Impact

Why it Matters

- “UAE Strategy for Artificial Intelligence 2031” targets **14% of national GDP** from AI by 2030.
- Hub71+, Dubai AI Campus, and MBZUAI establish the UAE as the region’s primary AI talent and startup base.
- Over **120+ AI use cases** adopted in transport, real estate, finance, energy, and city governance.

Relevance to Real Estate

- Reduces OPEX costs through smart cooling, predictive maintenance, and energy optimization.
- Creates AI employment clusters, boosting residential rental demand in ADGM, DIFC, Masdar, and Dubai Internet City.
- PropTech, tokenization, and AI-based valuations reshape ownership and resale models.
- Smart communities (Expo City, Sustainable City) become future-proof anchor assets.

Pillar 3

18.3 Sustainability

Net Zero Pathways & Emirate Programs

18.3 Sustainability: Federal Strategy & Global Reach

Federal Pathway

The UAE Energy Strategy 2050 (updated 2023) commits **AED 150–200bn** to 2030 for higher efficiency and clean energy, complementing the UAE Net Zero 2050 strategic initiative.

Masdar: Recapitalised to target **≥100 GW** renewables by 2030 and up to **1 mtpa** green hydrogen, creating global project flow.

Net Zero 2050: USD 160B+ committed to renewables, waste-to-energy, water efficiency, and green buildings.

Global ESG Hub: Hosts global capital via COP28 legacy, ADGM green finance rules, and the Dubai Sustainable Finance Hub.

Global Footprint: Masdar is now a majority owner of clean energy assets in **40+ countries**.

18.3 Sustainability: Emirate Programs & Real Estate Value

Emirate Programs

- **Abu Dhabi:** Estidama Pearl embedded in planning; Masdar City as a low-carbon district.
- **Dubai:** Al Sa'fat (Green Building Regulations) mandates efficiency in new builds; Expo City as a net-zero testbed.
- **Sharjah:** Commercial-scale Waste-to-Energy (BEEAH-Masdar) online, with Phase 2 doubling capacity to ~60 MW.
- **Ras Al Khaimah:** RAK Energy Efficiency & Renewables Strategy 2040 drives building retrofits and solar.
- **Fujairah/Ajman/UAQ:** Focus on port electrification, solar uptake, and coastal-ecosystem projects.

Relevance to Real Estate

- Green-certified buildings now rent/sell **8-15% higher** than non-green equivalents.
- Institutional investors favor ESG-aligned RE funds & REITs, increasing liquidity.
- Compliance with Estidama/Al Sa'fat provides embedded property value protection.
- International buyers (EU/Canada) now
- International buyers (EU/Canada) now prefer low-carbon homes for tax & compliance.



Pillar 4

**18.4 “New Tourism” & Culture
Demand Flywheels by Emirate**

18.4 “New Tourism” & Culture: The Real Estate Proposition

Why it Matters

- New 10-year strategy targets **50M+ annual visitors** across all emirates.
- **New Anchor Assets:** Wynn Resort RAK (2027), Saadiyat Cultural District (Zayed National Museum 2025, Guggenheim 2026), Expo City Dubai, Sharjah Safari.
- Drives non-oil GDP and increases Short-Term Rental (STR) yields.

Relevance to Real Estate

- STR yields in Dubai, Abu Dhabi, and RAK outperform traditional leasing by **30–70%**.
- Hotels + branded residences + gaming + culture creates dual-use property value (own + rent).
- Creates new investment pockets outside Dubai in RAK, Sharjah, and Fujairah.
- Tourism workers and digital nomads boost demand for mid-market housing.

Abu Dhabi Tourism Strategy 2030:

Targets **39.3m** annual visitors and **AED 90bn** GDP contribution by 2030.



Pillar 5

18.5 UAE Outbound Investments

Global Reach, Domestic Resilience

18.5 Global Investments: The Domestic Multiplier Effect

Key Global Platforms & Their Impact

- **Masdar:** A clean-energy champion executing global growth (e.g., \$15bn Philippines renewables MoU, UK's 1.4 GW East Anglia THREE wind farm), reinforcing domestic green-jobs ecosystems.
- **Mubadala & ADQ:** With AUM of ~AED 1.2tn (Mubadala) and global platforms in supply chains and infrastructure (ADQ), they deepen capital access for UAE mega-districts and developers. Key assets include stakes in U.S. private equity and CityFibre UK.
- **DP World:** Global ports and free zones integrate with national rail/air, reinforcing industrial/logistics real estate in KEZAD, JAFZA, and RAKEZ.
- **Strategic Assets:** UAE sovereign wealth funds own ports, wind farms, logistics, and luxury brands (e.g., ICD's stake in Kerzner) across Europe, the US, Asia, and Africa.

Relevance to Real Estate

Sovereign-backed capital cushions UAE real estate from global shocks, solidifying its 'safe haven property market' status. Global brand ownership leads to branded residence partnerships, and sovereign backing increases developer credibility (Aldar, Emaar, Wasl).



The Integrated Strategy: A Confluence of Value

The UAE's five strategic pillars are not siloed initiatives; they are a fully integrated blueprint for economic diversification and resilience.

- **Clean energy** powers **AI-driven smart cities**.
- **AI** optimizes **sustainable infrastructure** and **tourist experiences**.
- **Global investments** provide the capital backstop and brand partnerships that fuel **domestic development**.

This engineered future creates a uniquely stable and high-growth environment, making UAE real estate a foundational asset for capturing long-term, diversified value.