



Bewertung der Einstiegschancen und der Rentabilität für den Neueintritt in den Event Management Sektor der Vereinigten Arabischen Emirate

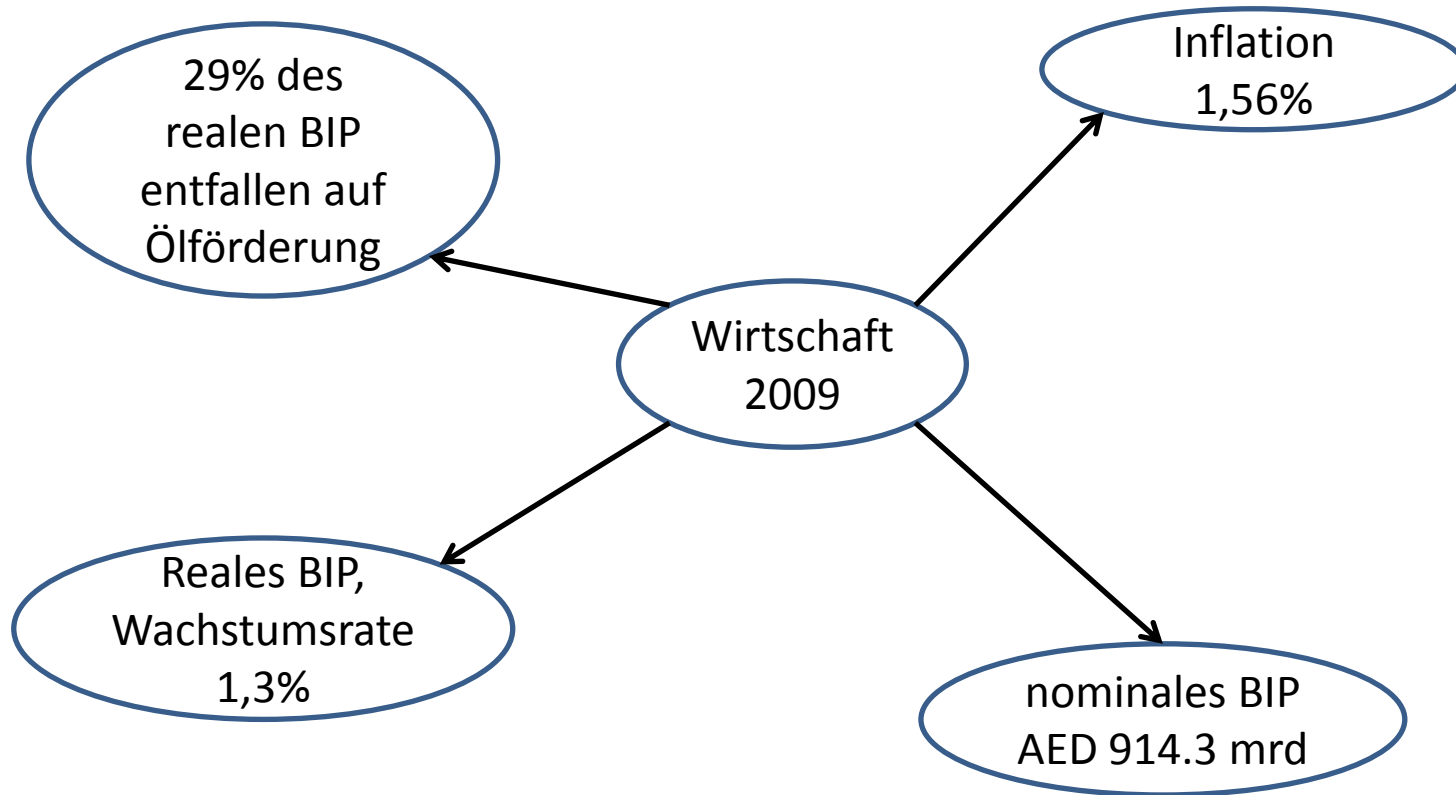


Allgemeine Zahlen und Fakten





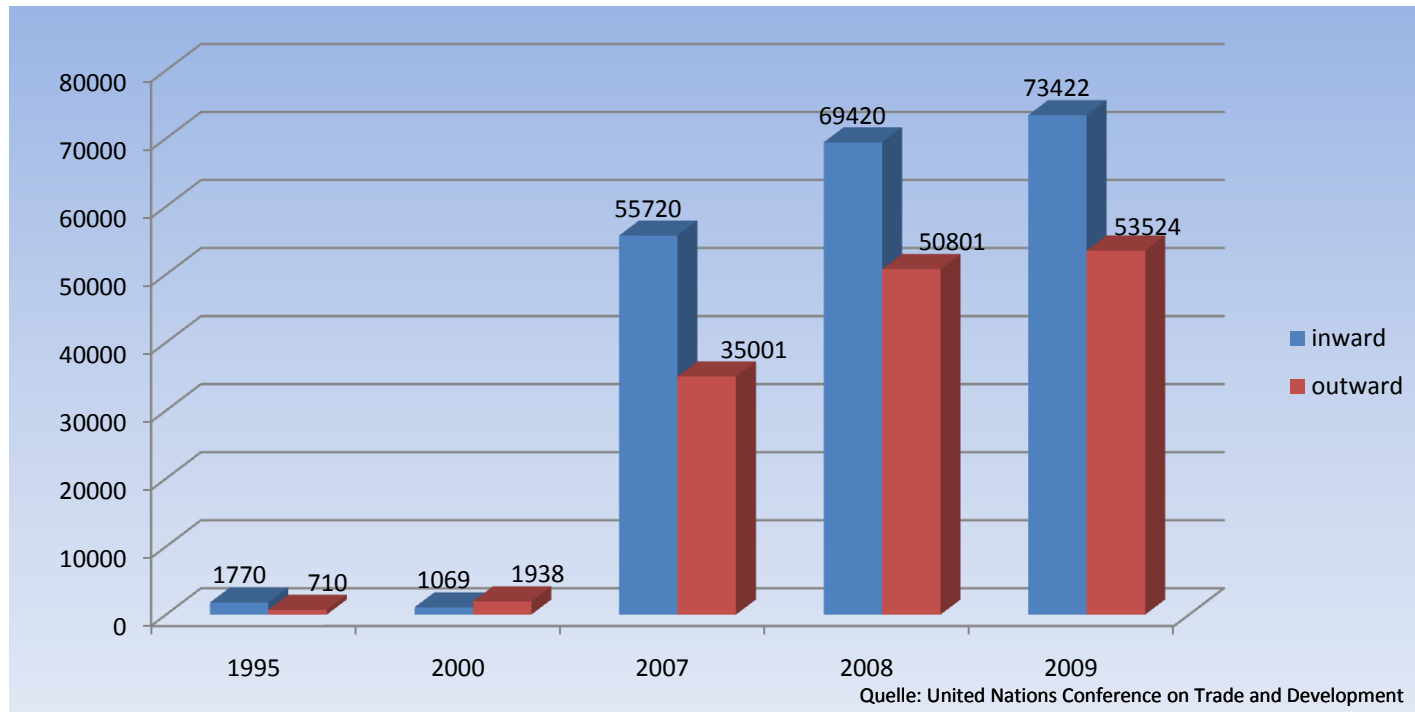
Allgemeine Zahlen und Fakten





Allgemeine Zahlen und Fakten

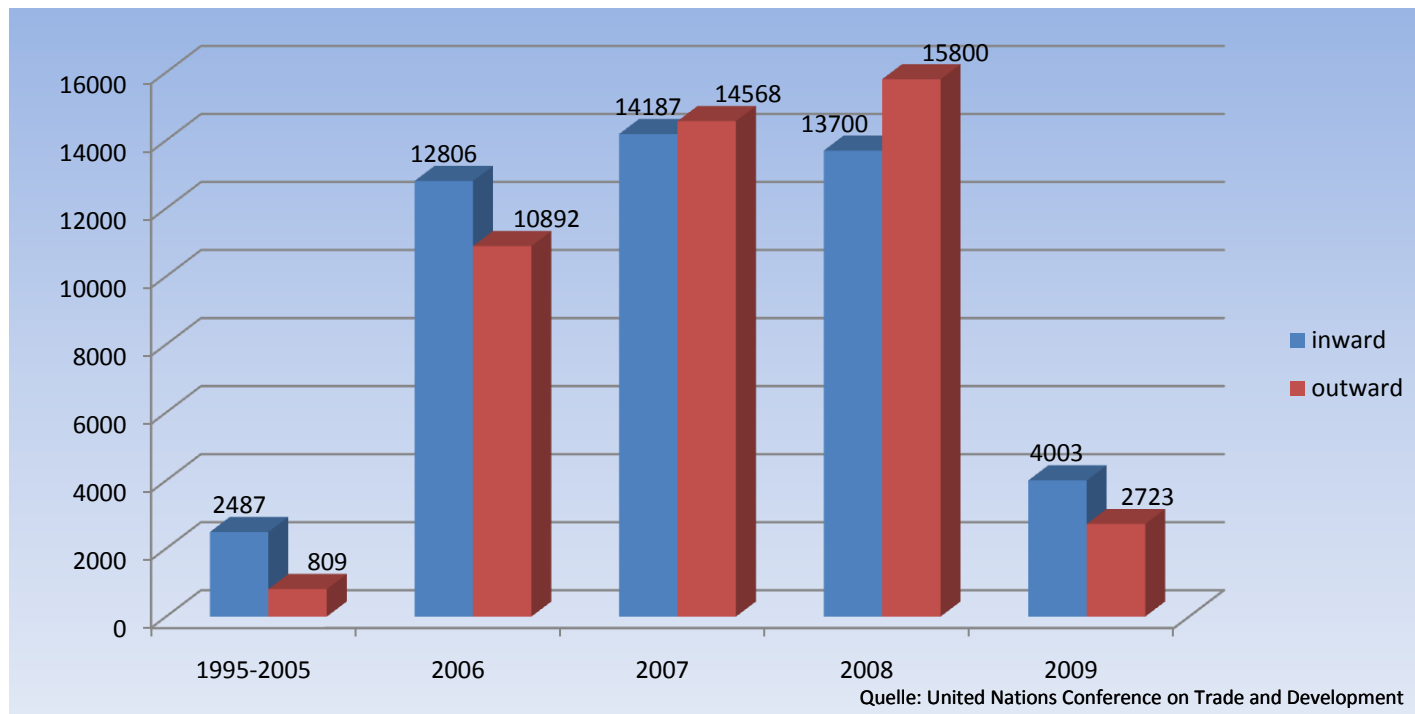
Ausländische Direktinvestitionen (in mio USD)





Allgemeine Zahlen und Fakten

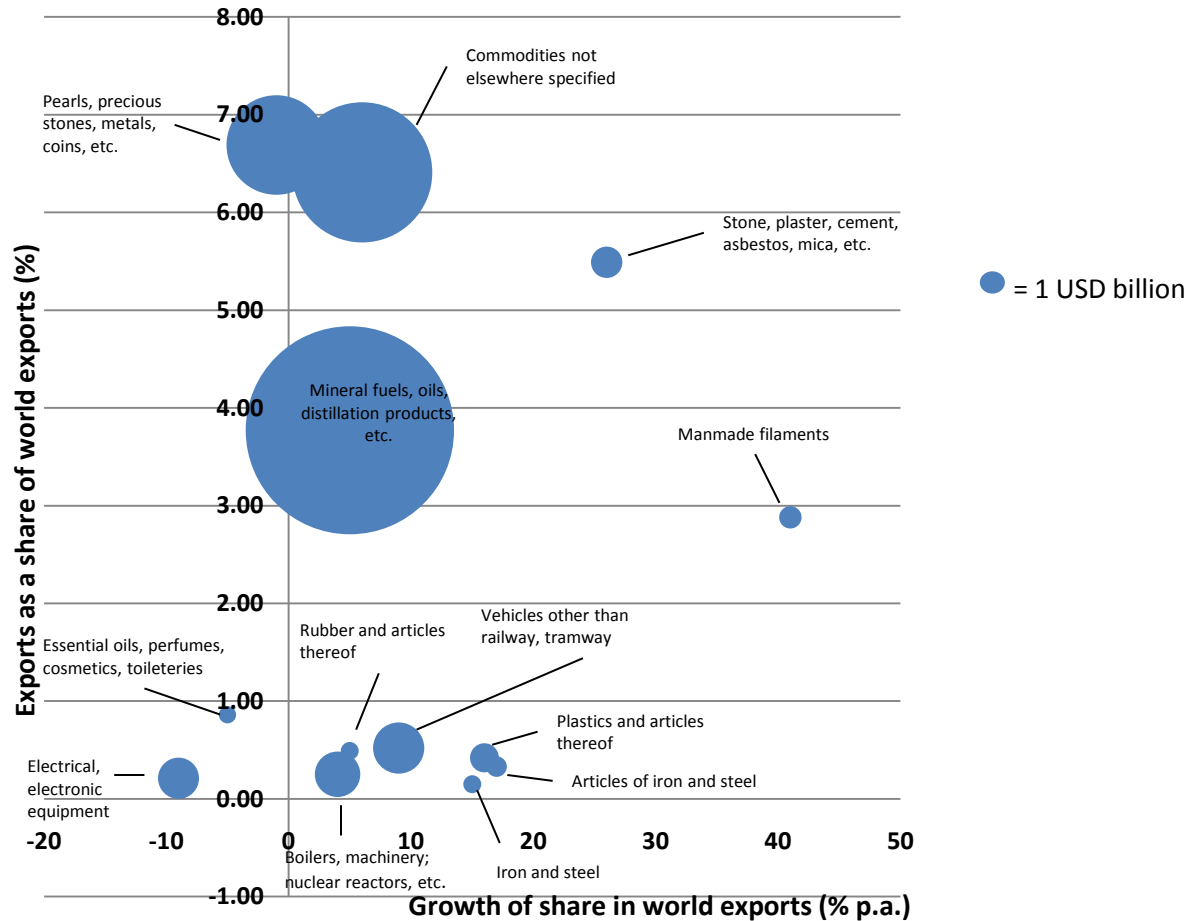
Bestand an ausländischen Direktinvestitionen (in mio. USD)





Kompetitivität der Vereinigten Arabischen Emirate

Composition of UAE exports by clusters (2008)



Quelle: International Trade Centre



Kompetitivität der Vereinigten Arabischen Emirate

	rank (out of 139)
General rank	25
Basic requirements	8
1st pillar: Institutions	20
2nd pillar: Infrastructure	3
3rd pillar: Macroeconomic Environment	12
4th pillar: Health and primary education	38
Efficiency enhancers	21
5th pillar: Higher education and training	36
6th pillar: Goods market efficiency	6
7th pillar: Labor market efficiency	26
8th pillar: Financial market development	33
9th pillar: Technological readiness	14
10th pillar: Market size	51
Innovation and sophistication factors	27
11th pillar: Business sophistication	22
12th pillar: Innovation	30



Kompetitivität der Tourismus Industrie der Vereinigten Arabischen Emirate

	Rank (out of 133)
General rank	33
T&T regulatory framework	39
Policy rules and regulations	53
Environmental sustainability	120
Safety and security	14
Health and hygiene	57
Prioritization of Travel & Tourism	6
T&T business environment and infrastructure	23
Air transport infrastructure	4
Ground transport infrastructure	39
Tourism infrastructure	30
ICT infrastructure	30
Price competitiveness in the T&T industry	50
T&T human, cultural, and natural resources	78
Human resources	25
Education and training	42
Availability of qualified labor	6
Affinity for Travel & Tourism	19
Natural resources	117
Cultural resources	84



Tourismus - Zahlen und Fakten

Prognosen

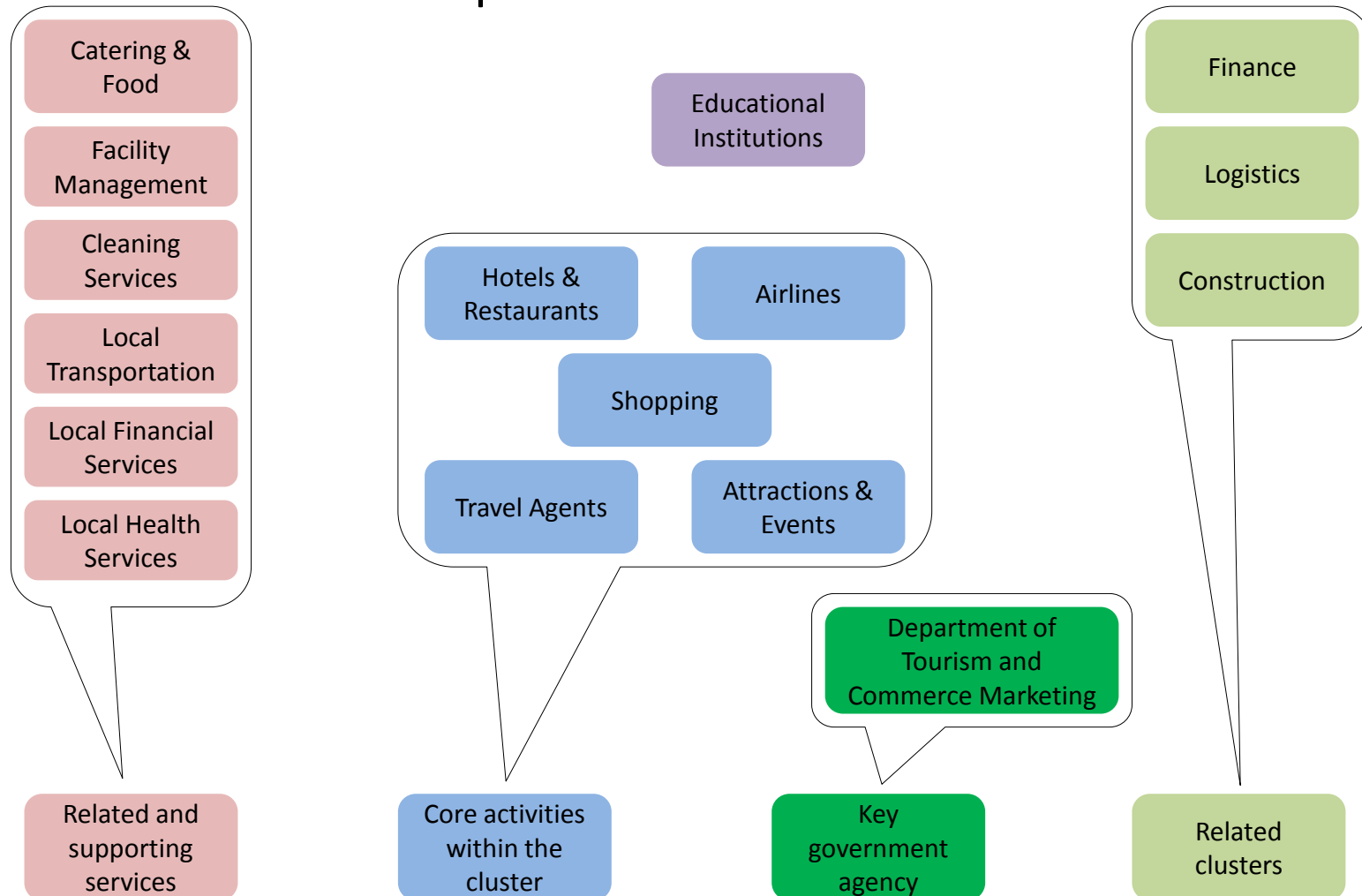
UNITED ARAB EMIRATES	2010			2020		
	AEDbn	% of total	Growth ¹	AEDbn	% of total	Growth ²
Personal Travel & Tourism	67.1	14.0	-9.6	116.8	11.6	1.4
Business Travel	7.6	0.8	-14.8	15.0	0.6	2.7
Government Expenditures	6.2	5.5	-8.7	11.5	5.5	2.1
Capital Investment	79.5	35.1	-20.6	224.4	43.2	6.4
Visitor Exports	81.6	10.6	-19.0	164.3	4.6	2.9
Other Exports	48.1	6.2	5.7	216.5	6.1	11.5
T&T Demand	290.1	18.0	-13.8	748.6	14.3	5.5
Direct Industry GDP	43.2	4.6	-20.7	101.8	4.3	4.5
T&T Economy GDP	156.3	16.6	-17.8	513.9	21.7	8.1
Direct Industry Employment ³	119.5	3.8	-4.4	148.9	3.6	2.2
T&T Economy Employment ³	429.2	13.8	-10.8	745.3	18.0	5.7

¹2010 real growth adjusted for inflation (%); ²2011-2020 annualised real growth adjusted for inflation (%); ³000 jobs

Quelle: World Travel & Tourism Council (2010)



Cluster Map des Tourismus Sektors in Dubai





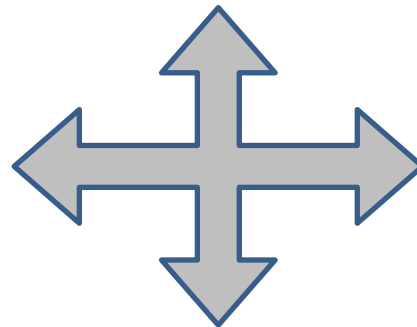
Tourismus Diamond Cluster

Factor Conditions

- + beneficial geographic location between many continents
- + good local infrastructure
- + almost no rain over the whole year
- + from 2011 on, 4 large international airports are within a range of 140km
- + major harbours of the Middle East are located in the UAE
- + huge local and foreign investments are being made
- + low-cost labour
- insufficient training/education of labour
- lack of environmental awareness
- few cultural resources

Firm strategy, structure and rivalry

- + many hotels in luxury segment, only recently middle-class segment has been discovered
- + tourism departments support the aggressive growth of the tourism sector
- market consolidated
- strong competition between hotels on the one hand, on the other hand price fixing exists amongst many hotels
- government owned entities may distort the market competition
- foreign investors cannot own land



Related and supporting industries

- + strong related industry clusters in logistics, finance, and construction
- lack of quality in services

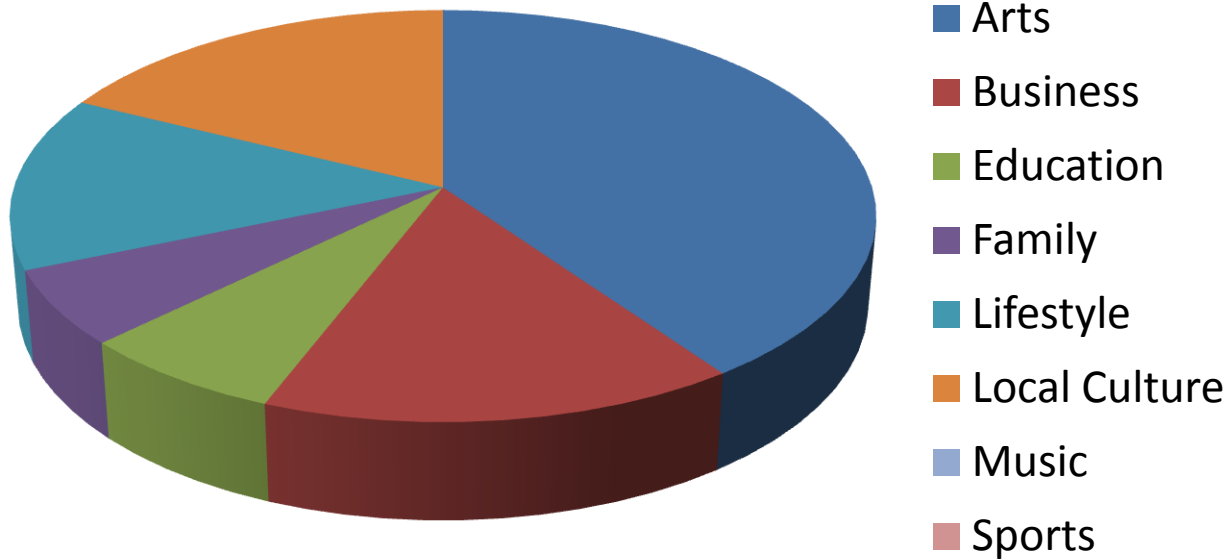
Demand conditions

- + government is trying to shift away from an oil-based economy, therefore providing means necessary to make the tourism sector attractive
- + openness towards foreigners and other cultures
- + large expatriate communities
- + political stability
- lack of local participation in expatriate communities/tourism sector

- + no taxes except for 10% ticket tax
- o religious regulations / guidelines
- Unpredictability of judiciary
- mourning could be reason for cancelled events, if e.g. a family member passes away

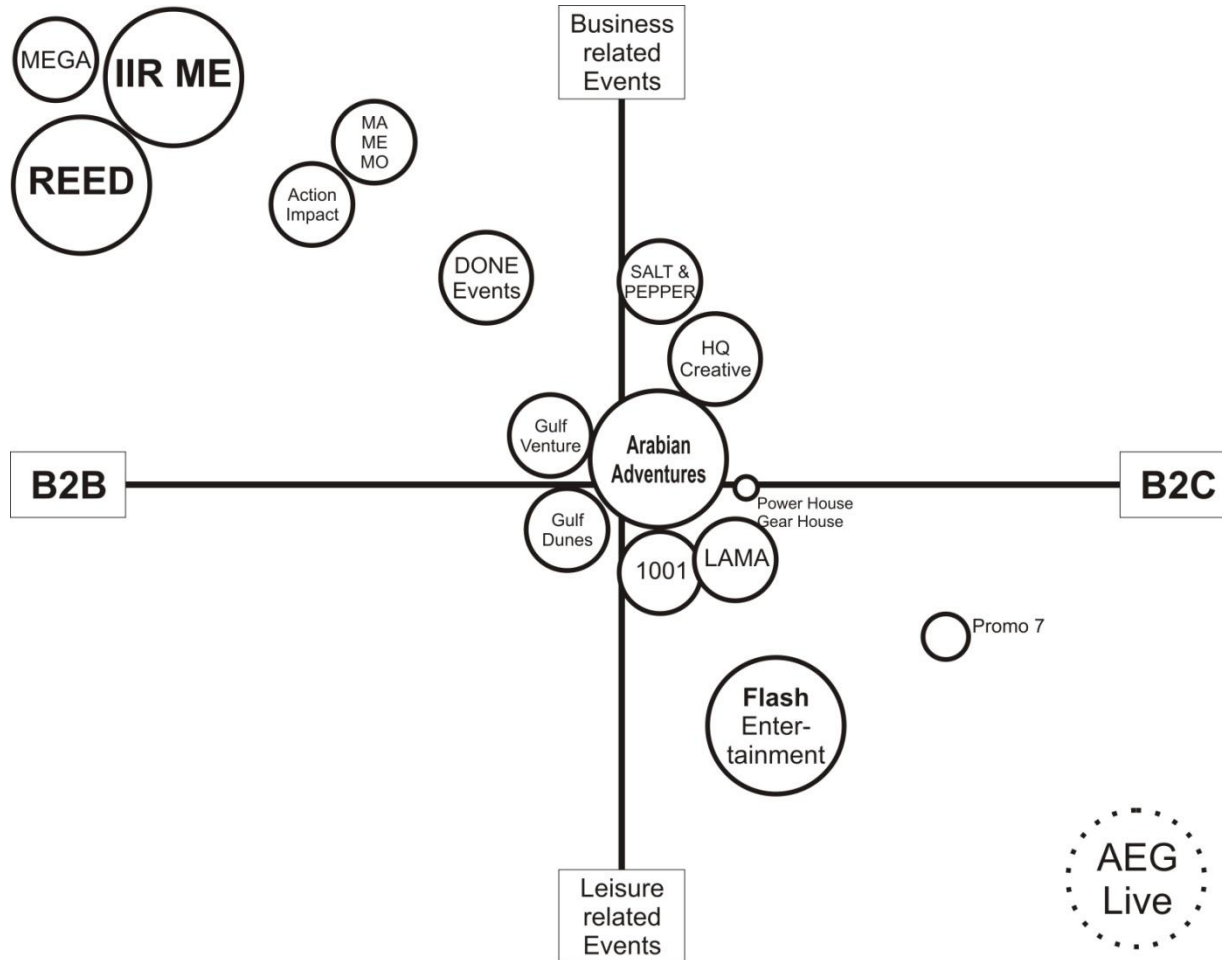


Events - revenue



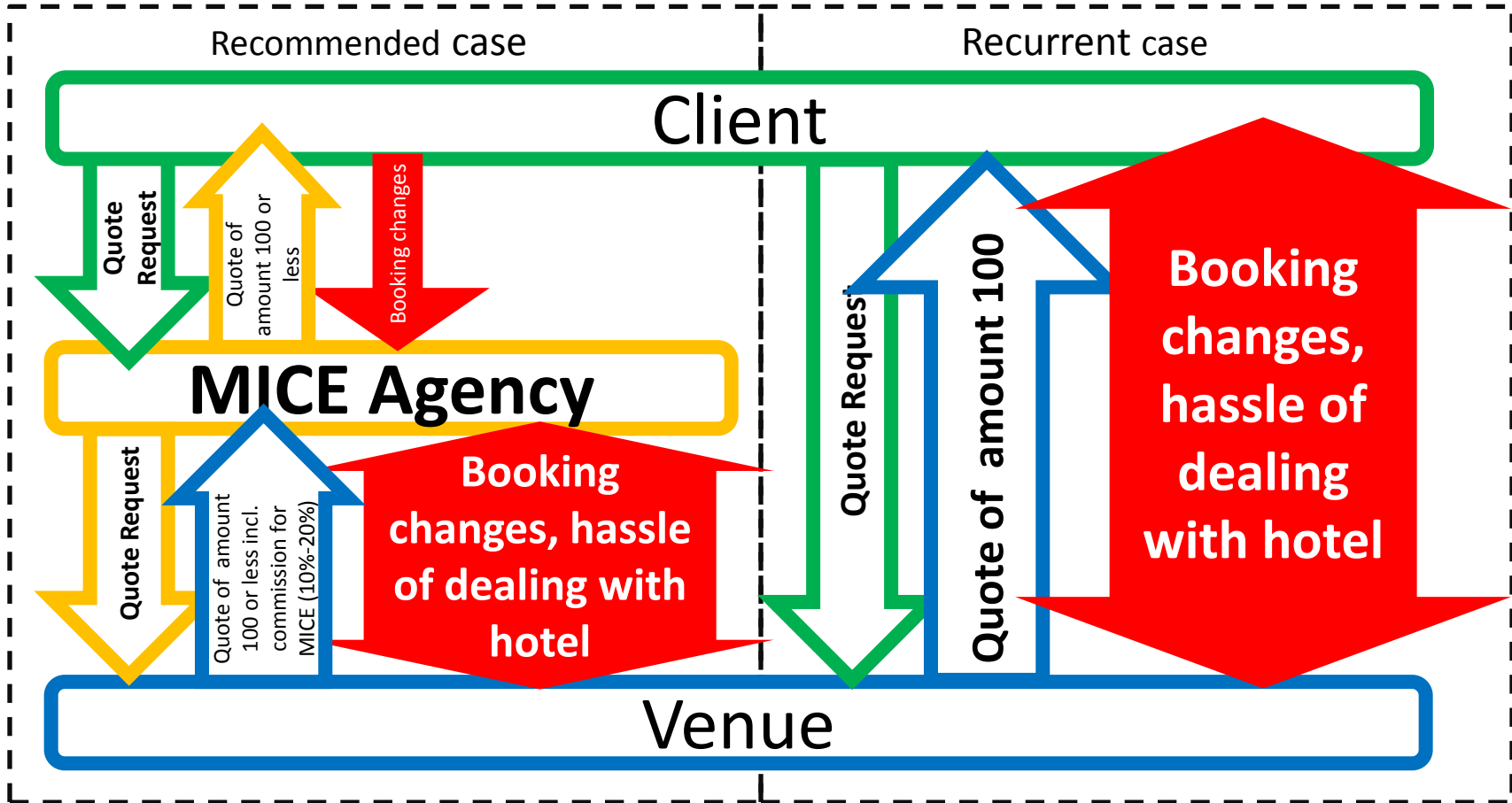


Wahrnehmungslandkarte des Event Management Sektors der Vereinigten Arabischen Emirate



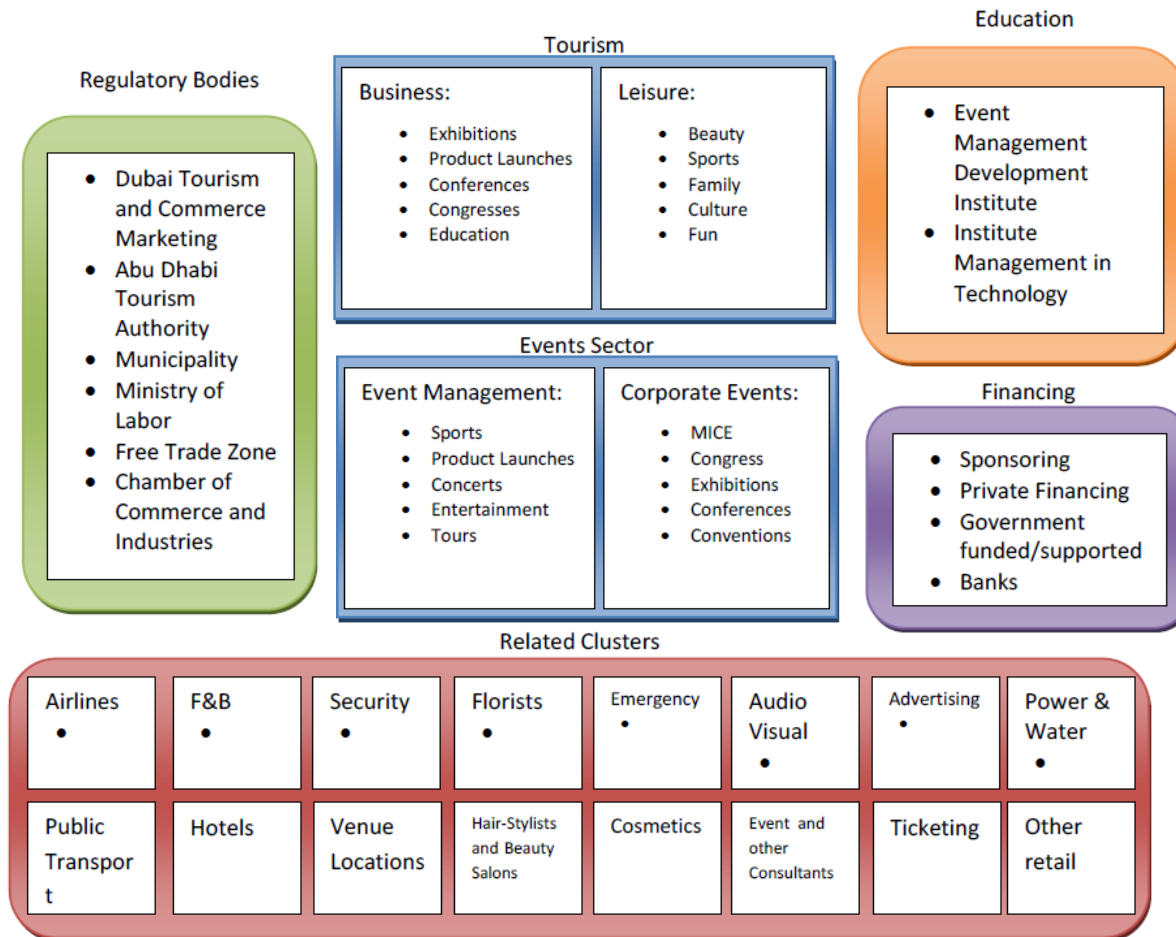


Probleme bei MICE booking procedure





Event Industrie Cluster Map





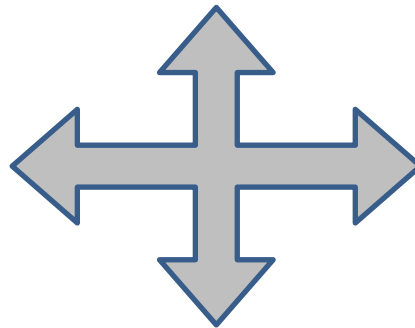
Event Diamond Cluster

Firm strategy, structure and rivalry

- Very large & strong competition
- Many companies have preferred list of contacts and will not change to new companies without USP and references
- Competition is sourcing innovative ideas from all over the world
- Very tough competition during the main event season (Nov. – May)

Factor Conditions

- + Highly qualified management staff
- + Some events are completely state funded
- + Low salaries for executing staff
- + From 2011 on, 4 large international airports are within a range of 140 km
- + Major harbours of the Middle East are located in the UAE
- + Good road network
- Executive staff is less proactive (meaning strong hierarchy)
- Need of local shareholder if not in Free Zone
- Some major event venues do not supply water, electricity, etc.



Related and supporting industries

- + Large variety of vendors
- + Growing number of venues
- Unreliable with deadlines
- Most venues will not allow external F&B
- Price fixing between venues

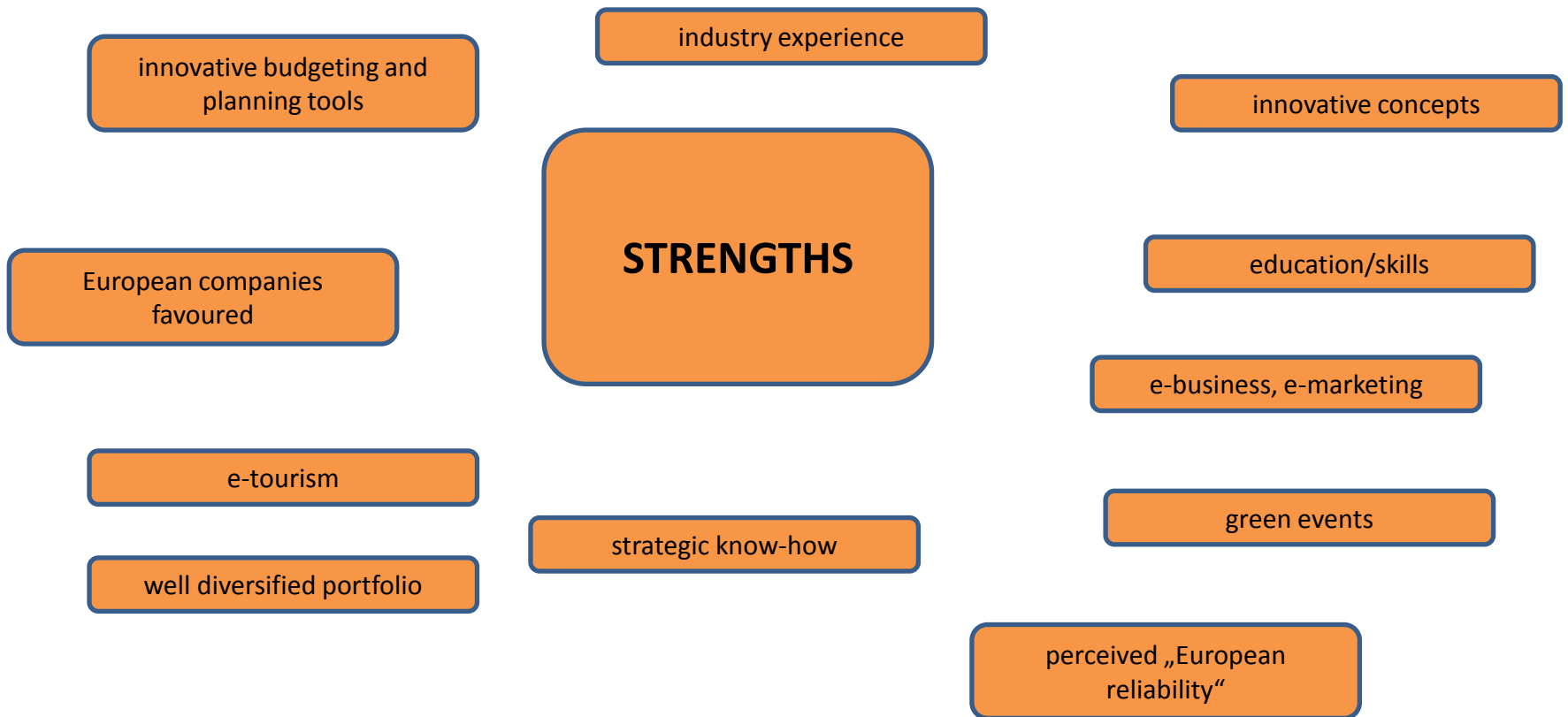
Demand conditions

- + Market for innovative ideas / technologies / events is there
- o Product quality is a must (whilst often lack in service quality)
- Ecological aspects are not considered in the industry

- + no taxes except for 10% ticket tax
- o religious regulations / guidelines
- Unpredictability of judiciary
- mourning could be reason for cancelled events, if e.g. a family member passes away

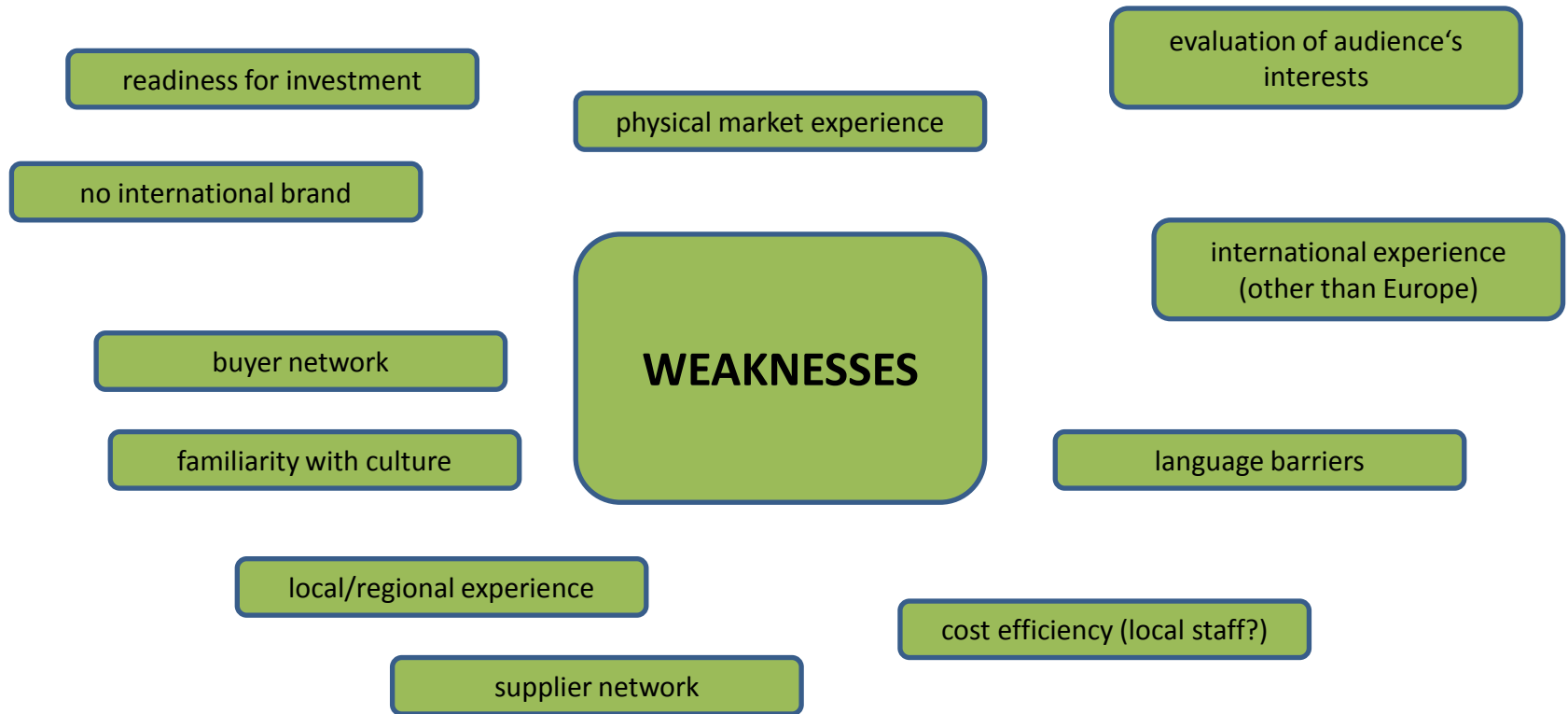


SWOT Analyse der Event Industrie



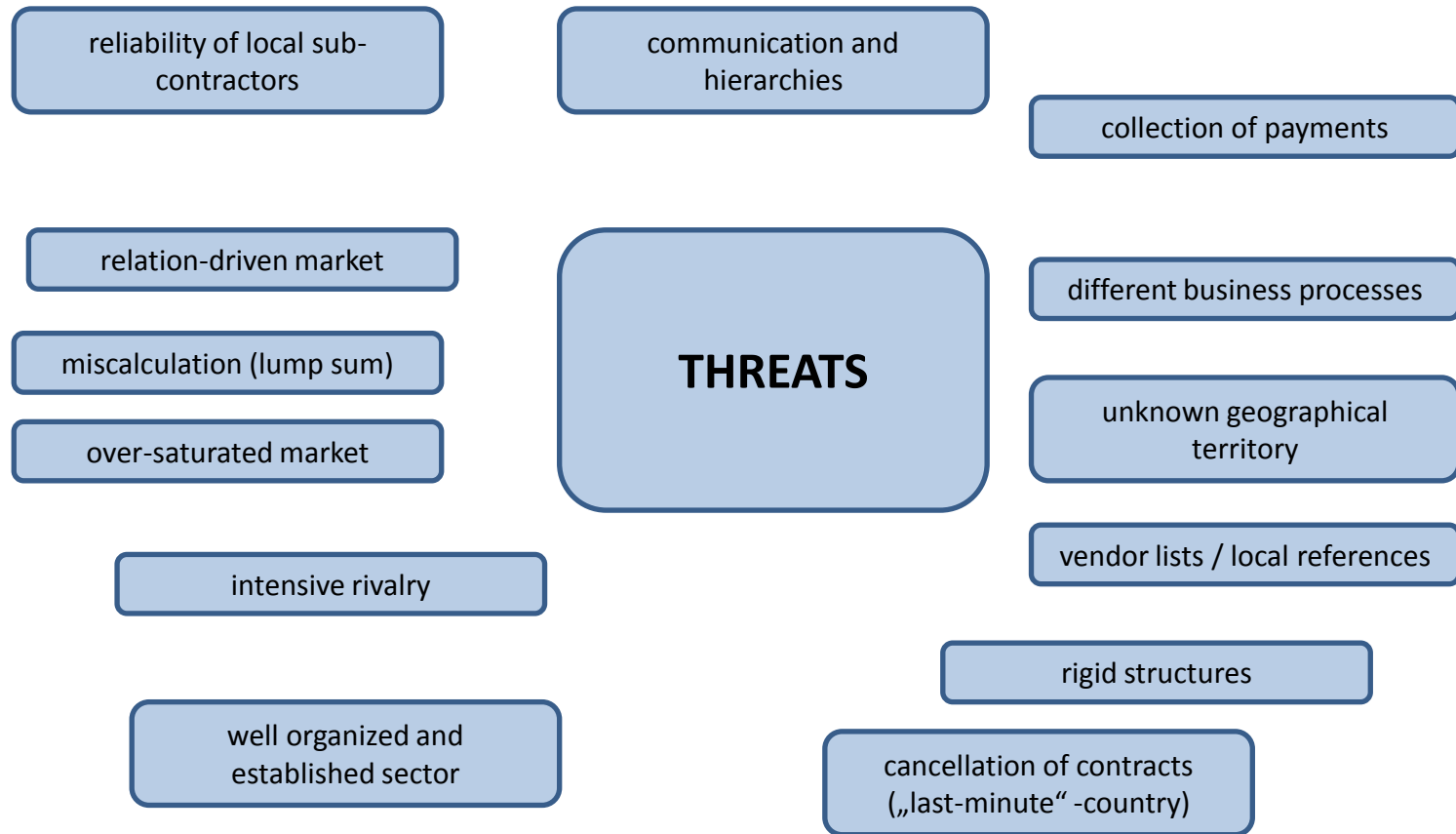


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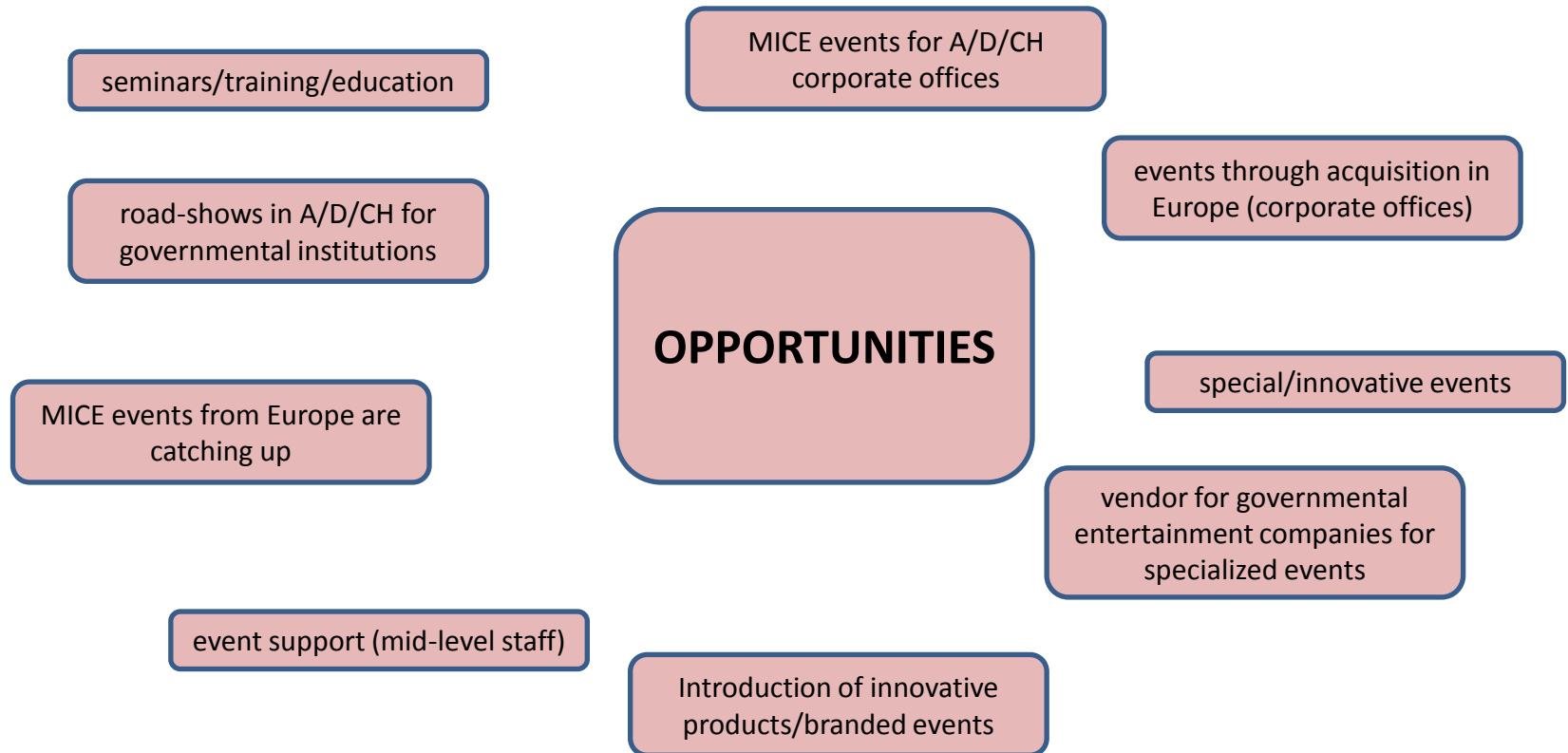


SWOT Analyse der Event Industrie





SWOT Analyse der Event Industrie





Vielen Dank für Ihre
Aufmerksamkeit!