

The MENA Rail and Metro Projects Market

And key trends, challenges and opportunities facing the market

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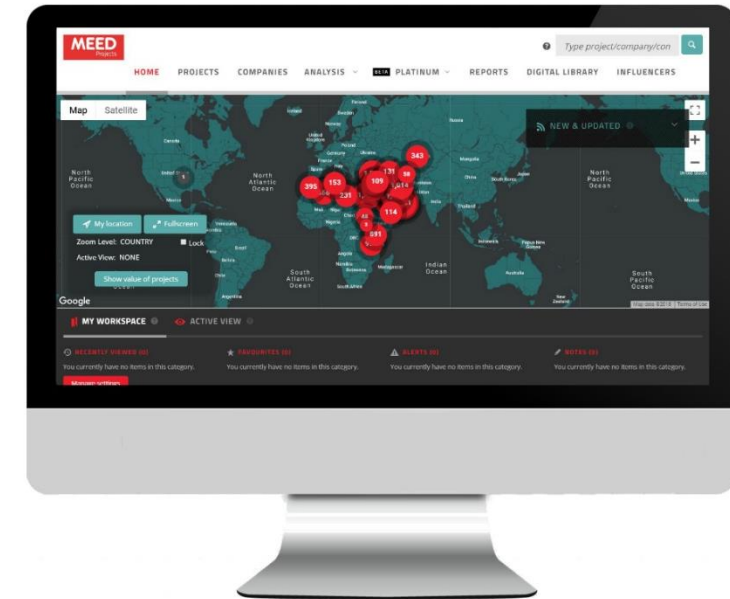
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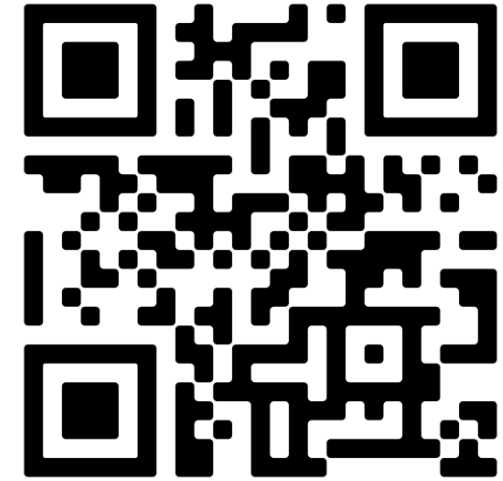
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MENA Rail Projects Market



MENA Rail Projects Market – Historical Context

The development of railway networks in the Middle East is not a new phenomenon. The first line in the region opened in 1852 linking Cairo with Alexandria. The 1,300-km Hejaz railway between Damascus and Medina, made famous by Lawrence of Arabia, opened in 1908

The Hejaz Railway c.1920s



Alexandria's Misr Station, completed in 1852



MENA Rail Projects Market – Overview and Key Facts

The Mena region has less than 24,000km of developed railway tracks over a land area of 15 million square kilometres. This region is very underserved with a very high population-to-rail ratio of more than 9,000 persons for every kilometre of track. Low car fuel costs, climatic conditions and geographical size have all been impediments to the development of rail networks

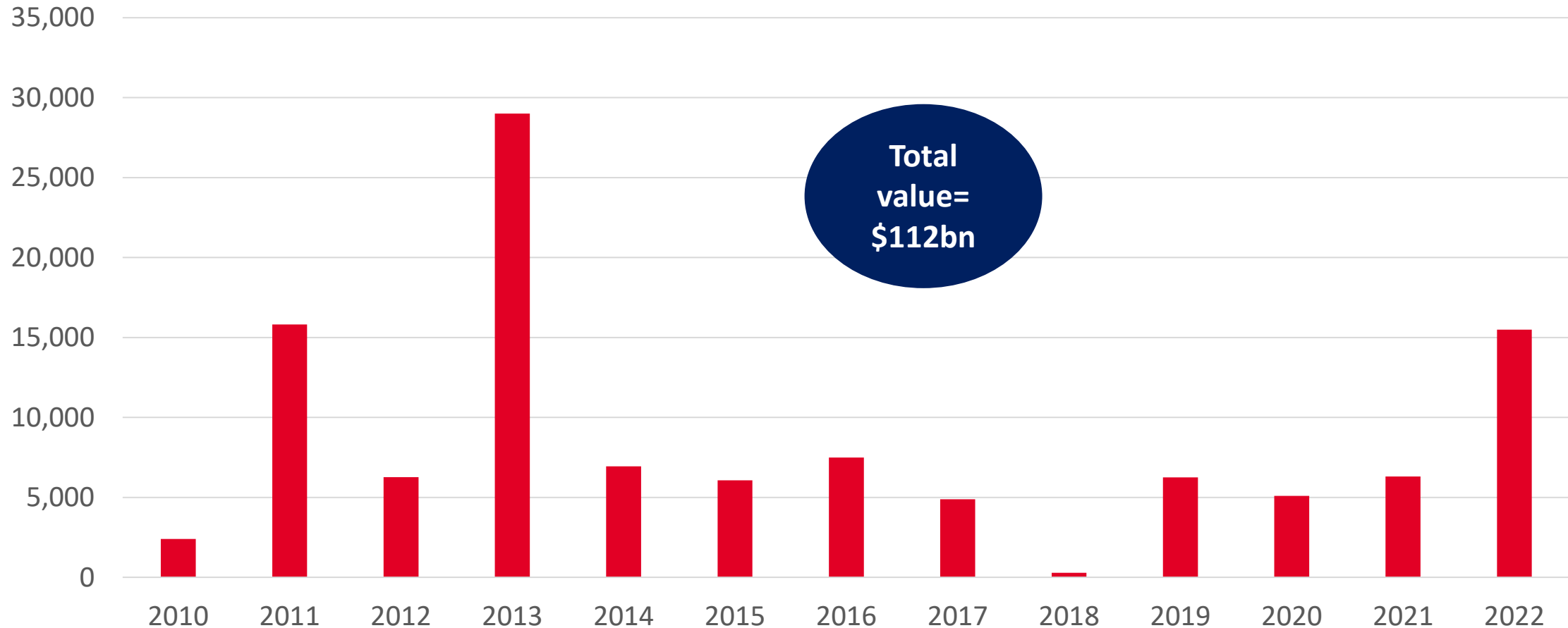
MENA Operational Rail, Metro, LRT and Tram networks

Country	Operational Length (km)	Description
Bahrain	0	No operational railway or metro
Kuwait	1	No operational railway or metro
Oman	0	No operational railway or metro
Qatar	76	Qatar Metro
Saudi Arabia	4,090	East Rail (449km), North Passenger Railway (2,418km), North Freight Rail railway (576km), Mecca Monorail (18.1km), Haramain High Speed Rail (453km), Riyadh Metro (176km)
UAE	945	Etihad Rail Phase 1 (264km) & 2 (605km), Dubai Metro (76.4km)
Iraq	1,905	State Company for Iraqi Railways
Jordan	509	Aqaba Railway Corporation and Hejaz Jordan Railway
Lebanon	0	No operational railway or metro as of 2023
Egypt	5,427	Egyptian National Railways (5,130km), Cairo Metro (94km) and Monorail (101km), 10th Ramadan City LRT (70km) , Alexandria Tram (32km)
Libya	0	All railways out of service due to political instability as of 2021
Algeria	4,498	ANSERIF network, Algiers and Oran Metros, Algiers, Oran, Constantine, Setif, Ouargla and Mostaganem tram lines
Tunisia	2,210	SNCFT (Société Nationale des Chemins de Fer Tunisiens), Tunis Tram
Morocco	2,134	ONCF (Office National des Chemins de Fer), Casablanca Tram, Rabat-Salé tram

MENA Rail Projects Market – Historic Contract Awards Performance

Spending reached its peak in 2013 when both the Riyadh and Doha metro projects were awarded. Expenditure declined thereafter due to falling oil prices and lack of political agreement on the GCC railway. However, the AlUla agreement in 2021 and the award of major contracts on the Line saw the market bounce back last year

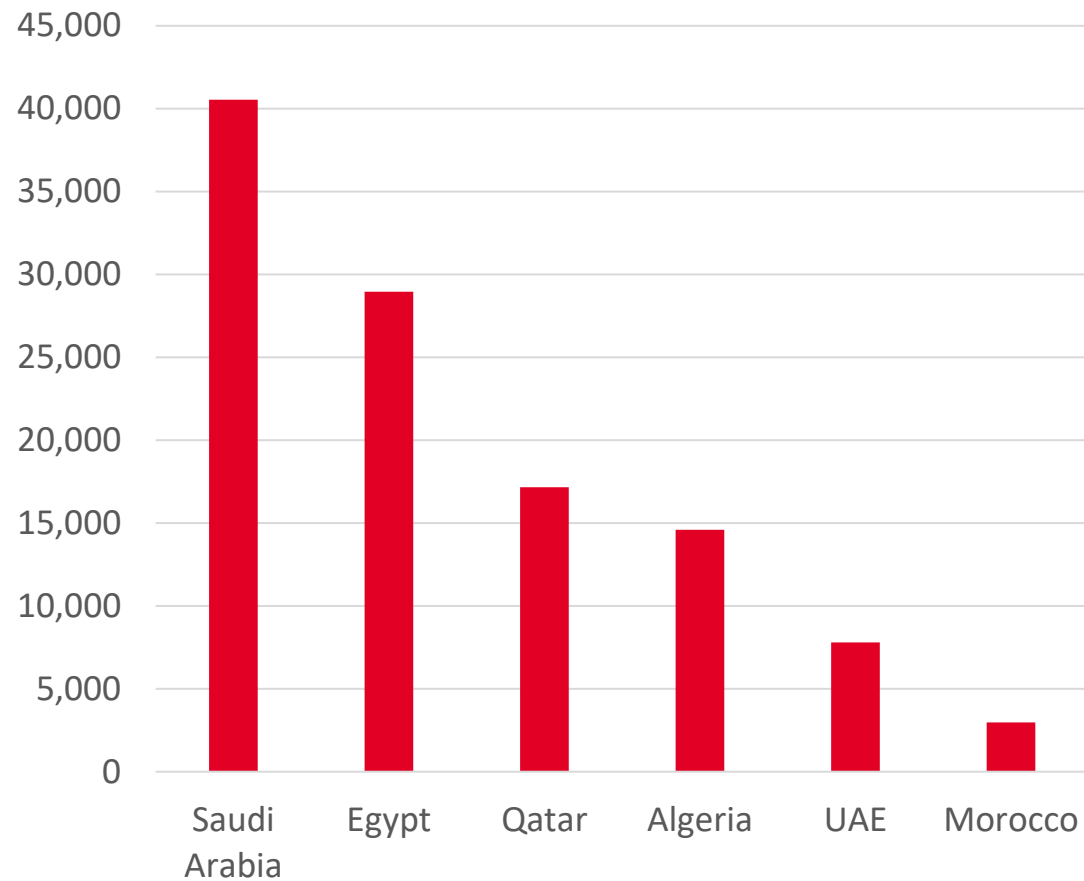
Value of MENA rail and metro contract awards 2010-2022 (\$m)



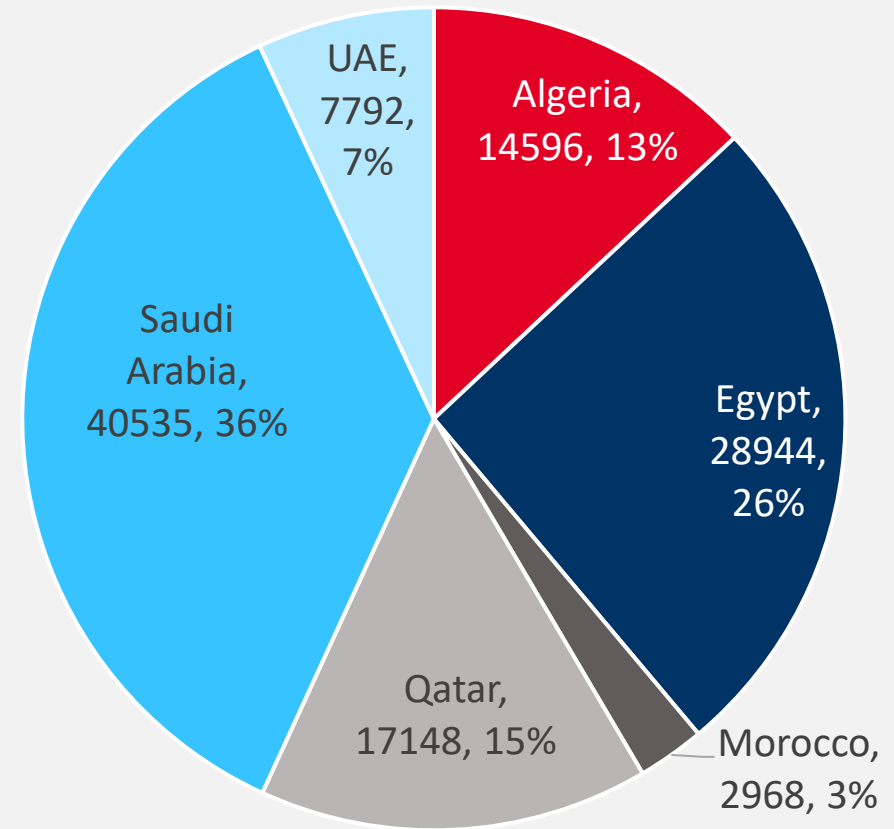
MENA Rail Projects Market – Historical Contract Awards Performance

Major rail and metro contracts have only been awarded in 6 MENA states over the past 13 years, the largest of which is Saudi Arabia followed by Egypt. In Bahrain, Oman and Kuwait there are no operational lines of any kind

Mena rail contract awards by country 2010-2022 (\$m)



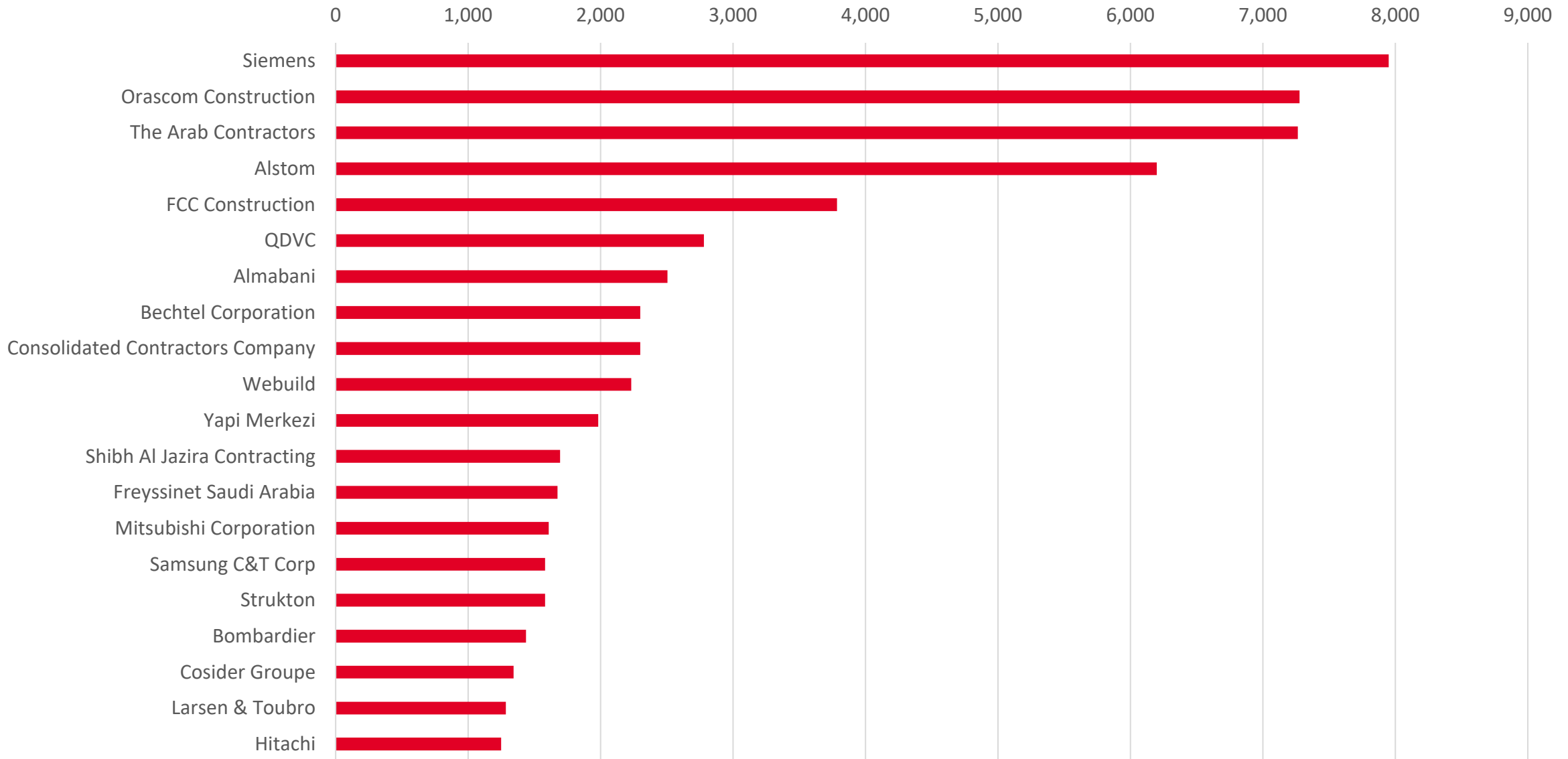
Share of railway contract awards (\$m, %)



MENA Rail Projects Market – Top Contract Awards Between 2010 and 2023

Project	Country	Sub-sector	Value (\$m)	Main Contractors	Client	Award Year	Completion Year
Haramain High-Speed Rail Network (HHR): Phase 2	Saudi Arabia	Railway	9,484	Ineco, Inabensa, Adif, Imathia, Al Rosan Contracting, Renfe, Talgo, Consultrans, Copasa, Obrascon Huarte Lain, Siemens, Al Shoula Holdings, Indra, ACS Group	Public Transport Authority Of Saudi Arabia	2011	2019
High Speed Rail Network: Greater Cairo-Aswan Railway Line (Phase 2)	Egypt	Railway	8,000	Siemens, The Arab Contractors, Orascom Construction	National Authority for Tunnels (NAT)	2022	2025
High Speed Rail Network: Ain Sokhna-Al Alamein High-Speed Railway(Phase 1)	Egypt	Railway	4,500	Orascom Construction, The Arab Contractors, Siemens	National Authority for Tunnels (NAT)	2021	2030
Dubai Metro : Red Line Extension (Route 2020)	UAE	Railway	2,885	Alstom, Gulermak, ACCIONA	Dubai Roads & Transport Authority	2016	2020
NEOM City: The Line: Drill & Blast Running Tunnels (Lot 2 & 3)	Saudi Arabia	Tunnel	2,780	China State Construction Engineering Corporation, FCC Construction, Shibh Al Jazira Contracting	NEOM	2022	2025
High Speed Rail Network: Luxor-Hurghada Railway Line (Phase 3)	Egypt	Railway	2,000	Orascom Construction, The Arab Contractors, Siemens	National Authority for Tunnels (NAT)	2022	2025
NEOM City: The Line: Drill & Blast Running Tunnels (Lot 4 & 5)	Saudi Arabia	Tunnel	1,850	Samsung Engineering, Archirodon, Hyundai Engineering	NEOM	2022	2025
QIRP: Doha Metro: Red Line North: Tunneling Works	Qatar	Tunnel	1,760	Galfar Al Misnad Engineering & Contracting, Webuild	Qatar Rail Company	2013	2020
Cairo Metro Network: Line 4 : Phase 1: Civil Package 1 (CP 401)	Egypt	Railway	1,594	Hassan Allam Construction, Petrojet, The Arab Contractors, Concord for Engineering & Contracting	National Authority for Tunnels (NAT)	2020	2028
NEOM - NEOM City: Oxagon: NICC: Connector South	Saudi Arabia	Tunnel	1,536	Webuild, Shibh al Jazera	NEOM	2023	2025
NAT - Greater Cairo Monorail: Phase 2	Egypt	Railway	1,360	Bombardier, Arab Contractors, Orascom	National Authority for Tunnels (NAT)	2019	2023
NAT - 10th of Ramadan LRT Phase 1	Egypt	Railway	1,320	AVIC, China Railway	National Authority for Tunnels (NAT)	2017	2022

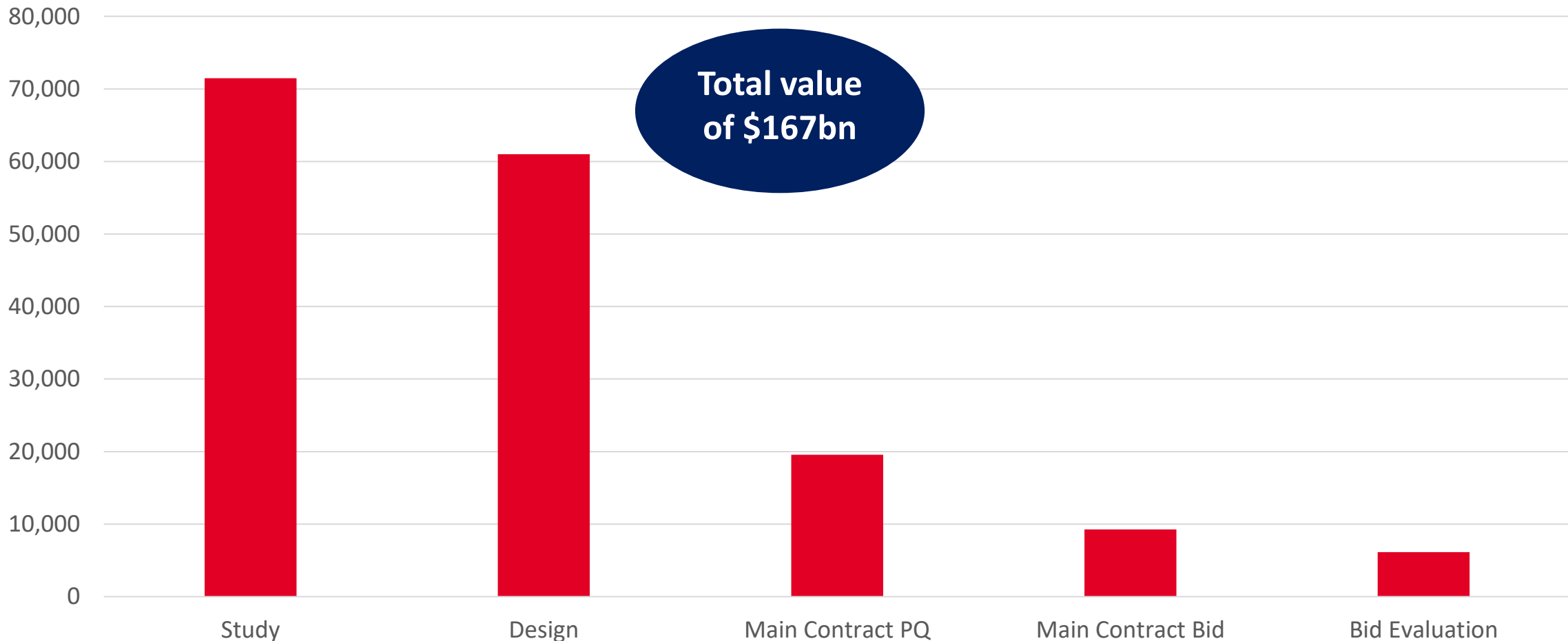
Top MENA Rail Contractors by Value of Work Awarded, (\$m)



MENA Rail Projects Market – Planned and Unawarded (Future) Contracts

There are \$167bn worth of railway and metro projects planned and un-awarded in the MENA region. Just under \$35bn worth of work is out in the market in tender or prequalification, with more than \$60bn in the design stage.

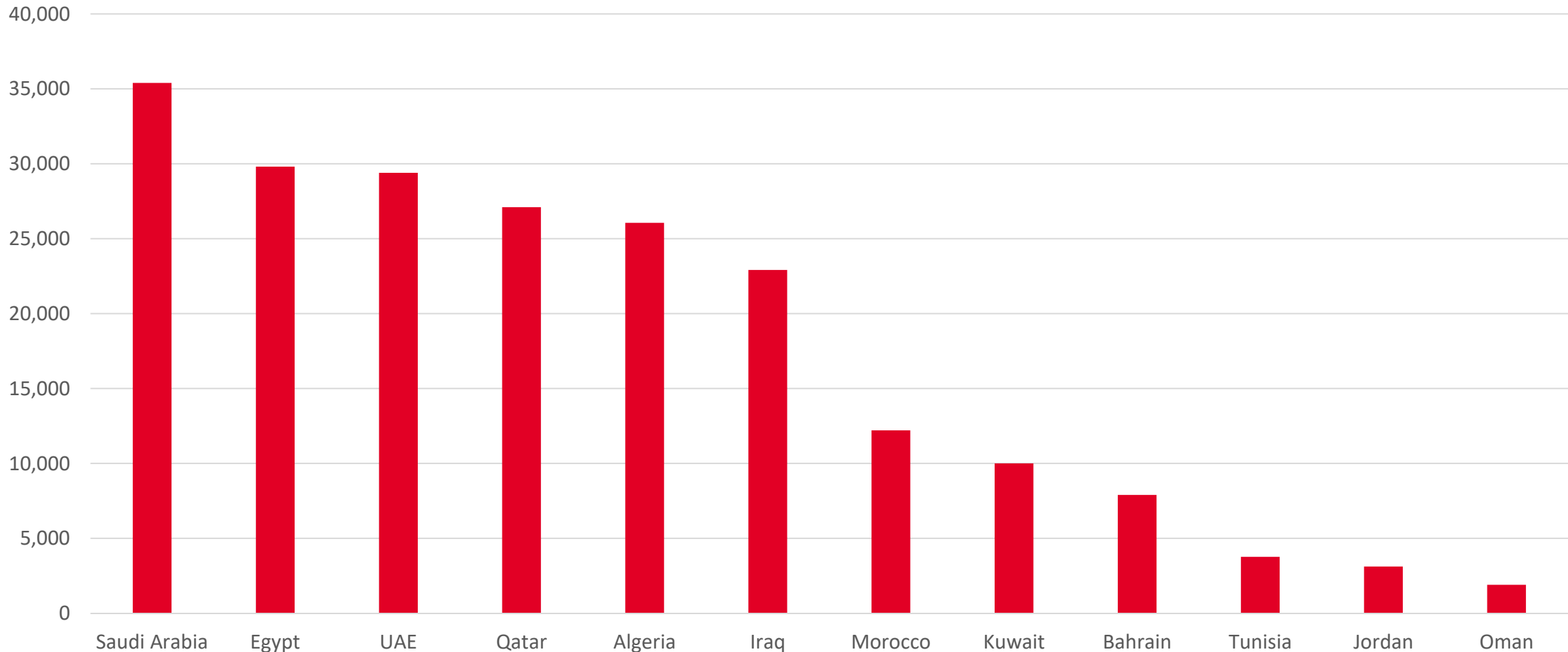
Value of Future Rail Projects in the Mena Region by Stage



MENA Rail Projects Market – Planned and Unawarded (Future) Contracts

The pipeline of future rail and metro projects is more diverse with Iraq, Kuwait, Bahrain and Oman all planning projects either for the first time or the first time in decades. However, the largest markets historically will continue to dominate going forward too

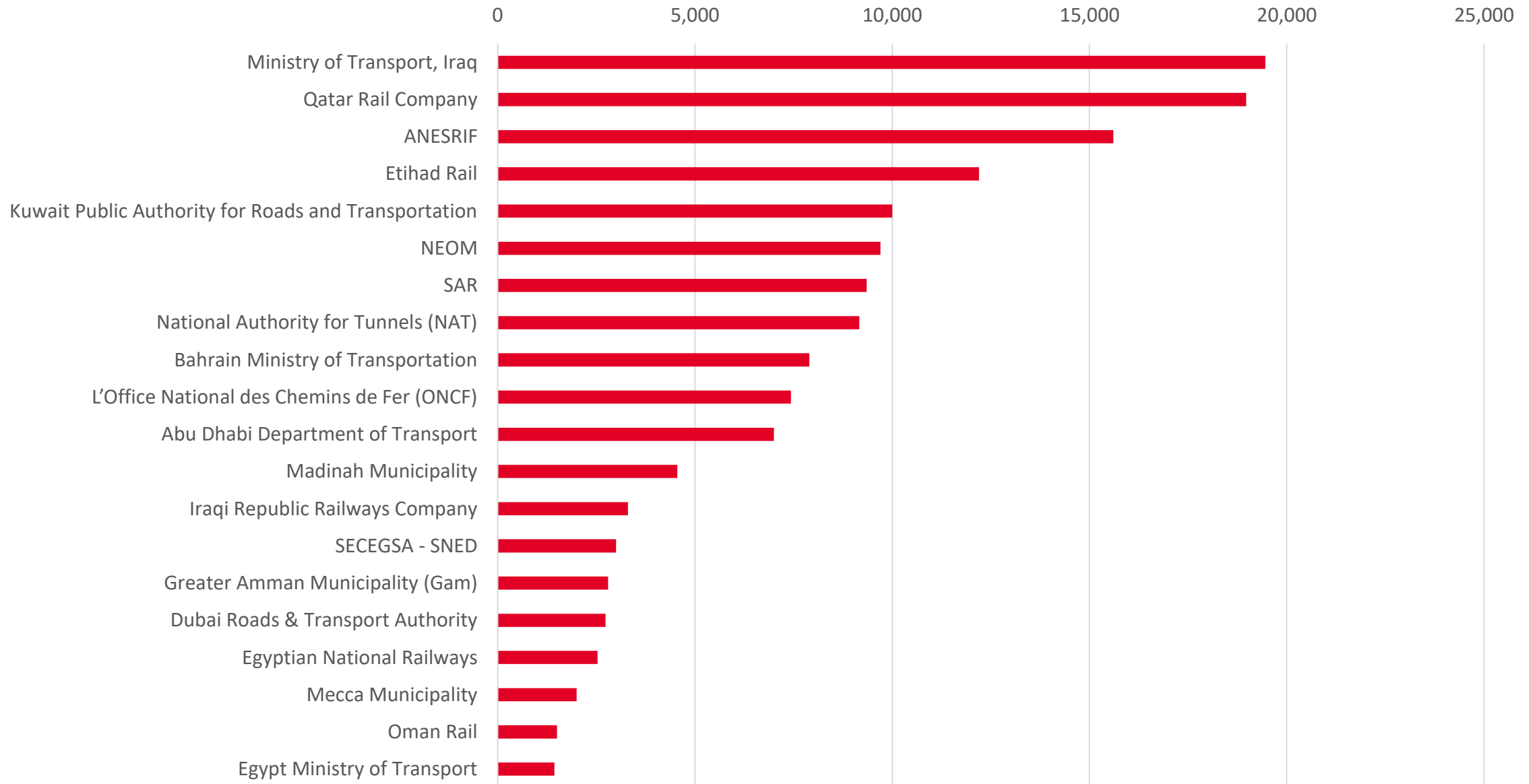
Breakdown of planned and un-awarded rail and metro projects by country (\$m)



MENA Rail Projects Market – Selected Top Planned and Unawarded Contracts

Project	Country	Sub-sector	Estimated value (\$m)	Status	Contract Type	Greenfield / Brownfield	Client	Award Year	Completion Year	Scope
Etihad Rail Phase 3: Dubai – Abu Dhabi High Speed Rail	UAE	Railway	10,000	Study	Build	Greenfield	Etihad Rail	2025	2029	High-speed railway line at and below grade between centres of Dubai and Abu Dhabi
Cairo Metro Network: Line 6	Egypt	Railway	5,000	Bid Evaluation	Build	Brownfield	National Authority for Tunnels (NAT)	2023	2028	Construction of 35km of track with 26 stations of which 12 will be elevated and 12 will be underground.
NEOM City: The Line: The Spine: Railway Network	Saudi Arabia	Railway	2,500	Main Contract Bid	Design Build (DB)	Greenfield	NEOM	2023	2026	Construction of 40km of railway network through tunnels.
National Railway Program: CORRIDOR 2: Oran to Algerian Malian border	Algeria	Rail Station	2,210	Main Contract PQ	Build	Greenfield	Agence Nationale d'Etudes et de la Realisation des Investissements Ferroviaires	2023	2029	Construction of a railway line of 680km from Oran to Algerian border with Mali, with a design speed of 220km/h.
NEOM City: Oxagon: NICC: Rolling Stock & Signalling System	Saudi Arabia	Railway	2,000	Main Contract Bid	Design Build (DB)	Greenfield	NEOM	2024	2027	Installation of signalling systems and rolling stock for 170km of railway.
National Railway Program: Corridor 3: Arzew port area to Gara-Djebilet	Algeria	Railway	1,650	Main Contract PQ	Build	Greenfield	Agence Nationale d'Etudes et de la Realisation des Investissements Ferroviaires	2023	2029	Construction of a railway line from Arzew's port area to Bechar to Tindouf to Gara-Djebilet over 1,650km.
National Railway Program: Corridor 1.2: El-Menea to Malian borders	Algeria	Railway	1,500	Main Contract PQ	Build	Greenfield	Agence Nationale d'Etudes et de la Realisation des Investissements Ferroviaires	2023	2029	Construction of railway line from El-Menea to Mali border of 1,500km.
Sohar Port to Al Wathba Rail Network: UAE Civil Package A	UAE	Railway	1,400	Main Contract PQ	Design Build Operate (DBO)	Greenfield	Etihad Rail, Oman Rail	2023	2028	Construction of a railway line from Al Wathbah Junction to UAE-Oman Border for 122km.
NEOM City: The Line: The Spine: Railway Network: Type A Works	Saudi Arabia	Tunnel	1,000	Main Contract Bid	Design Build (DB)	Greenfield	NEOM	2023	2026	Construction of cut and cover rail tunnels
NEOM City: Oxagon: NICC: The Connector Depot	Saudi Arabia	Railway	1,000	Bid Evaluation	Design Build (DB)	Greenfield	NEOM	2023	2025	Construction of a 5.5km long and 0.8km wide Connector Depot.
Rail Link: El Affroun Station: Center Port	Algeria	Railway	1,000	Bid Evaluation	Build	Greenfield	Agence Nationale d'Etudes et de la Realisation des Investissements Ferroviaires	2023	2026	Construction of a 48km electrified double track between the El Affroun station and center port.

Top MENA Rail Clients by Value of Planned or Un-awarded Work (\$m)



Future Planned Capacity Additions

Country	Planned Length (km)	Planned Projects
Bahrain	184	Bahrain Metro
Kuwait	574.2	Kuwait National Rail Road
Oman	337	Al Wathbah to Sohar, Dhank in Oman with the main line network, Muscat Metro
Qatar	659.9	Doha Metro, Passenger & Freight Rail, Light Rail Transit, West Bay automated people mover
Saudi Arabia	2,765	Neom's The Line, Riyadh Metro Extension, Saudi Land Bridge, extension of North Railway to Tabuk Line, Riyadh and King Abdullah Port Link (CTW410), Riyadh-Doha High-Speed Maglev Train, Medina Metro Red, Blue and Green, Cargo Trains Line 2 Extension, Hofuf Railway Signal System, Upgrading of North Train Freight Line, New Freight Railway Line, Saudi Kuwait High-Speed Railway Line, North Al Mashaaer Monorail
UAE	793.1	Etihad Rail phase 3, Hatta Cable Car, Dubai Metro Blue line, Abu Dhabi Metro, Oman Etihad Rail Sohar Port to Al Wathba Rail Network: UAE Civil Package A, Etihad Railway Network: Phase 2: Package C, Etihad Phase 2 Passenger Rail Links to Expo City and MBZ,
Iraq	2,176	High speed rail network: Eastern Route, Railway Line from Al Qaim to Tartus Port, Bismayah to Allawi Metro Line, Khor Al Zubair Port Railway Line in Basra, Baghdad Elevated Railway (BET)
Jordan	28	Amman Metro Rail, Aqaba Coastal Railway, Ajloun Cable Car
Lebanon	0	None announced as of 2021
Egypt	3,322	High Speed Rail Network in Egypt, Egypt National Railways Restructuring, Signal Upgrade Cairo–Alexandria Line, Cairo Metro Network: Modernisation & Extension of Line 1, Cairo Metro Network: Line 4, Alexandria Raml Tram Rehabilitation, Alexandria Metro,
Libya	0	None announced as of 2021
Algeria	16,923	National Railway Program, Algiers Metro Line Expansion Phase II, East Mining Line in Algeria, Oued Tlelat-Akid Abbes Railway Line Upgrade,
Tunisia	175.6	Sfax Metro, Rapid Rail Network
Morocco	968	Kenitra to Marrakech High-Speed Railway, Casablanca Tramway Extensions and Tram, Marrakech - Essaouira HSR Line, Morocco to Spain Undersea Rail Link, Railway Electrification Network Project, Marrakech-Agadir High Speed Railway Line

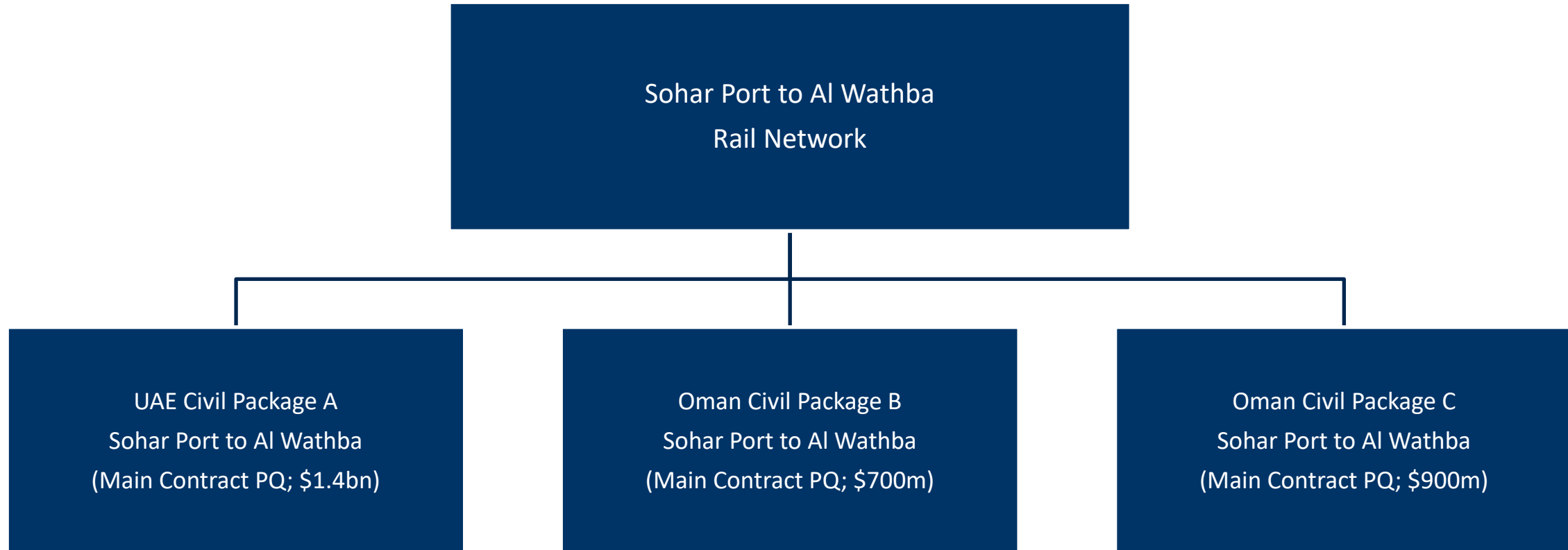
Oman-UAE Rail Link



Oman Rail/Etihad Rail - Sohar Port to Al Wathba Rail Network



Below are the key packages of Sohar Port to Al Wathba Rail Network project



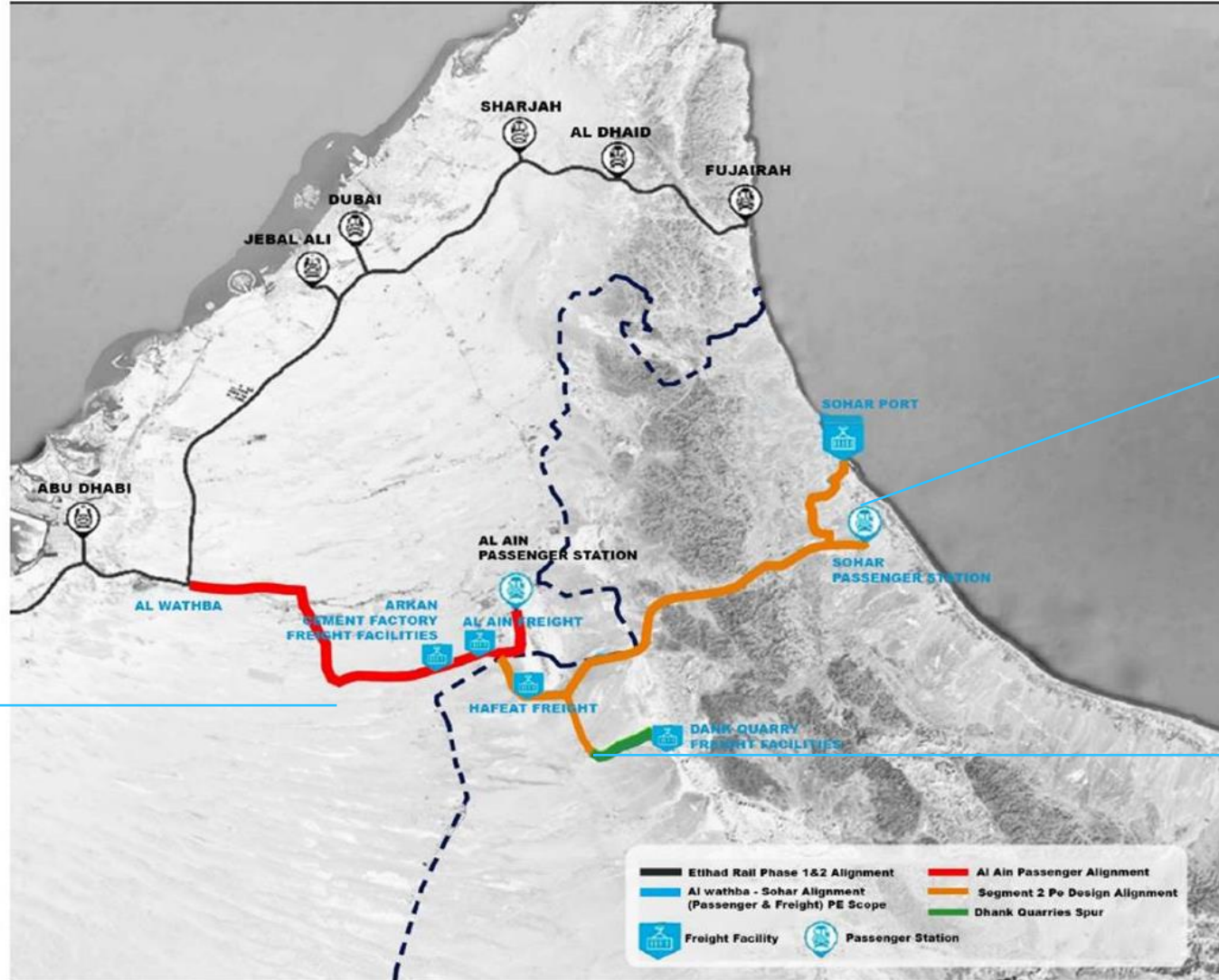
Oman Rail/Etihad Rail - Sohar Port to Al Wathba Rail Network

D&B lump sum contract for the civils, track work, utilities (including protection of existing), bridges, other structures, and traffic management, comprising of design, procurement, construction, project integration, testing, commissioning, and defect notification period of each railway section for all work packages of the project.

UAE Civil Package A Sohar Port to Al Wathba

The alignment connection with existing Etihad Railway Stage 2 network at Al Wathbah Junction. This includes culverts, Roads and Wadi crossings, sand mitigation measures, roads and highway diversions (permanent and temporary), line side civil works, and rail trackwork.

- Main line in UAE, 122km: from Al Wathbah Junction to UAE-Oman Border (Red alignment – UAE section)
- Spur line from UAE-Oman Border at Hafeet to Al Ain Station (comprising open cut, U-trough, elevated and at-grade sections also highway widening works) (Red alignment, 18km)
- Al Ain Passenger Station at grade station located in Deer Park
- Al Ain Industrial City Containers (40,000 TEUs per year), small maintenance shed for minor/light maintenance. Provisioning facility.
- Arkan Cement Factory (branch line and unloading facility)



Oman Civil Package C (Sohar Port to Al Wathba)

The alignment includes viaducts totalling approximately 21km and ranging in height from around 10 metres to over 20 metres, culverts, Wadi crossings, sand mitigation measures, roads and highway diversions, utility diversions (permanent and temporary), line side civil works, and rail trackworks

- Main line in Oman segment 2: From approximately 70km from UAE-Oman border (to be defined by chainage) to Sohar Port and Sohar City (Orange alignment – Oman section), 96km

- Sohar Port & Marshalling Yard
- Sohar Passenger Station
- Sohar Depot, Maintenance facilities, and OCC (building only)

Oman Civil Package B (Sohar Port to Al Wathba)

The alignment includes two tunnels of approximately 1.7 and 1.6km, culverts, Wadi crossings, sand mitigation measures, roads and highway diversions, utility diversions (permanent and temporary), line side civil works, and rail trackwork.

- Main line in Oman segment 1: from UAE-Oman Border at Hafeet for approximately 70km (to be defined by chainage) (Orange alignment – Oman section)

- Hafeet Freight Facility

Optional Spur including the following:

- Oman Rail Alignment connection to Dhank Quarries (Orange Alignment), 18km
- Spur to Dhank Quarries (Green Alignment), 16km
- Dhank Freight Facility

Overview

The UAE-Oman Rail Network is set to improve the competitiveness of the two countries in global trade and help establish their positions as logistics hubs that serve as gateways to regional markets. The scheme supports both countries' sustainable development goals by improving their transport and infrastructure sectors.

Passenger trains will run up to 200km per hour, reducing the journey time between Sohar and Abu Dhabi to 100 minutes and between Sohar and Al-Ain to 47 minutes. Freight trains will reach 120km per hour.

Stakeholders

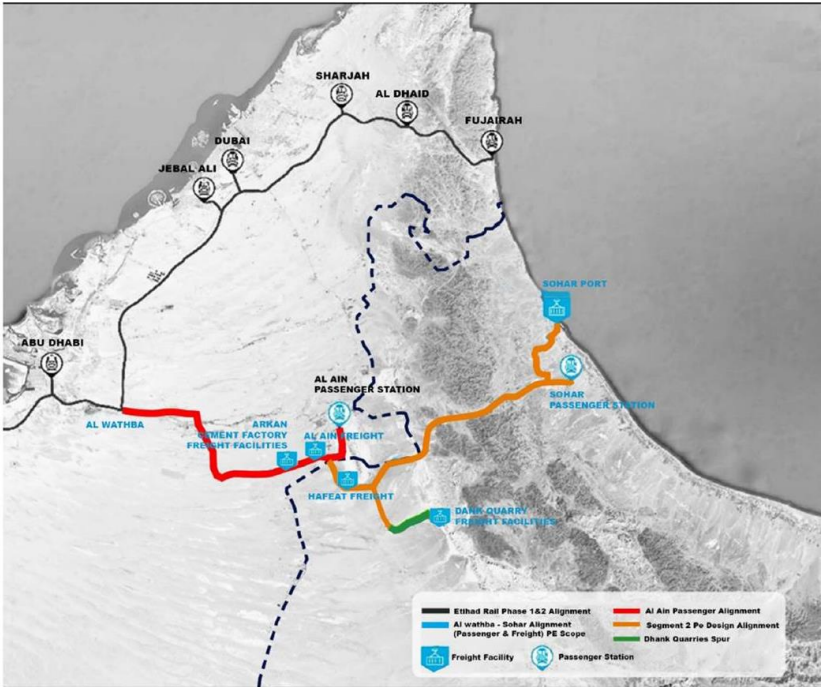
Oman-Etihad Rail Company is a joint venture of the sultanate's national railway developer and operator Oman Rail and the developer and operator of the UAE's Etihad Rail.

The project recently received a push after Oman-Etihad Rail Company inked a strategic agreement with Abu Dhabi-based Mubadala Investment Company to support its development.

Contractors from the UAE, Oman, Turkey, Greece, India and China are understood to have shown interest in qualifying for the civil works package of the UAE-Oman Rail Network.

Status

Oman-Etihad Rail Company issued the prequalification document for the three main packages earlier this year. Once firms and JVs have been prequalified, the main construction and rolling stocks tenders will be issued to bid with a likely award timeframe of H1 2024.



2022	2023	2024	2028
Project announcement	Tender issue	Award	First train running by Q4

Source: MEED, Oman Rail, Etihad Rail, and other secondary sources

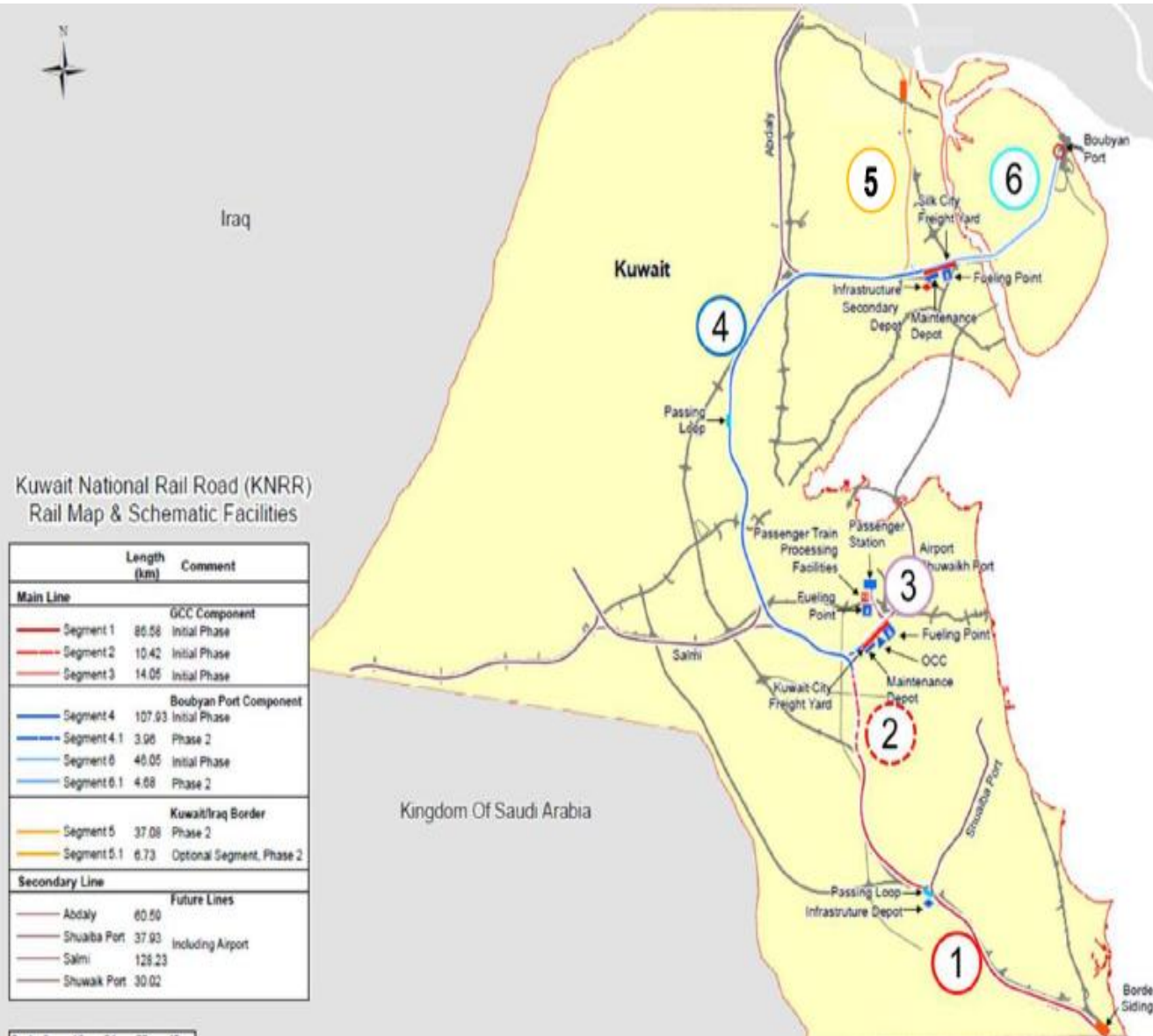
Kuwait-GCC Link



PART - Kuwait National Railroad

Key project facts

Project name	Kuwait National Rail Road
Country	Kuwait
Connecting cities/regions	The border of Kuwait in the south with the Kingdom of Saudi Arabia (Nuwaseeb Point) To Shedadia (Kuwait Urban Area)
Client/Project Company	Kuwait Public Authority for Roads & Transportation (PART)
Project sponsors	Government of Kuwait
Estimated cost (Budget)	\$10bn
Length (km)	575 (Phase 1 = 111km)
Design speed	—
Contract type	Build
Model	—
Project status	Study
Start date	2024 (Expected)
Full completion	2028 (Expected)



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PART - Kuwait National Railroad Phase 1

Overview

The Kuwait National Railroad is a 575km long development that is being implemented by the Kuwait government to connect different regions of the country.

While most of the development efforts will be concentrated in urban areas through the establishment of metro networks, a major part of the project involves the construction of a link to Saudi Arabia via the Nuwaiseeb point that represents a junction at the southern border of Kuwait with Saudi Arabia.

Kuwait Railroad will connect to the larger GCC Rail network via this link.

The tender for study and design of the link was published by the Kuwait's PART in January 2023, and covers all the modalities that will be necessary for undertaking and completing the project.

Stakeholders

PART is a government agency responsible for the development, management, and regulation of road and land transportation infrastructure in Kuwait.

PART comes under the purview of the Ministry of Public Works (MPW) in Kuwait and is funded by the ministry through budgetary allocations.

Status

The entire project is in the study stage.

The study and design tender for the first phase of the project was published in January 2023 and has a submission due in July 2023.

The tender has been issued by Kuwait's PART that is implementing the project.

Industry sources indicate that the winning candidate for the tender may be selected by the end of June 2023.

The final designs and studies for the project are expected to be completed by the end of 2023.

Once this is achieved, PART will offer contracts for the construction of the railway line for phase I.

The overall project is planned to be completed in two to three years.

Proposed development of Kuwait Railroad showing primary and secondary lines



2023

Starts with the issue of the study and design tender for phase I of the project

2024

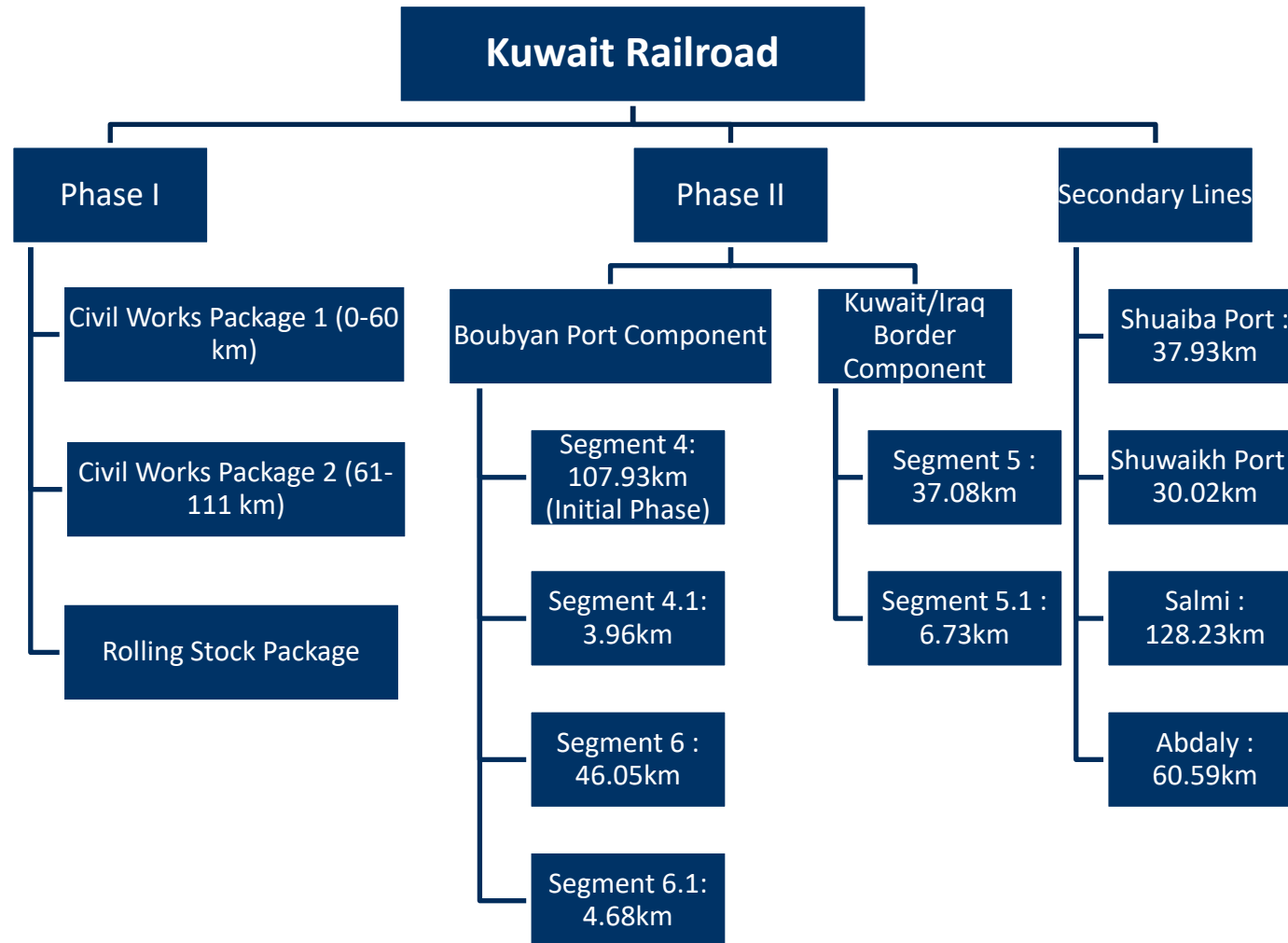
Phase I contract award expected by the end of the year

2028

Construction end and commissioning

PART - Kuwait National Railroad

This slide gives a diagrammatic flowchart of the various sub-projects that make up the Kuwait Railroad Project



The first phase of the Kuwait Railroad project consists of the following three segments split into two main civil works packages and a rolling stock contract:

- The 87km stretch from the Kuwait-Saudi Arabia border to the turnoff leading to Kuwait City crossing (Segment 1);
- The 10km distance from Kuwait City crossing's Freight Depot to the junction of the branch that connects to the passenger station (Segment 2);
- The 14km branch that leads to the Passenger Station, which includes facilities for passenger train service (Segment 3).

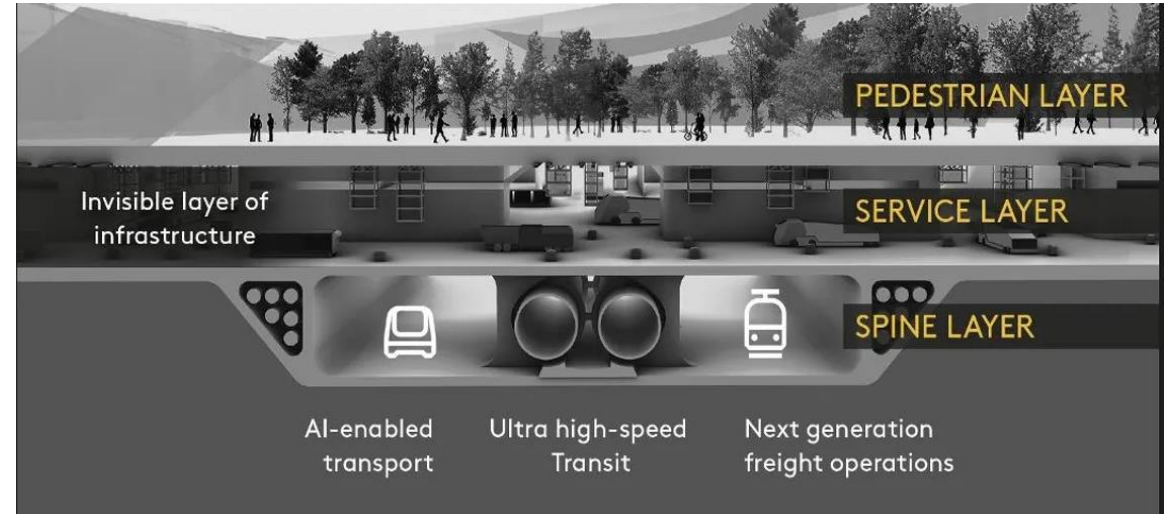
The Spine



Neom

The Spine contains a 170km-long high-speed rail network running alongside the length of The Line. Work is already under way on the tunneling under the central mountains, with other major infrastructure tenders out to bid

- Webuild and Shibh Al Jazira Contracting Company (Sajco) recently awarded a \$1.5bn contract to design and build 57 kilometres of a high-speed railway known as the Connector South linking The Line and Oxagon
- Two multi-billion-dollar drill and blast tunnelling contracts were awarded last year. The first was secured by FCC Construction SA/China State Construction Engineering Corporation/Shibh Al-Jazira Contracting Company Joint Venture (FCC/CSCEC/SAJCO JV), and the second to Samsung C&T Corporation /Hyundai Engineering and Construction Co. Ltd/Saudi Archirodon Company Ltd Joint Venture (SHAJV). The tunnels work will provide over 28 kilometers in length and provide separate tunnels for high-speed and freight rail services.
- Tendering is ongoing for other rail infrastructure contracts for tunnels including Type A,B and C precast installation work and the Delta Junction.
- Bids for the massive for rolling stock and systems expected to be submitted in October



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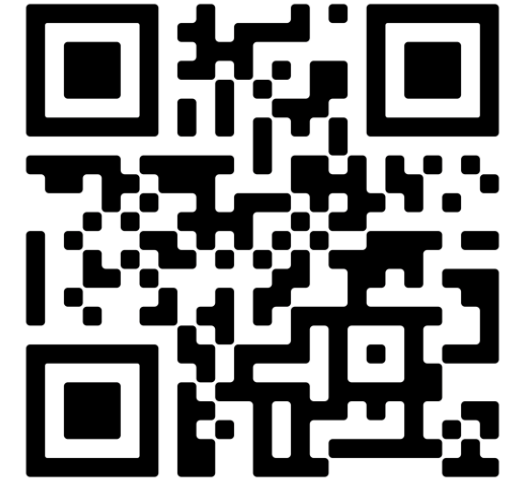
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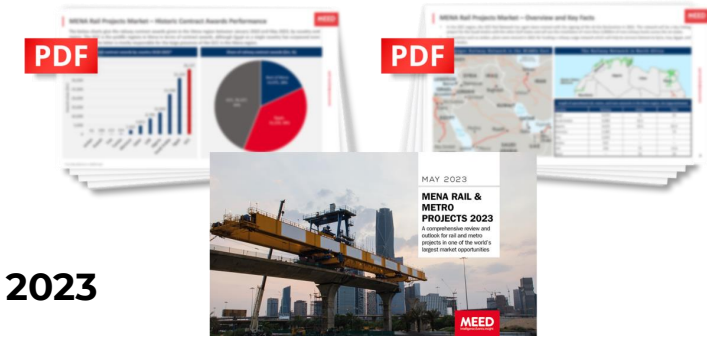
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