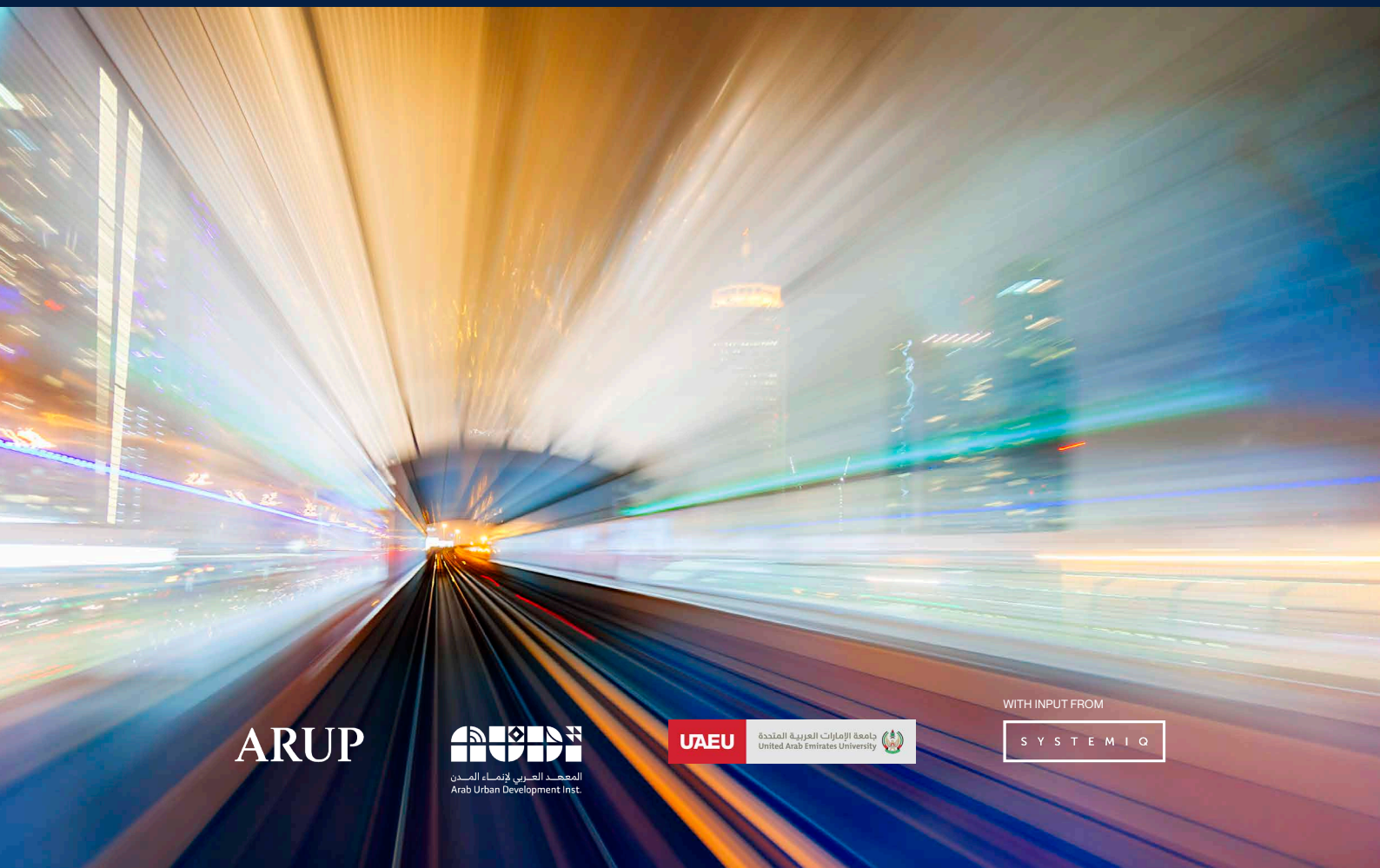
Al-Futtaim

RETHINKING URBANISATION & MOBILITY IN THE GCC

How a systems-based approach can transform our cities



ARUP

المعهد العربي لإنماء المدن
Arab Urban Development Inst.

UAEU جامعة الإمارات العربية المتحدة United Arab Emirates University

WITH INPUT FROM

SYSTEMIQ


Dubai Festival City
DUBAI FESTIVAL CITY

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Executive Summary

Cities across the Gulf Cooperation Council (GCC) are growing at remarkable speed. Yet the approaches that once guided urban planning and development are no longer enough to meet the demands of today's interconnected, fast-changing world.

To explore what the next decade of urban life in the region could look like, Al-Futtaim brought together voices from government, the private sector, regional think tanks, and non-governmental organisations for an industry roundtable. The discussion focused on how these groups can work together to build cities that are more liveable, inclusive, and resilient.

A clear message emerged: meaningful progress will depend on genuine collaboration between public and private sectors. Governments can shape the long-term vision and set clear priorities, while creating space for innovation through flexible regulations, pilot programmes, and practical support.

The private sector, in turn, must look beyond short-term profits and focus on creating shared value that benefits communities and the environment alike.

Participants also emphasised the importance of aligning policies and regulations across the region. Consistent and balanced frameworks are needed to encourage investment and make it easier to integrate emerging mobility solutions. Delivering change will require both short-term actions, such as improving public transport links and walkable infrastructure. Meanwhile, longer-term reforms are needed to guide shifts in culture and behaviour towards more sustainable travel choices.

Better access to reliable data was another key theme that emerged at the roundtable. Participants proposed creating a shared "decision support hub" that would allow open data exchange between public and private players. This would help fill critical gaps in planning and ensure decisions are based on evidence and real community needs, not just high-end market trends.

Finally, mobility must be treated as a central part of city-making, not an afterthought. That means developers, policymakers, and businesses working hand in hand to design neighbourhoods where transport, affordable housing, and daily life are seamlessly connected. By doing so, they can help people choose sustainable options naturally, not by obligation.

With its strong track record in innovation and investment, the GCC has an opportunity to set an example for the world, showing how modern cities can grow while staying people-focused, connected, and sustainable for generations to come.

Foreword

Ellora-Julie Parekh
Chief Sustainability Officer
Al-Futtaim

We recently had the opportunity to bring together peers, partners, and thought leaders from across the region for a roundtable dialogue on urbanisation and mobility in the Middle East, with a particular focus on the GCC. This session marks the beginning of a series of conversations aimed at shaping the future of cities and sustainable mobility in the region.

These discussions also highlight a broader shift in the role of the Chief Sustainability Officer. Today, we are increasingly tasked with supporting businesses to build resilience and long-term viability in a world where consumer preferences evolve rapidly, technological disruption accelerates, and regulatory and internal processes often move at a more conventional pace.

At Al-Futtaim, our operations touch the consumer in multiple ways, where people live, where people shop, where people dine, and how people move. This is a unique privilege, as well as a responsibility.

We recently conducted a survey in the UAE which indicated sustainable values influence daily choices for 90% of consumers. 84% of respondents said they actively choose sustainable products and services when shopping. This clearly confirms that consumers are aware of the power of their choices.

Our Group's roots go back 90 years, and Mobility and Real Estate have been key pillars of our portfolio for several decades, reflecting our commitment to technological innovation and sustainable growth. Our diverse range of passenger and commercial vehicles continues to evolve, incorporating cutting-edge powertrain technologies as demonstrated by our recent partnerships with Dubai's Roads & Transport Authority, and the Integrated Transport Centre in Abu Dhabi. And, as the developer behind the renowned Dubai Festival City, Doha Festival City and Cairo Festival City, we build to own and operate, embedding efficient resource management into every design.

From early adoption of technologies such as district cooling to ongoing advancements in sustainable infrastructure, innovation has always been central to how we build and grow. I am truly convinced that the Middle East, and especially the GCC, has a unique opportunity to leapfrog other regions in reimagining what future cities should look like — cities that are both resilient and appealing to modern consumers.

I hope this white paper sparks ongoing dialogue and inspires collective action toward building a more sustainable and resilient future, and we look forward to convening further discussions to advance these ideas.

Taking a Systems-Based Approach to Development

Infrastructure strains, environmental concerns, and the need for more efficient movement within cities are becoming increasingly apparent.

The cities of the GCC are uniquely positioned to redefine urban living and mobility for the 21st century and beyond. With substantial capital, a strong appetite for innovation, and a dynamic young population - where more than 50% of residents are under the age of 25 - they are well-positioned to become global blueprint models for integrated development.

However, even with these advantages, rapid urbanisation brings its own set of complex challenges that demand a fresh look at traditional planning methods. The region is already experiencing the critical impacts of climate change, ranging from extreme heat waves where summers exceed 45°C, to unstable weather such as the 142 mm rainfall event in Dubai in April 2024. This calls for adaptive strategies across all city systems to manage rising temperatures and resource limitations. Between 2020 and 2030, the urban population across the GCC is expected to grow on average by 30%, putting further pressure on infrastructure and long-term development. These factors present challenges — and, in equal form, opportunities to do things differently.

61.2 million

GCC population at the end of 2024

Source: GCC-Stat

85%

Average proportion of GCC population expected to reside in urban areas by 2035

Source: UN-Habitat

64%

Proportion of GCC urban residents with convenient access to public transport (<500m for low capacity systems and <1000m for high capacity systems)

Source: UN-Habitat

89%
Respondents say their primary car is a petrol or diesel car

7%
Respondents say their primary car is hybrid or plug-in hybrid

4%
Respondents say their primary car is a battery electric vehicle

Source: Blue Turns Green Mobility Survey, October 2025
n= 1,828; based in the UAE, of which 1,315 said they own a car

In Dubai alone, the number of vehicles during daytime hours has reached nearly 3.5 million, while in Riyadh over 92% of commuters rely on cars, with average drive times of about 33 minutes. A recent 'Blue Turns Green Mobility Survey' conducted by Al-Futtaim in October 2025 focusing on urban mobility and consumer attitudes in the UAE revealed that 89% of surveyed respondents own petrol or diesel cars, underscoring the strong prevalence of traditional vehicles as the main form of personal transport.

Historically, urban development, transport, energy, and digital infrastructure have often evolved in silos, hindering the creation of truly resilient, efficient, and liveable environments. As public expectations for sustainable, accessible, and high-quality urban living continue to grow, addressing these multifaceted issues through a comprehensive, systems-based approach is essential to unlock the full potential of these cities and establish them as leaders in urban innovation.

A systems-based approach views a city not as a collection of separate parts, but as an intricate, interconnected whole. Something happening in urban drainage or public transport will ripple across built form, mobility networks and energy systems.

For example, Dubai's recent Dh30 billion 'Tasreef' drainage project aims to increase storm-water capacity by 700% and manage over 20 million m^3 of runoff daily, showing how integrated infrastructure upgrades align with the broader mobility, land-use and resilience agenda.

Balancing Growth with Sustainability

Urban developments that will succeed in the long run will have to be integrative to create cohesive, resilient, and liveable environments.

When asked about the main challenge facing GCC cities in urban and mobility development during the Al-Futtaim industry roundtable, most participants identified adapting to future changes, including climate shifts and population growth, as the greatest concerns, followed by the lack of coordinated planning across city sectors.

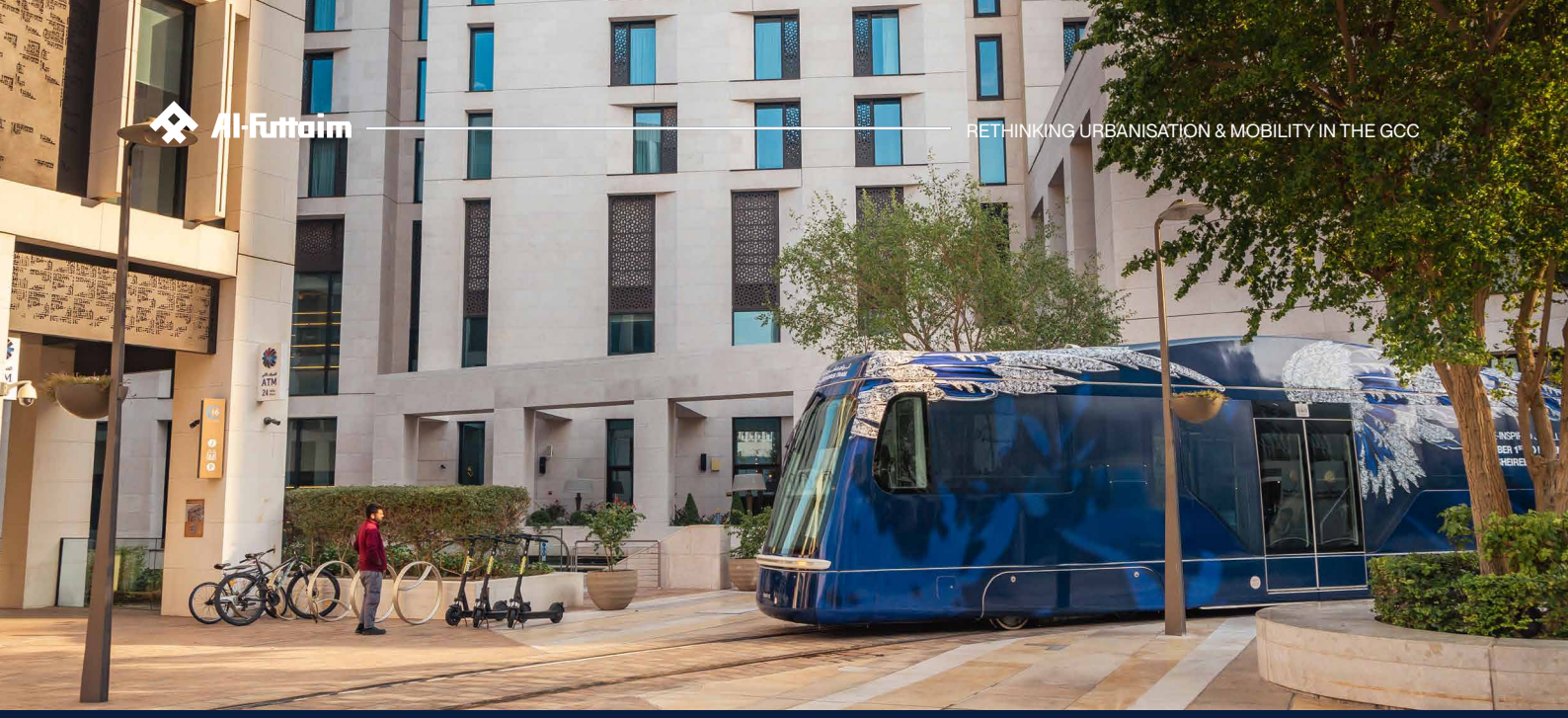
Discussions further highlighted the need for a system-based approach, considering all elements jointly. From the outset, it is essential to avoid the significant problems that arise from fragmented development, which could lead to inefficiencies and unintended consequences. This approach can help ensure that growth is not only rapid but also sustainable and well-managed.

Affordability and inclusion remain essential foundations for long-term urban success. Seamless access to housing and transport options determines who participates fully in the urban economy, and whether new development enhances or erodes overall quality of life.

Pricing mechanisms, parking policies, unit-mix strategies, and fare structures must be designed to encourage sustainable choices without restricting freedom of movement. Transit-Oriented Development (TOD) that is centred on high-quality public transportation, walkable neighbourhoods and mixed-use communities, can make cities more resilient and reduce reliance solely on private cars.

Developers, while driven by commercial targets, are increasingly recognising the long-term value and demand appreciation that comes from integrated communities, where amenities, services, and diverse housing options are seamlessly woven together. As one participant noted, progress demands a “triple objective that delivers financial return, environmental resilience, and social return.” This means that developers are now adopting a broader set of KPIs that integrate resilience and social value alongside profitability. This balance ensures that growth is not only sustainable but also equitable, fostering a sense of belonging and catering to the diverse needs of a modern urban populace.

In Dubai, the 20-minute city concept unfolding under the 2040 Urban Master Plan is designed to ensure essential daily services and amenities are just a short walk or bike ride away. This strategy recognises the significance of time in people’s lives, aiming to enhance quality of life by ensuring residents can reach 80% of their daily needs and destinations within a 20-minute timeframe on foot or by bicycle. This will be facilitated by integrated service centres and placing 55% of residents within 800 metres of mass transit stations.



Ease of commute is the top priority respondents seek for a high quality of life in their cities.

What is the most important factor for your quality of life in your city? Choose up to 3 options.

Easy and convenient commute	25%
Safe and clean environment	19%
Affordable housing	18%
Access to green parks	17%
Access to shops and entertainment	16%
Strong sense of community	5%
Other	0%

Traffic congestion and high cost of living are the biggest challenges that respondents currently face in their city.

What is the biggest challenge you currently face in your city? Choose up to 3 options.

Traffic congestion	30%
High cost of living	27%
Limited shops, restaurants and entertainment	18%
Limited green spaces and parks	15%
Lack of sense of community	7%
Safety concerns	3%
Other	1%

Source: Blue Turns Green Mobility Survey, October 2025
n= 1,828; based in the UAE

While the concept itself is not new by any means, the Covid-19 pandemic has supercharged structural and policy-driven shifts. The post-2022 dynamics such as rapid population inflows and geopolitical fragmentation have positioned Dubai and Riyadh as centres of major transit expansion backed by strong policies. Such a model inherently promotes a more active lifestyle, reduces carbon emissions, and enhances local economies by concentrating services, all of which became a priority for many during the pandemic. It represents a tangible commitment to designing cities around people, rather than solely around roads and vehicles, thereby improving overall urban liveability and efficiency.

Implementing the 20-minute city concept in the GCC, however, presents challenges such as the extreme summer heat. And while new developments offer a clean slate for such designs, transforming older neighbourhoods is equally important, though more complex due to existing infrastructure and parking provisions.

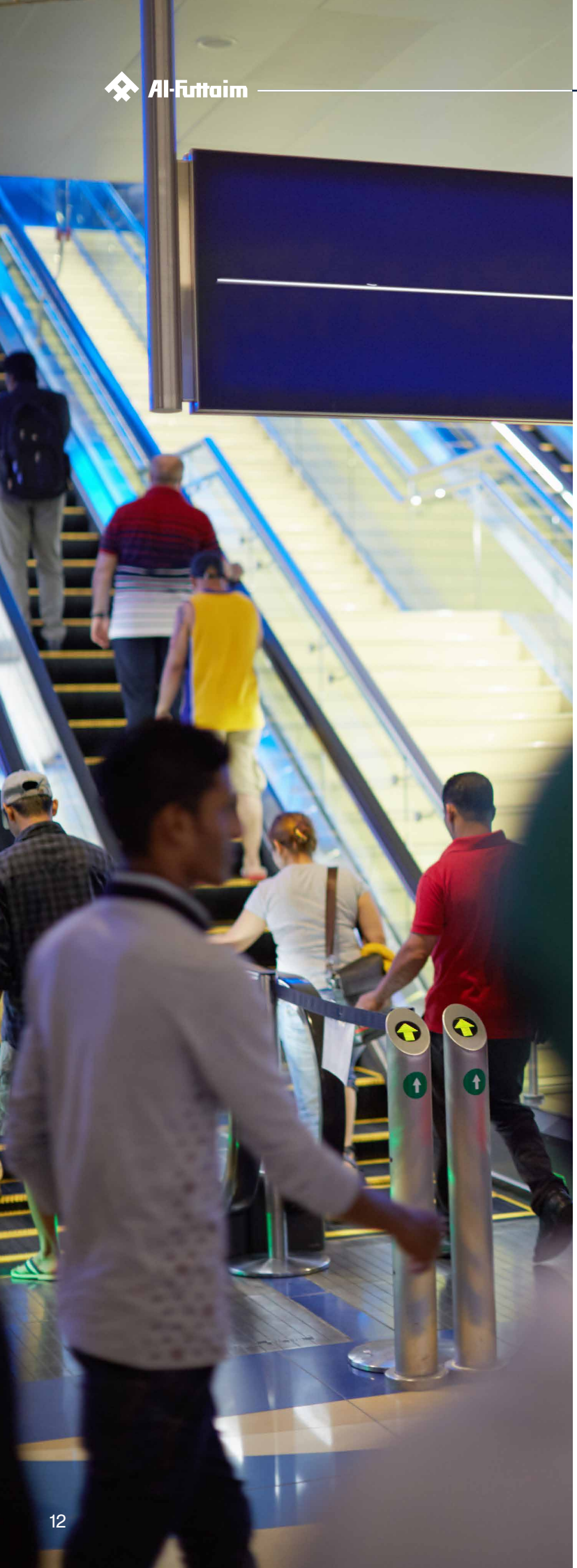
Addressing these challenges requires innovative solutions: for extreme heat, strategies include climate-controlled zones, extensive shaded walkways, green corridors and climate responsive street design. Meanwhile, flexible smart mobility hubs can help bolster electric vehicles and micro-mobility. For older neighbourhoods, regeneration efforts must focus on adaptive reuse of existing structures, creative solutions for parking, and strategic integration of last mile transport solutions.

The Challenge

A core challenge in implementing truly integrated urban systems lies in reconciling the commercial imperatives of developers with the broader societal goals of liveability, affordability, inclusivity, environmental sustainability and cultural relevance. The pursuit of density and convenience, while essential, must be paired with affordable housing and multimodal transport to ensure cities remain inclusive for a rapidly growing population.

The Solution

Overcoming this requires a shared understanding of long-term value, where integrated design is seen not merely as a cost, but as a strategic investment in future returns and urban resilience. This requires consultations, and adaptation mechanisms between planning authorities and urban developers and other actors, to move from rigid long-term planning to a more agile way to react to changing boundary conditions and consumer preferences.



Case Studies from the Region

Dubai Autonomous Transport Zone Takes Shape in Festival City and Creek Harbour

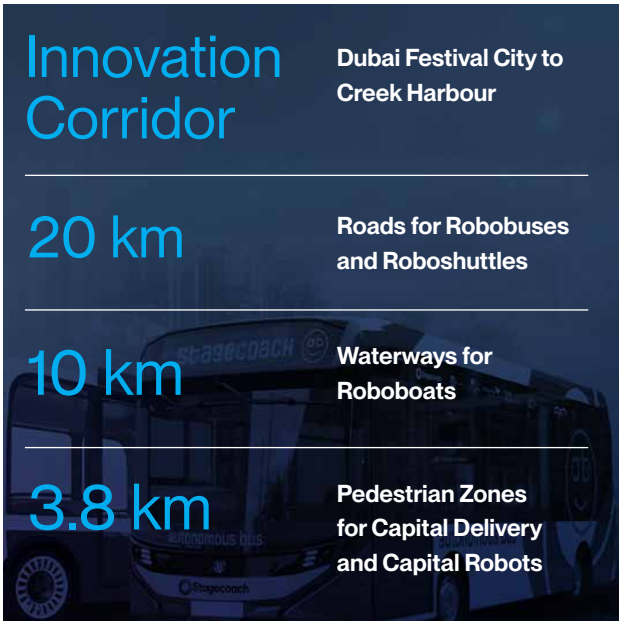
Dubai has taken a major step toward its goal of making 25 per cent of all trips driverless by 2030.

The Roads and Transport Authority (RTA) has signed landmark agreements with Emaar Properties and Al-Futtaim to establish the Dubai Autonomous Transport Zone — a 12-sq-km innovation corridor spanning Dubai Festival City and Creek Harbour.

The initiative, unveiled at the Dubai World Congress for Self-Driving Transport 2025, will transform the two communities into live testbeds for autonomous mobility solutions, including robotaxis, driverless shuttles, delivery robots, and self-driving abras.

The zone will integrate 20 km of roads for Robobuses and Roboshuttles, 10 km of waterways for Roboboats, and 3.8 km of pedestrian zones serviced by delivery robots. By aligning public ambition with private innovation, RTA, Emaar, and Al-Futtaim are setting the stage for a citywide rollout of autonomous mobility.

Dubai Autonomous Transport Zone



Source: Al-Futtaim Real Estate

Madinat al Irfan Redefines Oman's Urban Landscape

The Madinat al Irfan masterplan, developed in partnership with Oman Tourism Development Company (OMRAN), represents a bold new model for sustainable urban growth in Oman. Designed to diversify the economy, promote responsible resource use, and strengthen public transport, the project aligns with the UN Sustainable Development Goals, the Paris Climate Agreement, and the PAS 2080 low-carbon infrastructure standard. Set against a dramatic landscape of hills and wadis, the masterplan blends the natural terrain with contemporary urban spaces to create a city rooted in Omani heritage.

A central 25 km Wadi Park restores ecological water flows and introduces green corridors for urban farming and recreation, enhancing liveability and scenic value. The transport strategy prioritises walkability and public mobility, with human-scaled streets, compact neighbourhoods, and mixed-use districts to reduce car dependency by half compared with similar cities. Sustainable infrastructure measures — such as solar energy, district cooling, and water reuse systems — further lower the city's environmental footprint.

By combining placemaking, climate-responsive design, and community engagement, Madinat al Irfan sets a new benchmark for resilience and sustainability — an exemplar of how future Omani cities can thrive in harmony with their environment and culture.

A New Urban Centre

Source: Arup

E-Fly Powers Kuwait's Carbon-Free Micromobility Revolution

Launched in December 2022, **E-Fly is Kuwait's first eco-friendly e-scooter sharing platform,** offering a carbon-free, 5G-enabled micromobility solution designed to ease urban congestion and promote sustainable transport.

With over 350 scooters stationed across key city areas and university campuses, E-Fly provides a practical, affordable alternative to short car trips, helping reduce emissions and energy use. Aimed particularly at university students and urban commuters, the service enables users to locate, unlock, and ride scooters easily through a user-friendly mobile app, making it ideal for last-mile connectivity and short urban commutes.

Each scooter is engineered for safety and sustainability, featuring energy-efficient batteries, LED lighting, and durable, weather-resistant tires for enhanced stability in Kuwait's variable climate. Built from recyclable materials, the scooters are recharged daily, reinforcing their environmental credentials.

Since launch, E-Fly has logged over 100,000 rides, reflecting strong public adoption and growing trust in green mobility solutions. By merging smart technology, convenience, and environmental responsibility, E-Fly is helping redefine how Kuwait moves — transforming everyday transport into a cleaner, more connected experience.

King Abdulaziz Project for Public Transport Transforms Everyday Life for Riyadh's Residents

Riyadh is undergoing one of the world's most ambitious urban mobility transformations through the King Abdulaziz Project for Public Transport. Led by the Royal Commission for Riyadh City (RCRC), the initiative aims to create a modern, reliable, and inclusive transport system that improves connectivity and everyday life for residents and visitors alike.

At the heart of the project is the Riyadh Metro, featuring six lines stretching 176 kilometres and 85 stations, linking key destinations such as King Khalid International Airport, the King Abdullah Financial District, major universities, hospitals, and commercial hubs (Riyadh Metro). Designed for comfort and efficiency, the metro can initially serve 1.2 million passengers daily, expanding to 3.6 million at full capacity.

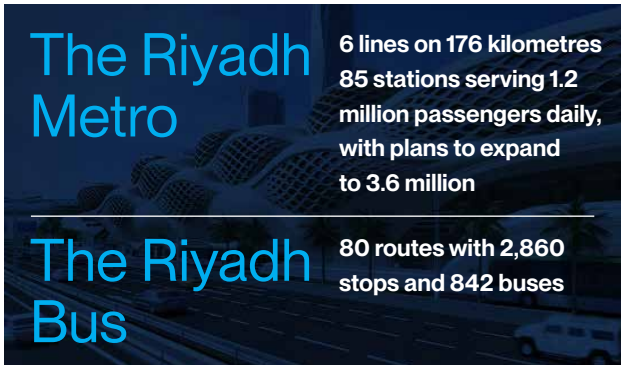
Complementing the metro, the Riyadh Bus Project covers 80 routes with 2,860 stops and 842 buses, integrating residential neighbourhoods with business centres. Bus Rapid Transit (BRT) corridors, feeder lines, and on-demand services make public transport accessible for every journey stage.

Together, these systems are reshaping Riyadh into a city where movement is seamless and sustainable. Beyond easing congestion, the project reflects a broader vision: to make public transport a cornerstone of urban life and a catalyst for environmental and social transformation.

E-Fly in Numbers

Source: Arab Urban Development Institute (AUDI)

Urban Mobility Transformation



Source: Arab Urban Development Institute (AUDI)

Agent-Based Mobility Modelling Supercharges Smarter Urban Planning in the UAE

The Emirates Center for Mobility Research (ECMR) at UAE University is developing an Agent-Based Modelling (ABM) framework to address a key challenge for policymakers and mobility planners: the lack of a unified, data-driven tool to forecast how new transport systems influence commuter behaviour across diverse population groups.

Unlike traditional models that rely on broad assumptions, ECMR's ABM simulates millions of virtual "agents" representing residents, workers, students, and tourists — each with distinct socio-economic profiles and travel preferences.

The model integrates data from multiple sources, including transport surveys, telecom mobility data (e.g. Etisalat), social media insights, SCAD population data, public transport performance, private-sector automotive trends, and emerging micromobility platforms. This combination creates an open, scalable environment that provides a high-resolution view of how people respond to travel time, cost, comfort, accessibility, and first- and last-mile connectivity.

Designed for government agencies, transport operators, real-estate developers, and private mobility providers, the framework supports collaborative, evidence-based decision-making. It lays the foundation for integrated, people-centered mobility systems across the UAE and, over time, the wider GCC region.

Unified Data Platform

Source: Emirates Center for Mobility Research (ECMR)

UN-Habitat's Cairo Bike Advances Last-Mile Connectivity and Active Mobility

Cairo, one of the world's most congested cities, faces acute challenges from urban sprawl, air pollution, and limited pedestrian and cycling infrastructure. Built around cars rather than people, the city's historic Downtown — once a hub of civic and cultural life — now contends with traffic, poor connectivity, and restricted access to public spaces.

To address these challenges, **UN-Habitat, in collaboration with the Cairo Governorate and with funding from the Drosos Foundation, launched Cairo Bike,** Egypt's first public bike-sharing system, as a pilot for sustainable urban transformation.
The initiative reclaims Downtown streets as shared spaces, adding a new dimension to Cairo's heritage and mobility narrative.

Integrating non-motorised transport into broader goals of accessibility, inclusion, and climate resilience, Cairo Bike connects residential and commercial zones to transport hubs through strategically located docking stations. The system promotes Transit-Oriented Development (TOD), reduces car dependency, and creates local jobs through gender-sensitive design and public awareness campaigns supporting active mobility.

Enhancing Strategic Connectivity

Source: UN-Habitat

Embedding Mobility from the Outset

Historically, mobility planning has often reacted to urban development, attempting to retrofit transport solutions into already established land-use patterns. This reactive approach can lead to congestion, inefficiency, and a diminished quality of life.

Mobility is now rapidly transforming, driven by autonomous vehicles, including Al-Futtaim's driverless pilot, alongside rising EV adoption, hybrid technologies, and hydrogen fuels. Each pathway demands distinct infrastructure, from high-power charging and grid upgrades to hydrogen refuelling and advanced mapping systems, requiring flexible, adaptive, and forward-looking planning approaches.

A UAE-based real estate developer at the Al-Futtaim industry roundtable affirmed the need to integrate mobility into urban planning from the development phase. Infrastructure, development and transport need to be regarded as a whole, ensuring they can meet the present and grow with the future needs of residents. By embedding mobility into the foundational design of urban spaces, cities can offer a multi-modal network with genuine choices, empowering residents to move efficiently and sustainably. As such, there is a need to strategically weave together diverse transport modes. This requires a keen understanding of human behaviour, leveraging incentives and disincentives - like successful models in Colombia's capital city Bogotá and beyond - to guide choices away from car dependency.

In the UAE, however, adoption of public transportation remains limited. Infrequent users of public transport constitute 67% of the overall sample captured in the Blue Turns Green Mobility survey, while frequent users make up just 33%. Both groups perceive public transport as inconvenient, and lengthy travel times are cited as the top challenge.

These findings highlight the need to make mass transit not only available but also time-competitive, comfortable, and seamlessly connected to other mobility modes. By strategically integrating diverse transport modes — from public transit to shared mobility — cities can create seamless, efficient journeys.

Effective public transport expansion further hinges on seamlessly integrating first- and last-mile solutions, such as micro-mobility and on-demand services, precisely tailored to network density, frequency, and accessibility metrics to bridge critical gaps. This ensures comprehensive coverage and maximises the utility of mass transit investments. Equally important are Travel Demand Management (TDM) measures, such as parking restrictions and pricing, that support a shift toward sustainable, shared mobility.

What are the main challenges with public transport in your opinion? Choose up to 3 options.

67% of respondents

are infrequent users of public transport, using it a few times a year or not at all

33% of respondents

are frequent users of public transport, using it once a month to several times a week

Takes too long	37%
Not available in my area	21%
Not comfortable	17%
Inconvenient schedules	17%
Safety concerns	5%
No challenge	4%
Too expensive	4%

Takes too long	34%
Inconvenient schedules	22%
Not comfortable	15%
Not available in my area	10%
Too expensive	8%
No challenge	6%
Safety concerns	6%

Source: Blue Turns Green Mobility Survey, October 2025
n= 1,828; based in the UAE

4%

Average EV sales penetration rate across Qatar, UAE and KSA in 2024, growing from 2% in 2023

Lower fuel and maintenance costs

Biggest drivers of EV adoption in UAE and Qatar, while technology is a key magnet in KSA

Source: Roland Berger EV Charging Index 2025

With rapid population growth, congestion has become a pressing issue, making it essential to develop affordable transport systems that support both public and eco-friendly mobility. According to the Al-Futtaim survey, ease of commute is the top priority for quality of life in UAE cities, cited by the majority of respondents.

They cited traffic congestion and the high cost of living as the two biggest challenges currently faced by residents, outpacing other concerns by a notable margin. Traffic congestion was cited by 30% of the respondents and 27% mentioned high cost of living. These findings underscore how mobility and affordability are deeply interconnected, shaping public sentiment and everyday urban experiences. The falling cost of private vehicles, which are often cheaper than public transport, adds another layer of complexity.

Addressing this requires a dual strategy, by improving the competitiveness of public transport through faster, more reliable, and better-connected services, while simultaneously correcting the hidden subsidies of car use through measures such as parking reform, congestion pricing, or fuel taxation. Meanwhile, public transport needs to be made more affordable and convenient, and excessive private car use needs to be disincentivised.

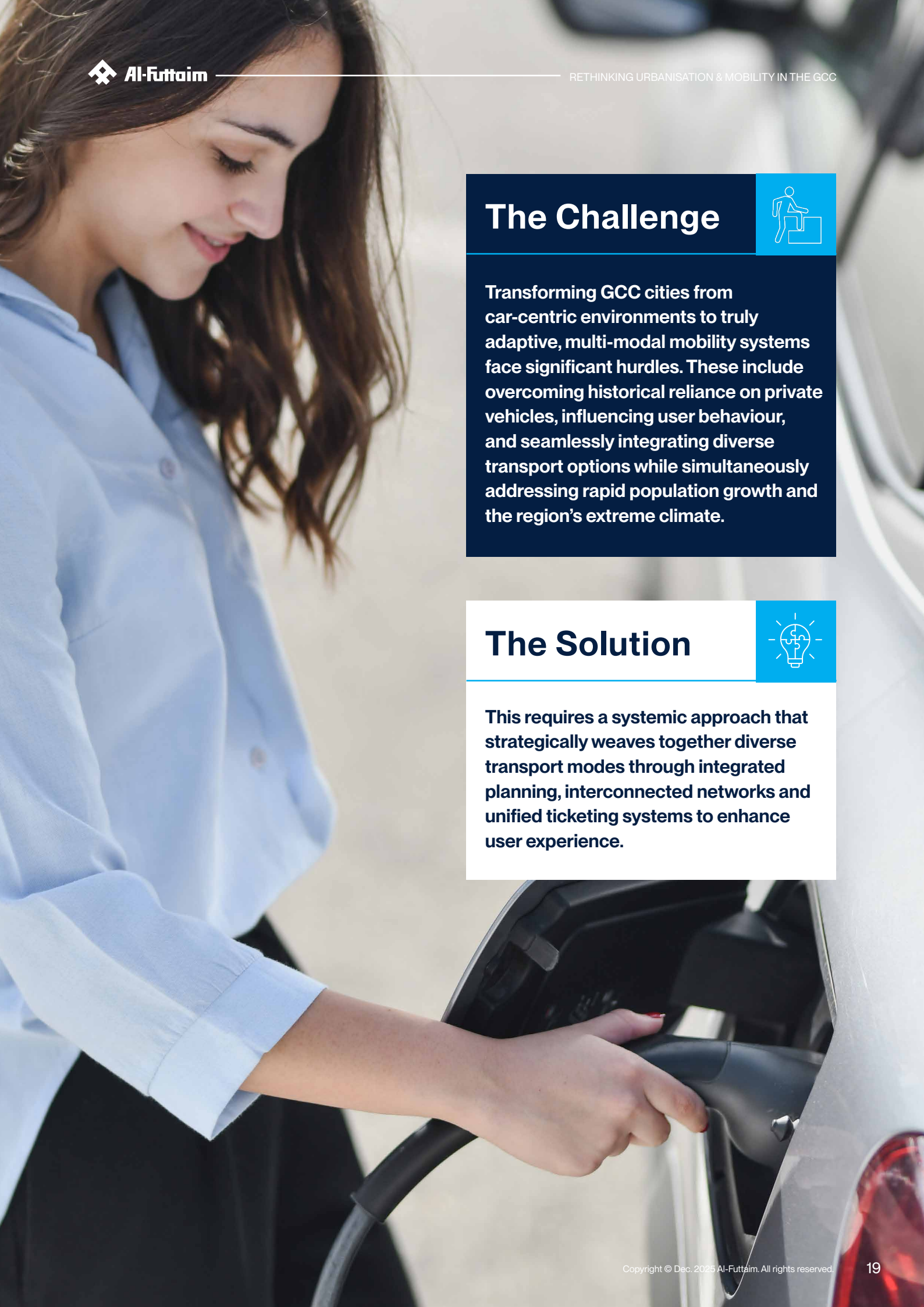
The successful transition to electric mobility in the GCC demands accessible charging infrastructure, distributed across urban centres, highways, and residential areas. Findings from the Al-Futtaim survey highlighted the urgency of this need: 28% of respondents cited lack of charging infrastructure as the biggest barrier to adopting Battery Electric Vehicles (BEVs) when asked to name up to three reasons for not choosing one as their next main car. Implementation therefore requires coordinated efforts between public and private sectors, focusing on smart grid integration and standardised charging protocols.

A Behavioural Shift

There is an urgent need for a multi-modal transport network that is accessible and affordable, pointed out an urban development consultant at the roundtable. As one participant noted, people don't need to be told what to do; people need to be provided with a range of options to make the best choice. And technology is becoming available to make that range of options broader.

Global experience shows that measures to manage traffic and promote sustainable mobility must be adapted to local realities. In the GCC, where private vehicle ownership remains high and often more affordable than public transport, restrictive approaches can have unintended consequences, such as encouraging multiple car ownership. Instead, incentive-based strategies that expand attractive, reliable alternatives are more effective in shifting travel behaviour.

Implementing strategic changes in smaller cities can be another way to go, since it is easier to shift the needle at a smaller scale, and thus inspire the big cities. The significance of local governments to bring about changes should not be overlooked in this context. This can be seen across the Arab world where smaller and mid-sized cities are increasingly demonstrating how targeted local action can drive broader change. In Egypt, for example, cities such as New Alamein and the New Administrative Capital are integrating sustainable transport and smart infrastructure from the ground up, setting examples that larger metropolitan areas can follow. This shows that municipal and regional governments can shape scalable and locally grounded models for urban transformation.



The Challenge

Transforming GCC cities from car-centric environments to truly adaptive, multi-modal mobility systems face significant hurdles. These include overcoming historical reliance on private vehicles, influencing user behaviour, and seamlessly integrating diverse transport options while simultaneously addressing rapid population growth and the region's extreme climate.

The Solution

This requires a systemic approach that strategically weaves together diverse transport modes through integrated planning, interconnected networks and unified ticketing systems to enhance user experience.

Partnering to Achieve Common Ambitions

Achieving a 10-year vision for integrated urbanisation and mobility in the GCC, while ambitious, is attainable through a systemic approach involving the wider ecosystem. This transformation hinges on a robust framework of collaborative governance, strategic policy, and innovative investment.

Public-private partnerships (PPPs) are seen as essential to accelerate integration and innovation. These models are inherently focused on risk-sharing and clear governance structures and can be tailored to suit unique economic and regulatory landscapes. Beyond providing a capital boost, these value-driven partnerships further leverage private sector efficiency to ensure public benefit and strategic alignment. PPPs can also play a vital role in sharing short-term costs and long-term returns, ensuring continuous progress and stakeholder buy-in.

A clear, coordinated vision from the public sector is essential to guide private sector action, whether the goal is managing population growth, boosting GDP, or expanding affordable housing. Most experts at the roundtable agreed that strong government leadership and effective policies are the most powerful drivers of better urban development across the GCC.

Effective urban planning further hinges on establishing secure and interoperable data sharing frameworks, with several experts emphasising technology, innovation, and research as influential factors when it comes to bolstering urban development.

Data is crucial for informed decision-making, enabling predictive analytics and real-time optimisation of mobility solutions. Overcoming current data scarcity, a challenge for urban planners, requires the development of decision support hubs. These hubs, with open access to vital information, can empower all sectors with actionable insights, facilitating a shift from reactive adjustments to proactive development.

Also, crafting agile regulatory frameworks is key to fostering innovation in mobility while ensuring safety, interoperability, and a consistent user experience across the region. Policies must drive growth while staying grounded in current realities and avoiding unintended outcomes. This means enabling the adoption of new technologies without compromising essential standards or creating fragmented systems. Striking the right balance between innovation and standardisation is critical to ensuring progress remains both agile and coordinated.

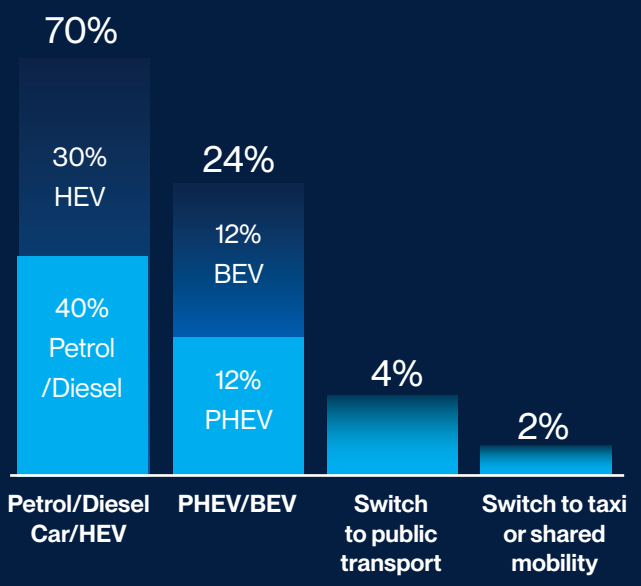
Given that innovation often originates from the private sector, implementing controlled “sandbox” environments is essential. These sandboxes allow for the safe and effective testing of new mobility technologies and policies, gathering crucial data and refining solutions before broader deployment. This minimises risk, optimises scalability, and fosters a supportive environment for disruptive innovation.

For their next car, 70% are considering a petrol/diesel/hybrid car while only 24% are thinking about a Plug-in Hybrid Vehicle (PHEV) or Battery Electric Vehicle (BEV).

Which option would you actually consider for your next main car?

To drive the adoption of sustainable mobility, compelling incentive programmes are needed for both developers building green infrastructure and users choosing eco-friendly transport options. These could range from tax breaks and subsidies to preferential access and rewards for sustainable choices, effectively guiding market behaviour towards desired outcomes.

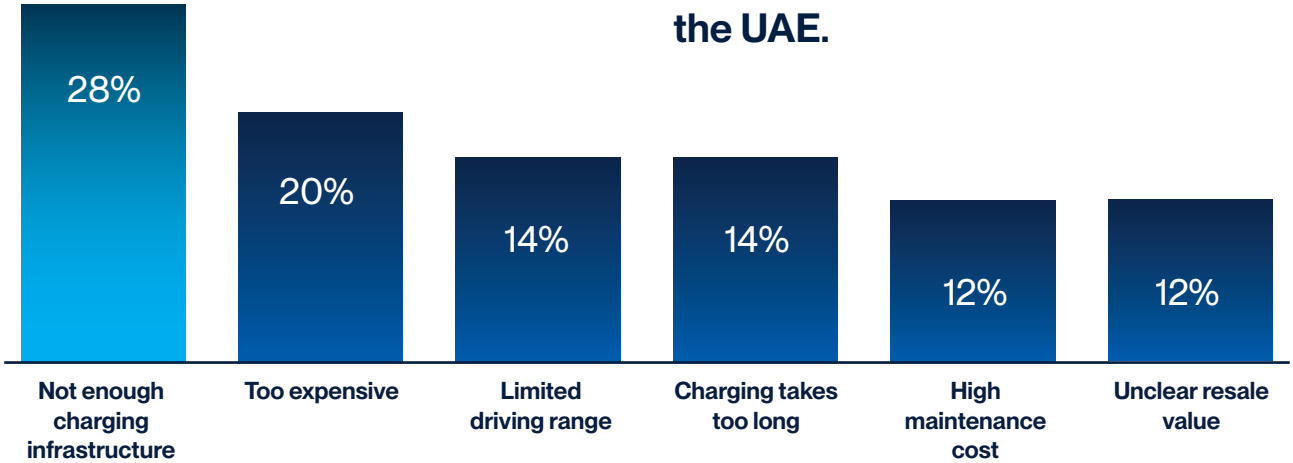
Ultimately, transforming urban and mobility systems is about enabling sustainable freedom of movement. This requires seamless collaboration and strong leadership to guide societies towards shared objectives, leveraging regulations and policies as powerful accelerators for change.



Source: Blue Turns Green Mobility Survey, October 2025
n= 1,828; based in the UAE

What are the main reasons you wouldn't choose a Battery Electric Vehicle? Rank top 3 options.

Lack of charging infrastructure is by far the largest barrier to Battery Electric Vehicles (BEV) adoption in the UAE.



Source: Blue Turns Green Mobility Survey, October 2025
n= 1,828; based in the UAE

From Quick Wins to Long-Term Success

Achieving the ambitious vision for integrated urbanisation and mobility in GCC cities requires a pragmatic approach that balances immediate impact with long-term strategic goals. Expert discussions at the Al-Futtaim industry roundtable underscore the importance of a staged implementation, combining tangible "quick wins" to build momentum and demonstrate value, with robust medium-term initiatives and transformative long-term objectives. This ensures continuous progress, maintains stakeholder buy-in, and allows for adaptive learning.

Quick Wins

1 to 2 Years

Immediate, impactful changes can significantly enhance urban mobility and liveability that foster public acceptance and demonstrating commitment. These include:

Enhanced Public Transport Integration:
Rapid deployment of electrified and more integrated public transport options, such as smaller electric buses for busy routes, improved first/last-mile connections, and optimising existing bus frequencies and networks.

Active Mobility Infrastructure:
Implementing shaded walkways and dedicated cycle paths in key areas, making active travel more comfortable and appealing, particularly during cooler months.

Demand Management Initiatives:
Promoting carpooling days, staggered school and work timings, and flexible work-from-home policies to alleviate peak-hour congestion. Parking regulations and fuel taxation can encourage use of public transport. Meanwhile, integrating nature-based solutions, such as shaded pedestrian corridors, green corridors, and urban landscaping, can further encourage walking, improve air quality, and enhance overall urban liveability.

Targeted Regulations:
Introducing quick regulations for new community developments that encourage developers to integrate long-term values like green spaces and public transport access from the outset.

Medium-Term Strategic Targets

3 to 5 Years

These initiatives build upon quick wins, laying more foundational elements for systemic change and requiring greater coordination and investment:

Public Transport Network Expansion:
Significant investment in expanding public transport networks, including new metro lines, Bus Rapid Transit (BRT) corridors, and increasing the density of public transport stops to match international benchmarks. UN SDG 11.2 recommends a distance of <500m to low-capacity mass transit (eg. bus, BRT) and <1000m to high-capacity systems (eg: metro).

NEV Ecosystem Development:
Roll out comprehensive New Energy Vehicle (NEV) policies and charging infrastructure, and establish clear standards to build public trust and accelerate adoption.

Data Infrastructure Development:
Establishing robust data-sharing frameworks and decision support hubs to provide urban planners and mobility providers with the necessary insights for informed planning and optimisation.

Pilot Projects in Smaller Cities:
Leveraging smaller cities or economic zones as "living labs" to test integrated urban and mobility concepts, gathering valuable data and best practices before wider deployment.

Long-Term Transformation Goals

10 Years +

The ultimate objective is a fundamental shift in how GCC cities are conceived, developed, and experienced, driven by a truly integrated and adaptive approach:

Structural Integration of Mobility:
Elevating mobility to a distinct and central pillar within urban planning, ensuring it is no longer an embedded component but a primary driver of urban form and function. This requires significant institutional and governance reforms.

Value-driven Urban Development:
Shifting the core business case for urban development to explicitly incorporate environmental, social, and liveability outcomes, moving beyond purely commercial benefits.

Comprehensive Decision Support Systems:
Fully operationalising advanced decision support hubs that provide open, integrated data across all urban sectors, enabling predictive modelling and holistic impact assessments.

Adaptive Regulatory Frameworks:
Developing agile and responsive regulatory environments that can continuously evolve with technological advancements and societal needs, fostering innovation while ensuring safety and equity.

Recommendations

The GCC is well placed to leverage its unique advantages – capital, ambition, and a youthful populace – to define a new benchmark for urban living. Realising this potential demands a fundamental commitment to a systems-based approach, to create truly integrated and adaptive urban environments.

The journey towards this future requires decisive action across multiple fronts. It necessitates a proactive integration of urban planning and mobility from the earliest stages, ensuring our cities are designed around people and their diverse needs. It calls for building resilient mobility systems capable of adapting to rapid population growth and the region's distinct environmental challenges. Crucially, this transformation will be enabled by robust governance, forward-looking policies, and innovative funding models that foster seamless collaboration between public and private sectors. By embracing the recommendations outlined herein, from fostering value-driven partnerships and leveraging data to implementing agile regulations and a staged approach to change, GCC cities can transcend traditional development models. They have an unparalleled opportunity to lead globally, demonstrating how integrated urban and mobility systems can create vibrant, equitable, and resilient cities that serve as blueprints for the world.

Integrate Urban Planning

- Adopt a systems-based approach, considering all urban elements jointly from the outset to ensure cohesive and resilient development.
- Balance density and convenience with affordability, inclusivity, and cultural preferences in all urban design principles.
- Implement climate-resilient urban design strategies, including climate-controlled zones, extensive shaded walkways, and smart mobility hubs to mitigate extreme heat.
- Prioritise regeneration efforts for older neighbourhoods through adaptive reuse, creative parking solutions, and strategic integration of last-mile transport.
- Embed mobility considerations from the earliest planning stages, ensuring urban development and transport are conceived jointly, with public transport and diverse mobility options at the core.

Think Big for Funding

- Foster value-driven Public-Private Partnerships (PPPs) focused on shared societal outcomes and long-term benefits, moving beyond mere financial transactions.
- Develop mechanisms to equitably share long-term returns and short-term costs between public and private entities in integrated projects.
- Implement compelling incentive programmes for developers building green infrastructure and users adopting sustainable mobility practices.

Treat Mobility as a System

- Strategically integrate diverse transport modes, including public transit, micro-mobility, and shared services, to create seamless and efficient journeys.
- Expand and integrate public transport networks, increasing density and frequency to match international benchmarks and enhance user experience.
- Develop comprehensive electric vehicle (EV) ecosystems, including robust charging infrastructure, smart grid integration, and standardised protocols.
- Implement demand management initiatives such as carpooling days, staggered timings, and flexible work policies to alleviate peak-hour congestion.

Trial and Support Through Policy

- Establish clear, top-down systemic visions from the public sector to align actions and provide necessary orientation for all stakeholders.
- Craft agile regulatory frameworks that balance innovation with standardisation, creating pathways for new technologies without sacrificing essential benchmarks.
- Implement 'sandbox' environments for safe and effective testing of new mobility technologies and policies, fostering disruptive innovation.
- Elevate mobility to a distinct and central pillar within urban planning, ensuring its proactive integration into urban form and function.
- Develop balanced policies that accelerate growth, align with current realities, and avoid unintended consequences.

Underpin Success with Data

- Establish secure and interoperable data sharing frameworks and decision support hubs to empower planners with actionable insights and enable predictive analytics.
- Promote inclusive market studies that reflect broader community segments, moving beyond high-end demographics to gather comprehensive data.
- Leverage technology and innovation to create seamless, multi-modal travel experiences and optimise urban systems.

Bring Everyone Along

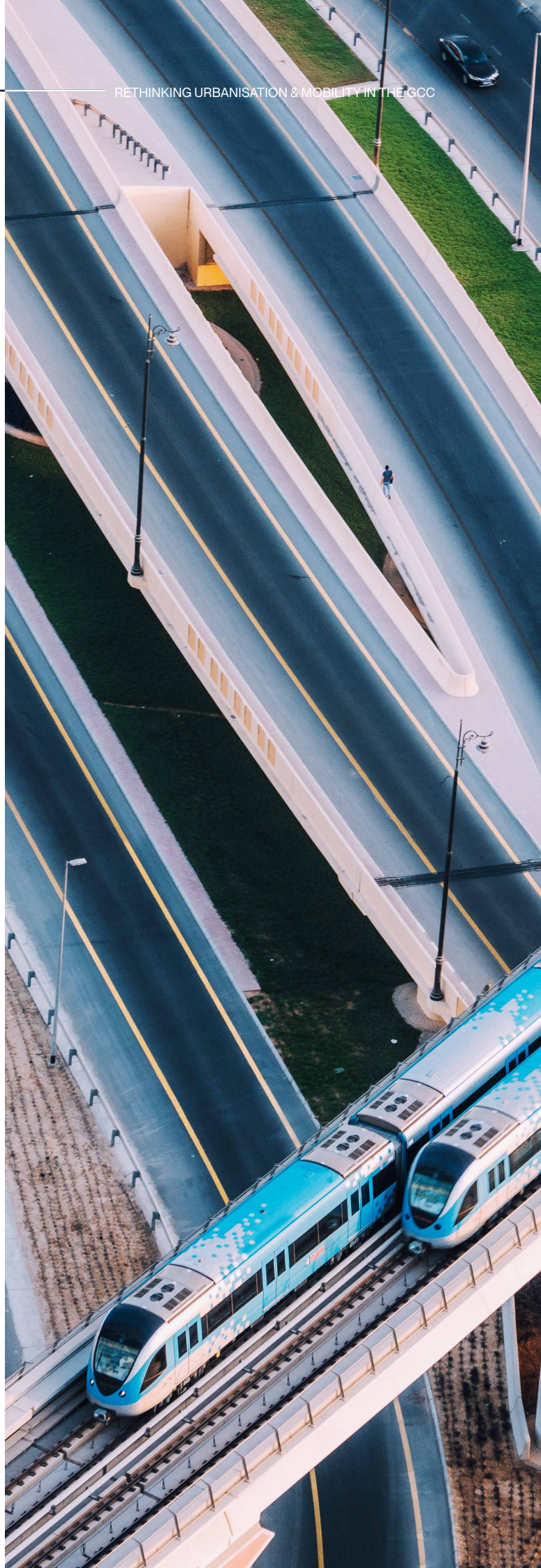
- Mandate collaborative planning sessions for all major projects and establish cross-departmental working groups with shared key performance indicators (KPIs).
- Empower developers and the private sector to take a proactive leadership role in driving transformation, providing them with support and recognition for innovation.
- Combine immediate, tangible "quick wins" with long-term policy shifts to gradually influence customer behaviour and build public acceptance for sustainable choices.
- Promote external knowledge sharing of the GCC's advancements in mobility and urban development to showcase regional innovation and inspire global best practices.

Appendix

Survey Methodology

This edition of the Blue Turns Green Mobility survey was conducted in the United Arab Emirates (UAE) between 25 October to 9 November 2025, with a total sample of 1,828 respondents (n = 1,828). Data was collected through an online, self-administered questionnaire. Audience data was sourced from Blue Rewards, Al-Futtaim's loyalty and customer engagement app, ensuring responses were gathered from actively engaged users.

The sample reflected a broad demographic mix. Respondents were 57% male and 43% female. In terms of age distribution, 25% were between 45–55 years old, 20% between 40–45, 18% between 35–40, 13% aged 55 and above, 12% between 30–35, and 12% under 30. The majority of participants were Indian nationals (43%), followed by Filipinos (16%), Europeans (12%), Pakistanis (11%), Emiratis (6%), Arabs (5%), and other nationalities (7%).



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