Exploring Digital Geographies
Cityscape Global

Jeremy Kelly, Head of Global Research
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Digital 'Imperative'
Your ride is arriving now
Exploring Digital Geographies

Dubai
U.A.E
Exploring Digital Geographies

Enterprises

Cities

Real Estate

Dubai

U.A.E
Defining Digital Enterprises
Exploring Digital Geographies

Enterprises

Cities

Real Estate

Dubai
U.A.E
Digital Cities
## Digital Cities

Digital Cities can be measured and defined in myriad ways.

### Start-Ups

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>San Francisco</td>
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<tr>
<td>2</td>
<td>New York</td>
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<tr>
<td>3</td>
<td>Los Angeles</td>
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<tr>
<td>4</td>
<td>London</td>
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<tr>
<td>5</td>
<td>Silicon Valley</td>
</tr>
<tr>
<td>6</td>
<td>Bangalore</td>
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<tr>
<td>7</td>
<td>Boston</td>
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<tr>
<td>8</td>
<td>Delhi</td>
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<tr>
<td>9</td>
<td>Toronto</td>
</tr>
<tr>
<td>10</td>
<td>Chicago</td>
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### Unicorns

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>San Francisco</td>
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<tr>
<td>2</td>
<td>Beijing</td>
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<tr>
<td>3</td>
<td>New York</td>
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<tr>
<td>4</td>
<td>Shanghai</td>
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<td>London</td>
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<td>9</td>
<td>Stockholm</td>
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<td>10</td>
<td>Hangzhou</td>
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### Patent Applications

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
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</thead>
<tbody>
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<td>Paris</td>
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<td>9</td>
<td>Boston</td>
</tr>
<tr>
<td>10</td>
<td>Nagoya</td>
</tr>
</tbody>
</table>

### Notes

- The numbers in the table represent rankings based on the specified criteria.
- The table includes major cities from different regions around the world.
- The cities listed are representative of the technology ecosystem, startup growth, and innovation hubs.
- The numbers 34, 27, and 127 correspond to the total scores or metrics for each category respectively.
Digital Cities can be measured and defined in myriad ways.

### Start-Up / GDP Ratio

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<td>Atlanta</td>
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<td>7</td>
<td>London</td>
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<tr>
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<td>Vancouver</td>
</tr>
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</table>

### Unicorns / Population Ratio

<table>
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<tr>
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<td>7</td>
<td>Austin</td>
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<tr>
<td>8</td>
<td>Denver</td>
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### Patents / Population Ratio

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<td>4</td>
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<td>Stuttgart</td>
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<td>6</td>
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<tr>
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<td>Boston</td>
</tr>
<tr>
<td>8</td>
<td>Shenzhen</td>
</tr>
</tbody>
</table>

9. **Dubai**

23. **Dubai**

119. **Dubai**
Introducing JLL’s Typology of Cities

Source: JLL and The Business of Cities, 2018
The ‘Enterprisers’

Bangalore
Hyderabad
Guangzhou
Shenzhen
Taipei
Kuala Lumpur
Ho Chi Minh City
The ‘Innovators’

Research Rich
- Boston
- San Diego
- Munich

Start-Up Success
- Silicon Valley
- Austin
- Berlin
- Stockholm
The ‘Established World Cities’

All-Round Cities
London
New York
San Francisco
Amsterdam
Toronto
Los Angeles

Corporate Giants
Tokyo
Seoul

Source: JLL and The Business of Cities, 2018
Real Estate
Changing ‘Digital Geographies’ within Cities
Changing ‘Digital Geographies’ within Cities

Science & Industrial Parks
- One North | Adlershof

Special Economic Zones
- DIC | Shenzhen High-Tech

Suburban / Edge City
- Silicon Valley | Western Corridor | Markham

Academic Driver
- Kitchener-Waterloo | Paris-Saclay

Core Locations
- West End | Lower Manhattan

Urban Transformation Projects
- Kings Cross | South Lake Union | ODE

Reimagined Urban Areas
- Shoreditch | Brooklyn | SoMa

Hub Building / Campus
- Station F | MaRS Discovery District

DIC | Shenzhen High-Tech

Kings Cross | South Lake Union | ODE
Creation of Digital Clusters

REAL ESTATE OFFER

- Amenities
- Infrastructure Offer
- Access to Talent
- Collaboration Opportunities
- Branding and Buzz
- Clustering Advantages

REAL ESTATE OFFER

1. Amenities
2. Infrastructure Offer
3. Access to Talent
4. Collaboration Opportunities
5. Branding and Buzz
6. Clustering Advantages
Creation of **Digital Clusters**

How does Real Estate Offer factor in?

- Cost
- Availability
- Style
- Smartness

**REAL ESTATE OFFER**

- Amenities
- Infrastructure Offer
- Access to Talent
- Collaboration Opportunities
- Branding and Buzz
- Clustering Advantages
World-class innovation ecosystems

Kings Cross
Urban Transformation

Shoreditch
Reimagined Urban Area

Thames Valley
Suburban / Edge City

LONDON
World-class innovation ecosystems
SAN FRANCISCO

CBD
SoMa
Reimagined Urban Area

Mission Bay
Urban Transformation

Silicon Valley
Suburban / Edge City
World-class innovation ecosystems

AMSTERDAM

- Oosterdokseiland
  - Urban Transformation
- Canal District
  - Core
- B.Amsterdam
  - Hub Building / Campus
Digital Clusters within Dubai

Core CBD
Shift from Deira to DIFC to Downtown

Reimagined Urban Areas / Urban Transformation Projects
Al Quoz | Maritime City

Transportation Hubs
JAFZA | DAFZA

Academic Drivers
Academic City | Knowledge Village

Low Density Business / Science Parks
TECOM | Silicon Oasis | d3

Edge City
Business Bay
Free Zones

- 1985 - 1990
- 1996 - 2001
- 2002 - 2005

- Jumeirah Lake Towers
- DIFC
- Dubai Production City
- Dubai Science Park
- Dubai Silicon Oasis
- Dubai Flower Center
- Dubai Healthcare City
- Dubai Studio City
- National Industries Park
Digital Geography of Dubai

13 Locations Surveyed

- Free Zone
- Onshore

- Business Bay
- Knowledge Village
- Dubai Internet City
- Dubai Media City
- Dubai Science Park
- Dubai Silicon Oasis
- Dubai Outsource City

16% Technology
19% Business Services
46% Finance
815,000 sqm

- Government
- Logistic
- Other
Digital Geography of Dubai

Clusters by business sector

Onshore

- Business Bay: 6%
- Deira: 9%

- Technology: 6%
- Business Services: 5%
- Finance: 2%
- Oil & Gas: 15%
- Government: 5%
- Others: 2%

Free Zones

- Dubai International Financial Centre (DIFC): 9%
- Dubai Internet City: 6%

- Technology: 13%
- Business Services: 4%
- Finance: 46%
- Oil & Gas: 28%
- Others: 2%

Legend:
- Technology
- Business Services
- Finance
- Oil & Gas
- Government
- Others
Digital Geography of Dubai

Clusters by company maturity

- **Dubai Design District**
  - Start Up (less than 3 years): 7%
  - Immature (3-10 years): 22%
  - Established (10-30 years): 50%
  - Mature (more than 30 years): 21%

- **Dubai Science Park**
  - Start Up (less than 3 years): 7%
  - Immature (3-10 years): 8%
  - Established (10-30 years): 15%
  - Mature (more than 30 years): 70%
Digital Geography of Dubai
Clusters by company nationality

Deira
- Local: 23%
- Overseas - Arabic: 10%
- Overseas - Eastern: 23%
- Overseas - Western: 67%

Dubai Internet City
- Local: 2%
- Overseas - Arabic: 65%
- Overseas - Eastern: 20%
- Overseas - Western: 13%
Dubai’s Response: Regeneration

- Relaxing licensing laws to level the playing field and move towards making the whole city a free zone.
- The city is expanding southwards towards Dubai South and Al Maktoum Airport.
- Filling the gaps with new developments e.g. Dubai Creek Harbour and MBR City.
- Redevelopment of existing urban areas e.g. Al Quoz and Umm Ramool industrial areas.
- Repositioning and expansion through infill and regeneration.
Where next for Dubai?
Key Takeaways

Digitisation is impacting all companies regardless of business sector. A new ‘digital geography’ is impacting cities across the globe. The most successful digital cities offer a range of real estate ecosystems. Amenity-rich, diverse, multi-use districts provide the most fertile ground for the digital economy within cities. Dubai’s traditional focus on single-sector business clusters in free zones is now adapting to the new digital reality. Dubai is firmly on track to becoming an innovation-led ‘New World City’.
Exploring Digital Clusters
The Dubai Experience

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www.jll-mena.com