

Table of Contents

Introduction	5
Methodology	5
About Frontier	6
About The Libya Report	6
Executive Summary	7
1. Introduction	8
1.1 Current Status: December 2012	8
1.2 Background to real estate market	9
1.3 Foreign investment in real estate	9
1.4 Security update.....	10
1.5 Impact of conflict on Tripoli.....	12
2. Key expatriate locations	15
2.1 Residential overview and update	15
2.1.1 Palm City	16
2.1.2 Oea Camp	17
2.2 Commercial properties	18
2.2.1. Dhat al Imad	19
2.2.2 Tripoli Tower.....	20
2.2.3 Corinthia Business Centre.....	21
3. Government entities: status and updates	22
3.1 Land Registry	22
3.2 Ministry of Planning.....	22
3.3 Ministry of Housing and Utilities (HIB).....	23
3.4 Economic and Social Development Fund (ESDF)	24
3.5 General Authority for Investment Promotion and Privatisation.....	26
3.6 Libyan Investment and Development Company (LIDCO).....	27
3.7 Social Security Fund for Investment	27
3.8 Organisation for the Development of Administrative Centres (ODAC)	28
4. Introduction to Tripoli	30
4.1 Infrastructure and areas of development.....	31
4.2 Transport and utilities.....	32
4.2.1 Ports.....	32
4.2.2 Airport	32
4.2.3 Roads	33
4.2.4 Railway/Metro.....	33
4.3 Demographics	34
4.3.1 Impact of conflict on population	35
5. District profiles.....	36
5.1 CBD	37
5.2 Souk al Thalatha.....	38
5.3 Felah	39
5.4 Downtown	40

Table of Contents

5.5 Gurgi	41
5.6 Old City and Port.....	42
5.7 Omar Mukhtar	43
5.8 Dahra	44
5.9 Airport Road	45
5.10 Hai al Andalous	46
5.11 Gargaresh	47
5.12 Seraj.....	48
5.13 Siyahiya	49
5.14 Janzour.....	50
5.15 Bin Ashour/Noflyeen	51
5.16 Souk al Juma	53
5.17 Tajura.....	54
6. Key district pricing.....	55
6.1 Gargaresh	55
6.2 Seraj.....	56
6.3 Siyahiya	57
6.4 Janzour.....	58
6.5 Bin Ashour/Noflyeen	59
6.6 Souk al Juma	60
6.7 Tajura.....	61
7. Project profiles	62
7.1 Al Waha	63
7.2 Felah Trade Centre	64
7.3 Forum Oyia	65
7.4 Bab Trablus I + II	66
7.5 Bab Trablus III	67
7.6 HIB housing project	68
7.7 Burj Tripoli	69
7.8 Tripolis Towers.....	70
7.9 Al Gathafi Tower	71
7.10 Medina Tower.....	72
7.11 Tower 69	73
7.12 Andalous Port	74
7.13 North Gheran.....	75
7.14 Tripoli Waterfront.....	76
7.15 Bab al Medina	77
7.16 Burj al Bahr	78
8. Directory	79
Ministries and government entities	79
Government developers and funds	79
Foreign developers	80

TABLE OF MAPS, CHARTS AND GRAPHS

1. Unit mix of Palm City residences	16
2. Tenant examples in Dhat al Imad (2012)	19
3. Rental rates and lease types for Dhat al Imad (2012).....	19
4. Tenant examples in Tripoli Tower (2012)	20
5. Rental rates and lease types for Tripoli Tower (2012)	20
6. Tenant examples in Corinthia Business Centre (2012)	21
7. Rental rates and lease types for Corinthia Business Centre (2012)	21
8. Status of current Housing and Infrastructure Board (HIB) contracts (2012).....	23
9. Subsidiary companies of Economic and Social Development Fund (ESDF).....	24
10. Subsidiary companies and holdings of ETHIC	24
11. Subsidiaries and holdings of Al Inmaa for Real Estate	24
12. Subsidiaries and holdings of Libyan Investment and Development Company (LIDCO)	25
13. Distribution of potential projects for privatisation by region	26
14. Distribution of potential projects for privatisation by type	26
15. Social Security Fund for Investment's hotel portfolio in Libya	27
16. ODAC contracts by region (2012)	28
17. ODAC housing projects by units per region (2012)	29
18. International and domestic flights to/from Tripoli and Libya (H1 2012)	32
19. Map of proposed Tripoli Metro	33
20. Tripoli population census by district (2006).....	34
21. Map of CBD	37
22. Map of Souk al Thalatha	38
23. Map of Felah	39
24. Map of Downtown.....	40
25. Map of Gurgi	41
26. Map of Old City and Port	42
27. Map of Omar Mukhtar.....	43
28. Map of Daha	44
29. Map of Airport Road	45
30. Map of Hai al Andalous.....	46
31. Map of Gargaresh	47
32. Villa rental and sales prices in Gargaresh (Q4 2012)	48
33. Land prices in Gargaresh (Q4 2012).....	48
34. Map of Seraj	49
35. Villa rental and sales prices in Seraj (Q4 2012)	50
36. Land prices in Seraj (Q4 2012)	50
37. Map of Siyahia	51
38. Villa rental and sales prices in Siyahia (Q4 2012).....	52
39. Land prices in Siyahia (Q4 2012)	52
40. Map of Janzour	53
41. Villa rental and sales prices in Janzour (Q4 2012).....	54
42. Land prices in Janzour (Q4 2012).....	54
43. Map of Bin Ashour/Noflyeen	55
44. Villa rental and sales prices in Bin Ashour/Noflyeen (Q4 2012)	57
45. Land prices in Bin Ashour/Noflyeen (Q4 2012).....	57
46. Map of Souk al Juma	58
47. Villa rental and sales prices in Souk al Juma (Q4 2012)	59
48. Land prices in Souk al Juma (Q4 2012)	59
49. Map of Tajura	60
50. Villa rental and sales prices in Tajura (Q4 2012)	61
51. Land prices in Tajura (Q4 2012)	61