

C&I ROOFTOP SOLAR ENTRY STRATEGY FOR UAE FREE ZONES

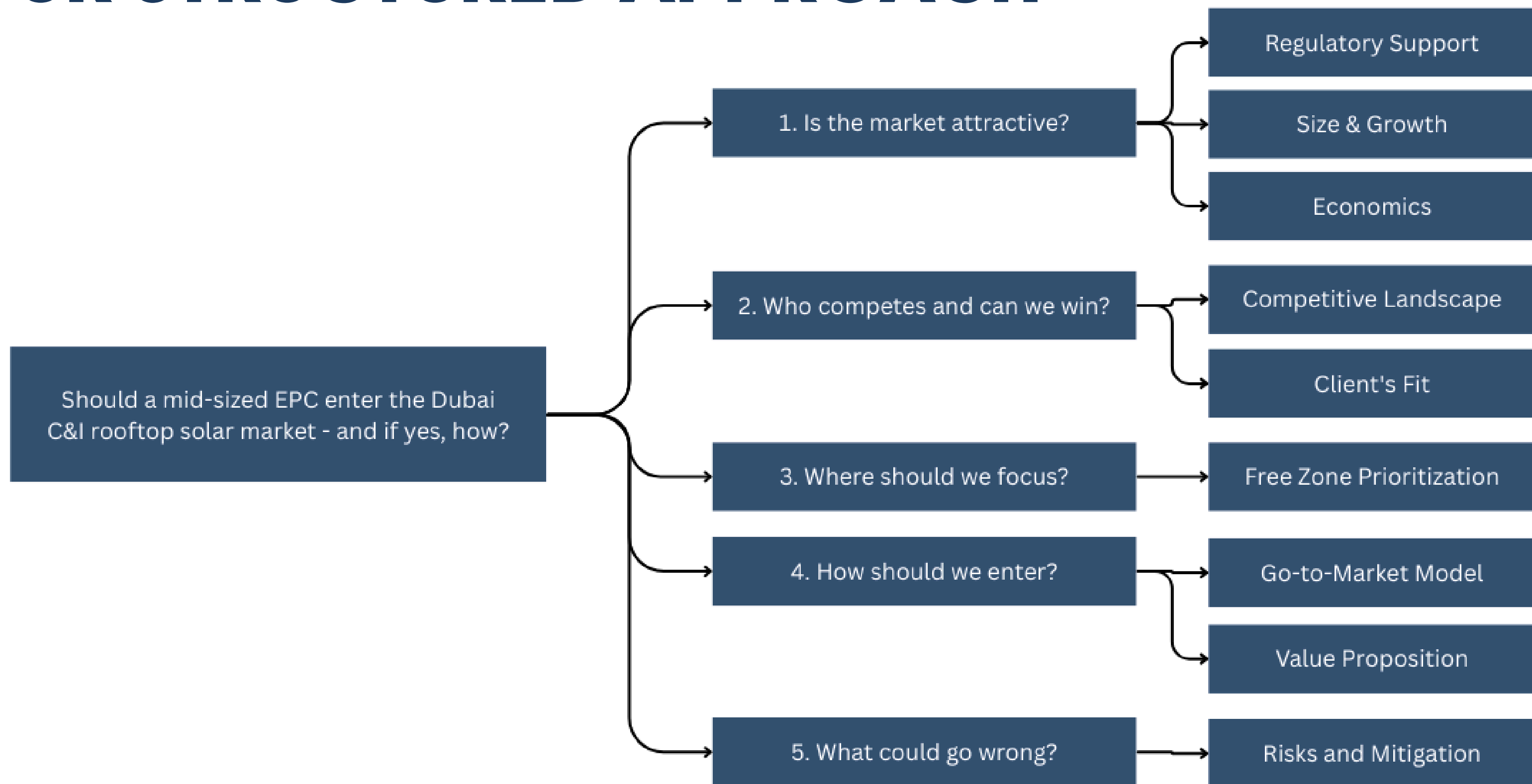
Feasibility and strategic analysis for a mid-sized EPC firm

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WHY THIS MARKET NEEDS A CLOSER LOOK

1. **Situation:** The UAE has ambitious net-zero goals (2050). Dubai's major free zones (JAFZA, Dubai South, DIC) contain thousands of large, flat-roofed warehouses and factories with high daytime energy consumption.
2. **Complication:** A mid-sized Solar EPC sees potential but lacks clarity on market attractiveness, competition, and the optimal entry model to win in this space.
3. **Key Question:** Should we enter the Dubai C&I rooftop solar market, and if yes, how?

OUR STRUCTURED APPROACH



FOUR POWERFUL DRIVERS CREATE A COMPELLING MARKET FOUNDATION



Regulatory
Strong Tailwind

UAE Net Zero 2050,
Shams Dubai program



Economic
Favorable Math

High irradiance + high
tariffs = strong IRR



Operational
Perfect Load Match

C&I daytime ops align
with solar generation



Strategic
ESG Imperative

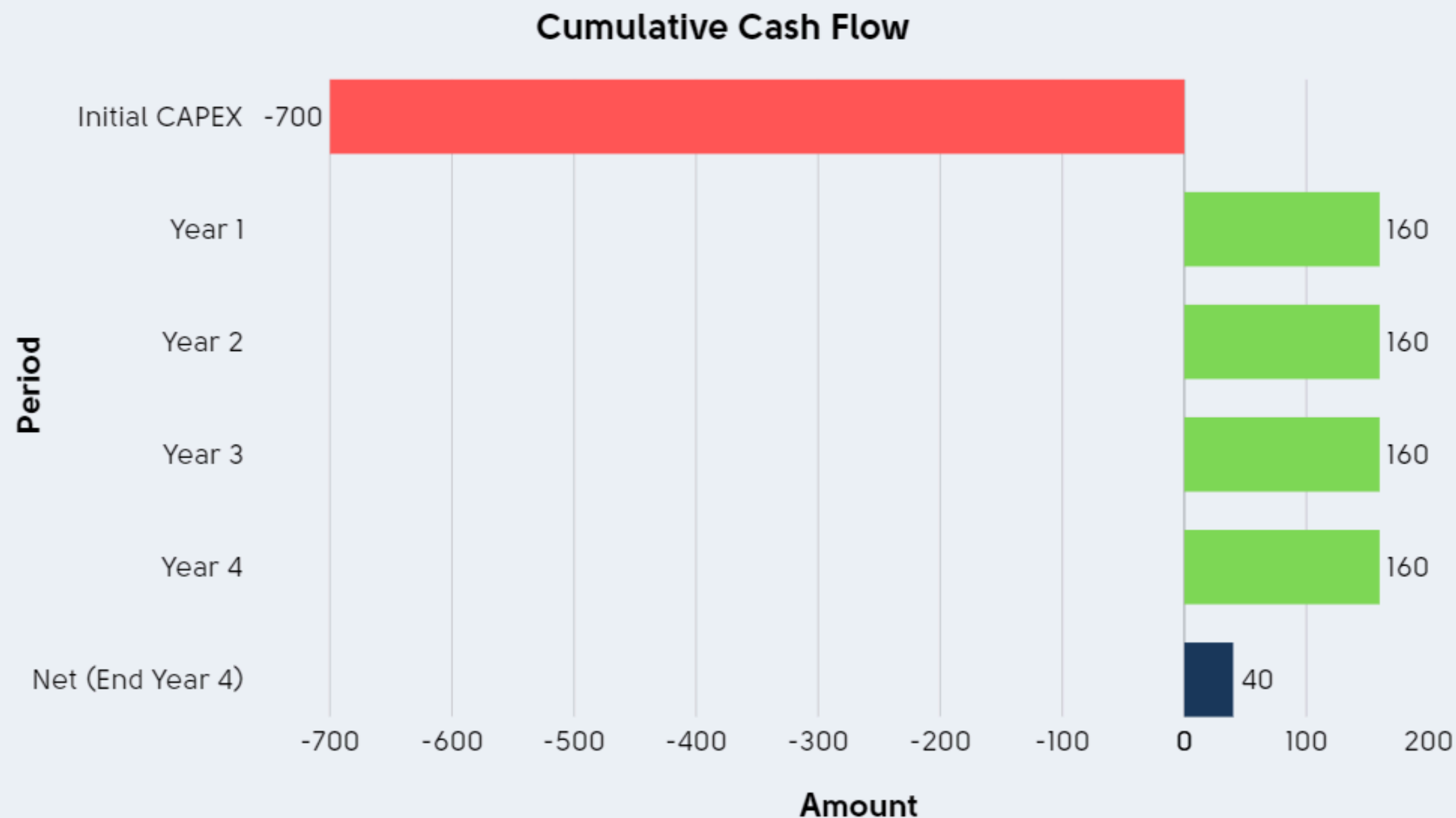
Tenant
decarbonization goals
drive demand

WORLD-CLASS SOLAR RESOURCE ENSURES HIGH AND PREDICTABLE OUTPUT



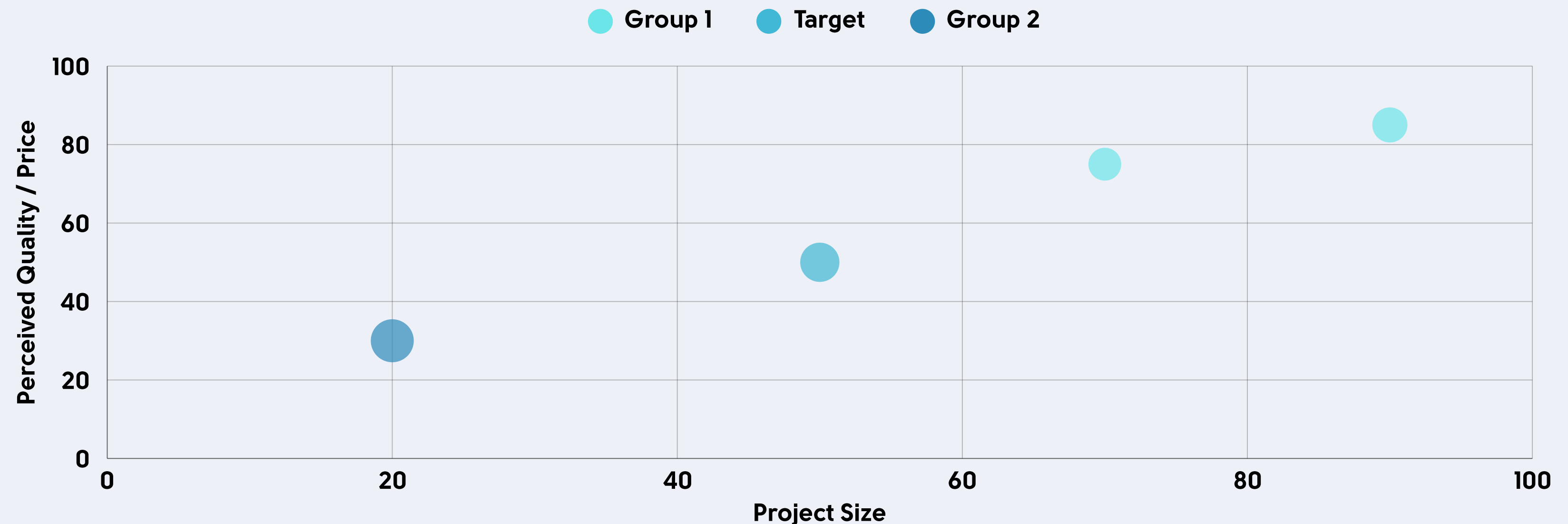
Key Takeaway: Dubai's ~1,900 kWh/kW/year is among the highest globally, ensuring robust system performance and predictable economics.

FOR FREE ZONE BUSINESSES, SOLAR IS A HIGH-ROI OPERATIONAL INVESTMENT



- **Typical payback:** 4–6 years
- Attractive long-term savings potential
- Strong alignment with daytime operations
- High predictability due to Dubai irradiance

THE MID-MARKET SEGMENT (50–500 KW) IS UNDERSERVED BY QUALITY PROVIDERS



An opportunity exists for a reliable, quality-focused player in the mid-market.

JAFZA EMERGES AS THE CLEAR PRIORITY FOR INITIAL FOCUS

Free Zone Prioritization Matrix

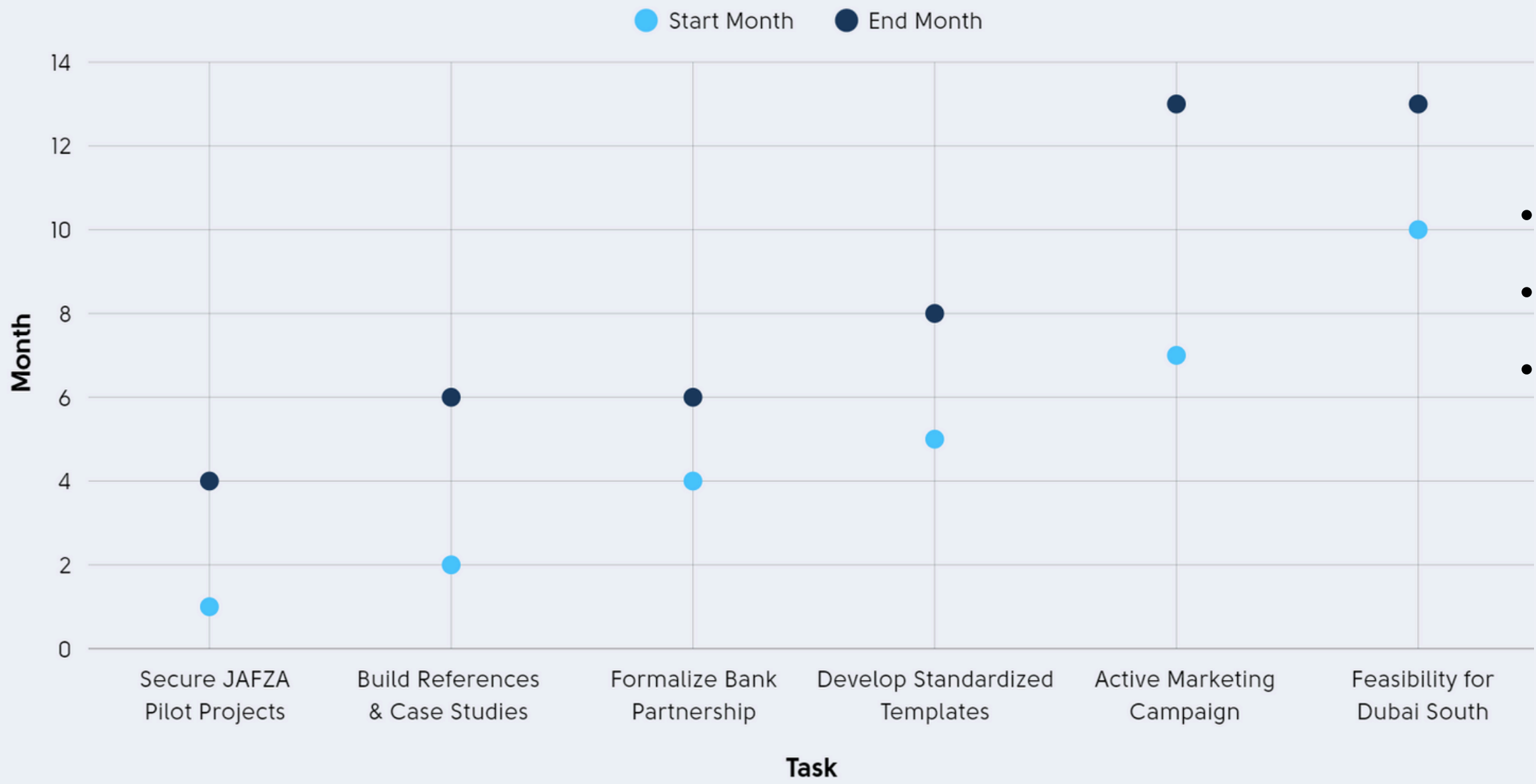
Free Zone ▲	Ease of Entry	Load Match	Rooftop Availability	Total
DIC	3.00	5.00	3.00	3.67
Dubai South	5.00	4.00	4.00	4.33
JAFZA	4.00	5.00	5.00	4.67
Total	4.00	4.67	4.00	4.22

- **JAFZA:** Highest overall potential. Recommended to launch here.
- **Dubai South:** Strong future candidate. Modern infrastructure.
- **DIC:** Viable but requires more selective site assessment.

"QUALITY-FOCUSED, JAFZA-FIRST, CAPEX-LED" ENTRY MODEL

- 1. TARGET:** Owner-occupied & long-lease warehouses in JAFZA.
- 2. MODEL:** CAPEX sales facilitated by partner financing. Offer "Feasibility Audit" as lead gen.
- 3. PROPOSITION:** Compete on reliability & lifecycle value: Tier-1 equipment, O&M guarantee, approval navigation.

A PHASED 12-MONTH PLAN TO BUILD MOMENTUM AND SCALE



- **Month 3:** Secure first pilot project.
- **Month 6:** Formalize bank partnership.
- **Month 12:** Achieve 5–8 MW contracted pipeline.

IDENTIFIED RISKS ARE MANAGEABLE WITH PROACTIVE PLANNING

Risk	Impact	Mitigation
Rooftop Structural Issues	High	Mandatory, billable structural audit pre-contract
Customer CAPEX Hesitation	Medium	Pre-arranged financing options via bank partner
Approval Delays	Medium	Dedicated approvals specialist with DEWA/zone relationships

RECOMMENDATION: ENTER THE MARKET WITH A FOCUSED, DISCIPLINED STRATEGY

1. **ENTER** the Dubai C&I rooftop solar market.
2. **FOCUS** on the quality mid-market gap in JAFZA.
3. **EXECUTE** via a CAPEX-led model, underpinned by financing and quality guarantees.

This approach captures a serviceable market opportunity with a compelling customer value proposition and manageable risk.