



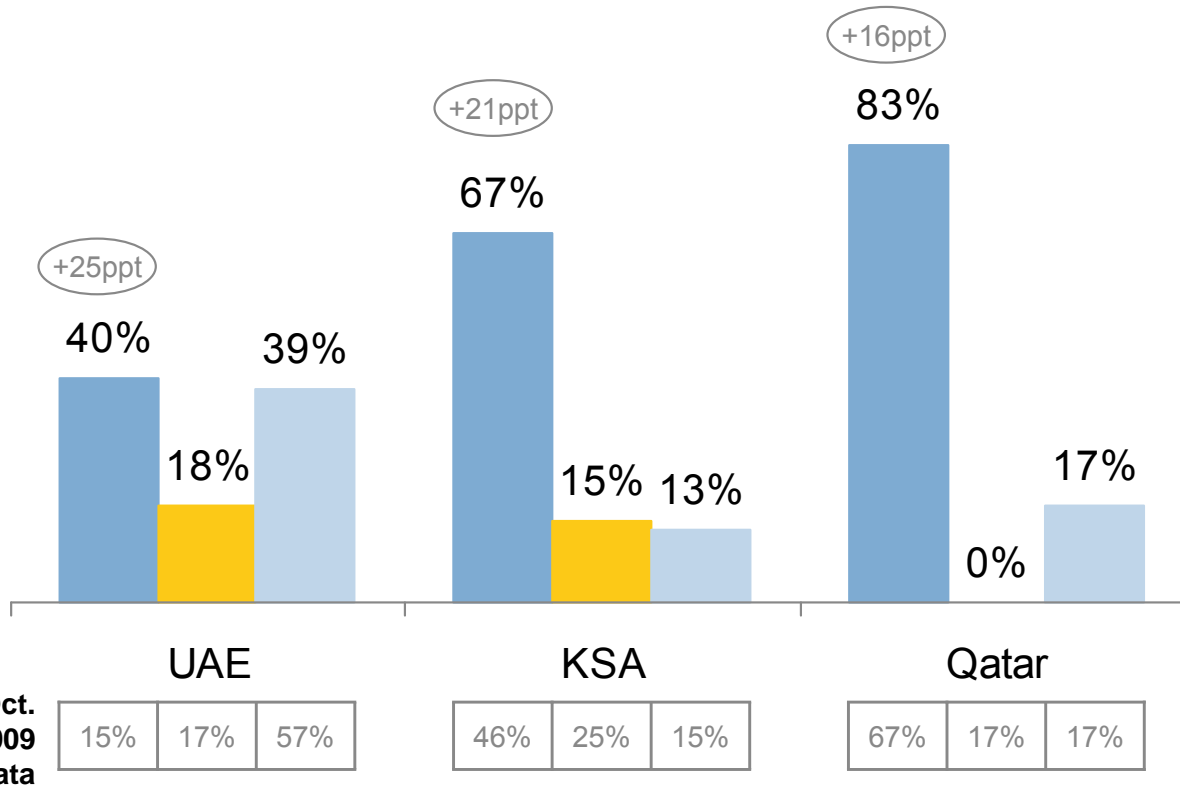
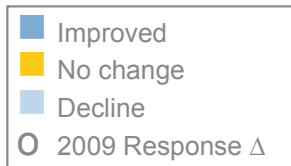
2nd GCC Business Confidence and Government Reform Survey 2010 – Select Results

An Oliver Wyman - Zogby International Survey

May 2010

The 2nd Oliver Wyman/Zogby International survey of GCC C-Suite executives shows business confidence in the region has risen significantly over the past year

What is your view of current business conditions in your country?



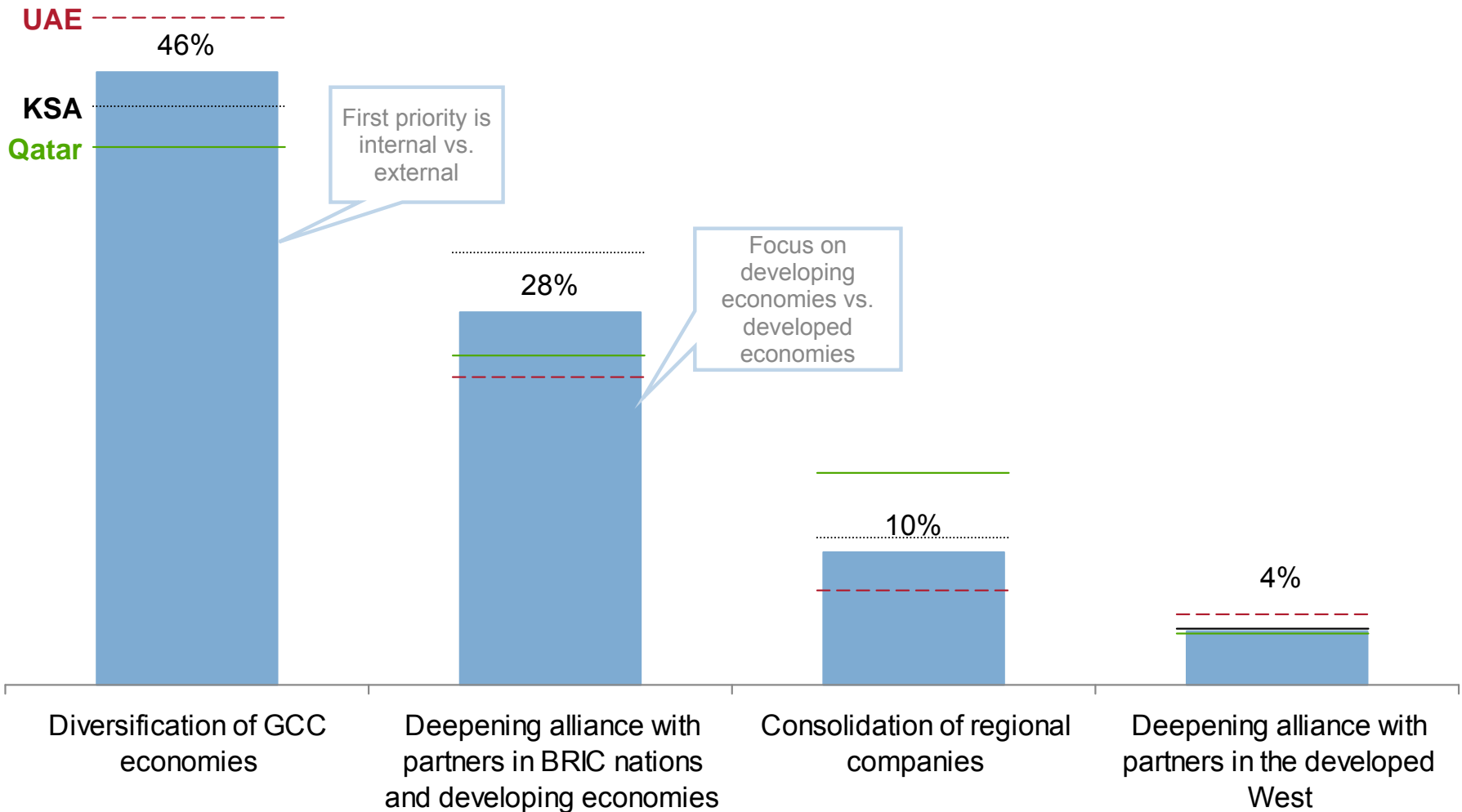
Comments

- Dramatic improvement of business confidence across the region
- Qatar and Saudi executives remain almost 2x more positive than UAE executives
- Pessimism and fear of further financial crises appear to be abating

Note: Sample size of 134 for the region. "Not stated" responses not shown in graph. Due to rounding, percentages may add up to more than 100%.

Economic diversification and strengthening ties with developing rather than developed nations top the competitiveness agenda

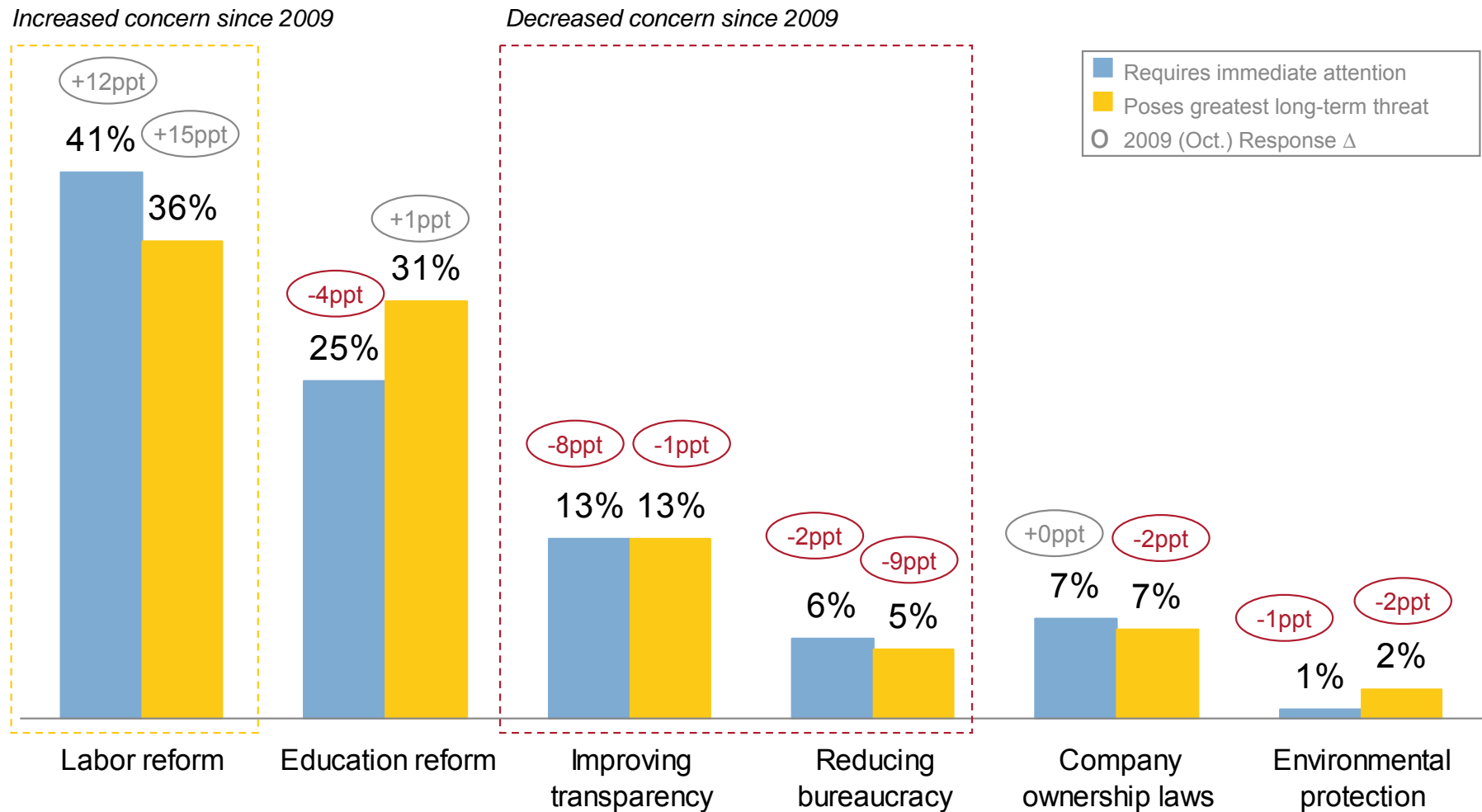
Where is the greatest opportunity for the GCC to improve competitiveness?



Note: Sample size of 134 for the region. "Not stated" responses not shown in graph.

Education and labor reforms continue to be seen as the most pressing issues for the GCC; improving transparency and reducing bureaucracy decreased in priority

Which issues require immediate attention, and which if left unaddressed, pose the greatest long-term threat to the region's competitiveness?



Note: Sample size of 134 for the region. "Not stated" responses not shown in graph.

OLIVER WYMAN

Oliver Wyman's Dubai office delivers unrivaled knowledge and expertise to clients in Bahrain, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, the United Arab Emirates, and beyond. With a focus on the financial services, aviation, telecommunications, transportation, and energy sectors, we support our clients in a broad range of assignments, including growth, reorganization, and turnaround strategies; new business planning and startup support; post-merger integration of global acquisitions; and design of new corporate governance structures.

Oliver Wyman will open offices in Riyadh, Saudi Arabia; and Abu Dhabi, United Arab Emirates, during 2010.

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