

BRICKS & BRIDGES: SHAPING THE GCC THROUGH CONSTRUCTION & INFRASTRUCTURE



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Introduction

At the GCC–France Business Forum, industry leaders from both regions gathered to explore opportunities in one of the world’s most dynamic sectors: construction and infrastructure.

Purpose: How the Gulf’s transformative giga-projects are reshaping markets – and how French expertise can help build the region’s next chapter.

The conversation spanned supply chain resilience, sustainability execution, talent mobility, and strategic positioning, offering practical insights for stakeholders seeking to bridge ambition with implementation.

A Region in Motion: The GCC’s Infrastructure Revolution

The GCC is undergoing a **historic transformation**, with massive investments across its six member states in urban mobility, logistics, tourism, data centers, renewable energy, and smart cities—anchored by ambitious national visions such as Saudi Vision 2030 and UAE Vision 2050. Landmark projects such as NEOM and The Line, Etihad Rail, King Salman and Al Maktoum airports, and Disneyland Abu Dhabi are redefining both the physical and economic landscape of the region.

This unprecedented scale, however, brings **equally unprecedented complexity**: supply chain strain, contractor saturation, and the need for specialization across the value chain. Developers face a **high-demand environment**, requiring coverage from design to delivery, while early capacity planning and strategic foresight are critical to filling emerging gaps.

For French stakeholders, the opportunity lies in **niche, high-value solutions** rather than competing on volume. By focusing on specialization and anticipating market needs, French contractors can leverage their expertise, innovation, and track record to capture strategic opportunities before the window narrows.

Sustainability: From Framework to Execution

Sustainability awareness in the GCC is high, but **execution remains a challenge**. The construction sector contributes significantly to global energy-related emissions, with embodied carbon accounting for a substantial portion. Key challenges include:

- Dependence on imported construction materials (up to 80%).
- Managing scope 3 emissions and minimizing waste.
- Scaling innovations such as converting plastic waste into building materials.

Emerging mandates—for example, energy self-sufficiency targets for major infrastructure projects—demonstrate that **the total cost of ownership now outweighs initial costs**. Sustainability is increasingly viewed as an **investment driver**, not an afterthought.

Best practices for French stakeholders

- Localize innovation and adapt low-carbon construction tracking systems to regional realities.
- Align policy frameworks with practical implementation to achieve measurable impact.

Preserving Technical Expertise

The presence of French engineering in the GCC has **declined over the years**, partly due to accreditation barriers, talent mobility challenges, and shifting market dynamics. New competitors have developed strong commercial capabilities and presentation methods, highlighting the importance of **combining technical excellence with commercial agility**.

A generational shift is also affecting expertise: younger engineers often enter consultancy roles directly, limiting field experience. This can reduce the depth and practicality of delivered solutions.

Key recommendations:

- Innovate in **how expertise is showcased**, leveraging partnerships, digital tools, and practical field experience.
- Communicate technical capabilities effectively to match evolving client expectations.

Cultural Adaptation and Localisation

Across the GCC, markets are at **different stages of social and economic evolution**. As localization accelerates, Western-centric business models no longer suffice.

French stakeholders must:

- Embrace localization and **build trust with local partners and authorities**.
- Celebrate and adapt their **unique strengths**—precision, quality, and innovation—rather than trying to emulate competitors.
- Focus on **niche expertise** in complex engineering, sustainability, or digital integration to secure strategic positioning.

Key Takeaways for French Stakeholders

1. **Specialize to Compete:** Focus on high-value niches such as sustainability systems, design engineering, and digital project integration.
2. **Localize Innovation:** Adapt tools, standards, and processes to regional realities, particularly for sustainability tracking, waste management, and material sourcing.
3. **Invest in Visibility:** Strengthen communication, commercial agility, and on-the-ground engagement to regain market share.
4. **Develop Talent Pipelines:** Support mobility programs and accreditation partnerships to bring French engineering talent to the GCC.

5. **Build Trust through Partnership:** Long-term success depends on alliances with developers, government bodies, and investors. Strategic collaboration is replacing purely transactional engagements.

Conclusion: Building the Future Together

As the GCC accelerates toward its ambitious 2030 and 2050 visions, **demand for world-class infrastructure is at an all-time high.**

Success will not come from scale alone; it will rely on:

- **Strategic agility**
- **Strong local partnerships**
- **Sustained innovation**

The opportunities are immense, but French stakeholders must act with **adaptability, foresight, and a deep understanding of local dynamics** to become not just participants, but key architects of the GCC's transformation.