



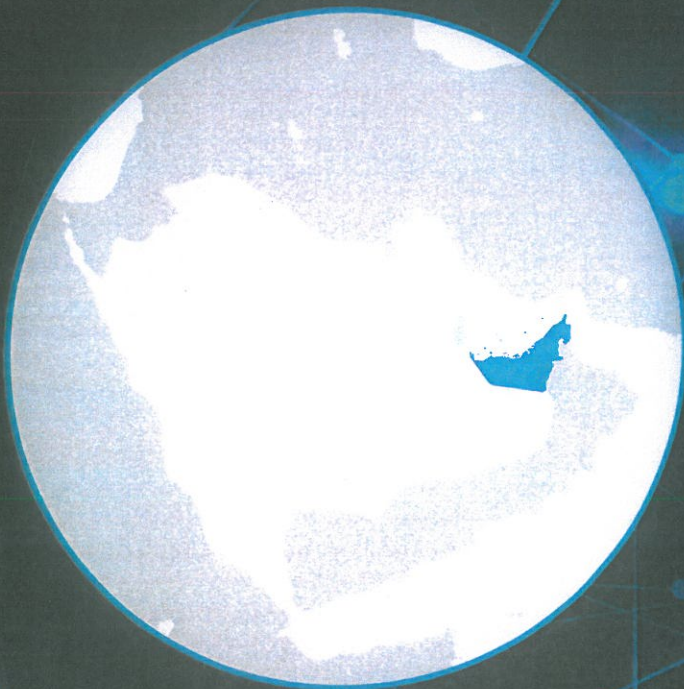
The Middle East

Population: 330 million (2017)
GDP: USD 2,274 billion (5.5% of global GDP)
Growth rate: 3.3% (e) (2015)
Expected growth rate: 3.1% (2018)

United Arab Emirates

GDP: USD 370.3 billion
Population: 9.2 million
Size of IT market:
Equipment - USD 7 billion
Software - USD 1 billion
Services - USD 2.7 billion

Key industries in IT spending: Government, Oil & Gas, Finance, Infrastructure & Construction, Retail



Executive summary

Now is the time for governments to reinvent and redesign digital services for citizens.

As technological progress continues to accelerate, governments everywhere are under pressure to adapt. At the same time, public institutions face tough economic conditions and the challenges of rapid political and social change.

To meet these complex and often competing demands, governments across the globe are on the journey to becoming digital. This journey is not just about implementing new technology; the reality is that governments and public services must transform their thinking and ways of working to stay relevant.

Today's citizens increasingly expect to access the public services and information they need instantly online whenever and wherever they need them. The challenge – and the great opportunity – is how to shift away from merely digitizing existing services and processes, many of which have existed for decades. Now the imperative for governments is to deliver faster, better, easier, citizen-centric services and evolve into a modern e-State.

This paper explores the concept of an e-State that is now being shaped by today's global megatrends and technological advances. It explains the urgency for governments to change and looks at the key digital enablers on the journey to digital government.



e-State example: Estonia

Estonia is a world leader in digital evolution and becoming an e-State.

The country's powerful neighbor and long geo-political history are key reasons for Estonia's emergence as a pioneering e-State. In the early 90s, following the end of the Soviet Union, Estonia started to build a digital infrastructure from scratch in a greenfield environment.

Not hindered by any old legacy systems – precisely what these days many other governments struggle with – a new digital society could be designed by default. The absence of a proper paper bureaucracy in the wake of independence made the choice of a digital infrastructure cheaper than old-fashioned red tape. There were other reasons. A new digital backbone was a strategic security and defense mechanism in the new world order. It was also a way of giving opportunities for the new Estonian generations – and a means of achieving global visibility.

As well as building e-Estonia as a modern e-State for its own citizens, the vision was extended to expatriate Estonian citizens living abroad. And as the latest e-State-services became available for an Estonian living and working in the US or Australia, then why not make those same e-services – such as registration, legal and financial transactions, trade, education, voting, and so on – all available to non-Estonian citizens by making them 'e-Estonian Residents' and achieve visibility as a digital pioneer, in turn attracting new visitors, entrepreneurs and students?

Estonia's strategy of building data backups in 'data embassies' outside Estonia but within Estonian embassies (thus still keeping its data secure on Estonian territory and therefore safeguarding data sovereignty) is a clear example of the digitally-savvy Estonia earning its place as a frontrunner 'e-State'.

Today Estonia is making joint agreements of understanding with other larger governments (UK, Singapore, France and so on) to act as a showcase so that others can learn 'How to become an e-State'.

e-State example: China

While it is important to point out that in China the issue of 'privacy' does not exist as it does in other countries, China's example is still informative.

China is now becoming a digital world leader. In recent years, two tech giants have radically changed the lives of ordinary Chinese citizens. Alibaba (which most of us know as the Chinese Amazon) provides Alipay. TenCents (recently outstripping Facebook) delivers WeChat, the app that is most used in daily life and now has almost a billion users. These two apps encompass much of citizens' lives meaning every move, every transaction, every moment of leisure, travel, medical treatment and so on is handled via those apps. And as privacy is not an issue, all that data is shared and used by the Chinese State in an algorithm to 'measure' the individual.

With digital identity already covered by Alipay, what is now called 'Sesame Credit' will in 2020 be implemented by law as a social credit system that will be obligatory for every Chinese citizen. Under Sesame Credit, citizens receive credits based on their daily behaviors and consumption, allowing them to get travel, apply for mortgages and so on. In turn, data and algorithms can be used to make e-services to Chinese citizens cheaper, better, faster and more timely.

Under this system, the Tech Giants earn more revenue and the Chinese Government has more control of Chinese citizens' data – because if so-called 'non-State-friendly' activities appear in the algorithm (wrong writers, wrong website, wrong game and so on), an individual's scoring decreases and, ultimately, could put them on a black-list, disconnecting them from booking train tickets, applying for a visa, getting the best medical treatment and so on.

While these kinds of algorithms and tracking would never be accepted in the western world, the integration of public services in massively-used apps gives a notion of how digital societies could look in a few years' time. Some even say Sesame Credit is just catching up with scoring systems used by banks for decades in Europe or the US and that China is just taking it to the next level.

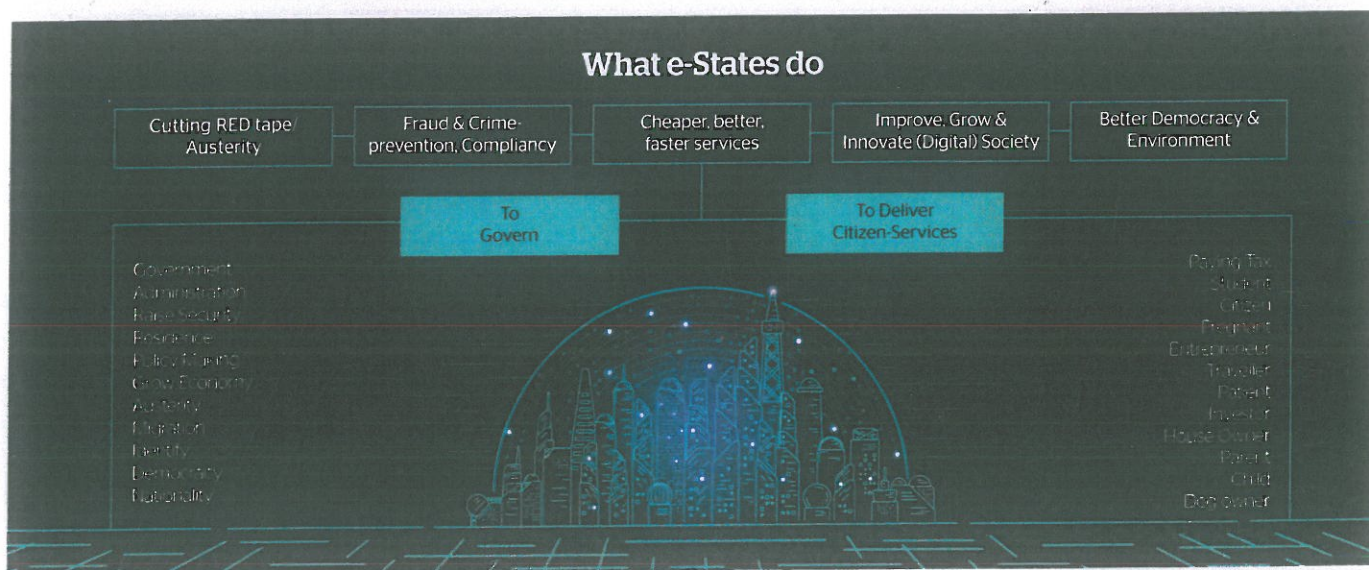


What is an e-State?

An e-State is a modern, digitally enabled government operating in a globalized economy, for its citizens.

One the one hand, an e-Sate must GOVERN: to implement policy, keep citizens safe and secure, provide and maintain the framework of law, order and justice, address society's challenges, and generate and maintain prosperity. It does this in an integrated agile efficient way that keeps the country safe, stable and resilient.

It also must deliver citizen-centric SERVICES to meet the needs and improve the lives of all citizens (taxpayers, families, students, entrepreneurs, travelers, patients, investors, home owners, parents, children, vulnerable citizens). It does this in a cost-efficient way that is data-driven, with services that are quick and easy to access and use.



Global megatrends

The vision of becoming an e-Sate is being driven and shaped by worldwide shifts and changes that include four global megatrends.

Good Government

Delivering digital services in ways that are faster, cheaper and easier for citizens.

World citizenship

This is about enabling citizens to choose and use new digital services from multiple countries as e-Residents, supporting global citizen mobility and aspiration. Many younger or more digitally-savvy citizens may well be more mobile on a global scale - for travel, or study, or internship, or even as entrepreneurs. By embracing this megatrend, countries make themselves more attractive as modern 'connected' locations.

Country as a Service

In a globalized world, countries deliver services beyond their own territories and populations to attract new entrepreneurs, citizens and investment. While this concept was invented by Estonia, more and more countries are interested in evolving this model to promote and grow their economies.

Digital commons

In a world of political devolution, this is about harnessing new digital enablers to support and enable new forms of communities and governance at local level.

Measuring digital maturity

Today, becoming an e-State is a journey of evolution that governments all over the world have embarked on. To plot their progress, indexes such as the European Commission's Digital Economy and Society Index and the global Digital Evolution Index measure digital evolution in different countries, pinpointing the countries whose digital economies are moving

fast and those whose might be in trouble. Examples of today's front-runners include New Zealand, Estonia, Singapore, UAE and Israel. Each of those countries has much to teach others about how to accelerate the journey to digital maturity.

Digital transformation journey for governments

So, how do governments embrace fast-changing technology on their journey to digital government while delivering business as usual?

Firstly, by recognizing that digital is essential to deliver faster, efficient government services; and also by finding digital transformation partners to shape their digital strategy and guide, facilitate and enable them along their digital transformation journey to:

- Improve the experiences of citizens and deliver better, joined-up services
- Re-invent new business models and service to get a step change in performance

- Ensure and maintain operational excellence across the whole enterprise
- Win and maintain high levels of cyber security and trust.

To create a high-performing, data-driven 'e-State' depends on governments' ability to deliver joined-up digital services, together with data analytics and machine learning about citizen behavior to personalize and continuously improve provision of services.

Digital enablers

Governments now have the great opportunity to reinvent and redesign the way their services can be delivered - to optimize technology, stay relevant and put citizens at the heart of delivery. For government, this means harnessing digital enablers in order to be:

- **Lean and agile** so that they're ready for whatever technology or change is needed - and are operating efficiently and flexibly
- **Data-driven** so that they can harness internal and external data sources to gain new insights to meet whatever challenges they face - while remaining sovereign over their country's data
- **Cyber secure** so that they win and maintain public trust and meet all regulatory requirements.



Digital enabler:
journey to cloud

Controlling data and adopting hybrid cloud is a key enabler for any digital vision. Without doubt, cloud adoption is now on the critical path. Cloud is the technology 'engine' that organizations need to power smooth, efficient, effective, resilient digital public services.

For any public agency under budget pressure, 'doing much more for less' is a major benefit of cloud. And there are other benefits: more freedom to innovate and change while knowing that IT does not have to play catch-up.

Cloud gives provides the platform for embracing whatever technologies they need, now and in the future, while retaining control over the nation's data. To make the move to the right hybrid cloud solution, governments need third party support - not just giving data away in exchange for free services from the tech giants. This is about partnership: government leaders need to understand digital and digital leaders need to understand governments.



Digital enabler:
data and analytics

Harnessing data, becoming truly data-driven and innovative by design will be the hallmarks of successful organizations in the digital age. Using insights from analytics and 'big data' can make major contributions to governments by enabling them to improve operational excellence and support timely evidence-based decision-making.

The opportunities to use data and analytics to address governments' priorities are almost limitless. Data and analytics can be used to improve citizens' lives, predict needs, for example to deliver more timely and effective interventions for vulnerable citizens, and direct precious government resources to where they're needed most. The challenges are to embed data and analytics into processes and decision-making - and to overcome restrictive national legislation that may be holding back innovation by restricting the sharing of data between agencies.

Atos Codex is a complete portfolio for data-driven business transformation. Combining deep market knowledge and technical expertise, Atos designs, builds, runs and secures smart business services and data platforms. Atos Codex helps public organizations to unlock the value of the data they own and generate better outcomes for public services, for citizens and businesses, and for society at large.



Digital enabler: robotic process automation and artificial intelligence

Robotic Process Automation (RPA). RPA is increasingly common and is perfect for automating relatively simple, repetitive tasks.

Artificial Intelligence (AI). While there are many forms, there are four main types of AI: voice and facial recognition; natural language processing; machine learning; and deep learning. AI can be used to automate more complex tasks that require connective, or 'intelligent', processes. This kind of intelligent automation is now in high demand and fast maturing.

While RPA is appropriate for back-office and accounting processes, when it is combined with AI, any process with administrative content can be automated. Given this potential, there are a wide variety of uses for RPA and AI across public services.

Digital enabler example: Citizen vault

In the past, public services occupied physical locations in communities. Citizens went to those locations, submitted their information (usually by filling in a form), then the data was validated by the relevant agency before a decision was made. Today, we go through a similar process online, by visiting websites, filling in forms and waiting for data to be processed and decisions to be made. This is not a digital revolution; it is a marginal efficiency gain.

In contrast, a true e-State understands that citizens should not be logging into services to pass on their information; services should be logging into the citizen to facilitate Good Government. How could this work?

Imagine each citizen had access to a 'citizen vault' that secured the citizen's individual data. Like today's banks, these would be tightly regulated organizations. These citizen vaults have two core purposes: to only store data they know to be correct and to only ever act in the interest of the individual who owns that data.

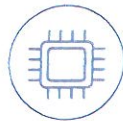
At the simplest level, if I store my name, date of birth and address in my citizen vault, how will my interaction with public services be transformed?

1. I wish to register with a doctor. My citizen vault offers me options for surgeries to register with; I choose one and am automatically enrolled because my name, date of birth and address are pre-validated. I can then book my first appointment immediately. Importantly, the surgery has no need to collect, process or store any data.

2. I would like to buy some alcohol. As I walk out of the store, I am stopped by a police officer who needs to check my age to ensure that I haven't been sold the alcohol illegally. Using a unique reference number for my citizen vault, they can confirm that I am over 18. Importantly, they are not provided with my exact date of birth, nor any ancillary information, such as my name and address, because it is not central to their enquiry.

3. I want to buy a parking permit from my local council. My citizen vault knows where I live but doesn't store the details of my car. I upload those so I can get my parking permit as well as pay my road tax. Again, no data is taken from me, processed or stored by government; it simply confirms my eligibility and proceeds on that basis.

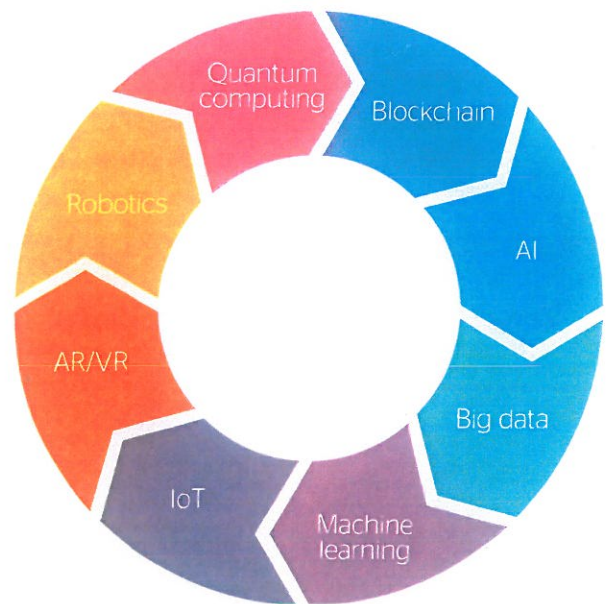
In this way, I have interacted with three separate arms of government and no public body has had to pay to collect, validate or store my data. This has the potential to end huge and expensive IT programs and repatriate responsibility for data from institutions to individuals. The test of success will be the point at which governments stop paying IT suppliers for systems to process data and, instead, start paying citizens for access to their pre-processed data. This is true digital transformation and the first e-States will be the ones to adopt it.



Digital enabler: blockchain

Blockchain is the first technology that offers a way to fully manage digital assets in a trusted, traceable, automated and predictable way. What distinguishes blockchain is that each 'block' is linked and secured using cryptography. Trust is distributed along the chain, eliminating the need for a trusted third party to facilitate digital relationships.

Blockchain is sometimes called 'The Single Point of Truth', perfectly fit for registration, identification, verification, authentication - the core tasks of government. In fact, it could be a key enabler for a transformation of the relationship between the citizen and the government. Citizens will be able to possess (not merely own) their own data and grant access to that data to digital public services.



Digital enabler example: Blockchain

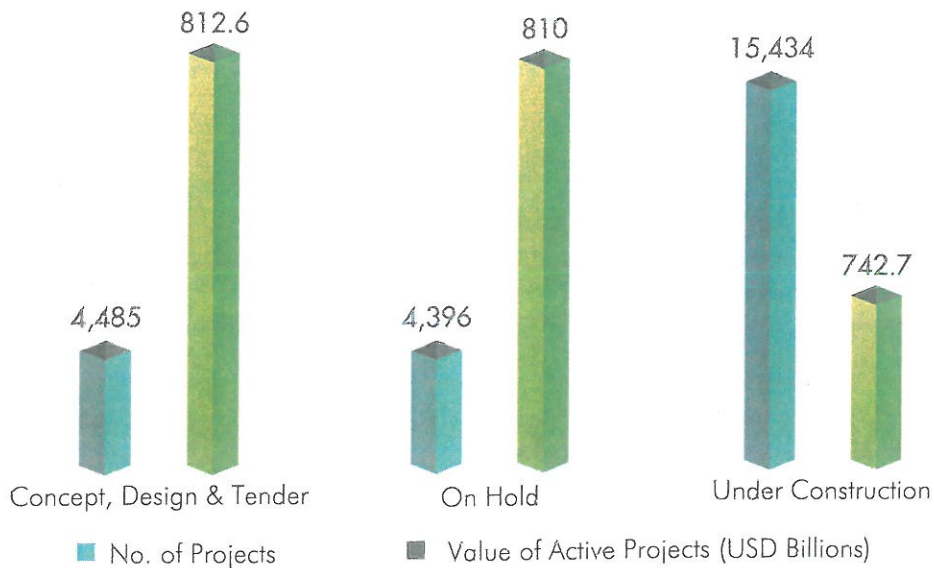
Although still in its early days, blockchain may have a huge impact on daily life and subsequent services from government.

The characteristics of blockchain are registration, authentication and verification of transactions. These are all key elements of what governments exist to do. Applying this new technology drastically changes the landscape of typically bureaucratic handling of public bodies. For example, if socially-vulnerable families lack the financial resources for their children to be able to swim in the local pool or pay the fees for the local library/gym, with blockchain, communities can themselves set up a credit system where selected families receive credit points that enable them to go to the pool or borrow a book. This avoids the need to ask for subsistence from government, which takes time, waiting, filling in forms, waiting for budgets and finally the pool or library as well needing declaration forms to receive the adequate funding. In other words, red tape.

A bigger impact will be when blockchain is used to determine citizens' identity (as a resident, as a taxpayer, as an entrepreneur, as a husband, as a father and so on). If blockchain replaces that (digital or paper) process with a ledger that is secure and resilient, the result is truly transformative. We are not there yet - but reshaping our public space and reinventing the way public bodies deliver citizen-centric services is at a tipping point.

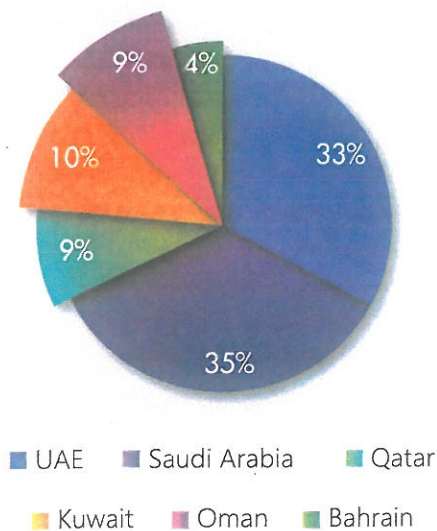
GCC

The Big Picture



There are 24,315 projects in the GCC estimated at USD 2.3 trillion. In September, the number of projects being tracked in the GCC increased by 3% as compared to August while the total estimated value of projects decreased by 1%.

One hundred and eight projects worth USD 8.1 billion moved to construction while 109 projects worth USD 11 billion, including the USD 2.7 billion [Dubai Square Mall](#) were put on hold. The largest project awarded was [Phase 2 of ADNOC LNG - Integrated Gas Development Expansion \(IGD- E\)](#) worth USD 1.01 billion while the mega-urban development, [Renaissance City](#) in Abu Dhabi was cancelled.

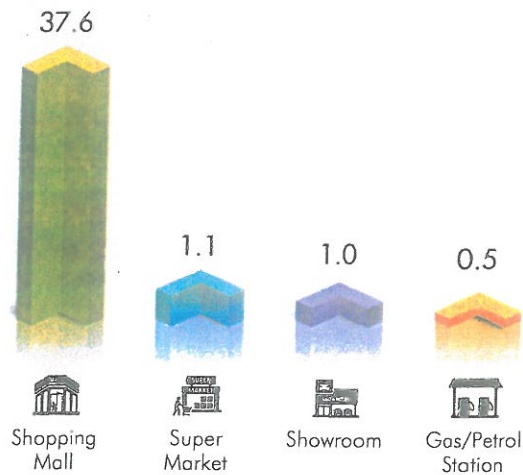


UAE

The UAE constitutes 54% of projects in the GCC or 33% in dollar terms. Even though we saw a 6% month on month increase in the number of UAE projects, the total value of projects decreased by 4%. Sixty-three projects estimated at USD 4.9 billion moved to construction, 67 projects worth USD 6.4 billion were put on hold and 516 projects worth USD 5.9 billion were completed.

Retail

Contract Awards Skyrocket



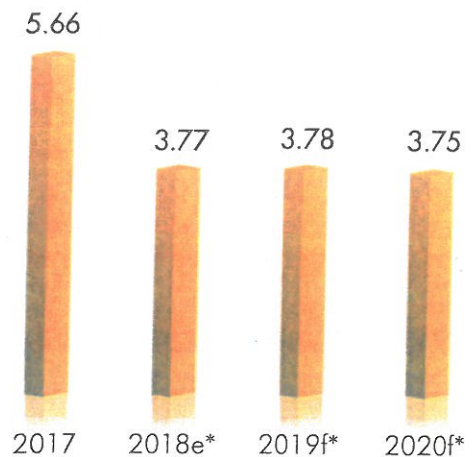
Even though the retail industry in the region has been severely stressed over the last several months, there are 530 retail projects worth USD 40.2 billion, planned or underway in the GCC.

The largest projects awarded in Q3 2018 include the USD 1 billion [Ishbilyah City Centre](#) in Riyadh. The Ishbilyah City Centre will be the first City Centre mall by [Majid Al Futtaim](#) in



Saudi Arabia and is expected to be the first of many. The project will cover over 100,000 square meters of gross leasable area featuring 250 stores, and as in its UAE malls, it will have a 9,000 square meter Carrefour hypermarket, a food court and an entertainment complex that hosts a Magic Planet.

Saudi Arabia is expected to see a significant growth in retail projects due to the recent policy changes made by the country, including the 35-year ban lifted on cinemas. The Saudi government estimates that the cinema sector will contribute more than USD 24 billion to the country's economy by 2030, create 30,000 permanent jobs and 130,000 temporary jobs.



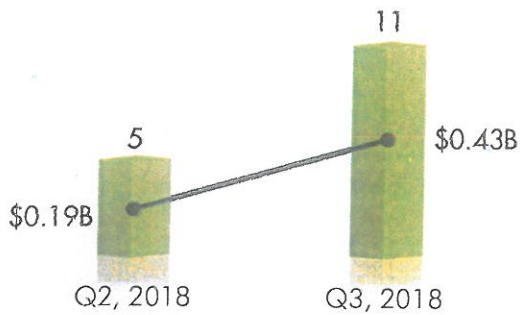
[Majid Al Futtaim](#) opened their first cinema theatre in Saudi Arabia earlier this year under the 'Vox Cinemas' brand that is said to open 600 screens in the next five years with an investment over USD 533 million.

Healthcare

Slow but Steady Recovery

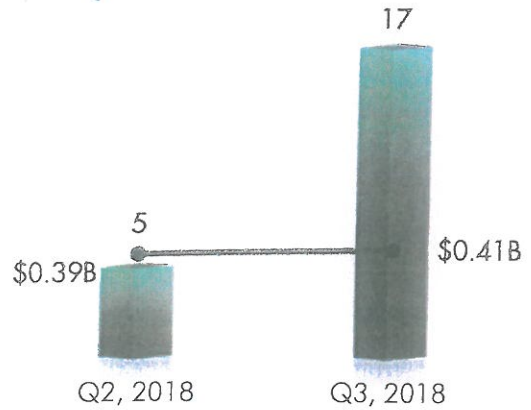
GCC Healthcare construction has around 700 projects worth over 50 billion dollars, planned or underway.

The sector saw USD 363 million in contract awards including the USD 180 million [Al Reem Hospital & Rehabilitation Center](#) in Abu Dhabi which involves the construction of a 275 bed hospital in two phases. The 52,000 square meters project will see



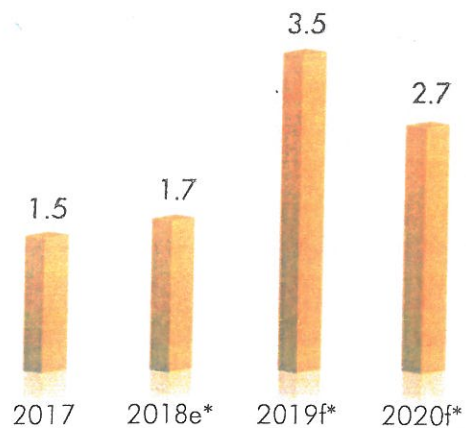
100 beds operating in phase 1 and 175 beds added in phase two, which will be a women and children's hospital offering specialized pediatric surgery and treatments, as well as comprehensive gynecology and obstetrics services supported by a neonatal intensive care unit.

The number of announced healthcare projects increased significantly compared to Q2. Completed healthcare projects in Q3 2018 saw a 124% jump in terms of value compared to Q2 with the completion



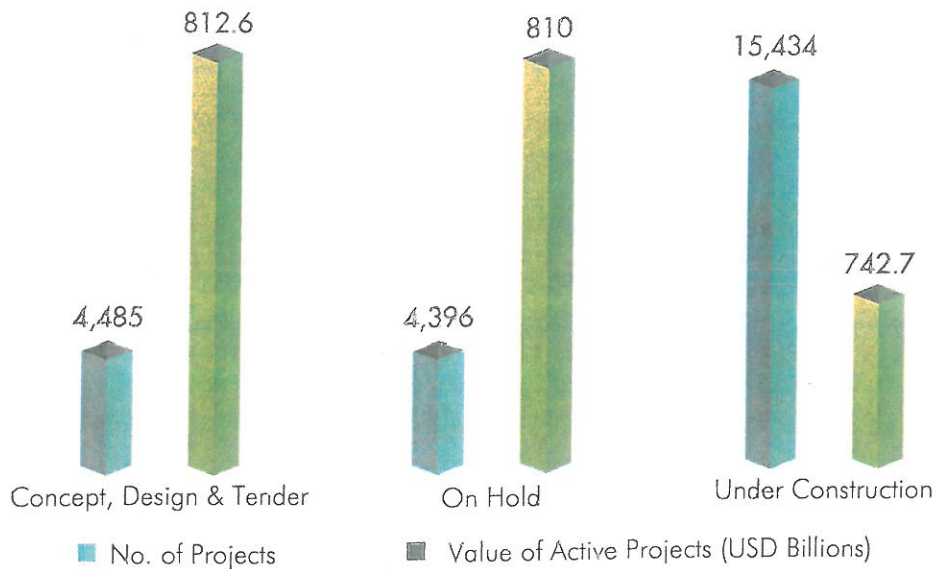
of the USD 1.2 billion [Al Jahra Hospital Extension](#) at Al Qasr in Kuwait City.

Even though the healthcare industry is seeing a Q-on-Q recovery, its performance is significantly below the expectations at the beginning of the year. With contracts worth USD 585 million awarded as of Q3 and USD 1.7 billion worth of projects in tender, it is unlikely that healthcare contract awards will touch the currently forecasted value of USD 1.7 billion by the end of this year.



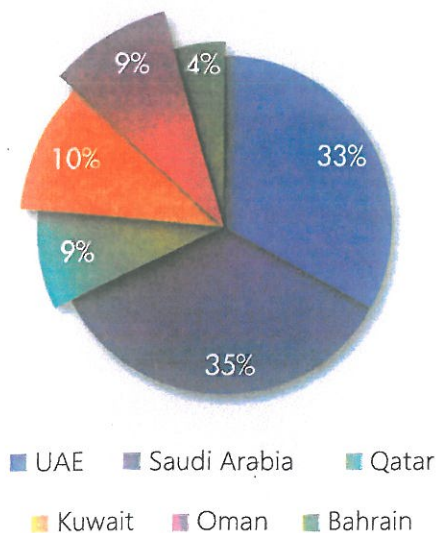
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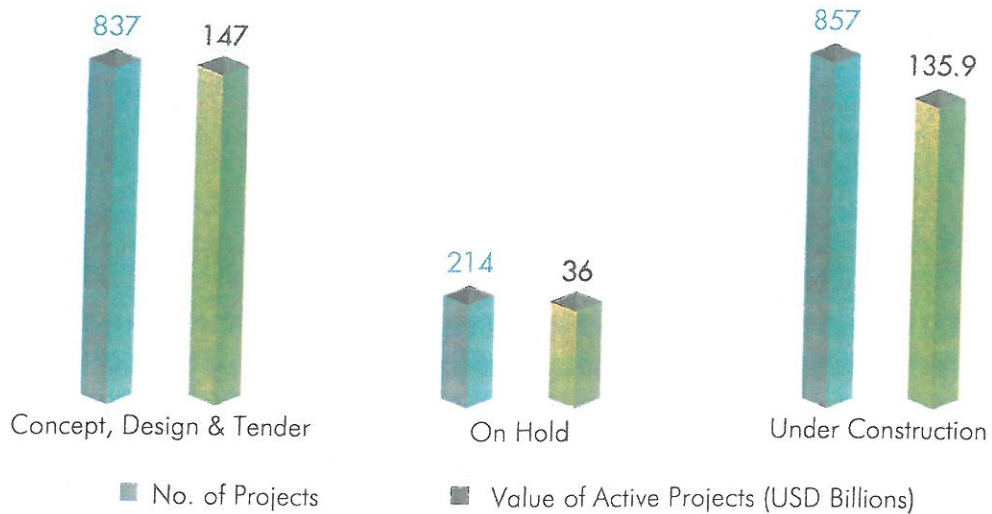


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GCC Utilities

A Powerful Q3

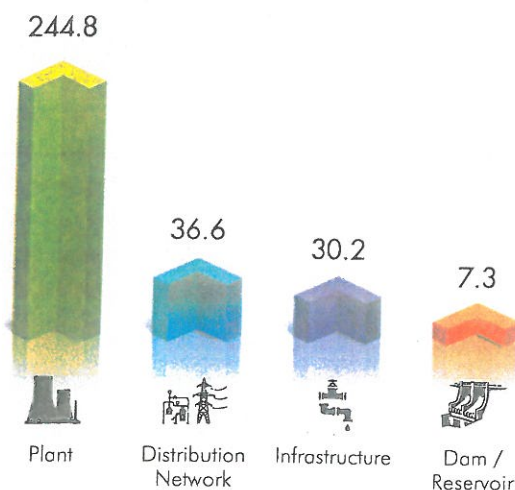


The 1,908 current and planned utility projects in the GCC, estimated at USD 318.9 billion, constitute 8% of projects in the region. Supported by massive projects such as nuclear power plants, and mega renewable energy projects, these projects constitute 13% of the GCC project market in terms of their estimated value.

In September, the number of utility projects being tracked in the GCC

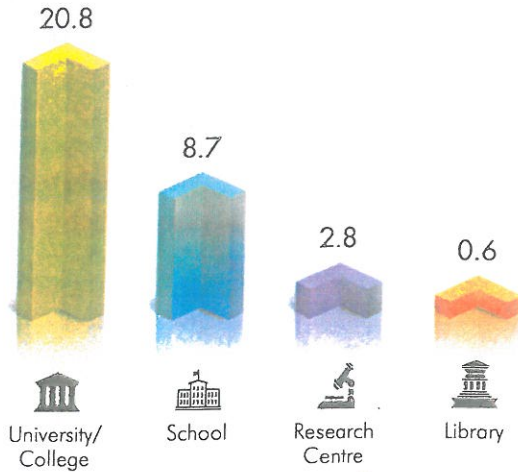
increased by 2%, with no significant change in the overall value of projects in the sector. This was primarily due to the introduction of small-scale utility projects like drinking water networks and electrical distribution networks. Around 65% of the projects introduced in the month were each valued below USD 10 million.

In Q3 2018, there was a 64% increase in utility contract awards as compared to the previous quarter. Notable awards include the [infrastructure package 1](#) for Sharjah's USD 6.5 billion [Aljada Residential City](#) which is a fully integrated mixed-use development located in between the Al Dhaid Road and the University City Road in Sharjah. When complete, the community will spread across an area of 2.2 square kilometers and will accommodate up to 70,000 residents along with supporting commercial infrastructure.



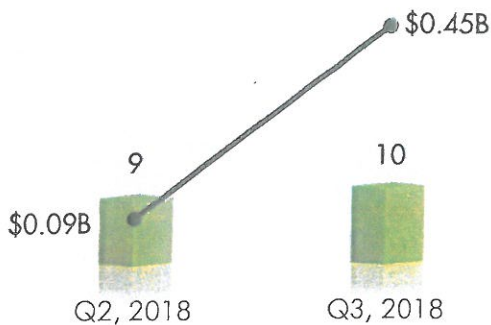
Education

The Quarter that saved Education in 2018



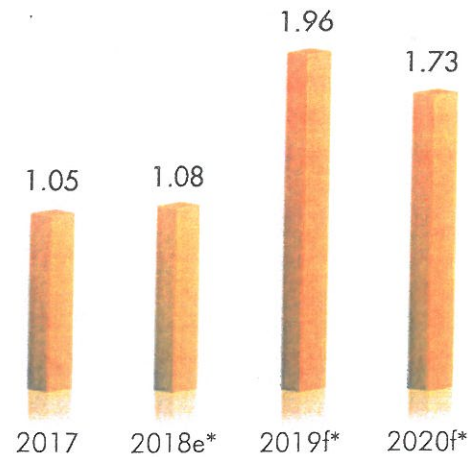
We are currently tracking 884 education projects worth USD 32.9 billion in the GCC. Saudi Arabia comprises 48% of the total value of education projects in the region followed by 20% in the UAE.

Education contract awards in the region were UAE-centric in Q3 2018 and increased considerably, making the quarter the best quarter for new project awards in the last 12 months.



Construction in the sector was driven by the main contractor award for the [Higher College of Technology](#) at Baniyas in Abu Dhabi worth USD 250 million and the [Diamond Innovation Center](#) worth USD 140 million at Sustainable City in Dubai.

The UAE government's continued drive to promote the development of the education sector is supported by the recent announcement of 5-year and 10-year residency visa extensions for exceptional students. While the initiative is insufficient in itself, it is a major step in the direction of creating mid-term opportunities to increase the country's talent pool.



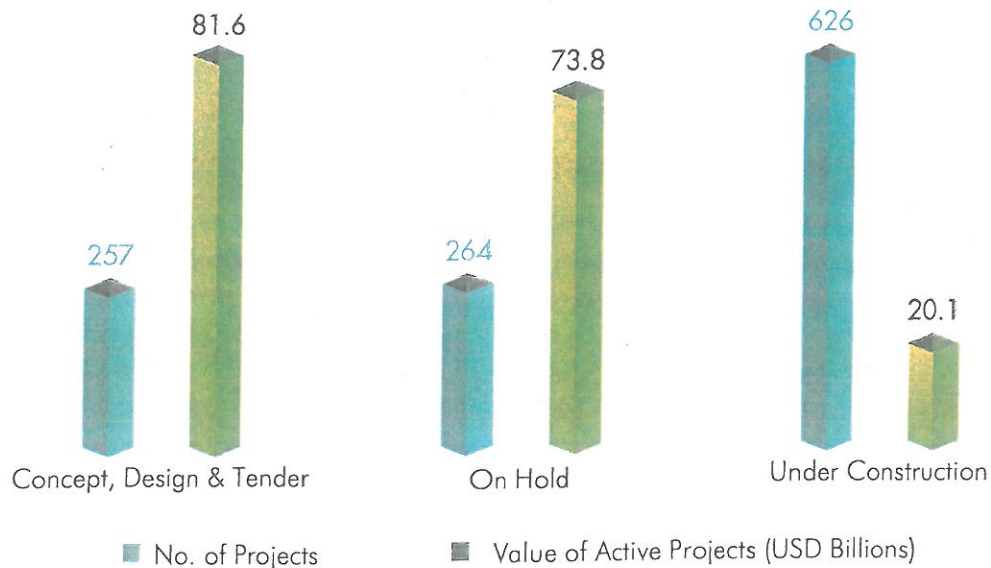
As of Q3, there is a 39% decline in the forecasted 2018 GCC contract awards predicted by the BNC five year moving average model compared to the beginning of the year and even though there are USD 1.39 billion worth of education projects in tender, the revised mathematical forecast of USD 1.08 billion is still too optimistic, considering that only USD 496 million has been awarded so far.

“Dubai is a popular education destination for international students and extended visas will further enhance our position as a hub for higher education. We are expecting a significant growth in the number of students coming to study in UAE and this decision will not just benefit the UAE economy but also enable greater opportunities for higher education institutions and students.”

*Dr. Warren Fox,
Chief of Higher Education,
Knowledge and Human Development Authority (KHDA)*

GCC Industrial

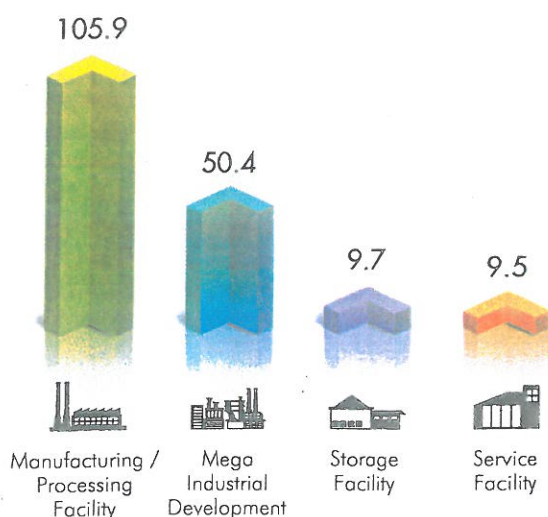
Warehousing Overshadows Manufacturing



With 1,147 industrial projects in the GCC estimated at USD 175.5 billion, the industry's share of active projects across the region is just 7% at present as most industrial projects are relatively low value storage or light-manufacturing facilities.

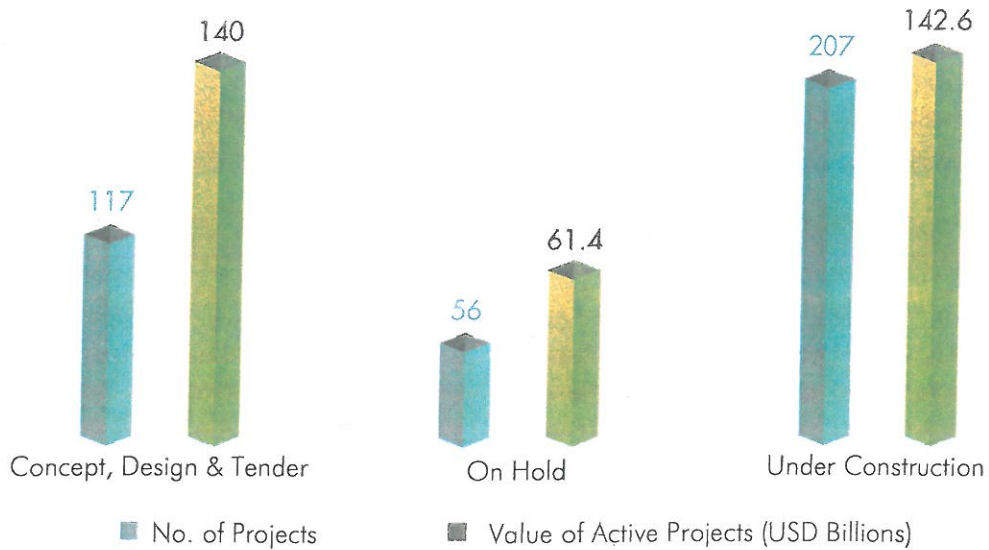
In September, 10 projects worth USD 406 million were put on hold, 5 projects worth USD 60 million moved to construction and 24 projects worth USD 400 million were completed.

A major industrial project spanning across 634,000 square meters namely [Tusdeer Khumra Logistics Park](#) in Saudi Arabia worth USD 146 million was put on hold shortly after the design work was completed in June with the tender expected this quarter.



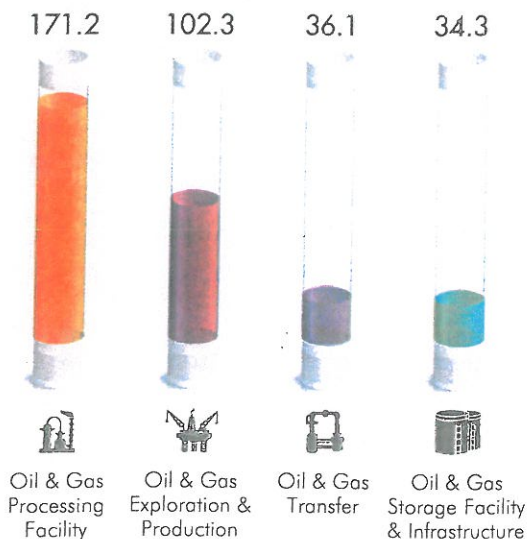
GCC Oil & Gas

GCC's Gas-centric Quarter



There are 380 oil & gas projects in the GCC estimated at USD 343.9 billion. Even though these projects constitute only 2% of the total projects in the region, in dollar terms, these projects account for 15%. The oil & gas sector grew in Q3 2018 with a 5% quarter on quarter increase in the total estimated project spend of planned and ongoing projects, with the award of 13 projects valued at USD 4.9 billion during the quarter.

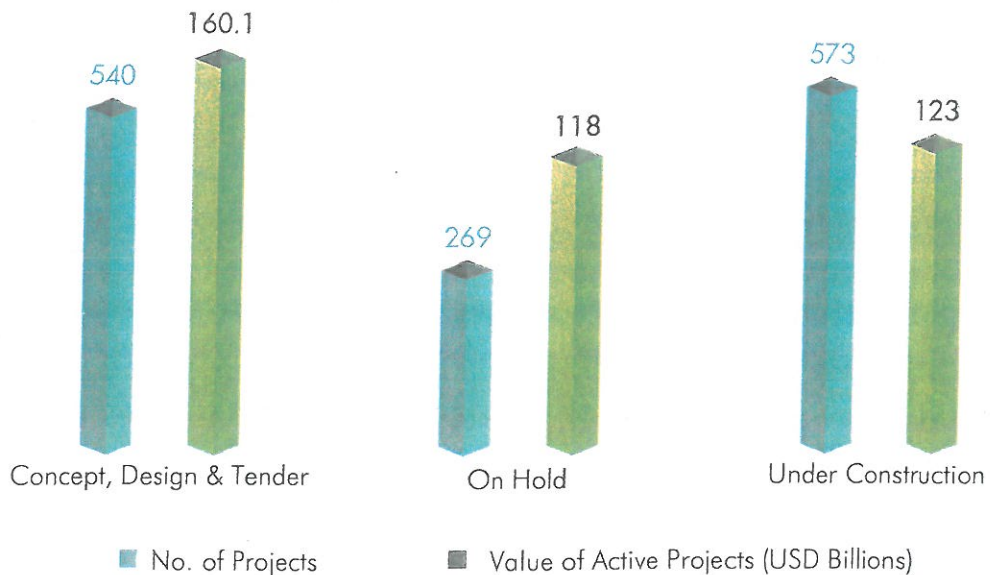
[Phase 2 of ADNOC LNG - Integrated Gas Development Expansion](#) project to transfer 245 MMcf/d of additional low-pressure gas to Hasban from Das island, via the existing pipeline network and boost offshore gas processing capacity by an additional 400 MMcf/d was awarded to a joint venture between the Spanish EPC [Tecnicas Reunidas](#) and Abu Dhabi based [Target Engineering Construction](#). The work scope of the revised project has been optimized by [ADNOC](#) and an offshore component has been taken out, which is likely to result in 20% to 25% savings for the operator.



[Saudi Aramco](#) has embarked on a massive program to boost gas output for electricity and petrochemical production by developing gas fields not associated with oil production. As part of this program, the Turkish contractor [Tekfen](#) was awarded the [Satellite Haradh Gas Compression Plant Pipelines](#) project which is a part of Haradh Gas Increment Program in Al Ahsa, Saudi Arabia.

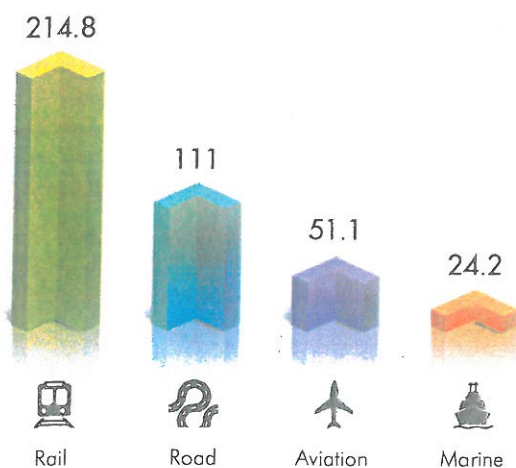
GCC Transport

In the Slow Lane



There are 1,382 active transport projects in the GCC estimated at USD 401.1 billion. Saudi Arabia has the largest share of transport projects in dollar terms followed by the UAE and Qatar. The transport sector comprises 17% of the total project value of construction in the region, due to multi-billion-dollar metro and airport expansion projects across the GCC.

September was a slow month in terms of project activity in the transport sector. Three projects worth USD 353 million were put on hold, 8 projects worth USD 583 million moved to construction and 21 projects worth USD 2.6 billion were completed. The largest transport project put on hold last month was a [monorail project](#) worth USD 294 million located in [King Abdullah Financial District \(KAFD\)](#) in Riyadh.

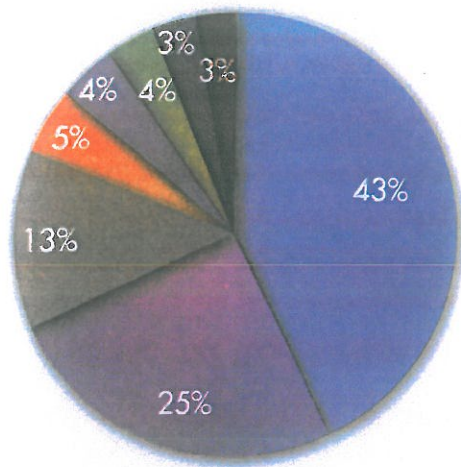


There was a decrease in the value of announced, awarded and completed projects in Q3 as compared to Q2. Even though there was a 21% decline in the value of transport related contract awards, major road contracts were awarded in Kuwait & Qatar last quarter including [upgradations for sections of Sixth Ring Road and King Fahd Bin Abdul Aziz Road](#) in South Surra in Kuwait estimated at USD 387.5 million and the [roads and infrastructure project](#) located in Al Sailiya in Qatar worth USD 165 million.

Urban Construction

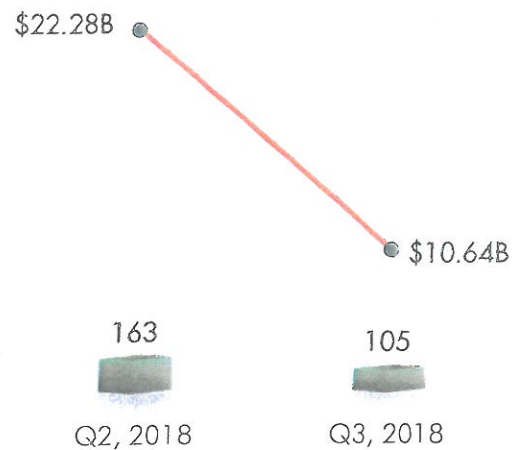
Justice Prevails Over Contract Awards

The 19,498 projects in GCC's urban construction sector is dominated by residential and commercial buildings which comprise around 42% of the total value of active projects in the sector, followed by hospitality projects with 13% and healthcare with 5%.



- Buildings
- Hospitality
- Leisure & Recreation
- Religious Buildings
- Mega Urban Development
- Healthcare
- Retail Facilities
- Education

Urban development witnessed the highest project movements in Q3 as 86 projects worth USD 4.8 billion moved to construction while 89 projects worth USD 8.6 billion were put on hold and 772 projects worth USD 8 billion were completed. The UAE is currently the most active construction market in the region, with USD 480.6 billion worth of urban projects, which account for 43% of GCC urban construction, followed by Saudi Arabia at 34%.



One hundred and five projects worth USD 10.64 billion were announced during Q3 2018, including the USD 2 billion [Amaala \(video\)](#) located at Northwestern Coast of Tabouk in Saudi Arabia and the USD 1.8 billion [Al Ruwais City Development](#) located in Abu Dhabi.

In spite of the decline in the value of new project announcements in Q3 as compared to Q2 2018, the value of urban construction contract awards across the GCC increased by 51% as compared to Q2 2018. These contracts include the USD 1 billion

