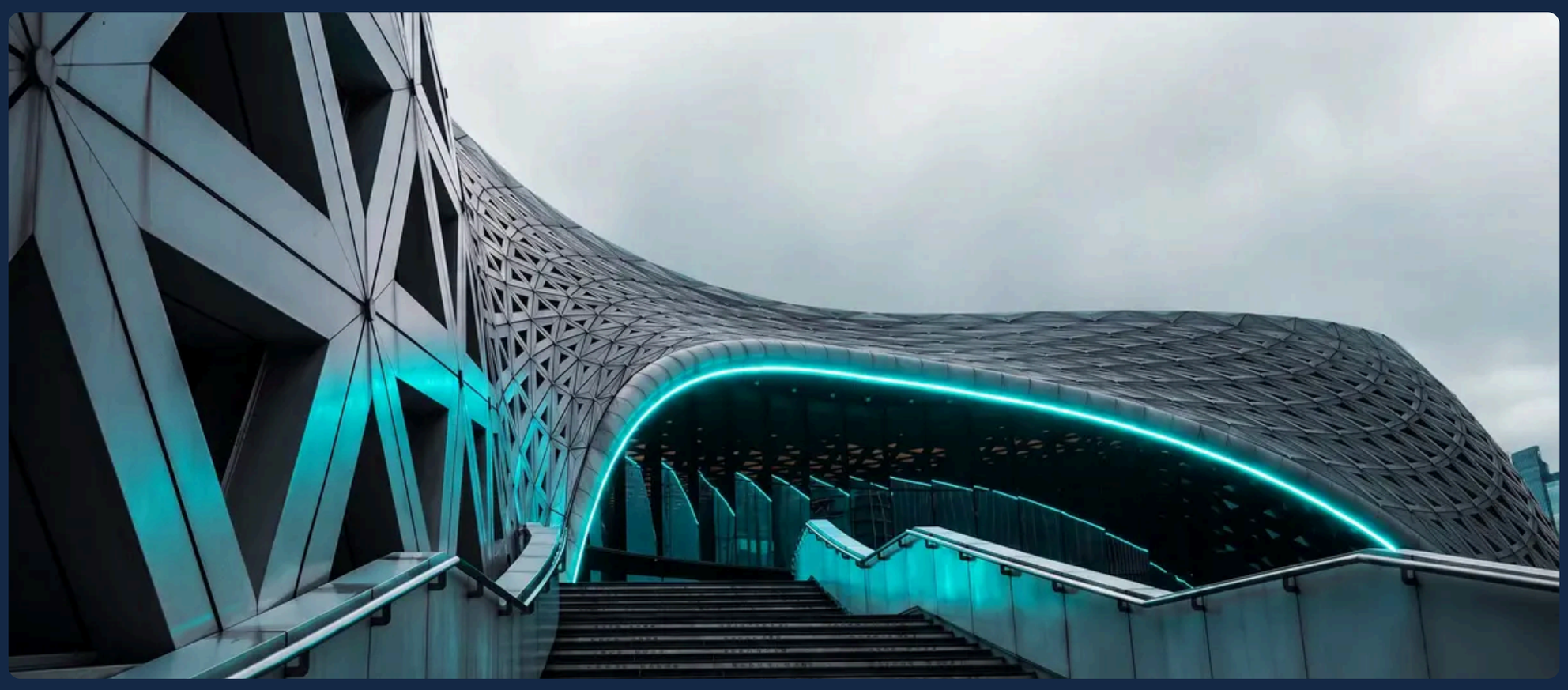
THOUGHT LEADERSHIP · WHITE PAPER

NOVEMBER 2026



GCC MAJOR CAPITAL PROGRAMMES

From Project Controls to Programme Intelligence

How GCC major capital programmes can use trusted AI, commercial data and human-led assurance to improve cost confidence, procurement insight, delivery performance and certainty of outcomes.

Download the white paper

15 pages · PDF · 1.7 MB

WHAT'S INSIDE THE PAPER

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The 2026 GCC delivery context

AT A GLANCE

$2.05tn

GCC project pipeline ahead – the prize for getting delivery intelligence right

80.9%

Average EOT claimed vs planned schedule in the Middle East – the cost of fragmented control

4 – 6%

Share of firms with AI fully integrated – the pilot-to-production gap this paper addresses

EXECUTIVE SUMMARY

The GCC is still building at scale. The question is how to stay in control.

The GCC remains one of the world's most active major capital programme markets. Infrastructure, aviation, logistics, real estate, energy, utilities and transport programmes continue to support national transformation agendas and long-term economic diversification across the region.

The delivery environment, however, is becoming more complex. Regional disruption, supply-chain pressure, shifting award patterns, regulatory development, cybersecurity requirements and rapid AI adoption are creating new challenges for major programme owners. The market itself remains substantial: contract awards reached US$61.2 billion in Q1 2026 and US$59.4 billion in Q2 – still 30% higher than the same period last year, while Kamco Invest / MEED report a longer-term pipeline of around US$2.05 trillion of upcoming GCC projects, 26.1% of it in the UAE.

Against this backdrop, three insights matter most.

01

Major programme delivery is now shaped by volatility as much as scale.

Owners are no longer managing large capital commitments in a stable environment. They are managing shifting market conditions, supply-chain disruption, cost movement, contractor appetite, procurement timing and schedule risk. Timely, connected and reliable information has become essential to maintaining control.

02

The next performance frontier is connected programme intelligence.

Major programmes already generate large volumes of cost, tender, procurement, market, risk, schedule and performance data, but it often sits across disconnected systems, reports and teams. The opportunity is to convert fragmented project data into a secure intelligence layer that improves decisions across the full programme lifecycle.

03

AI can improve performance, but only when it is secure, governed and human-led.

Technology has an important role to play, but adoption alone does not create value. The challenge now is moving AI from experimentation into trusted, repeatable professional workflows without replacing professional judgement. 2026 research from the Royal Institution of Chartered Surveyors (RICS) shows AI use growing rapidly across construction and commercial property while widespread integration remains rare, reinforcing the importance of governance, data, integration and human oversight as adoption scales.

> The strongest model is human-in-the-loop intelligence: AI-enabled platforms supporting experienced professionals with better evidence, faster processing, improved visibility and stronger assurance.

The professionals closest to the work – commercial, procurement, cost planning, project controls and delivery teams – remain the decision-makers. What changes is the quality, speed and traceability of the evidence behind every decision they take.

Where IOX fits

IOX is not black-box automation. It is a secure, governed, human-led intelligence platform that connects commercial data, tender intelligence, cost planning, benchmarking, portfolio reporting and predictive risk analytics, helping major programme owners make better, faster and more defensible decisions.

ONE PLATFORM · SIX CONNECTED CAPABILITIES

- Commercial data
- Tender intelligence
- Cost planning
- Benchmarking
- Portfolio reporting
- Predictive risk analytics

HOW TO READ THIS PAPER

Sections 1–3
The pressure: volatility, cost movement and the performance gap.

Sections 4–5
The technology and the governance that makes it trustworthy.

Sections 6–8
The operating model: people, connected intelligence and the IOX pathway.

01 — MARKET CONTEXT

The GCC major programme market remains large, but increasingly volatile

The GCC projects market remains significant, but 2026 data points to a more selective and changeable environment. Contract awards reached US$61.2 billion in Q1 2026 before easing to US$59.4 billion in Q2. Although Q2 awards were lower than the previous quarter, they were still 30% higher than the same period last year, evidence of a market that remains active even as timing, prioritisation and risk conditions shift. Kamco Invest / MEED also report a longer-term GCC project pipeline of around US$2.05 trillion, with the UAE accounting for 26.1% of it.

In the UAE, project awards reached US$29.2 billion in Q1 2026, down 18.5% year-on-year, with transport representing the largest share of new awards. This reinforces the importance of live market intelligence in sectors where procurement strategy, cost planning and delivery decisions are closely linked to public outcomes, long-term infrastructure capacity and changing market conditions.

The macroeconomic context adds further pressure. PwC Middle East's May 2026 Economy Watch highlighted disruption to oil exports, trade and supply chains as factors reshaping the GCC outlook, citing the IMF's April 2026 forecast of 1.8% GCC GDP growth in 2026, down from a previous 4.4%. The World Bank's April 2026 MENAAP Economic Update projects GCC growth slowing from 4.4% in 2025 to 1.3% in 2026.

The 2026 GCC delivery context

AT A GLANCE

$61.2bn
GCC contract awards, Q1 2026

$59.4bn
GCC contract awards, Q2 2026
+30% vs Q2 2025

$2.05tn
Upcoming GCC project pipeline

26.1%
Share of GCC pipeline in the UAE

Greater volatility in trade, logistics, capital allocation and project sequencing now shapes how, and when, this pipeline is delivered.

Sources: Kamco Invest / MEED Projects, Q1–Q2 2026; PwC Middle East; IMF; World Bank.

Publicly disclosed regional programmes also show why the challenge is not only about market size. These are multi-year, multi-package programmes with complex interfaces, significant capital commitments and fixed public outcomes; portfolios of interdependent packages, stakeholders, procurement decisions, cost plans, risks, approvals and delivery milestones. At that scale, the value of programme intelligence compounds: a single cost plan, tender return or progress report may support one decision, but structured and reused across packages, it becomes a strategic asset.

For major programme owners, cost, procurement and delivery decisions need to be informed by live intelligence, not static assumptions. That leads directly to the next challenge: volatility is now affecting programme delivery, not only cost.

02 — REGIONAL VOLATILITY

Volatility is now a programme intelligence issue

Regional volatility is no longer confined to material price escalation. It affects procurement strategy, logistics, contractor appetite, programme certainty, contract administration, claims risk and delivery momentum.

Omnium International's Market Intelligence Bulletin: Geopolitical Risk & Cost Update, issued on 17 April 2026, described an active GCC risk environment affecting supply chains, procurement, programme, contract administration, safety and overall project delivery, noting extending lead times, risk premiums entering the market and uncertainty affecting decision-making across the project lifecycle. The report identified trends highly relevant to major programme owners: disruption to maritime and airfreight routes, pressure on UAE transshipment flows, longer lead times for critical materials, contractor force majeure and extension-of-time notices, risk premiums in new tender submissions and uncertainty around contractor appetite.

Volatility affects more than cost

NINE PRESSURE POINTS

- Lead times
- Freight routes
- Tender premiums
- Contractor appetite
- Procurement timing
- Force majeure / EOT notices
- Critical path
- Risk allowances
- Leadership confidence

Selected cost movements illustrate why traditional cost plans can quickly become outdated.

Cost movement snapshot April 2026

OMNIUM INTERNATIONAL

+72%	+3–5%	+4–6%	+2–3%	+5–8%
UAE diesel in one month, AED 2.72 to AED 4.69 / litre	Steel	PVC / plastics	Cement	Transportation

The implication is practical: without connected intelligence across cost planning, tendering, supply chain, schedule and delivery performance, teams risk making high-value decisions on information that is already out of date.

03 — THE PERFORMANCE GAP

Major programmes still struggle with cost, time and disputes

The difficulty of delivering major programmes is not new. Bent Flyvbjerg, a leading academic in megaproject management and former Professor at Oxford's Saïd Business School, has spent decades researching cost overruns, schedule delays, optimism bias and strategic misrepresentation in large infrastructure and capital projects. His 2014 paper estimated global megaproject spending at US$6–9 trillion annually, around 8% of global GDP, and described the "iron law" of megaprojects: over budget, over time, over and over again.

Industry data points in the same direction. HKA's Eighth Annual CRUX Insight Report, published in November 2025, analysed more than 2,200 projects across 114 countries with combined capital expenditure of US$2.433 trillion, and found contractor time extensions sought averaging 65.8% of planned schedules.

The Middle East is particularly exposed to schedule claims. HKA's regional analysis reports contractors in the Middle East claiming extensions of time averaging 80.9% of planned schedules, against a 66.5% global average, with claimed costs amounting to 34.0% of budgeted capex.

The scale of the challenge

FLYVBJERG · HKA CRUX

$6–9tn
Global megaproject spending each year ~8% of global GDP

65.8%
Average time extension sought vs planned schedule, global

80.9%
Average EOT claimed vs planned schedule, Middle East

34.0%
Claimed costs as share of budgeted capex, Middle East

How risk accumulates across the lifecycle

A FAMILIAR CHAIN

01 Optimistic assumptions
02 Weak reference data
03 Procurement complexity
04 Supply-chain pressure
05 Interface risk
06 Change
07 Delay
08 Claims
09 Retrospective lessons learned

Each link compounds the last and by the time the pattern is visible in reports, the risk has usually already materialised.

These patterns show why traditional project controls can be insufficient: they often explain what happened after the risk has already crystallised. The next step is to use data and AI to identify emerging risk earlier, but that only works when the technology is governed properly.

04 — AI IN DELIVERY

AI-enabled delivery is moving from concept to execution

AI is now moving into practical capital project delivery. McKinsey's July 2026 analysis of AI in architecture, engineering and construction put global construction output at around US$15 trillion in 2025, with projected demand reaching US$22 trillion by 2040, and estimated that AI and automation could unlock around US$228 billion of annual value in the US AEC sector by 2030.

The wider industry is reaching a similar inflection point. The Royal Institution of Chartered Surveyors' (RICS) AI in Commercial Property and Construction Report 2026, based on more than 3,100 industry responses globally, found around two-thirds of construction respondents now using AI in some part of their work, and more than three-quarters of commercial property respondents reporting some level of use. Embedded adoption, however, remains limited: early-stage pilot activity sits at around 39% in both sectors, while widespread or full integration is only around 4% in construction and 6% in commercial property.

The pilot-to-production gap

RICS 2026 · MCKINSEY 2026

$15tn	$228bn	~2/3	39%	4–6%
Global construction output, 2025	Potential annual value unlocked by AI in the US AEC by 2030	Construction respondents using AI in some part of their work	Early-stage pilot activity in both sectors	Widespread or full integration

RICS describes this as a "pilot-to-production gap". The barrier is increasingly not access to AI, but the ability to convert successful experimentation into routine professional practice, which makes data quality, systems integration, security, skills, supervision and governance progressively more important as adoption increases. For major programme owners, the objective should not be to deploy more AI for its own sake, but to establish the operating environment in which useful AI applications can be adopted securely, integrated with existing information and controls, and scaled with appropriate professional oversight.

From AI pilot to production

EIGHT STEPS TO RESPONSIBLE SCALE

01 Growing adoption	02 Pilot proven	03 Data structured
04 Systems integrated	05 Security assured	06 Human oversight defined
07 Governance embedded	08 AI scaled responsibly	

This supports the evolution of portfolio-wide performance platforms. AI-enabled analytics can help teams identify early warning indicators, test schedule scenarios, understand critical path sensitivity, assess procurement sequence risk and spot emerging delivery pressure across a portfolio.

FROM REPORTING TO PREDICTIVE INSIGHT

Four layers of programme intelligence

Reporting looks backwards. Intelligence looks forward – and keeps people in charge of the decision.

1 **Historic reports** show what happened.

2 **Dashboards** show what is happening.

3 **Predictive analytics** help identify what may happen next.

4 **Human judgement** decides what to do about it.

The important distinction is that predictions are not decisions. They are decision-support signals that require professional interpretation – a point that grows more important as AI regulation, governance and professional standards mature.

05 GOVERNANCE & STANDARDS

Governance, regulation and professional standards are raising the bar

The GCC is moving quickly on AI, data and digital government, and 2026 has been a landmark year for the UAE in particular.

The UAE's 2026 AI governance timeline

TWELVE WEEKS THAT SET THE DIRECTION

APR–MAY 2026

Agentic AI framework

The UAE Government announces a framework to deploy Agentic AI across 50% of government sectors, services and operations within two years.

JUN 2026

AI and Data Authority

The UAE Cabinet approves the establishment of the Artificial Intelligence and Data Authority, the single national body responsible for data, AI and digital government.

JUL 2026

UAE AI Charter

The UAE publishes the Charter for the Development and Use of Artificial Intelligence, focused on trust, responsibility and accountability.

Data protection and cybersecurity are equally important. The UAE's Federal Decree-Law No. 45 of 2021 provides the federal framework for personal data protection. Saudi Arabia's Personal Data Protection Law required organisations to take compliance measures by 14 September 2024, and Saudi Arabia's National Cybersecurity Authority has updated its Cloud Cybersecurity Controls as CCC-2:2024.

International frameworks reinforce the same direction. ISO/IEC 42001:2023 is the world's first AI management system standard, while NIST's AI Risk Management Framework and Generative AI Profile provide guidance for trustworthy and responsible AI risk management.

UAE · KSA data law

Federal Decree-Law No. 45 of 2021 (UAE) and the Saudi PDPL set the regional bar for personal data protection.

ISO/IEC 42001:2023

The world's first AI management system standard, a governance frame for enterprise AI adoption.

NIST AI RMF

Risk management framework and Generative AI Profile for trustworthy, responsible AI.

Professional standards are also evolving, led by RICS, whose first global standard for the responsible use of AI in surveying practice came into effect on 9 March 2026.

The RICS AI Standard: professional judgement at the centre

RICS' 2026 industry research shows why the standard matters. As AI use has increased, privacy and security concerns in construction have risen from 22% to 30%, while widespread operational integration remains uncommon. RICS argues that the next phase of adoption requires organisations to plan explicitly for how pilots become routine practice, including the data, integration and supervision needed to support them.

Its recommendations are practical: assess AI use against the RICS AI Standard; document where AI has contributed to professional outputs, including the tools, data and points of human review involved; use enterprise-grade tools where client data is concerned; and establish clear protocols for AI-assisted professional work. As adoption matures, RICS expects organisations to embed explainability, human oversight, audit trails and demonstrable accountability into client-facing AI processes.

RICS guidance places professional skill, judgement, oversight and output reliability at the centre of responsible AI use. Its July 2026 commentary goes further: where AI is used materially, clients should be told when it will be used, how its use can be challenged, what rectification exists and whether opting out is possible.

RICS also identifies a wider role for the profession in enabling responsible scale; sector-specific guidance and case studies, expanded AI CPD, greater awareness of the AI Standard and the relaunch of the RICS Tech Partner Programme, with technology partners expected to align with the Standard and, over the medium term, a more structured framework to help professionals evaluate technology against its responsible-AI requirements.

Trusted AI guardrails

WHAT ENTERPRISE-GRADE ADOPTION REQUIRES

- Data protection
- Hosting control
- Client-owned data
- Human review
- Source traceability
- Audit trail
- AI risk register
- Professional accountability
- Client transparency

For major programme owners, the conclusion is clear: AI-enabled platforms must be secure, governed, auditable and professionally controlled. That makes people-based capability central to successful adoption.

06 — PEOPLE & ASSURANCE

People-based capability remains the core of assurance

> The future of major programme intelligence is not AI replacing professionals. It is experienced professionals using AI-enabled platforms to improve speed, consistency, evidence quality and decision confidence.

Major programmes involve judgements that are not purely computational. A platform can flag a tender anomaly, but a commercial professional must decide whether it is a scope gap, a pricing strategy, a genuine risk or harmless variance. A platform can surface schedule risk, but project leaders must decide what intervention is appropriate. A platform can generate benchmarks, but cost planners must decide whether the reference class is valid.

RICS' 2026 standard reinforces this principle by requiring professional judgement, oversight and reliability assessment wherever AI materially affects surveying services. RICS' Surveying Skills Report (October 2026) shows how scarce that judgement now is: 54% of professionals report critical or moderate skills shortages, driven above all by too few mid-career, experienced professionals, and only 9% feel well prepared to use generative AI. AI competence alone is not enough without the domain knowledge to interrogate and challenge AI-generated outputs. Responsibility remains with appropriately qualified professionals, it does not transfer to the technology.

The human-in-the-loop assurance model

A CONTINUOUS CYCLE

1	2	3	4	5	6
AI processes information	Professional reviews context	Source evidence is checked	Judgement is applied	Decision is recorded	Learning improves the next package

THE LOOP FEEDS BACK TO STEP 1 EVERY PACKAGE MAKES THE NEXT ONE SMARTER

Human-in-the-loop is therefore not a conservative fallback, it is an essential assurance mechanism. It protects clients from over-reliance on automated outputs, supports defensible decisions and keeps accountability with appropriately qualified people.

It is also how adoption scales. Teams trust AI-enabled workflows when outputs are transparent, source-linked, reviewable and challengeable. Leadership supports adoption when there is a clear audit trail. IT and cybersecurity teams approve deployment when data boundaries, access controls and retention rules are defined. With that foundation in place, major programme owners can move from isolated project controls to connected programme intelligence.

The skills context

RICS SURVEYING SKILLS REPORT · OCTOBER 2026

54%
report critical or moderate skills shortages 63% in QS and project management

60%
leading driver: too few mid-career, experienced professionals

9%
feel well or very well prepared to use generative AI

42%
top organisational response: upskilling existing staff (35% adopting AI tools)

Source: RICS Surveying Skills Report 2026 (global survey of 3,698 professionals, published October 2026).

07 — THE DIRECTION OF TRAVEL

Advanced programme thinking points to connected intelligence

Leading programme thinking is moving away from isolated project controls and towards integrated delivery models, reference-class intelligence, shared data, better governance and portfolio-level decision support.

Flyvbjerg's work supports the use of an "outside view": comparing projects against actual outcomes from relevant reference classes to challenge optimism and improve forecast reliability. Nuno Gil, Professor of New Infrastructure Development at Alliance Manchester Business School, focuses on megaproject governance, value creation, value distribution and multi-party decision-making. His research describes megaprojects as complex organisational systems where governance evolves over the lifecycle, and where performance depends on how stakeholders align around purpose, value and decision-making, especially relevant to GCC programmes, which bring together government entities, developers, consultants, contractors, operators, regulators, funders and supply chains with different priorities and decision rights.

The same shift appears in practice. The UK Infrastructure and Projects Authority's Transforming Infrastructure Performance: Roadmap to 2030 promotes better use of data, digital approaches, benchmarking and modern delivery models, and its Data Analytics and AI in Government Project Delivery framework sets out how public project organisations can use data analytics and AI to improve delivery. Project 13, sponsored by the Institution of Civil Engineers, similarly promotes an enterprise model for infrastructure delivery, moving beyond transactional delivery towards integrated, outcome-focused collaboration.

Traditional model vs emerging model

THE SHIFT IN PRACTICE

TRADITIONAL MODEL	EMERGING MODEL
Isolated project controls	→ Connected programme intelligence
Static cost plans and assumptions	→ Live, reference-class benchmarks
Retrospective reporting	→ Predictive early-warning indicators
Data captured once, left in documents	→ Structured data reused across packages
Transactional, package-by-package delivery	→ Integrated, outcome-focused collaboration
Lessons learned at closeout	→ Learning applied package to package

The common thread is clear: major programme owners need a model that connects data, people, governance and decisions. This is where the IOX platform provides a practical pathway.

08 — THE IOX PATHWAY

From fragmented data to programme intelligence

Major programmes generate valuable intelligence throughout the lifecycle. Cost plans reveal assumptions and confidence levels. Tender returns expose live market behaviour. Clarifications, qualifications and exclusions show how bidders understand risk. Awards capture real pricing. Variations, delay events, progress reports and disputes provide evidence of scope pressure, performance risk and lessons learned.

Too often, this information is captured once, used once and left behind in documents, spreadsheets, reports or disconnected systems.

The opportunity is to create a programme intelligence flywheel.

The programme intelligence flywheel

EVERY PACKAGE MAKES THE NEXT ONE SMARTER

01 Cost plan	02 Tender package	03 Tender returns	04 Commercial evaluation	05 Award data
10 Better next decision	09 Predictive insight	08 Benchmarks	07 Schedule & delivery performance	06 Change & risk

STEP 10 FEEDS THE NEXT COST PLAN THE CYCLE COMPOUNDS WITH EVERY PACKAGE

This is the environment where IOX is designed to help. The IOX platform brings tender intelligence, commercial data structuring, cost modelling and portfolio-level performance analytics together within a secure, governed, human-in-the-loop intelligence layer, designed around the principles increasingly required for enterprise AI adoption: controlled data environments, traceable sources, defined professional review, auditability and clear accountability.

IOX is not designed to replace existing enterprise systems, consultant teams or professional controls. It is designed to connect the data and intelligence that already exist across the programme, and make them more usable, traceable and decision-ready.

One connected platform, four capabilities

ioMaster

Faster Investment Decisions

- Rapid feasibility studies
- Investment testing and scenario modelling
- Earlier cost-informed decisions
- Reduced pre-commitment risk

ioProcure

Tender Analysis Accelerated

- Reduce tender analysis effort by up to 80%
- Accelerate procurement decisions
- Improve commercial governance
- AI-enabled, auditable workflows

ioInsight

Cost Intelligence at Speed

- Rates and benchmark data
- Supplier performance intelligence
- Market cost movement tracking
- Single source of commercial truth

ioInsight

Programme-wide Cost Insight

- Portfolio-wide procurement visibility
- Commercial risk and delivery
- Proactive risk identification
- Increased investor confidence

The business benefits are practical

- Stronger cost confidence
- Faster tender analysis
- Improved procurement assurance
- Better feedback from procurement into cost planning
- Earlier risk visibility
- More consistent reporting
- Stronger auditability
- Safer AI adoption

CONCLUSION

The next frontier is trusted intelligence

The next generation of major programme delivery will not be defined by technology alone. As the latest RICS research demonstrates, the challenge is moving from AI experimentation to trusted, operational adoption at scale. It will be defined by trusted intelligence: structured data, secure platforms, professional judgement, predictive insight, human-led assurance and governance models that allow owners to make faster, better and more defensible decisions.

The opportunity is clear: move beyond fragmented project controls and create a secure programme intelligence layer that makes every package smarter than the last.

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