

**United Arab Emirates Construction Industry Market Size & Forecast - by Value and Volume (area and units), 40+ Market Segments Across Residential, Commercial, Industrial, Institutional, Infrastructure Construction, City Level Construction by Value and Construction Cost Structure, Q1 2025 Update**

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**Report description:**

According to ConsTrack360, construction market in United Arab Emirates is expected to grow by 6.2% on annual basis to reach AED 189,591.1 million in 2025.

The construction market in the country experienced robust growth during 2020-2024, achieving a CAGR of 7.3%. This upward trajectory is expected to continue, with the market forecast to grow at a CAGR of 4.8% during 2025-2029. By the end of 2029, the construction sector is projected to expand from its 2024 value of AED 178,492.0 million to approximately AED 242,336.7 million.

This report provides a detailed data-centric analysis of the construction sector in United Arab Emirates, offering a comprehensive view of market opportunities in the building and infrastructure construction industry at the country level. With over 100+ KPIs covering growth dynamics in building and infrastructure construction, construction cost structure analysis, and analysis by key cities in the country, this databook provides a wealth of data-centric analysis with charts and tables, ensuring stakeholders are fully informed.

It offers a comprehensive analysis of market dynamics in the construction sector through a range of KPIs such as value, volume, and number of units. The building construction covers detailed segmentation over 30+ segments in residential, commercial, industrial, and institutional sectors.

ConsTrack360's research methodology is based on industry best practices. Its unbiased analysis leverages a proprietary analytics

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platform to offer a detailed view of emerging business and investment market opportunities.

## Key Insights

### United Arab Emirates Residential Construction Industry

The residential construction sector in the UAE offers strong growth opportunities due to robust population and economic growth demand, supported by significant government initiatives and private investments. Both luxury and affordable housing segments are seeing increased activity, ensuring a balanced market that caters to a diverse population.

However, challenges such as rising construction costs, potential oversupply risks, and high financing costs require careful planning and risk management. To ensure long-term success, stakeholders must prioritize innovation, sustainability, and coordinated urban planning.

### Macroeconomic Factors

- Inflation and supply chain disruptions have driven up input costs in the residential sector, with key materials such as steel and cement seeing significant price hikes in 2022-2023. By 2024, elevated energy prices and higher labor costs continue challenging developers, though cost management strategies like value engineering are in place.
- Robust demand for housing is fueled by rapid population growth, urbanization, and an influx of expatriate investors; for example, Dubai saw property prices rise about 20% in 2023. Meanwhile, luxury and ultra-prime segments have surged, even as affordable housing needs grow among middle-income residents.
- Balancing supply and demand is a critical risk, as oversupply from previous cycles could re-emerge if developers overbuild during this boom. High global interest rates also increase mortgage and financing costs, posing further challenges for timely project delivery.

### Project Landscape

- Major housing projects are underway across the UAE; for example, Emaar Properties is launching 27 new residential projects in Dubai with an investment of approximately AED30 billion. These projects span master-planned communities, new beachfront towers, and high-rise developments in downtown areas.
- The Abu Dhabi government is funding extensive housing programs, planning over 13,000 new homes across Abu Dhabi, Al Ain, and Al Dhafra, including the Yas Canal Project, which will deliver 1,146 villas by 2027.
- Developments in Sharjah and the Northern Emirates, such as Aljada and Sharjah Waterfront City, also highlight growing private investment in these regions.

### Government Policies & Programs

- UAE authorities have launched significant housing initiatives to ensure supply and social stability, exemplified by Abu Dhabi's approval of over 13,000 new homes for citizens. Dubai's Affordable Housing Policy, initiated in March 2024, supports over 100 projects targeting lower- and middle-income residents.
- The regulatory environment has strengthened, with Dubai's RERA enforcing escrow requirements and limiting speculative flipping to protect investors. Simultaneously, all emirates now allow 100% foreign ownership in designated zones, and long-term visas for property investors further stimulate demand.
- Public spending on housing remains high, with AED9.5 billion allocated to the Sheikh Zayed Housing Programme for 2022-2026 and additional subsidies such as free land allocation and utility connection incentives supporting new developments.

### Industry-Specific Developments

- Major developers are adopting new technologies like BIM and 3D printing to improve efficiency and reduce on-site errors in residential projects. Modular construction techniques and prefab elements are also increasingly being used to shorten build times and ensure consistent quality.
- Sustainability is a key trend, with projects incorporating solar-powered amenities, high-efficiency insulation, and extensive green

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spaces to lower energy consumption. Some communities are pursuing net-zero goals, aligning with the UAE's Clean Energy and Net Zero 2050 strategies.

- Workforce challenges persist due to a tight labor market, with contractors reporting shortages of skilled trades such as masons, electricians, and project supervisors. The industry addresses these issues by investing in training, upskilling, and even automation tools to enhance productivity.

#### United Arab Emirates Commercial Construction

The commercial construction sector in the UAE is poised for robust growth, driven by a booming tourism industry, a surge in business activity, and government initiatives aimed at positioning the country as a global business and travel hub. High-profile mixed-use developments and new office towers underscore a strong market recovery, while innovative hospitality projects continue to attract domestic and international investment.

#### Macroeconomic Factors

- The commercial construction sector rebounds strongly as the UAE's economy recovers from the pandemic slump. A 26% year-on-year expansion in the tourism industry and a surge in new business setups have renewed demand for offices, retail, hospitality, and entertainment projects. However, high global inflation and elevated interest rates have increased development and financing costs, putting pressure on project budgets.
- Shifts in work and consumer behavior are reshaping demand across the sector. In prime markets like Dubai and Abu Dhabi, a "flight-to-quality" is driving up the uptake of Grade A office space as companies relocate and expand, reducing vacancies and pushing rents upward. Meanwhile, retail is evolving with a pivot to experiential formats and smaller community malls, while the hotel sector is booming, with record tourism figures exceeding pre-pandemic levels.
- Despite these positive trends, the sector faces significant challenges and risks. Oversupply remains a concern, particularly for older office stock and retail spaces that struggle to attract tenants in an evolving market. In addition, rising borrowing costs and stricter regulatory requirements-including a new 9% federal corporate tax-could delay or reduce the scope of marginal projects.

#### Project Landscape

- Several high-profile developments across the UAE highlight the UAE's commercial project pipeline. For instance, in Ras Al Khaimah, construction is underway on the Wynn Resort Al Marjan Island, featuring a 1,000-foot tall hotel tower with over 1,500 rooms and a full array of gaming, retail, and MICE facilities. The project is targeted for a 2027 opening and is expected to position RAK as a new upscale tourism destination.
- Dubai is witnessing large mixed-use developments integrating commercial, residential, and leisure components. Dubai Creek Harbour, for example, is a 6 km<sup>2</sup> waterfront project that will include 8 million square feet of retail, 3,664 office units, and 22 hotels alongside 39,000 homes. At the same time, Mohammed Bin Rashid City combines arts, retail, entertainment, and business districts in a sprawling master plan. These integrated projects are designed to create self-contained "live-work-play" communities.
- New office towers are also coming online in Dubai and Abu Dhabi. Projects such as ICD Brookfield Place in Dubai DIFC and Uptown Tower in DMCC are adding premium Grade A office stock, while developments like the ADNOC Business Center Tower and Makers District commercial towers on Reem Island are meeting the strong demand from multinational companies. These projects highlight the trend of modernizing and expanding commercial space in key business hubs.

#### Government Policies & Programs

- The UAE government's tourism and hospitality strategies are major policy drivers for commercial construction. Under the UAE Tourism Strategy 2031, which aims to boost tourism's GDP contribution to AED450 billion and attract 40 million hotel guests annually, AED100 billion new investments are targeted to develop hotels, resorts, theme parks, and related infrastructure. Emirate-level programs in Dubai and Abu Dhabi further support these efforts with initiatives that include fast-track approvals and land grants for landmark projects.
- Broader economic diversification and free zone policies also impact commercial development. The UAE's business-friendly environment-features 100% foreign ownership, long-term residency options, and low corporate taxes-continues attracting

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international companies and expatriates, fueling demand for modern office and retail spaces. Initiatives in free zones such as Dubai Future District and Abu Dhabi's industrial and media zones promote the construction of specialized campuses, offices, and studios.

- Regulatory changes are shaping the resilience of the commercial real estate market. Dubai's RERA enforces strict escrow requirements and limits speculative flipping to protect investor interests, while recent adjustments to zoning rules encourage converting surplus office space to residential use. New corporate taxes and initiatives like long-term visas for property investors have been implemented to maintain a stable, sustainable, and competitive commercial construction environment.

#### Industry-Specific Developments

- Technological advancements are driving efficiency in the commercial construction sector. Large projects are now built using Building Information Modeling (BIM) to improve design coordination, and digital tools such as drones and AI-based project management software help streamline construction processes and reduce errors. In skyscraper projects, innovative techniques like prefabricated facade systems and top-down construction are significantly shortening build times.
- Sustainability and green building are now core components of new commercial developments. Developers are increasingly pursuing certifications such as LEED, BREEAM, or Estidama, and retrofitting existing buildings with solar panels, geothermal systems, and energy-efficient technologies is becoming common practice. High-profile projects like Dubai's new DEWA headquarters demonstrate how net-zero energy design is setting benchmarks for the sector.
- Workforce challenges are also prominent in commercial construction as competition for skilled labor intensifies. There is a "shrinking pool" of available contractors and specialized trades, prompting some developers to secure international partnerships or adopt design-build contracts. In response, the industry invests in upskilling programs and embracing automation, ensuring that future projects can be delivered efficiently despite labor market constraints.

#### United Arab Emirates Institutional Construction

Institutional construction in the UAE offers stable, high-impact opportunities that directly support social development and quality of life. With strong government backing, robust fiscal allocations, and a clear focus on education and healthcare expansion, the sector is set to grow even amid global economic uncertainties. Key projects in schools, hospitals, and cultural centers underscore the UAE's commitment to delivering world-class public infrastructure. Challenges remain around ensuring timely project delivery and optimal utilization of new facilities. Complex stakeholder coordination, rising construction costs, and potential workforce shortages pose risks that must be carefully managed through innovative project delivery and effective cost-control measures. Furthermore, as institutional projects often require sustained public funding, balancing budgets while meeting diverse community needs is essential.

#### Macroeconomic Factors

- The institutional construction sector-which includes government buildings, educational facilities, healthcare infrastructure, and other public institutions-is closely tied to government expenditure.
- Population growth and a diversifying demographic profile drive the need for expanded institutional facilities. A young demographic and an expanding expatriate workforce fuel demand for more K-12 schools and higher education institutes, while growing medical tourism and local health needs increase demand for hospitals and clinics. Authorities prioritize constructing additional schools in new residential communities and expanding healthcare capacity to meet targets such as specific hospital beds per 1,000 population ratio.
- However, several challenges and risks persist. Complex stakeholder management among government agencies and end-user ministries and strict regulatory compliance (covering health standards and education specifications) can slow progress and delay project delivery. Moreover, rising construction costs and potential skills shortages for advanced facilities increase the risk of under-utilization or budget strains, particularly if economic diversification efforts shift priorities away from institutional investments.

#### Project Landscape

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- The education segment of institutional construction in the UAE is robust, with numerous school and university projects underway. Dubai and Abu Dhabi are adding new K-12 schools through public-private partnership (PPP) programs, with the first batch of eight schools tendered in 2022. Dubai has also approved new campuses under its "Dubai Schools" initiative. Additionally, premium private school operators such as GEMS and Taaleem are constructing innovative, sustainably designed schools in Dubai and Sharjah.
- In healthcare, the construction landscape is equally active, with multiple new hospitals and specialized centers in progress. Projects include major expansions like the Cleveland Clinic Abu Dhabi Cancer Center expansion completed in 2022 and Dubai's Medicare University Hospital in Al Qusais, set to commence operations by the end of 2022. Sharjah is making headlines with the ambitious Jawaher Boston Medical District, a healthcare and research city developed in partnership with renowned international institutions.
- Government and cultural projects also contribute significantly to the institutional landscape. New courthouses, police stations, and municipal offices are being constructed or upgraded in developing areas, while landmark cultural projects such as the Guggenheim Abu Dhabi Museum (with a planned 2025 opening) and the Abrahamic Family House in Abu Dhabi enhance public infrastructure. These projects are designed to bolster civic services and tourism, ensuring public facilities meet high international standards.

#### Government Policies & Programs

- National strategies emphasize the critical role of institutional construction in achieving the UAE's development goals. The UAE Centennial 2071 and We the UAE 2031 visions set ambitious targets for world-class education and healthcare systems, prompting sustained investments in modern facilities. These strategic visions are supported by concrete programs like the National Strategy for Wellbeing 2031, which includes initiatives to build community sports, health facilities, and advanced educational institutions.
- Federal and emirate governments share responsibility in this sector. While the Ministry of Education sets standards and funds school construction in several emirates, Dubai and Abu Dhabi manage most of their educational and healthcare facilities independently. For instance, establishing the Sheikh Mohammed bin Zayed University for Humanities reflects federal investment, while local health authorities in Dubai and Abu Dhabi spearhead their hospital projects.
- Incentives and PPPs are increasingly used to supplement government budgets and drive project efficiency. Public-private partnerships allow private consortia to finance and build new schools and hospitals with government backing, ensuring quality and efficiency. Additionally, programs by institutions such as the Emirates Development Bank offer low-cost financing and land grants, reducing barriers and making it easier for the private sector to contribute to the institutional construction agenda.

#### Industry-Specific Developments

- Technological integration transforms institutional construction by enabling high-tech, efficient facility design and management. New schools incorporate smart classroom technology, featuring interactive screens, IoT sensors for air quality monitoring, and robust IT networks to support e-learning. In parallel, modern hospitals are being built with dedicated telemedicine rooms, digital health record systems, and modular operating theaters to streamline specialized care.
- Sustainability is a top priority in new public projects, with green building practices increasingly common across the sector. Many schools now incorporate solar panels and natural lighting, while state-of-the-art hospitals use cogeneration, LED, and advanced HVAC systems to optimize energy use. Moreover, upcoming landmark projects like the Zayed National Museum are designed to meet high sustainability standards, ensuring that environmental considerations are integral to institutional construction.
- Workforce development and skills training are also evolving to meet the complex demands of institutional construction. Contractors now require specialized expertise in hospital-grade MEP systems and smart building technologies, driving the need for ongoing training and international collaboration. Furthermore, initiatives to increase Emirati participation in technical roles are helping to build a sustainable, locally based workforce, ensuring that facilities meet modern standards and are maintained effectively in the long term.

#### United Arab Emirates Industrial Construction

The UAE's industrial construction sector offers significant opportunities driven by ambitious government strategies and robust

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economic diversification. With strong backing from initiatives like Operation 300bn and the "Make it in the Emirates" campaign, large-scale oil, petrochemicals, and advanced manufacturing projects are expected to continue growing. These developments support local production capacity and position the UAE as a competitive manufacturing and logistics hub in the region. However, the sector faces considerable challenges, including rising material and energy costs, global supply chain disruptions, and risks associated with long-term megaprojects. Additionally, intense regional competition and evolving environmental regulations require firms to adopt innovative and sustainable construction practices. Addressing these challenges will necessitate focusing on efficient project management, strategic partnerships, and continuous investment in workforce development and technological innovation.

#### Macroeconomic Factors

- The nation's economic diversification initiatives propel the UAE's industrial construction sector. The government's Operation 300bn strategy (2021-2031) is designed to significantly boost the industrial sector's GDP contribution, spurring new manufacturing facilities and the expansion of industrial zones. This policy environment encourages domestic and foreign companies to invest in production capacity. At the same time, strong growth in the non-oil economy in 2023 has further supported increased industrial activity and the construction of key infrastructure, such as logistics hubs.
- Despite the push for diversification, the sector remains partially linked to oil and gas cycles. High oil prices in 2022-2023 enabled ADNOC to secure record revenues, which are now being reinvested in megaprojects like refineries, petrochemical complexes, and gas processing facilities. However, if oil prices were to decline, some projects might be deferred; to mitigate this, the UAE is also promoting alternative industries-such as metals, pharmaceuticals, and food processing-that have their independent demand drivers.
- Rising inflation and supply chain issues also challenge industrial construction. Global disruptions have increased prices for specialized machinery, steel, and electrical components, and the heavy use of diesel-powered equipment further drives up costs. Although the UAE's modern ports and bulk government purchasing help mitigate some of these cost pressures, geopolitical factors like the war in Ukraine continue to add uncertainty by affecting the supply of high-tech components.

#### Project Landscape

- The UAE's industrial project pipeline features several major oil, gas, and petrochemical initiatives. For instance, ADNOC's Hail and Ghasha Sour Gas Development-comprising 11 offshore artificial islands and processing facilities-is estimated at \$15 billion and is expected to begin production by 2026. The Borouge 4 Petrochemical Complex Expansion in Ruwais, a joint venture between ADNOC and Borealis, represents a \$6.2 billion investment to expand polyolefins production and reduce reliance on imported chemicals.
- Significant investments are underway in the metals and mining sub-sector to boost local production and recycling. Emirates Global Aluminium (EGA) has recently commenced construction of the UAE's largest aluminum recycling plant near the Al Taweelah smelter, which will process 170,000 tonnes of scrap annually into low-carbon aluminum billets. Meanwhile, projects in steel production-such as plans by Emirates Steel Arkan for a new flat steel rolling plant-and ongoing mining initiatives in Fujairah for quarry materials are expanding the industrial base.
- The manufacturing and logistics segments are also vibrant. The UAE is attracting diversified manufacturing projects in pharmaceuticals, food processing, and defense sectors, with developments in industrial zones like Abu Dhabi's Kezad and Dubai Industrial City. Moreover, logistics construction is thriving, as evidenced by Amazon's massive fulfillment center in Dubai South and the planned Dubai Wholesale City. This global trading hub integrates warehousing with food processing and other industrial activities.

#### Government Policies & Programs

- The UAE government's Operation 300bn strategy underpins the nation's drive to increase industrial capacity and competitiveness. This policy initiative sets a clear roadmap to boost factory numbers and localize supply chains, incentivizing companies to invest in new industrial facilities. The "Make it in the Emirates" initiative further supports this by offering procurement contracts worth AED110 billion for manufacturers, spurring memorandums of understanding and groundbreakings

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- In addition to these high-level strategies, financial incentives play a crucial role in industrial development. The Emirates Development Bank has allocated AED30 billion to finance projects at attractive rates, particularly in the manufacturing, renewables, and technology sectors. Investors in many industrial zones also benefit from long-term, low-cost land leases and tax breaks. At the same time, government support often includes grants and subsidized utilities that lower overall project costs.
- The regulatory landscape has been refined to encourage industrial growth and attract international investors. The 2019 full foreign ownership law allows 100% foreign-owned manufacturing companies outside free zones, removing local partner requirements. Furthermore, environmental regulations under the UAE Net Zero by 2050 initiative now require new industrial projects to incorporate emissions control and resource-efficient designs, with technical guidance and cost-sharing available to help mitigate the additional upfront expenses.

#### Industry-Specific Developments

- Technological advancements are playing a transformative role in industrial construction throughout the UAE. Major projects now use 3D modeling and digital twins during the design phase to optimize plant layouts and identify potential issues before construction begins, reducing costly rework. Additionally, modular construction techniques have been widely adopted, with entire process skids and plant modules prefabricated off-site and installed, accelerating project timelines and enhancing quality control.
- Sustainability is becoming an essential component of industrial design and construction. New facilities are being built with integrated renewable energy sources, such as on-site solar photovoltaic farms to power operations, and many projects incorporate energy-efficient technologies to lower operational costs and emissions. Environmental mitigation is also central to new designs, with contracts increasingly including advanced emissions control systems and waste treatment facilities and initiatives to retrofit existing plants with carbon-capture technologies.
- The workforce required for industrial projects is evolving in response to these advanced technologies and sustainability mandates. The sector is witnessing a growing demand for specialized engineers and construction managers with expertise in high-tech plant systems, prompting the UAE to import skilled labor and invest in local training programs. Additionally, initiatives to increase Emirati participation through internships and technical education are gradually building a more sustainable, locally based talent pool to support future industrial projects.

#### United Arab Emirates Infrastructure Construction

The UAE's infrastructure construction sector is set to remain a major engine of economic growth, underpinned by robust public investment and long-term strategic planning. As demonstrated by recent budget increases and mega projects like Etihad Rail, continued funding ensures that the country's infrastructure will support urban expansion, global connectivity, and sustainable development for decades. These investments are critical for maintaining the UAE's competitive edge as a global commerce, tourism, and innovation hub.

However, the sector must navigate significant challenges, including rising costs, supply chain uncertainties, and the need for resilient, future-proof designs. Coordination among federal and emirate-level agencies, alongside the effective management of large-scale PPPs, will be essential to avoid cost overruns and ensure project success. Furthermore, as regional competition intensifies and climate change adds new pressures, continuous innovation in construction technology and sustainable practices is imperative.

#### Macroeconomic Factors

- Government expenditure remains a cornerstone for UAE infrastructure, as robust public investment underpins long-term strategic visions such as UAE Centennial 207. In 2024, the federal budget allocated AED6 billion (4% of the total) to infrastructure and economic projects—an increase of 8.3% from 2023—demonstrating a clear commitment even amid global uncertainties. High oil revenues have provided the fiscal space to support mega projects; for example, Abu Dhabi announced \$18 billion in infrastructure spending in Q1 2024 to cover transport, housing, and utilities.
- Rapid urbanization and strong population growth further drive infrastructure development in the UAE. With cities like Dubai and Abu Dhabi planning for millions more residents by 2040, new roads, transit lines, and utilities are critical to prevent congestion.

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and maintain high living standards. Global events and ambitious regional goals-such as hosting major climate and trade conferences-add urgency to upgrading airports and ports to handle increased throughput.

- Cost pressures and inflation remain significant challenges for infrastructure projects. The price spike for steel, cement, and fuel during 2022-2023 has pushed up bid prices and increased financing costs, especially as many projects are debt-financed or structured as PPPs. Although recent trends show some moderation in inflation and the strong US dollar has helped temper import costs, supply chain disruptions and higher interest rates continue to drive uncertainty in project budgets.

#### Project Landscape

- In transport infrastructure, major projects continue to transform connectivity across the UAE. Etihad Rail, the national railway network, is progressing well-with Stage 1 (freight from Shah oilfield to Ruwais port) already operational and Stage 2, a 1,200+ km line connecting all emirates, nearing completion-and it is set to add passenger services by 2030. Alongside these rail projects, Dubai Metro and Abu Dhabi's light rail expansions are planning to complement the growing inter-city transport network.

- Roads and bridges are also witnessing extensive upgrades and new construction. Projects such as the Dubai Al Ain Road upgrade (an AED2 billion project) and the Shindagha Corridor with its iconic Infinity Bridge highlight ongoing improvements to the UAE's road network. Abu Dhabi is planning new bridges to enhance urban connectivity. In the Northern Emirates, ongoing federal road works-including projects like the Khor Fakkan West Ring Road-aim to improve links across Sharjah and Fujairah, ensuring a consistent standard of infrastructure nationwide.

- Aviation and maritime infrastructure remain key pillars in the UAE's global connectivity strategy. Abu Dhabi International Airport's new Midfield Terminal, completed in late 2023 at a cost of approximately \$7 billion, is set to boost capacity to around 45 million passengers annually, while DXB in Dubai and expansions at Sharjah Airport continue to strengthen the nation's aviation hub status. Meanwhile, Khalifa Port and Jebel Ali Port have undergone recent expansions and automation upgrades to enhance throughput and support rising trade volumes.

#### Government Policies & Programs

- National infrastructure strategies drive investment by linking long-term vision with actionable projects. Initiatives like the "Projects of the 50" announced in 2021 and subsequent high-level plans underscore the UAE's commitment to modernizing its infrastructure in alignment with global best practices. These programs ensure that strategic projects, such as rail expansions and port enhancements, are prioritized within multi-year funding envelopes.

- Public-private partnerships (PPP) are increasingly embraced to leverage private capital and expertise in infrastructure development. Regulatory frameworks-such as Dubai's PPP Law and Abu Dhabi's own guidelines-provide clear structures for risk sharing and long-term concessions, encouraging investors to participate in projects ranging from road upgrades to transit-oriented developments. Additionally, the UAE promotes alternative financing methods such as green bonds and sukuk, as evidenced by the recent DEWA IPO and ADNOC asset leasing, which furth

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