INYA SOLUTIONS
ENABLING HUMAN PROGRESS THROUGH TALENT

SECTOR INSIGHT · 01 · TRANSPORTATION & RAIL

The Gulf's rail decade is now a labour problem.

US$250bn of GCC railway is half-built and moving from procurement into peak construction. The engineering is solved. The workforce is not.

US$250bn	50%	US$26.6bn	AED20.5bn
Estimated cost of the GCC Railway programme, 2,177km, six states	GCC Railway completion reported by the authority, May 2026	Saudi Landbridge, 1,500km, design consultant appointed	Dubai Metro Blue Line award, 30km, opening 2029

A workforce intelligence briefing for programme directors, delivery leads and supply chain managers across the GCC.
Prepared by INYA Solutions · inyasolutions.com · Data current to July 2026.

EXECUTIVE SUMMARY

Everyone is counting kilometres. Almost nobody is counting people.

The Gulf has spent fifteen years proving it can finance railways. The GCC Railway programme — 2,177km linking all six member states, estimated at around US$250bn — passed 50 per cent completion in May 2026 according to the GCC Railways Authority, with a stated completion target of December 2030. That is no longer an aspiration document. It is a construction programme with a clock on it.

Underneath the headline number, the individual national programmes have all crossed the same threshold in the same eighteen months. Dubai's Blue Line is under construction. Hafeet Rail is 40 per cent complete. The Saudi Landbridge has its design consultant appointed and its Riyadh section in bid clarification. Etihad Rail is transitioning from freight into passenger operations. Riyadh Metro has moved from commissioning into expansion planning.

This is the point in a rail cycle where workforce demand stops being linear and starts compounding. Civil peaks and systems ramps overlap. Testing and commissioning teams arrive while construction is still finishing. Operations and maintenance recruitment starts two years before revenue service. And every one of these programmes is drawing from the same pool of people, in the same region, in the same window.

> **The Gulf did not run out of money for railways. It is running out of people who have commissioned one before.**

US$26.6bn Saudi Landbridge 1,500km, target 2034	**US$5.6bn** Dubai Metro Blue Line award, December 2024	**US$3bn** Hafeet Rail UAE–Oman 40% complete, April 2026	**145** Companies registering interest in Qiddiya High Speed Rail

THE ARGUMENT OF THIS REPORT

Rail programmes in the GCC are no longer constrained by capital, political will or engineering capability. They are constrained by the availability of a narrow band of specialists — signalling and train control engineers, systems integration leads, testing and commissioning managers, and rail-experienced construction managers — who exist in the low thousands globally and are being competed for by every programme in the region simultaneously. Programmes that treat this as a procurement problem will be late. Programmes that treat it as a delivery risk, planned eighteen to twenty-four months ahead, will not.

THE CAPITAL

What has actually been committed

The table below covers programmes that are awarded, funded or in active procurement as at July 2026. It deliberately excludes concept-stage announcements. Every entry represents work that will generate a workforce requirement inside the next thirty-six months.

Programme	Country	Value	Stage / status	Workforce signal
Saudi Landbridge	Saudi Arabia	US$26.6bn	Design consultancy awarded to Sener (2026), alongside Hill International and Italferr on PMC. Riyadh section in bid clarification. Target completion 2034.	Very high — 1,500km of new alignment. Civils and track mobilisation from 2027.
Dubai Metro Blue Line	UAE	AED20.5bn (US$5.6bn)	Awarded December 2024 to MAPA / LIMAK / CRRC consortium. 30km, 14 stations, 28 trains, 15.5km underground. Operations from September 2029.	Peak civils now; systems and T&C ramp from 2027.
Hafeet Rail (UAE–Oman)	UAE / Oman	US$3bn	40% complete as at April 2026. 238km Sohar to the UAE network. Two 2.5km tunnels, 36 bridges, 27m m^3 of earthworks completed. JV of Etihad Rail, Oman Rail and Mubadala.	Tunnelling and structures now; cross-border systems integration next.
Riyadh Metro expansion	Saudi Arabia	Est. US$800–900m (Line 7 package)	Network carried 189.5m passengers in its first ~18 months. Line 7 project management tendered. Arriyadh New Mobility Consortium, led by Webuild, engaged on expansion works.	O&M scale-up plus new-build design and PMC roles.
Qiddiya High Speed Rail	Saudi Arabia	In tender	250km/h interurban link: King Salman International Airport – KAFD – Qiddiya, 30-minute end-to-end. PPP structure. 145 companies registered interest, including 68 developers and main contractors.	Bid-team and design demand now; delivery demand 2027 onward.
Etihad Rail passenger service	UAE	National programme	900km network, 11 cities, passenger service launching 2026 following freight operations.	Operations, maintenance and customer-facing recruitment at scale.
Saudi–Kuwait rail link	Saudi Arabia / Kuwait	GCC Railway segment	650km link. Groundbreaking announced for 2026, completion estimated 2028. Kuwait has approved the route for its high-speed connection to Riyadh.	Early — but mobilisation planning windows open now.
GCC Railway (network)	All six states	~US$250bn (programme est.)	2,177km. Reported at 50% completion, May 2026. Target December 2030. Bahrain connection via the King Hamad Causeway.	Sustained multi-country demand through 2030.

Values are as publicly reported by the awarding authority or by established trade press. Where a programme is in procurement, no value is stated. See the source note on the final page.

DELIVERY PHASE

Where the work actually sits right now

Capital value tells you how big a programme is. It tells you nothing about who it needs this quarter. A US$26bn railway in design consumes perhaps two hundred people. The same railway at civils peak consumes several thousand. The same railway again in testing and commissioning consumes a few hundred — but they are the hardest few hundred people to find anywhere in the world.

The reason the current moment is difficult is not that one programme has reached peak. It is that the region's programmes are stacked. Blue Line civils, Hafeet structures, Landbridge mobilisation and Etihad Rail operational readiness are concurrent, and they draw on overlapping talent pools.

Delivery phase	Typical duration	Disciplines consumed	Current GCC pressure
Feasibility & design	18–30 months	Design managers, alignment and permanent way designers, systems architects, rail planners, PMC and cost consultants	High — Qiddiya HSR, Landbridge sections, Riyadh Line 7
Enabling & utilities	12–24 months	Utility diversion managers, geotechnical engineers, permits and interface leads	High — Blue Line, Landbridge corridor
Civils & structures	36–60 months	Tunnelling engineers, TBM crews, viaduct and station construction managers, QS and planners, HSE at scale	Peak — Blue Line, Hafeet Rail, Riyadh expansion
Track & permanent way	18–36 months	P-way engineers, track laying supervisors, welding and survey specialists	Rising sharply — Landbridge, Hafeet Rail
Rail systems	24–42 months	Signalling and train control (CBTC, ETCS L2), traction power, SCADA, telecoms, systems integration managers	Severe scarcity — the binding constraint region-wide
Testing & commissioning	12–24 months	T&C managers, integration test leads, RAMS and safety assurance, independent safety assessors, verification engineers	Severe scarcity — globally, not just regionally
Trial running & handover	6–12 months	Operational readiness leads, training managers, competence assessors	Rising — Etihad Rail passenger launch
Operations & maintenance	Perpetual	Drivers, controllers, maintenance technicians, depot and asset managers	High and structural — Riyadh, Doha, Dubai, Etihad Rail

THE STACKING PROBLEM

— Signalling and train control engineers are typically needed from around month 30 of a programme and remain critical through to handover — a five to seven year commitment on a single project.

— Testing and commissioning leads with ETCS Level 2 or CBTC integration experience are, on any realistic estimate, a global population in the low thousands. The GCC is currently trying to staff at least four concurrent programmes from that pool.

— Because these disciplines arrive late in the programme, they are almost always planned late. Recruitment starts when the schedule says the role is needed — which is nine to twelve months after it should have started.

THE TALENT QUESTION

Four structural pressures, not one skills gap

"Skills shortage" is a lazy phrase. It flattens four distinct problems that need four distinct responses. Programme directors who separate them make better decisions than those who treat the whole thing as a recruitment budget issue.

01

Genuine global scarcity

Signalling, train control, systems integration and rail T&C are scarce everywhere on earth. No amount of local recruitment effort creates them. These roles must be sourced internationally, and the sourcing lead time is long — typically four to seven months from brief to on-site, once visa and mobilisation are included honestly.

02

Regional circulation, not growth

A large share of GCC rail hiring is programmes recruiting from each other. That moves people between projects and inflates rates. It does not add a single additional engineer to the region. Across the GCC, 90 per cent of organisations report significant skills gaps, with competition for the same people cited by 31 per cent as a primary driver.

03

The experience cliff

The Gulf's first metro generation — Dubai, Doha, Riyadh — created a cohort of people who have delivered a railway end to end. That cohort is finite, ageing, and in extraordinary demand. Meanwhile the next programmes need people who have done it before, precisely because the schedules leave no room to learn on the job.

04

Localisation as a hard constraint

Nationalisation targets are no longer aspirational. In Saudi Arabia, engineering firms with five or more engineers must maintain at least 30 per cent Saudisation, with a 30 June 2026 compliance deadline. In the UAE, firms with 50 or more staff must reach 10 per cent Emiratisation in skilled roles by end-2026. These are delivery constraints with financial penalties, not HR preferences.

WHAT THIS MEANS FOR YOUR SCHEDULE

If your programme reaches systems installation in 2028, your signalling and T&C sourcing strategy needs to exist in 2026 — not your recruitment campaign, your strategy. Which markets, which competitor programmes will be releasing people and when, what your visa pathway looks like, what you will pay, and what your nationalisation pipeline will have produced by then. Programmes that build this into the delivery plan hold their dates. Programmes that leave it to procurement discover the problem in the quarter they needed it solved.

CRITICAL ROLES

Where the market is tightest

The following assessment reflects INYA's view of the current GCC rail market. Difficulty ratings are our own, based on time-to-fill and the size of the qualified candidate pool available to the region.

Discipline	Phase	Sourcing difficulty	Realistic lead time	Comment
Signalling / train control engineers (ETCS, CBTC)	Systems	Critical	5–7 months	The single hardest rail discipline to source into the Gulf. Competition is global.
Testing & commissioning managers	T&C	Critical	5–7 months	Arrive late in the programme, so almost always planned late. Decides your RFS date.
Systems integration managers	Systems	Critical	4–6 months	Multi-supplier interface ownership. Very few genuinely experienced people.
RAMS & safety assurance engineers	Systems / T&C	High	4–6 months	Independent safety assessment capacity is a regional bottleneck.
Tunnelling engineers & TBM specialists	Civils	High	3–5 months	Blue Line and Hafeet Rail are drawing heavily on the same pool.
Permanent way engineers	Track	High	3–5 months	Landbridge scale will materially tighten this over 2027–2028.
Traction power & OCS engineers	Systems	High	4–5 months	Overlaps with grid and substation demand — see INYA Sector Insight 03.
Rail construction managers	Civils	Moderate–High	3–4 months	Available, but rail-specific experience commands a significant premium.
Operational readiness & training leads	Handover	Moderate–High	3–4 months	Etihad Rail passenger launch and Riyadh expansion both competing.
Planners, QS and cost managers	All	Moderate	2–3 months	Deep regional pool, but rail programme experience thins it considerably.

Lead times assume a compliant international mobilisation including visa processing and relocation, and are measured from approved brief to productive on site — not to offer acceptance. Programmes that plan against offer-acceptance dates routinely under-forecast by two to three months.

LOCALISATION

Nationalisation is now a delivery risk

For years, nationalisation targets were treated as a compliance overhead — something the HR function managed and the delivery team heard about once a year. That is over. The 2026 rule changes in both Saudi Arabia and the UAE have moved localisation onto the critical path, with financial consequences attached and enforcement deadlines inside the current year.

Saudi Arabia

- Engineering firms employing five or more engineers must maintain a minimum of 30 per cent Saudisation, effective from 27 July 2025 with a compliance deadline of 30 June 2026.
- A minimum monthly salary threshold of SAR 8,000 applies for engineering roles to count toward Saudisation.
- Saudi engineers must hold Saudi Council of Engineers accreditation.
- A new three-year Nitaqat cycle was introduced between November 2025 and April 2026, raising quotas across multiple professions and eliminating the Yellow tier.
- From 15 April 2026, a Saudi employee does not count toward a company's Saudisation percentage unless the employment contract is electronically documented on the Qiwa platform.
- The stated policy objective is to localise more than 340,000 additional private sector jobs by 2028.

United Arab Emirates

- Private sector companies with 50 or more employees must reach 10 per cent Emiratisation across skilled positions by the end of 2026.
- The requirement increases by 2 per cent annually, split as 1 per cent in each half of the year. The H1 2026 deadline was 30 June 2026.
- A minimum monthly wage of AED 6,000 for Emiratis in the private sector took effect on 1 January 2026.
- From 1 July 2026, non-compliant companies face financial contributions of AED 10,000 per month — AED 120,000 annually — for each unfilled position.

THE UNCOMFORTABLE ARITHMETIC

— A rail programme cannot meet a 30 per cent national engineering quota by hiring nationals into signalling roles that require fifteen years of experience. Those people do not exist in sufficient numbers in any country, including the ones running the quota.

— The programmes that succeed do two things at once: they source scarce international expertise for the roles that genuinely require it, and they build structured national pipelines into the roles where a capable graduate or technician can be developed inside the programme timeline — planning, QS, HSE, operations, maintenance, asset management.

— Treating localisation as a percentage to be hit at year end, rather than a capability to be built over three years, produces both non-compliance and no lasting capability. Structured training and cross-sector transition are what turn the second option into something real.

DELIVERY RISK

Six workforce failures we see repeatedly

None of these are hypothetical. Each is a pattern our leadership has watched play out on GCC rail programmes, usually more than once.

01

Systems recruitment starts when systems work starts

The single most common failure. Signalling and T&C hiring begins when the programme reaches that phase, not eighteen months before it. By the time the first engineer is on site, the phase is already late and the schedule is being re-baselined around a resourcing problem nobody named.

02

Mobilisation time excluded from the plan

Offer accepted is treated as resource secured. Visa processing, medicals, attestation, relocation and family logistics add two to three months, and vary substantially by nationality and destination country. Plans built on offer dates are wrong by a quarter, every time.

03

Rate inflation mistaken for market rate

When four programmes bid for the same forty people, rates rise without any increase in supply. Programmes benchmark against the inflated number, conclude the market has moved, and pay it — funding a bidding war rather than solving the underlying shortage.

04

Localisation left to the eleventh hour

A quota deadline arrives, the programme hires rapidly into roles that do not fit, attrition follows within a year, and the target is missed again in the next cycle. The cost is paid twice: penalties, and a wasted development window.

05

Operational readiness planned as a handover activity

Drivers, controllers and maintenance technicians need to be recruited, trained and certified before trial running, not after. Programmes that discover this during commissioning delay revenue service by months for reasons that have nothing to do with the railway itself.

06

No visibility of who is being released, and when

Every programme completing a phase releases exactly the people the next programme needs. Almost nobody tracks this systematically. The organisations that do — that know which consortium is demobilising which discipline in which quarter — hire better people, faster, at more sensible rates.

WHAT TO DO

Five moves worth making this quarter

None of this requires a new budget line. It requires workforce to be treated as a delivery input with a lead time, in the same way as long-lead plant or a permit.

Move	What it involves	Why it matters
Build a resource-loaded workforce curve	Map headcount by discipline against the construction programme for the next 36 months, not the next 12. Include ramp-down as well as ramp-up.	Turns workforce from a reactive requisition process into a forecastable input with visible pinch points.
Identify your five critical-path roles	Not your fifty vacancies — the five roles whose absence would stop the programme. For most GCC rail schemes these sit in signalling, systems integration and T&C.	Focuses scarce attention where scarcity is real, and justifies a different sourcing approach for those roles.
Set your international sourcing strategy 18 months out	Decide target markets, understand competitor programme timelines, confirm visa pathways and set realistic rate expectations before the requirement lands.	Removes the four-to-seven month lead time from your critical path by absorbing it in advance.
Design the localisation pipeline against real roles	Identify which disciplines can genuinely absorb and develop national talent within the programme timeline, and structure training and mentoring around those, rather than spreading targets evenly.	Produces compliance and capability simultaneously, instead of a year-end hiring scramble that delivers neither.
Track demobilisation across the region	Monitor which programmes are completing which phases, and when their specialist teams will be released.	The best-value senior hires in the GCC are people finishing a programme nearby — if you know when that is.

> **Capital decides whether a railway gets built. Workforce decides when it opens.**

METHOD & SOURCES

How this briefing was built

INYA maintains a continuously updated register of GCC infrastructure programmes across four sectors, tracking stage, value, client, consultants, contractors and workforce signals. This briefing draws on that register, on public announcements by the awarding authorities, and on our leadership's direct delivery experience across the region's landmark rail programmes.

Primary sources monitored

- **Client and authority announcements:** Dubai RTA, Saudi Arabia Railways, Royal Commission for Riyadh City, Etihad Rail, Hafeet Rail, Oman Rail, Qatar Rail and Ashghal, the GCC Railways Authority, and the transport ministries of Oman, Bahrain and Kuwait.
- **Specialist rail press:** Railway Gazette International and International Railway Journal for contract awards, consortium composition and technology selection.
- **Regional project intelligence:** MEED and MEED Projects, Zawya Projects, Saudi Gulf Projects and Construction Week Middle East.
- **Regulatory sources:** Saudi Ministry of Human Resources and Social Development and the Qiwa platform; UAE Ministry of Human Resources and Emiratisation.
- **Verification:** national tender portals (Etimad, Monaqasat, Oman Tender Board, Kuwait CAPT) and stock exchange disclosures from listed contractors on Tadawul, ADX, DFM, Qatar Exchange and Muscat Stock Exchange.

Notes on the figures

Project values are as publicly reported and are stated in the currency of the original announcement, with an approximate US dollar conversion where useful. Programme-level estimates — notably the US$250bn figure for the GCC Railway network — are long-standing published estimates rather than a consolidated audited figure, and should be read as an order of magnitude. Completion percentages reflect statements by the responsible authority on the date given. Sourcing difficulty ratings and lead times are INYA's own assessment of the current market, not third-party data.

Programme experience referenced in this document was gained by INYA's leadership in senior delivery and workforce leadership roles with major international organisations prior to founding INYA Solutions. It is referenced to demonstrate individual track record, not contracts held by INYA Solutions.

This document is provided for information. It does not constitute commercial, legal or immigration advice. Nationalisation rules and thresholds change frequently; confirm current requirements with the relevant authority before acting.

WORK WITH INYA

Your programme is funded.
Is it staffed?

INYA Solutions is engaged by programme and project directors, not HR functions. We are brought in when workforce planning, mobilisation and compliance have fallen out of step with the delivery schedule — or, better, before they do.

Our leadership has delivered workforce on Doha Metro, Dubai Metro, Haramain High Speed Rail, the Saudi Landbridge, Etihad Rail and Lusail LRT. We know what a rail programme actually consumes, month by month, because we have staffed one.

— Workforce Strategy & Planning

— Mobilisation & Compliance

— Specialist Search & Recruitment

— Workforce Development & Train-to-Deploy

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