

ANNUAL REPORT

Communications
Regulatory Authority
State of Qatar

هيئة تنظيم
الاتصالات
دولة قطر

2023

Fostering Qatar's Digital Future



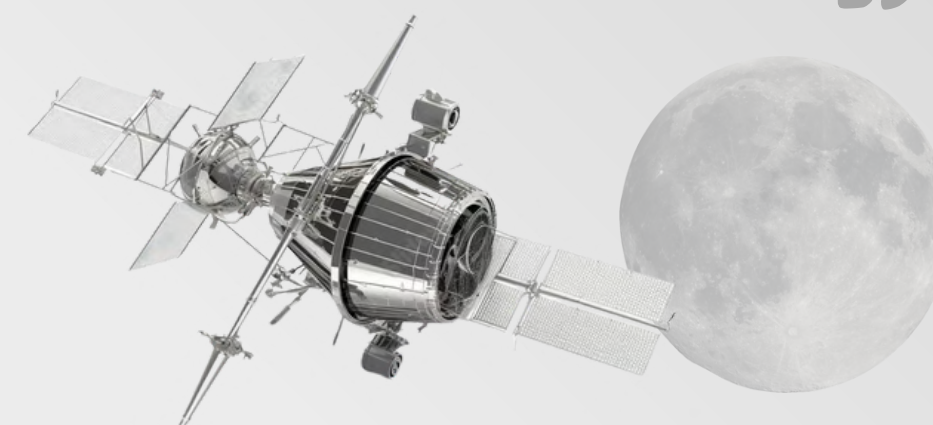
بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ

“In the Name of Allah, the Most
Gracious, the Most Merciful”

His Highness
**Sheikh Tamim bin
Hamad Al Thani**
Amir of the State of Qatar

His Highness
**Sheikh Hamad bin
Khalifa Al Thani**
The Father Amir





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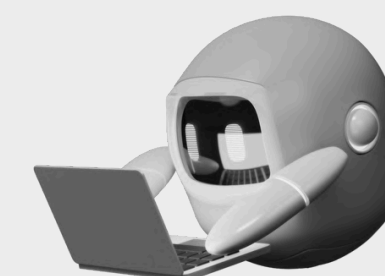
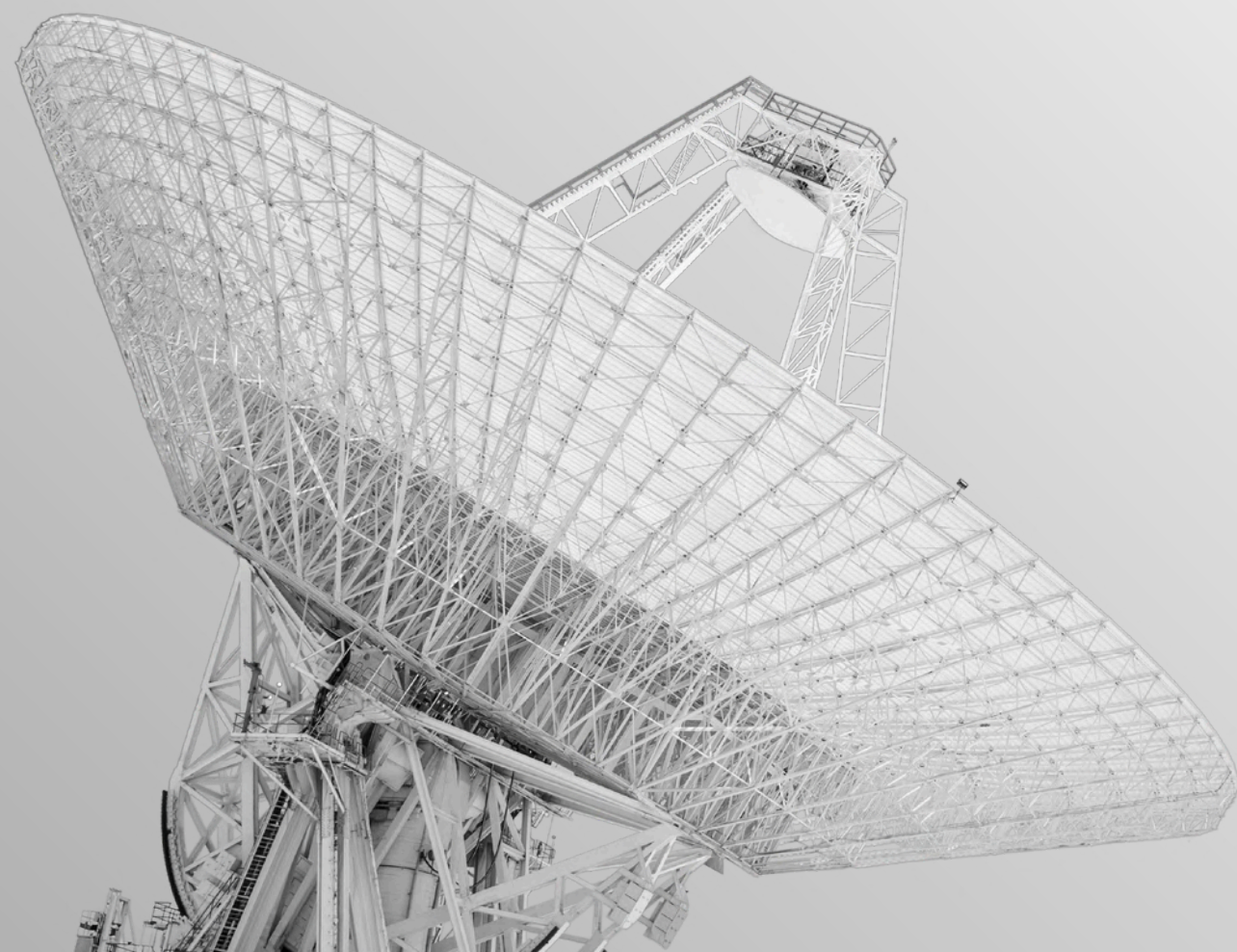
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Executive Summary

The Communications Regulatory Authority (CRA) is pleased to present its 2023 Annual Report, reflecting our unwavering commitment to advancing Qatar's Information and Communication Technology (ICT), telecommunications, and postal sectors.

Under the visionary leadership of His Highness The Amir Sheikh Tamim bin Hamad Al Thani, and guided by the Qatar National Vision 2030, CRA has made significant strides in fostering a competitive, innovative, and future-ready digital landscape.

New President of the CRA

Eng. Ahmad Abdulla AlMuslemani

This year marked a pivotal moment in our journey with the appointment of Eng. Ahmad Abdulla AlMuslemani as the new President of the CRA. His strategic vision and expertise are set to propel CRA towards new heights, as we align our efforts with the Third National Development Strategy and the Digital Agenda 2030.

Progress in key areas

Qatar's digital landscape in 2023 showcased the nation's remarkable progress, with high internet and social media penetration rates, and a thriving mobile market.

The economic performance of the ICT sector remained robust, contributing significantly to Qatar's non-hydrocarbon GDP. Qatar also achieved top global rankings in various ICT indices, underscoring its commitment to digital excellence.

CRA's performance in 2023 was marked by notable achievements across key areas. We made significant progress in domain management, infrastructure access, numbering, and quality of service regulation. We played a crucial role in shaping the regulatory landscape, while our financial performance remained stable. Spectrum management and allocation saw major advancements, and our efforts to foster competition within ICT markets yielded positive results.

Stakeholder engagement

Stakeholder engagement remained a top priority, with CRA actively participating in local and international forums, fostering collaboration, and contributing to global policy discussions. We also launched several consumer-centric initiatives, such as the updated "Arsel" mobile app and the digital registration service for telecom consumers. Our consumer satisfaction survey revealed high levels of satisfaction with IT and telecom services in Qatar, while also identifying CRA's success in protecting consumer rights and promoting competitiveness.

Developments in the Postal Sector

A key development in 2023 was the enactment of the new Postal Services Law, marking a significant step towards modernising Qatar's postal sector. Qatar Post has embarked on a digital transformation journey, enhancing operational efficiency and customer experience. As part of our mandate, CRA assumed a pivotal role in regulating and supervising this sector, ensuring fair competition and protecting consumer interests.

Looking toward the future

As we look towards 2030, CRA remains committed to realising the vision of a connected, digital Qatar. Our future outlook is centred on six key areas: enhanced connectivity and digital transformation, fostering innovation and a competitive market environment, evolving our regulatory framework, integrating emerging technologies, deepening stakeholder engagement and collaboration, and maintaining open, transparent communication.

Driving digital excellence

This report showcases our dedication to driving digital excellence, promoting competition, and ensuring consumer protection. We remain steadfast in our mission to unlock the full potential of Qatar's digital landscape, setting new standards for innovation and paving the way for a thriving, knowledge-based economy in line with the Digital Agenda 2030.



Message from the President of the Communications Regulatory Authority of Qatar

I am pleased to present the CRA Annual Report for 2023, a pivotal year as I begin my presidency at the Communications Regulatory Authority during a crucial era of digital transformation in Qatar.

CRA has made significant advances over the past nine years, enhancing collaboration with regulators and developing governance frameworks for the digital economy. It has supported tourism by managing spectrum allocation and approvals during major events such as the Formula 1 Qatar Grand Prix 2023 and the AFC Asian Cup Qatar 2023.

Qatar's ICT sector has grown, contributing a 36% increase to our non-hydrocarbon GDP, with the telecom sector rising to QAR 11.602 billion in 2022 from QAR 9.52 billion in 2014.

Strategic investments of QAR 1.421 billion in 2022 have established Qatar as a true digital leader in the GCC region, reflected by our 8th place in the Digital Policies sub-pillar in the 2023 Future Readiness Economic Index.

We have achieved near-universal 5G coverage and expanded our fibre network to 99% of the population, ensuring high-speed, reliable internet. Qatar's 97.3 score on the ITU's IDI Index 2023 underscores our commitment to leading global telecommunications standards.

Our regulatory efforts over the past nine years include issuing 1,800 type approval certificates for radio devices and 33,000 customs clearance certificates for radio equipment, promoting a competitive market.

The opening of the Universal Postal Union (UPU) office in Doha highlights Qatar's growing role in the global postal sector, enhancing collaboration and knowledge exchange. Moving forward, CRA will implement a robust cloud policy framework, set guidelines, and foster industry collaboration to embrace emerging technologies in fintech, e-commerce, and IoT.

As we progress, I am dedicated to aligning CRA with the Third National Development Strategy and Digital Agenda 2030, ensuring our regulatory framework supports and propels digital transformation, driving sustainable development and prosperity.

Eng. Ahmad Abdulla AlMuslemani

President, Communications Regulatory Authority

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CRA

Overview



حماية المستهلك
وتعزيز المنافسة
Protecting Consumers &
Promoting Competition

Mandate

“The CRA shall regulate the communications and information technology sector, the post sector, and access to digital media.” Emiri Decree No. 42 of 2014.

Vision

A smart and connected nation, enabled by effective and innovative telecom, IT, postal and access to digital media regulation.

Mission

To enable the development of a digital society and the postal sector for the social and economic benefit of Qatar, through a forward-looking, transparent and consistent regulatory framework. To foster sustainable competition to promote a fair marketplace and improve customer experience through the ubiquitous availability of smart, innovative and high-quality services. To continue building our institutional capabilities through investing in and developing our staff, expertise and resources.

Our Duties



To make world-class communications and technology services available to our citizens, residents, and businesses.



To ensure the efficient and effective use of national resources, especially the radio spectrum.



To protect our citizens and residents from invasions of privacy, offensive content, unfair treatment, and harmful activities.



To develop a framework that secures a universal service obligation for postal services in Qatar.

Our Focus

Our current focus is to facilitate economic diversification and greater innovation and investment in ICT – in order to enhance the competitiveness and attractiveness of the State of Qatar as a regional hub for global technology and communications services.

Over the past decade, the CRA has successfully created a strong framework to support the establishment of Qatar's world-leading telecommunications infrastructure. Now, our focus has shifted to the ICT sector as a key enabler of digital growth.

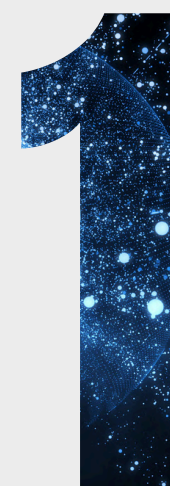
We are committed to enabling a business-friendly ecosystem within the IT, Telecom, Digital Media, and Postal sectors which will support the continued transformation of Qatar into a world-leading digital economy.

We achieve these objectives by maintaining a regulatory framework that supports the implementation, monitoring, and enforcement of communications, competition, and consumer protection laws.

Our Remit

As the sector regulator in Qatar, the remit of the CRA is to promote and support open and competitive Telcom, IT, Postal and Access to Digital Media sectors – providing advanced, innovative, and reliable communications services. This requires us to balance consumer rights and the needs of service providers within the context of the national strategy.








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**Qatar's Digital
Landscape 2023**



Key Statistics

-  Internet users: **2.68 million**
-  Internet penetration: **99.0%**
-  Social media users: **2.62 million**
-  Social media penetration: **96.8%**
-  Social media usage rate: **97.8% of internet users**
-  Facebook Messenger reach: **1.40 million**
-  Social media gender split: **28.3% female, 71.7% male**

-  Facebook users: **1.95 million**
-  YouTube users: **2.62 million**
-  Instagram users: **1.10 million**
-  TikTok users (18+): **2.14 million**
-  LinkedIn users: **1.20 million**
-  Snapchat users: **975,000**
-  Twitter users: **1.05 million**

[Source: DIGITAL 2023: QATAR]

Economic performance

In 2023, Qatar's Ministry of Finance reported a substantial budget surplus of QAR 43.1B, demonstrating the nation's strong economic resilience. The fourth quarter specifically saw a surplus of QAR 1.4B, contributing to the strategic reduction of public debt and highlighting Qatar's dedication to maintaining fiscal and financial stability in the face of global economic uncertainties.

The final quarter's total revenue stood at QAR 55.6B, predominantly driven by oil revenues of QAR 51B, alongside QAR 4.6B from non-oil sectors. Despite a 10% decrease in non-oil revenue compared to the preceding quarter, overall expenditure rose by 8.9% to QAR 54.2B, underlining the government's commitment to strategic investment in the country's future.

Revenue Q4 2023:

QAR 55.6B Total revenue final quarter	QAR 51B Oil revenues final quarter	QAR 4.6B Non-oil sectors final quarter	QAR 54.2B Overall expenditure final quarter
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Overall Expenditure Q4 2023:

QAR 16.9B For salaries and wages	QAR 17.8B For current expenses	QAR 17.7B For major capital projects	QAR 1.8B For secondary capital expenditures
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Growth & Investment:

12.6%

Projected CAGR of Qatar's
cybersecurity market
(2022-2026)

9.2%

Projected CAGR of
ICT market in Qatar
(2020-2024)

26.3%

Expected growth of the cloud
computing market size in
Qatar (2022-2026)

QAR 1.1B

Projected cloud
computing market
size by 2026

QAR 22.9B

Projected ICT
spending in
Qatar by 2027

QAR 6.2B

Total government investment in
TASMU Smart Qatar, which
consists of 40% IoT use cases

[Source: TASMU]

The economic landscape in Qatar showed signs of normalisation in 2023, following a surge attributed to the World Cup. The International Monetary Fund (IMF) anticipates a favourable medium-term economic outlook, driven by LNG production expansion and continuous reform efforts. The fiscal discipline maintained amidst the hydrocarbon windfalls of 2022-23 resulted in significant surpluses and a rapid reduction in central government debt. The IMF underscores the importance of sustained fiscal prudence, revenue diversification, and enhanced spending efficiency as foundational to Qatar's medium-term fiscal strategy.

Industry Insights

The sector remains focused on the domestic market, with only 11% of surveyed local IT companies serving foreign markets. The industry outlook is optimistic, with more than 70% of ICT businesses considering Qatar an attractive market for international expansion. Demand drivers for the ICT sector in Qatar include an expected 5.5% compound annual growth rate (CAGR) in IT spending until 2025, outpacing the overall economic growth.

A significant 80% of IT companies in Qatar are small, employing fewer than 50 people, which highlights the vibrancy of local businesses but also points to scale-related challenges that need addressing. Service provision and distribution dominate the activities of these companies, with around half also engaging in hardware production or software development.

While many IT firms are incorporating emerging technologies into their offerings, a considerable portion (approximately 40%) still focuses solely on traditional technologies — those already in widespread use — and the lower end of the value chain, particularly among local businesses.

Private Sector Growth

The public sector currently serves as a significant client base for half of the ICT companies, a trend that is likely to continue. However, the private sector is anticipated to increase its ICT spending due to globalisation trends and local government initiatives like TASMU, with national champions playing a pivotal role in digitalisation efforts. Private sector growth is a national priority, as reflected in the National Development Strategy and Digital Agenda 2023.

On the investment and funding front, approximately two-thirds of surveyed ICT businesses, irrespective of their geographic scope and maturity, plan to increase their investments in Qatar within the next 3-5 years.

Foreign Direct Investment (FDI)

FDI inflows into Qatar's ICT sector have significantly increased, representing a larger proportion of total FDI inflows compared to peer countries. Ooredoo Qatar and Vodafone Qatar have made substantial investments in the telecom sector, exceeding QAR 1 billion annually since 2017, with further market investments in data centres, cloud infrastructure, and development services essential for the sector's expansion. The majority of ICT companies prioritise investments towards serving customers over enhancing their offerings or innovation.

Funding Sources










Some areas within the general funding ecosystem, particularly concerning the availability of startup financing, require development. ICT companies tend to finance their operations mainly through cash flow, retained earnings, business loans, credit lines, and private equity investments. Small and Medium Enterprises (SMEs) often find it challenging to access commercial loans from banks, limiting their growth capital options. Additionally, ICT startups have not heavily leveraged Venture Capital (VC) funding due to the underdevelopment of the local VC market.

Mobile and Fixed Telecom Markets Summary

The mobile telecom market in Qatar is performing very well. 5G network coverage is almost 100%, speeds are among the highest in the world, and prices are reasonable and competitive, especially for lower usage. This illustrates that competition has gone a very long way in this market as the challenger Vodafone Qatar has created a healthy competitive market with excellent performance. The main remaining challenge is to implement stand-alone 5G networks to support industrial IoT solutions based on 5G use cases.

For the fixed market, fibre coverage is almost universal, but prices are quite high. Advertised speeds increased significantly in 2023 as Vodafone introduced 1 Gbps fibre connections at reasonable prices, prompting Ooredoo to follow suit. Meanwhile, the entry of Vodafone Qatar has not had the same beneficial effects on competition as for mobile due to structural constraints. CRA will therefore evaluate appropriate actions to establish a high-performing fixed market.

Individual licensees in Qatar as of 2023

 Fixed & Mobile	 Fixed & Mobile	 Passive fixed
 Wholesale fixed	 Public satellite services	 Public satellite services
 VSAT	 VSAT	 VSAT

Service Provider Performance

Ooredoo and Vodafone are the primary players in Qatar's telecom sector, both offering voice and broadband services over fixed and mobile networks. Both providers are listed on the Qatar Stock Exchange.

Ooredoo Qatar's revenue decreased by 8% in 2023 to QAR 7.3 billion, and EBITDA decreased by 6% to QAR 3.6 billion. The main reasons for the decrease were that Ooredoo discontinued low-margin transit revenue, carved out the fintech business and finally the positive impact of the FWC 2022 on increasing 2022 revenue.

Vodafone Qatar grew its total revenue by 1% to QAR 3.1 billion and EBITDA of QAR 1.3 billion—an increase of 4% over the previous year. The company has improved its market position through increased revenue from fixed and ancillary services.

Total revenue for the sector decreased 5% to QAR 11.0 billion in 2023. Fixed and Mobile services dominated—with Ooredoo contributing 66%, Vodafone 28%, and other licensees 6% of total revenue.

Mobile Networks and Services

Qatar boasts one of the highest levels of coverage for high-speed mobile services in the world. As a pioneer in 5G non-stand-alone implementation, an astonishing 98.9% of Qatar's population were covered by 5G services by the end of 2023. At 4.6 million mobile broadband subscriptions, and a penetration rate of 156%, mobile internet access is practically ubiquitous throughout Qatari society.

Data: Population coverage by mobile technology

Mobile coverage by technology	2023
3G	100.0%
4G	99.9%
5G	98.9%

[Source: Ooredoo and Vodafone Qatar]

Data: Mobile usage penetration

Mobile usage 2023	Subscriptions	Penetration
Mobile broadband	4.6 million	156%

[Source: Ooredoo and Vodafone Qatar, CRA calculations]

During 2023, there was a minor decrease in voice traffic per subscriber, while data traffic per subscriber showed a minor increase. Though predicted, Qatar has yet to experience a mobile data explosion with the advent of 5G. So far, revolutionary data-intensive 5G mobile services have not emerged for the consumer mass market.

Data: Mobile usage of services per month

Mobile Services per Subscription	2023
Mobile voice per month, in minutes	141
Mobile data per month, in GB	15

[Source: Ooredoo and Vodafone Qatar, CRA calculations]

Mobile Services Pricing

Qatar is currently ranked 6th globally for the most affordable mobile prices, calculated as a percentage of Gross National Income (GNI) for the high-usage mobile voice and broadband basket (140 minutes/month, 70 SMS, 1.5 GB data, on 3G or above networks). This means that mobile consumers in Qatar enjoy world-leading technology at reasonable prices and reflects the success of CRA's regulatory strategy for mobile services which emphasises competition-led market dynamics.

International price comparisons by ITU and OECD consider the service basket for multiple usage patterns. Data is collected from service providers and validated via their websites. However, since the service offerings differ between countries, comparisons are not exact. Pricing is typically indexed as a percentage of GNI, in USD and USD PPP levels.

Data: Relative Ranking by ITU based on Mobile prices for high usage bundles

Mobile prices compared by ITU	2023
ITU Affordability Index Ranking (High Consumption basket)	6
Percent of GNI	0.23%
Price (monthly)	16 USD (58.26 QAR)

[Source: ITU]

The organisation for cooperation between Arab telecom regulators, AREGNET, conducts an annual price benchmarking study of telecom prices among its member states based on OECD methodology and baskets. Based on prices for December 2022, mobile prices in Qatar compare well to GCC averages while remaining higher than OECD averages.

According to the table below, prices for lower-usage mobile baskets are quite close to OECD averages while prices get comparatively higher in Qatar (and the GCC average) as usage increases.

Mobile prices compared by AREGNET	Qatar	OECD	GCC
Residential 100 calls, 2 GB data (QAR PPP mth)	52	51	100
Residential 900 calls, 10 GB data (QAR PPP mth)	180	84	246

[Source: AREGNET (Teligen)]

Fixed Services

Qatar has excellent fibre-optic coverage and is among the leading nations for access to fixed services with 99.9% of the households covered by high-speed fibre. Advertised fixed speeds were boosted during 2023 when Vodafone Qatar introduced 1 Gbps fibre subscriptions at substantially reduced prices with Ooredoo following suit soon after. As a result, at year-end 2023, 44% of fixed subscriptions were for 1 Gbps or more, compared to 5% in 2022.

However, CRA analysis shows that while the average advertised fixed speed per subscriber was 514 Mbps in Q4 2023, according to Ookla speed measurements for December, the median fixed speed was only 139 Mbps. During 2024, CRA will investigate this phenomenon further and will support Service Providers in increasing measured speeds to better align them with advertised speeds.

Data: Fixed Service Speeds

	<100 Mbps	>100 Mbps	>500 Mbps	>1,000 Mbps
2023	17%	34%	5%	44%
2022	25%	49%	21%	5%

[Source: Ooredoo and Vodafone Qatar]

Data: Key Metrics for Fixed Services

Fixed Coverage by Technology	2023
Fiber Households Coverage	99.9%
Fiber Broadband Subscriptions of total fixed	86.2%

Data: Subscribers for Fixed Services

Fixed subscriptions	2023
Fixed Voice Subscriptions	0.5 million
Fixed Broadband Subscriptions	0.3 million

[Source: Ooredoo and Vodafone Qatar]

Fixed Services Pricing

Price comparisons for fixed services are bound by similar constraints as those for mobile offerings. Quoted prices in Qatar tend to be for triple play packages, which include television services, thus inflating the perceived price in comparison to countries where the most common packages include only fixed broadband.

However, intensified competition as a result of Vodafone rolling out its own network and taking market share from Ooredoo has resulted in improved service offerings.

Qatar is ranked in 60th place for the affordability of fixed broadband (price in USD as a % of GNI). CRA will continue to support user-friendly and value-for-money offerings, especially in the enterprise and business segments.

Data: Relative ITU Ranking for Fixed Broadband Services

Fixed prices compared by ITU	2023
ITU Affordability Index Ranking	60
Percent of GNI	1.4%
Price in USD (monthly)	100 USD (364.15 QAR)

[Source: Ooredoo and Vodafone Qatar]

The AREGNET study which is based on OECD methodology also includes comparisons of fixed pricing. The AREGNET study also includes Vodafone Qatar's offerings while the ITU study only includes Ooredoo Qatar. For OECD more than one Service provider is included per country while for GCC only the incumbent is included. This makes a big difference, as incumbents are often more expensive than newcomers.

According to the table below, prices for fixed broadband in Qatar are lower than GCC averages while they are notably higher in Qatar than OECD averages. Prices for fixed broadband in Qatar have decreased considerably since 2017.

Fixed broadband AREGNET	Qatar	OECD	GCC
Residential 100 Mbps (QAR PPP month)	275	109	325
Business 100 Mbps (QAR PPP month)	361	128	656

[Source: AREGNET (Teligen)]

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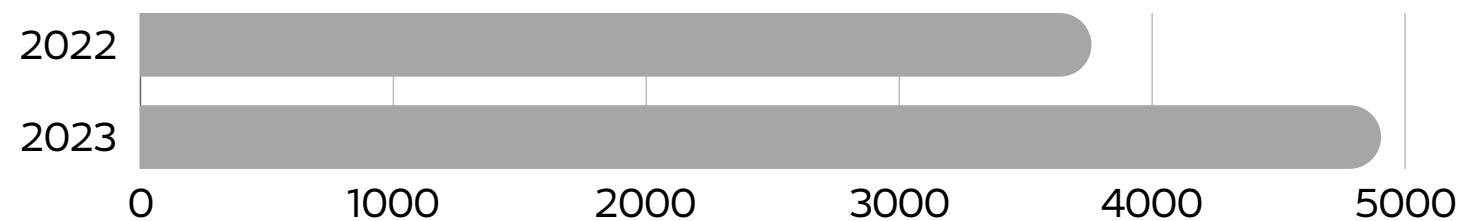
Performance Indicators

Domains

The policies of the Communications Regulatory Authority adhere to global internet governance standards, in accordance with the guidelines set by IANA, ensuring a robust framework for domain name management. The domain name dispute resolution process is comprehensive, involving document verification, meetings with relevant parties, communication with registrars, and requesting supporting documents to effectively resolve ownership issues.

The ".qa" domain name system has been enhanced with advanced security features, significantly improving its stability and reliability. The monitoring system has been upgraded to detect attacks in their early stages, with the capability to immediately block suspicious IP addresses, thereby enhancing security and ensuring the integrity of data and services available through the ".qa" domain.

Despite the challenges faced by domain management in updating old domain data, the total number of ".qa" domains registered has seen a significant increase. A comparison of ".qa" domain registrations between 2022 and 2023:



Collaboration with international agencies such as RIPE, IANA, and ICANN has played a crucial role in shaping domain name policies in Qatar. These partnerships provide valuable insights into global policy trends and technological advancements, enriching the strategic direction of the Authority.

Efforts to promote the use of ".qa" domains among local businesses include encouraging their registration to support business development, ensuring data security and privacy, and collaborating with local business associations to foster adoption. These initiatives aim to leverage the ".qa" domain as a symbol of authenticity and local identity, enhancing user trust within Qatar.

Looking ahead, planned innovations include system upgrades to enable automation and multi-factor authentication, addressing the challenges posed by the availability of generic top-level domains, and capitalizing on opportunities to promote ".qa" as an original Qatari brand. Key milestones in domain registration and management have been achieved through technical enhancements aimed at improving ".qa" domain performance, reliability, and security, marking significant progress in Qatar's digital landscape.

Access To Infrastructure

In 2023, significant advancements were made in Qatar's telecommunications infrastructure through the initiation of five major projects. The Public Works Authority (Ashghal) in coordination with the Communications Regulatory Authority (CRA) launched four infrastructure projects, and CRA introduced a new Geographic Information System (GIS) based solution, called the Duct Management System (DMS), for enhanced infrastructure management with Licensed Telecom Service Providers (LTSP's) in the state of Qatar.

To facilitate access for new market entrants, CRA has established processes through the DMS System, including standards for government telecom duct infrastructure construction and in-building wiring guidelines, ensuring quality service delivery. The average utilisation rate of the existing telecommunications infrastructure remained at 100% in both 2022 and 2023, indicating full capacity usage.

Qatar continues to invest in the expansion and upgrade of its telecom infrastructure. Plans include enhancing network capabilities, broadband access, and developing 5G technology, alongside regulatory frameworks for the construction and installation of radio communication stations, in-building wiring standards, standards for government telecom duct infrastructure design and construction and infrastructure development initiatives. Progress since 2022 can be seen in the following tables.

Mobile Sites

2022	2023
3377	3454

Fibre-Optic Cables Deployment Using (Govt. tel duct infrastructure)

2022	2023
370 km	542 km

Government telecom duct infrastructure

2022	2023
3439 km	4188 km

Internet Exchange Points (IXPs)

2022	2023
6	14

Ducts & Poles

2022	2023
11000 poles	11000 poles

[Source: CRA]



Adapting to emerging technologies like 5G and IoT, Qatar is implementing key strategies such as 5G deployment, infrastructure expansion, and IoT readiness. These efforts are supported by collaboration with technology providers, smart city initiatives, regulatory support, and research and development to ensure the telecom infrastructure meets future demands.

Through 2023, valuable insights were gained regarding infrastructure access, emphasising the importance of broadband access, addressing 5G rollout challenges, and the effectiveness of public-private partnerships for infrastructure development.

Statistical data from 2023 highlights the active engagement and utilisation of the DMS, with 684 work orders processed, extensive duct reservations, and numerous customer and site inspections conducted across various municipalities. Additionally, achievements in the development of standards for telecom duct infrastructure and the recognition of CRA's GIS presentation at the GIS Technology Day underscore the authority's commitment to innovation and excellence in telecommunications infrastructure management.

Telecom Numbering

In 2023, CRA focused on enhancing the telecommunications framework, notably by developing a comprehensive Machine-to-Machine (M2M)/Internet of Things (IoT) framework rather than implementing new policies or regulations on numbering. This strategic initiative is designed to support and regulate the burgeoning M2M/IoT technology sector within Qatar, ensuring a structured and conducive environment for its growth.

Telephone number allocations saw a significant adjustment in 2023, with mobile number allocations decreasing to 300,000 from 2,300,000 in 2022, and landline allocations increasing slightly to 40,000. Total number allocations decreased from over 2.436 million in 2022 to 340,034 in 2023. This is attributable to the unique demand for new number allocations during FIFA World Cup Qatar 2022™.

Number portability usage decreased, with 79,000 consumers utilising the service in 2022, down to 60,000 in 2023. The processing time for number portability requests remained efficient at one day.

Numbering type	2022	2023
Mobile	2,300,000	300,000
Fixed line	36,000	40,000
IOT /M2M	100,000	0
Freefone	33	34
Total	2,436,033	340,034

[Source: CRA]

Qatar's National Numbering Plan (NNP) continues to align with international standards, specifically ITU-T recommendations, ensuring global compatibility and coordination. The numbering team's active participation in ITU Study Group (SG2-Numbering related) meetings and TSAG meetings in 2023 has been recognised, with their contributions officially approved by ITU T SG-2 and the updated NNP published in the ITU Bulletin.

The experience of 2023 underscored the need for enhancements in the numbering plan and regulations, with a particular emphasis on upgrading the Numbering Management System. This upgrade was essential for automating the numbering allocation process, reflecting CRA's commitment to improving operational efficiency and adapting to technological advancements in the telecommunications sector.

The ICT Development Index 2023

Qatar achieved the third highest IDI score worldwide as measured in the International Telecommunications Union's "ICT Development Index 2023".

ICT Development Index 2023, sorted by IDI score:

Position	IDI Score	Position	IDI Score
1	Kuwait (ARB) 98.2	6	Finland (EUR) 96.7
2	Singapore (ASP) 97.4	7	United States (AMS) 96.6
3	Qatar (ARB) 97.3	8	Bahrain (ARB) 96.5
4	Denmark (EUR) 96.9	9	Hong Kong (ASP) 96.5
5	Estonia (EUR) 96.9	10	United Arab Emirates (ARB) 96.4

Additionally, Qatar was among the top ten countries globally for a number of specific indicators used to calculate the IDI figures.

Qatar's Position - ICT Development Index 2023

- 1st** Fixed broadband internet traffic per subscription
- 1st** Population covered by at least a 3G mobile network
- 2nd** Individuals using the internet
- 2nd** Individuals owning a mobile phone
- 3rd** Population covered by at least a 4G mobile network
- 9th** Mobile broadband subscriptions per 100 inhabitants

Quality of Service: Consumer Affairs

In 2023, CRA undertook several strategic initiatives and projects aimed at enhancing the regulatory framework and services within the telecommunications sector. Notably, CRA initiated the Network Neutrality Framework, a significant move towards ensuring open and fair internet access. The QoS regulatory Framework was published in May 2023, following an official consultation with all service providers in December 2021 and another consultation with Ooredoo and Vodafone in 2022.

CRA completed a pivotal project by publishing the Quality of Service Regulatory Framework on May 16, 2023, under Decision (11) of 2023. This comprehensive framework includes the Policy on Quality of Retail Telecommunications Services and the Regulation on the Quality of Retail Public Telecommunications Services, aiming to elevate the quality and reliability of telecom services across Qatar.

In addition to these initiatives, CRA actively participated in the Telecommunications Regulatory Summit hosted by Ookla in MENA from June 4-8, 2023. The summit featured a two-day training on Ookla's platforms and a three-day conference discussing the impact of crowdsourced solutions on Quality of Service (QoS) and Quality of Experience (QoE), among other critical topics. This participation offered valuable insights into utilising crowdsourced solutions for monitoring telecom service providers' performance, especially significant after the publication of the QoS Regulatory Framework.

Legal Affairs

Drafting and Implementing Legislation: In 2023, the Communications Regulatory Authority (CRA) made significant strides in shaping the regulatory landscape of Qatar's telecommunications sector. A key achievement was the drafting and issuance of the Postal Law, Law No. (15) of 2023, which regulates postal services in Qatar. Additionally, the CRA provided essential inputs to various regulatory instruments, including quality of service regulations.

Enforcement and Compliance: To ensure compliance with CRA's regulations and instructions, withdrawal notices were issued to non-compliant service providers. The CRA also coordinated with the Financial Sanction Committee to conduct thorough investigations and enforce the regulatory framework, including monitoring penalty decisions to guarantee service provider compliance.

Dispute Resolution and Consumer Protection: The CRA played a crucial role in mediating disputes between service providers and consumers, demonstrating a balanced approach to protecting consumer rights while maintaining cooperative relationships with service providers. The authority also managed both internal and external aspects of court cases, showcasing a comprehensive legal strategy to uphold its regulatory responsibilities.

Future Developments: Looking ahead to 2024, the CRA is preparing a procedural rule related to the Dispute Resolution Process to further streamline dispute handling within the telecommunications sector. With the new Postal Law now in effect, the development of secondary legislation is anticipated to provide detailed guidance on the law's implementation.

CRA Financial Performance

CRA's total revenues in 2023 were QAR 460,301,192.15, representing year-on-year growth of -3.0%. The percentage contribution by revenue source was as follows.

Revenue source	2022	2023
License & Industry Fees	84.70%	85.53%
Spectrum	10.92%	11.19%
Numbering	2.68%	3.04%
Financial Penalties	1.44%	0%
Domain Related	0.27%	0.24%
Total revenue (QAR):	476,534,822.88	460,301,192.15

Spectrum Management and Allocation

Through 2023, CRA continued to support major events by assigning frequencies and authorising radio equipment, utilising a tailored 'Spectrum Applications Portal' for each event to streamline the application process. Key events supported included the Formula 1 Qatar Airways Qatar Grand Prix 2023, the 2023 MotoGP Qatar Airways Grand Prix of Qatar, the AFC Asian Cup™ Qatar 2023, and the upcoming World Aquatics Championships Doha 2024, and 2024 FIA World Endurance Championship.



A significant regulatory development was the publication of the Spectrum Plan for the AFC Asian Cup™ Qatar 2023, outlining procedures for radio spectrum authorisation, equipment usage, and mechanisms for spectrum management and monitoring to prevent interference or unauthorised use during the event.

CRA renewed temporary additional IMT assigned spectrum for Mobile Service Providers for another three years, indicating an ongoing commitment to expanding bandwidth allocations. Specifically, the 700 MHz band, 3500 MHz band, and 26 GHz band are now dedicated to 5G technology, marking a significant step towards enhancing Qatar's digital infrastructure.

Notable advancements in spectrum management included the publication of the Spectrum Management Report for the FIFA World Cup Qatar 2022 on the ITU website, and preparations for CPM2-23, WRC-23, RA-23, and CPM1-27. Stakeholder engagements such as participation in the S'hail Exhibition and GCC and ASMG meetings for WRC-23 preparations highlighted CRA's collaborative efforts.

2023 also saw the adoption of new technologies reliant on spectrum, notably through the "Policy Statement on Private Mobile Networks Using 5G Technology," encouraging enterprises to utilise public mobile networks or, in exceptional cases, apply for spectrum licences for private 5G networks.

Looking beyond 2023, CRA plans to update the National Frequency Allocation Plan (NFAP), the Class License for Short Range Devices (SRDs), develop the Class License for Amateur Hunting Radio Devices, and revise the Spectrum Fees Regulations. These plans aim to further enhance spectrum allocation and management to support Qatar's evolving telecommunications landscape.

Key spectrum metrics

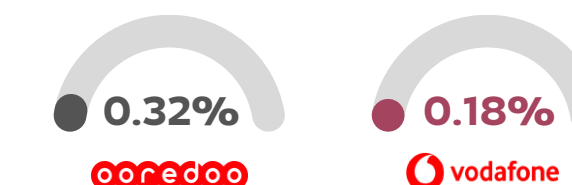
Frequencies	5,241
Licences Issued	1,281
Licences Amended	117
Licences Cancelled	120
Licences Renewed	4,479
Temporary Licences	109
Equipment Registration (Deployment) Requests	176
No. of Licensed Equipment Registered (Deployed)	1,919
Type Approval of Radio and Telecom Terminal Equipment (RTTE)	1,951
Import Authorisation Issued	224
Import Authorisation Amended	643
Import Authorisation Cancelled	95
Import Authorisation Renewed	640
Customs Clearance	19,540
Monitoring Investigation and Settled	66
Other Cases Interference (e.g. Special Events)	6
Radio Frequency Emission	4
Quality of Service (QoS) Investigation	4

In August 2023, CRA published the CRA Network Audit – 2022 QoS Measurements Summary which provided a comparison of the performance of Vodafone Qatar and Ooredoo across various key metrics:

Call completion rate:



Unsuccessful call attempt rate:



Average call setup time:



Webpage download success rate:



SMS successful completion rate (Own Network):



SMS successful completion rate (Cross Network):



SMS Avg end to end transfer time (Own Network):



SMS Avg end to end transfer time (Cross Network):



Throughout the year, CRA also focused on regular Quality of Service reports submitted by service providers as per their licensing requirements, ensuring compliance and enhancing service standards.

Fostering Competition

CRA has a strategic objective to foster a competitive and innovative telecommunications sector, a cornerstone in supporting the nation's broader development ambitions.

CRA Policy on Private 5G Networks: The Communications Regulatory Authority (CRA) of Qatar issued a policy encouraging the use of public 5G networks by enterprises, with a provision for exceptional cases where enterprises can apply for a spectrum license to operate private 5G networks. This approach supports specialised connectivity needs, fostering market innovation and competitiveness. It offers a clear regulatory framework that attracts investment while enhancing service quality in public networks.

Network Neutrality: On 14 December 2023, CRA introduced guidelines to enhance network neutrality, promoting fair access to digital media for all market participants without stifling their development. This framework supports CRA's strategy by boosting market competitiveness, attracting foreign investment, and advancing national socio-economic development through enhanced digital media adoption and transformation.

Quality of Service (QoS) Regulatory Framework: Effective from 27 March 2023, this framework mandates service providers to improve the quality of public telecommunications services. It includes bi-annual performance reporting to ensure compliance with enhanced QoS indicators, fostering competition among providers, increasing transparency, and empowering consumers to make informed choices based on service quality.

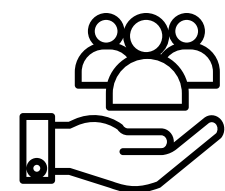
Updated National Frequency Allocation Plan: Following the World Radiocommunication Conference, Qatar updated its National Frequency Allocation Plan to align with international standards, ensuring global interoperability and minimising cross-border interference. This update optimises spectrum use, enabling the deployment of advanced technologies like 5G and IoT, and spurring innovation and competitiveness within the telecom sector.

CLS Reference Offer: CRA is midway through delivering on a core task to develop a Reference Offer for CLS, which involved comprehensive market assessment and development of a targeted regulatory approach, and has been successfully delivered. Currently, CRA is further focused on the development of the Reference Offer, which will be publicly consulted with the relevant stakeholders. This phase aims to present the findings of the assessment on access to international connectivity through Submarine Cable Landing Stations and to consult on the detailed Reference Offer for Access to Submarine Cable Landing Station International Connectivity Services that will be required from all licensed owners of SCLS that provide access to international connectivity services.

Data Centre Connectivity: CRA conducted comprehensive surveys and benchmarks focused on both the demand and supply sides of the data centre market within Qatar. This initiative also included benchmarking against relevant jurisdictions to ensure that Qatar's data centre capabilities remain competitive and capable of meeting both current and future demands.

CRA Work Plan regarding the update of the Applicable Regulatory Framework for the telecommunications sector

This CRA Work Plan has been developed to track ongoing progress and update the ex-ante telecommunications regulatory framework with a target timeline until 2024. The Work Plan currently lists a total of 50 tasks, which are divided by core business unit as follows:



15

Consumer Affairs



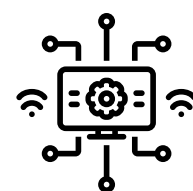
8

Regulatory Affairs and Competition



7

Spectrum Management



20

Technical Affairs

Progress through 2023 has been significant. The majority of tasks are now initiated and currently under implementation, with 32% of all tasks already completed. 4 of these tasks were completed during 2023.

11 ongoing tasks are in the final phase of delivery - and are on track to be completed by mid-2024.

Deliverables completed in 2023

Standard on Inbuilding Wiring

CRA published a common and neutral standard for in-building wiring to facilitate the rollout of FTTx networks in property developments for the benefit of all stakeholder groups.

Standards for Government Telecom Duct Infrastructure Design and Construction

CRA issued the Regulation for the Standards for Government Telecom Duct Infrastructure Design and Construction, with the aim of establishing and setting common standards and requirements that fit Qatar's government telecom duct infrastructure needs and requirements.

National Blockchain Blueprint for Qatar

CRA established a blueprint for blockchain at the national level, outlining its key elements: regulatory foundation, adoption foundation, and innovation. The blueprint identifies key blockchain requirements, and provides a set of recommendations for building an efficient regulatory framework, establishing a solid governmental approach, and fostering a supportive environment for creativity.

Quality of Service Regulatory Framework

CRA has formulated a Quality of Service Regulatory Framework to raise the minimum requirements for the Key Performance Indicators, support competition, ensure transparency, and give consumers the opportunity to choose the appropriate Service Provider for their needs. The regulation includes a monitoring and audit process to achieve this objective. Service Providers will submit periodic/bi-annual reports to reflect the QoS performance.

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Regulatory Framework Updates

08
JAN '23

Standards on Inbuilding Wiring



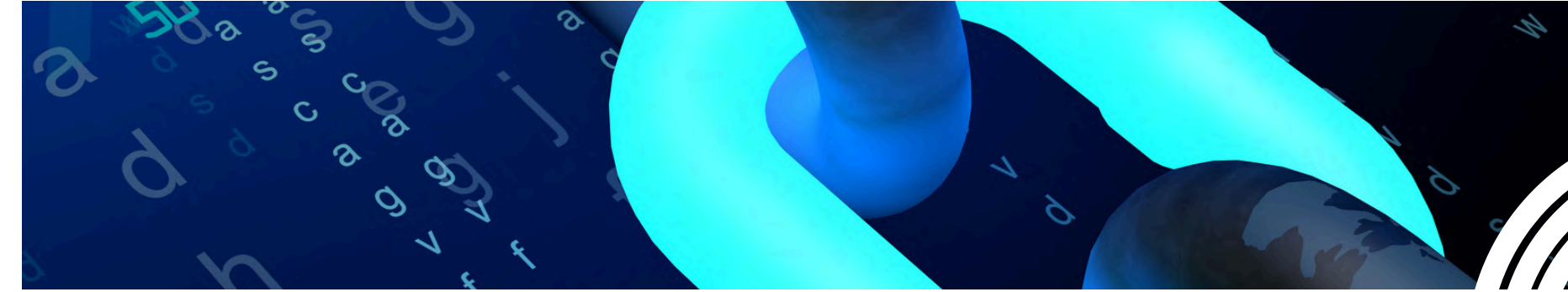
The new "Standard on Inbuilding Wiring" addresses the essential role of in-building wiring within telecommunication infrastructure, essential for delivering high-quality services in residential, business, and commercial settings.

Aimed at adapting to the ICT sector's rapid evolution and the increased demand for advanced telecommunication services, this standard seeks to foster fair competition among service providers by establishing a unified framework for in-building wiring that supports fibre network deployment and adheres to international best practices. It encourages the sharing of infrastructure and efficient space use, recommending modern technologies like ducts and Category-6 cables to future-proof networks.

Targeted at professionals in wiring design and network engineering, the document outlines network demarcation points and stakeholder responsibilities, emphasising the need for regular updates and stakeholder collaboration.

16
MAR '23

CRA National Blockchain Blueprint



The "National Blockchain Blueprint for Qatar," created in March 2023 by CRA, Hamad Bin Khalifa University, and Qatar University, sets forth a strategic vision for integrating blockchain technology within Qatar's IT sector. This initiative aligns with the objectives of the Qatar National Vision 2030, aiming to foster an innovative and expanding technological landscape. The blueprint highlights blockchain's transformative potential, laying out essential requirements and recommendations for establishing a robust regulatory foundation, government strategies towards blockchain, and an ecosystem conducive to creativity and innovation.

It advocates for a holistic approach to support national aspirations, encouraging blockchain's adoption to spur economic growth and transition to a knowledge-based economy. The document calls for a strong regulatory framework to attract investment and nurture a vibrant industry, detailing necessary support mechanisms for startups and technological ventures. It also explores blockchain's potential across various sectors, pinpointing needs and challenges such as regulation, infrastructure, and public awareness. The blueprint concludes that blockchain implementation can significantly contribute to Qatar's human and economic growth, driving job creation, skill enhancement, and economic diversification, thereby boosting Qatar's global competitiveness.

27
MAR '23

Policy on Quality of Retail Telecommunications Services



CRA prepared the "Policy on Quality of Retail Communication Services for Public Consultation" to establish a framework for Quality of Service (QoS) in the telecommunications sector, aligning with the Qatar National Vision 2030 and the National Broadband Plan.

This policy sets out to define QoS standards and monitor service provider compliance to transform Qatar into a smart, connected nation with top-tier communication services. Stakeholders are encouraged to provide feedback.

The policy introduces Key Performance Indicators (KPIs) to measure the Quality of Experience (QoE) from the consumer perspective, covering various service layers from network availability to internet service quality. Methods including field tests, service provider reports, and customer feedback will be employed to ensure compliance, aiming to enhance Qatar's telecommunications infrastructure to support the country's development.

01
MAY '23

Quality of Service Regulatory Framework



CRA introduced a new Quality of Service (QoS) Regulatory Framework to improve public telecommunications services across the country. This framework mandates licensed telecom service providers in Qatar to adhere to newly established Key Performance Indicators (KPIs), covering aspects such as network availability, call setup success rate, voice quality, and call completion ratio for fixed, mobile, and broadband services.

Amel Salem al-Hanawi, the director of the Consumer Affairs Department at CRA, highlighted that this initiative is part of CRA's commitment to ensure consumers in Qatar can access advanced and high-quality telecom services. The framework includes conducting annual QoS audits, with results published on CRA's website to maintain transparency.

Service providers are required to submit regular QoS reports, aligning with the framework's standards. This initiative is set to benefit consumers by enabling informed decisions, stimulating competition among providers to offer high-quality services at competitive prices, and contributing to the growth of Qatar's telecom sector.

13
JUNE '23

Maritime Radio Station Licensing for Small Ships



CRA expanded its services to include maritime radio station licensing for small ships in Al Khor and Al Ruwais Cities, facilitating the issuance, renewal, amendment, and cancellation of licences. This initiative aims to serve the residents of Qatar's northern cities by offering a local option for managing maritime radio licensing requirements, eliminating the need to visit CRA's headquarters in Doha.

Service availability is scheduled at the Al Khor City office on Sundays, Mondays, Wednesdays, and Thursdays, and at the Al Ruwais City office on Tuesdays, operating from 8:00 AM to 2:00 PM. The maritime radio station licence, crucial for safety, allows the use of Very High Frequency (VHF) band systems for ship communication and the Automatic Identification System (AIS) for ship tracking, enhancing maritime safety and security by ensuring effective ship-to-ship and ship-to-shore communication and providing essential tracking and identification capabilities.

26
NOV '23

Policy on the Establishment of Private Mobile Networks Using 5G Technology



The President of the CRA issued Decision No. 53 of 2023, introducing a policy on the establishment of private mobile networks using 5G technology. This decision is the outcome of a public consultation held in 2022, gathering input from telecom service providers, ICT equipment vendors, government bodies, and large enterprises in Qatar.

The policy encourages enterprises to utilise the 5G services offered by public mobile operators but also outlines conditions under which CRA would consider granting a spectrum licence for enterprises to operate their own 5G private mobile networks. These conditions include demonstrating the insufficiency of public operators to meet their requirements, alongside a comparison of prices with regional and international standards.

Applications for a spectrum licence must specify the network's geographic scope, intended services, desired spectrum band, and bandwidth, with justifications for these selections. CRA's evaluation of applications will focus on national and public interest, aiming to regulate private 5G networks' implementation, ensure efficient radio spectrum use, and promote technological innovation within Qatar.

14
DEC '23

Public Consultation Guidelines for Network Neutrality



The "Public Consultation - Guidelines for Network Neutrality", issued on December 14, 2023, by CRA, presents a proposed framework for ensuring network neutrality in Qatar, aligning with the nation's digital transition goals and the Qatar National Vision 2030.

The document aims to engage various stakeholders, including ISPs, businesses, residential customers, digital media providers, and the IT sector, in a consultation process to define clear network neutrality guidelines.

These guidelines advocate for ISPs to treat all lawful internet traffic equally, promoting an open internet that encourages innovation, fair competition, and broad access to digital media.

The framework will ensure open access to digital content, enhance market competitiveness, and provide clear principles for network neutrality, positioning Qatar's digital sector as accessible and competitive to foreign investors.

20
DEC '23

Qatar - South Korea MOU Radio Spectrum Management



On December 20, 2023, Qatar and South Korea signed a Memorandum of Understanding (MOU) aimed at advancing radio spectrum management. This agreement, signed by Eng. Ahmad Abdulla AlMuslemani of Qatar's Communications Regulatory Authority (CRA) and Jeongsam Kim of South Korea's Central Radio Management Service (CRMS), signifies a commitment to cooperation in efficiently using radio frequencies and enhancing radio communication services quality.

The MOU highlights areas of collaboration such as adapting to the evolving radio spectrum environment, joint radio spectrum monitoring efforts, and the exchange of education and training to bolster human resources in this field. Additionally, it includes participation in conferences and the sharing of experiences in managing the radio spectrum for international events, facilitated by organisations like the International Telecommunication Union (ITU).

This partnership marks a significant step for CRA in fostering international collaboration, enriching expertise in radio spectrum management, and establishing itself as a significant contributor to global telecommunications discussions, promising mutual benefits for both Qatar and South Korea in terms of knowledge exchange and technical cooperation.

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**Stakeholder
Engagement**



23
JAN '23

4th Meeting of GCC Group in Charge of Preparing for the World Radiocommunication Conference 2023

CRA actively participated in the 4th meeting of the Cooperation Council for the Arab States of the Gulf (GCC) Group in charge of preparing for the World Radiocommunication Conference 2023 (WRC-23) in Riyadh, Saudi Arabia, from January 23-25, 2023, as part of the preparations for WRC-23 scheduled to take place in the United Arab Emirates.

During the meeting, the Group discussed several important issues related to radiocommunication, with the aim of harmonising stances and developing common views on the key issues before the official participation in the WRC-23.



30
JAN '23

ITU-T SG20 Meeting

CRA participated in Study Group 20 (SG20) of the Telecommunication Standardisation Sector within the International Telecommunication Union (ITU), which was held at the ITU headquarters in Geneva, Switzerland from January 30 - February 10, 2023.

During this meeting, CRA presented a paper titled "Protecting the Privacy of Internet of Things (IoT) Users" addressing the privacy challenges and risks in the IoT field and CRA's proposed actions, as well as exchanging views and experiences with the stakeholders and taking part in the key discussions to contribute to the development of international standards related to ICT.



19 FEB '23

Inaugural IIC MENA Chapter Event

On February 21, 2023, CRA hosted the inaugural International Institute of Communications (IIC) Middle East and North Africa (MENA) Chapter event in Doha, attended by His Excellency, senior representatives of regulators, policymakers, experts, and specialists in the ICT field from various countries of the MENA region.

The event aimed to address the ICT industry's pressing issues and challenges through presentations and discussions, fostering knowledge exchange among participants. For CRA, organising this event was a strategic initiative to lead ICT development discussions in the MENA region, thereby reinforcing its role in influencing the future direction of the industry.



20 FEB '23

30th Arab Spectrum Management Group Meeting

CRA participated in the 30th Arab Spectrum Management Group (ASMG) meeting, held by the Telecommunications and Digital Government Regulatory Authority (TDRA) in the United Arab Emirates (UAE) from February 20 to 23, 2023.

The meeting discussed several important issues related to radiocommunication, with the aim of harmonising stances and developing common views on the key issues before the official participation in the World Radiocommunication Conference 2023 (WRC-23), which will be held under the umbrella of the International Telecommunication Union (ITU) in the UAE from November 20 - December 15, 2023.



27 FEB '23 Mobile World Congress 2023 in Barcelona

CRA participated in the Mobile World Congress (MWC) 2023, the world's largest mobile industry gathering organised by the Global System for Mobile Communications Association (GSMA) in Barcelona, Spain, under the theme "Velocity". The event explored 5G technology acceleration, Reality+, OpenNet, Digital Everything, and FinTech. The congress hosted over 2,000 exhibitors and a Ministerial Programme that facilitated discussions among industry leaders, ministers, telecom regulators, data protection authorities, and international organisations representatives on crucial policy and regulatory issues.

CRA's strategic participation allowed it to engage with global counterparts, keeping abreast of the latest technologies, trends, and best practices in the field, which helps CRA to develop flexible regulatory instruments that can accommodate current and future technological developments, effectively regulating the ICT sector to support the achievement of Qatar National Vision 2030 goals.



05 MAR '23 Qatar ICT Forum 2023

The Qatar ICT Forum 2023, hosted by CRA on March 5, 2023, in Doha, brought together stakeholders within the Information and Communications Technology (ICT) ecosystem to deliberate on sector development and emergent digital trends.

Attended by His Excellency Mohammed bin Ali Al-Mannai, Minister of Communications and Information Technology, alongside high-ranking officials, local ICT experts, academia, government representatives, and global industry leaders, the forum aimed to foster discussions on technological innovation, digital economy growth, and perspectives on bridging the digital skills gap.

A highlight of the event was the presentation of CRA's 2022 ICT Sector Research Study findings and insights into the regional market outlook, and the publication of Qatar's ICT Landscape & Digital Trends Report, reinforcing CRA's commitment to promoting a competitive and innovative telecommunications sector in Qatar.



13 MAR '23 World Summit on the Information Society Forum 2023

CRA took an active role in the World Summit on the Information Society (WSIS) Forum 2023, which took place March 13-17, 2023, in Geneva, Switzerland. The Forum covered topics including bridging digital divides, building confidence and security in the use of Information and Communication Technologies (ICTs), digital economy and trade, digital governance and capacity building, and digital inclusion, as well as the role of ICT in implementing the SDGs.

During the Forum, CRA presented its plans for hosting the ITU Plenipotentiary Conference 2026 and highlighted Qatar's potential in the ICT field. At its exhibition booth, CRA showcased Qatar's achievements in the global ICT landscape and raised awareness about PP-26 and the important role it will play in shaping the future of the global ICT sector.



27 MAR '23 2nd Session of the 2023 Conference Preparatory Meeting for the World Radiocommunication Conference 2023

CRA was an active participant in the second session of the 2023 Conference Preparatory Meeting (CPM23-2) for the World Radiocommunication Conference 2023 (WRC-23) held in Geneva, Switzerland, from March 27 to April 6, 2023.

This involvement is a testament to CRA's commitment to contributing to the development of international radio regulations and engaging in pivotal discussions on the usage of the radio-frequency spectrum and satellite orbits.



01 MAY '23 Radio Spectrum Management and Monitoring Training Course

CRA participated in a spectrum management and monitoring training course in California, USA, from May 1-5, 2023. This event was a collaborative initiative between TCI International Inc. and the United States Telecommunications Training Institute (USTTI), focusing on the practical application of spectrum management and monitoring according to International Telecommunication Union (ITU) standards, addressing contemporary challenges in the field.

During this training, CRA presented Qatar's effective management and monitoring of the radio spectrum for the FIFA World Cup Qatar 2022™, detailing the successful strategies, preparation, operational rollout, and challenges faced during the event.



09 MAY '23 CRA shares FIFA expertise with France's National Frequency Agency

A virtual meeting between CRA and France's National Frequency Agency (Agence nationale des fréquences - ANFR) was conducted to exchange insights on spectrum management and monitoring, drawing on Qatar's experience during the FIFA World Cup Qatar 2022™.

The meeting aimed to support France's spectrum management preparations for the Paris 2024 Olympics. CRA presented a comprehensive overview of spectrum preparation and operational management strategies implemented during the World Cup – underscoring its leadership in spectrum management on a global scale and deepening collaborative ties with international counterparts.



22 MAY '23 RIPE 86 Meeting in the Netherlands on Internet Policy

CRA participated in the RIPE 86 meetings, held in Rotterdam, the Netherlands from May 22-26, 2023. RIPE meetings attract a global audience from the disciplines of Internet network operations and governance to deliberate on Internet policies and operational issues.

CRA's aim in the RIPE 86 meetings was to contribute to and gain insights from discussions on Internet policies. This underscores CRA's commitment to aligning Qatar's Internet policies with international standards, offering the opportunity to stay abreast of global Internet policy developments, network with peers worldwide, and shape policy discussions pertinent to Qatar, ensuring CRA remains adaptable and meets the dynamic needs of Internet users in Qatar while keeping pace with global technological progress.



05 JUNE '23 Global Symposium for Regulators 2023

CRA took part in GSR-23 from June 5-8, 2023, in Sharm El-Sheikh, Egypt. Organised by the ITU and the Government of Egypt, the symposium themed "Regulation for a Sustainable Digital Future," gathered industry leaders to discuss regulatory and policy issues such as digital transformation, resilient digital infrastructure, online child and youth safety, and the environmental impacts of digitalisation.

CRA actively engaged in various sessions, including high-level panels and roundtable discussions, to share insights and explore best practices in digital regulation. In preparation for GSR-23, CRA contributed to drafting best practice guidelines, emphasising regulatory incentives for a sustainable digital future and showcasing Qatar's expertise in developing digital infrastructure, particularly in underserved areas. Additionally, CRA participated in the Network of Women (NoW) event as a member of the Steering Committee of NoW in the Arab region, further highlighting its commitment to fostering international collaboration and progress in the ICT sector.



12
JUNE '23

Ookla Telecommunications Regulatory Summit MENA

CRA participated in Ookla's Second Annual MENA Telecommunications Regulatory Summit, a pivotal event, uniting policymakers, regulatory bodies, and industry specialists to discuss the telecommunications sector's future in the Middle East and North Africa (MENA) region.

The summit featured a broad assembly of participants from government, regulatory agencies, telecom operators, and tech companies, focusing on discussions about 5G deployment, digital transformation, regulatory frameworks, and enhancing regional connectivity and digital inclusion.



14
JUNE '23

ICANN77 Policy Forum

CRA participated in the ICANN77 Policy Forum, held by the Internet Corporation for Assigned Names and Numbers (ICANN) in Washington, D.C., from June 12-15, 2023. The Forum brought together multi-stakeholders; governments, businesses, civil society, and technical experts from around the world to discuss critical issues related to the management and evolution of the Internet's Domain Name System (DNS) and participate in policy-making that governs the technical aspects of the Internet.

The Forum provided a valuable opportunity for fostering dialogue, exchanging perspectives, and exploring collaborative opportunities with stakeholders from around the world. Moreover, through its active participation, CRA stays informed about the latest related international developments, trends, and policies, which contributes to promoting the growth of Qatari domain names and innovation in Qatar's digital landscape.



19 JUNE '23 22nd Meeting of the GCC Roaming Working Group

Qatar hosted the 22nd meeting of the Cooperation Council for the Arab States of the Gulf (GCC) Roaming Working Group at the Waldorf Astoria Lusail Hotel from June 19-20, 2023, focusing on international roaming services. The meeting brought together representatives from GCC member states and the Secretariat General of the GCC to discuss roaming service prices and their impact, following the enactment of previous price caps.

A benchmarking study conducted with GCC telecommunications regulatory bodies was presented, aiming to inform future roaming service pricing strategies. The meeting also reviewed international practices in roaming service agreements and the regulation of roaming service prices among GCC states, evaluating potential future directions.



20 JUNE '23 First Meeting of the Temporary Working Group to Study Data Flow and Peering between the GCC States

Qatar, represented by CRA, hosted the first meeting of the Temporary Working Group to Study Data Flow and Peering among GCC states at the Waldorf Astoria Lusail Hotel on June 20-21, 2023.

The meeting aimed to enhance data flow, strengthen network interconnections, and improve the reliability of regional networks across the GCC. Discussions covered the review of GCC telecommunications legislation, the current dynamics of data flow and peering, and addressed existing challenges, with Qatar putting forward its proposals and recommendations.



05 SEPT '23 | Suhail Exhibition

CRA participated in the 7th edition of the "S'hail - Katara International Hunting and Falcons Exhibition", organised by the Cultural Village Foundation (Katara) from 5 - 9 September 2023 in Katara.

The event served as a platform for CRA to enhance public awareness about Qatar's regulatory framework concerning hunting radio devices and wireless device usage. CRA focused on educating falconry and hunting enthusiasts about licensing procedures for hunting radio devices and other wireless hunting equipment, underlining its role in regulating the radio spectrum in Qatar.



05 OCT '23 | Future Networked Car Symposium 2023 in Qatar

On October 6, 2023, Qatar hosted the "Future Networked Car Symposium 2023" at the Doha Exhibition & Convention Center (DECC), co-organised by the International Telecommunication Union (ITU) and the United Nations Economic Commission for Europe (UNECE), under the platinum sponsorship of CRA.

The symposium facilitated knowledge sharing and collaboration between the automotive and telecommunication industries within the GCC region and beyond. It showcased innovative technologies and solutions for automated vehicles, connectivity, and cybersecurity, highlighting challenges and opportunities for networked cars in the GCC – as well as best practices required to enable the safety of networked cars in the GCC and the regulatory and policy frameworks required to support their deployment.



15
NOV '23

CRA Participation in GIS Technology Day 2023

The GIS (Geographic Information System) Technology Day 2023 was an annual gathering hosted by The Center for GIS at the Ministry Municipality Qatar, bringing together over 200 GIS professionals from Ministries, Public Sector Organisations, and Universities to explore the latest advancements in geospatial intelligence.

CRA was invited to present its GIS solution (Duct Management System), explain how the system was customised using the advanced ESRI ArcGIS suite of products and highlight the custom features that helped CRA manage passive government telecom duct infrastructure access regulations with telecom service providers in the state of Qatar.

The GIS community and judges commended CRA's commitment to providing an effective means for managing government telecom duct assets and awarded it the 3rd prize for its GIS presentation.



20
NOV '23

World Radiocommunication Conference 2023

CRA participated in WRC-23, a pivotal event dedicated to the examination and revision of international Radio Regulations that govern the radio-frequency spectrum and satellite orbits. The Qatar delegation at WRC-23, led by the CRA President and comprising experts from CRA alongside radio spectrum specialists from the government and private sectors, discussed crucial regulatory frameworks for satellites, earth stations, satellite technologies for broadband services, and space research.

At the event, the CRA booth highlighted Qatar's readiness to host the ITU Plenipotentiary Conference 2026 (PP-26) and demonstrated the nation's advanced ICT sector. Post-WRC, CRA will release Qatar's National Frequency Allocation Plan (NFAP), after a transparent consultation process, reflecting WRC's outcomes and aligning with Qatar's overarching needs in various sectors. This plan will play a pivotal role in shaping Qatar's spectrum governance.

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**International Relations
and Industry Collaboration**



During 2023, CRA was an active participant in the global telecommunications and information technology arenas through meaningful contributions and engagement with various international forums and collaborative projects.

Smart City Expo Doha 2023

CRA's involvement in IT-focused forums, such as the Smart City Expo Doha 2023, underscored its commitment to advancing smart city initiatives and leveraging technology to enhance urban living in Qatar.

ITU IDI Index 2023

CRA played a pivotal role in the International Telecommunication Union's (ITU) development of the new ICT Development Index (IDI) for 2023. The Regulatory Affairs and Market Data Study (MDS) section participated in multiple ITU forums, conferences, and expert group meetings, contributing significantly to discussions on indicators for measuring fixed broadband (FBB) penetration.

MoU with South Korea

CRA, on behalf of the State of Qatar, entered into a Memorandum of Understanding with the Republic of Korea's Central Radio Management Service (CRMS) focused on the development of radio spectrum management, the importance of cooperation in the efficient use of radio frequencies and the enhancement of radio communication services. The agreement includes collaboration in adapting to changes in the radio spectrum environment, joint efforts in radio spectrum monitoring (including satellite radio monitoring), and the sharing of education and training experiences to bolster human resources in this field – as well as joint participation in conferences and the exchange of knowledge at events organised by the ITU or other international entities.





Global launch of the 'Future Readiness Economic Index' (FREI) 2023 Report

The CRA session at the 21st Doha Forum was the venue for the global unveiling of the third edition of the 'Future Readiness Economic Index (FREI) 2023 Report,' emphasising the critical role of digital policies in future readiness. Attendees included the Minister of Communications and Information Technology, HE Mr. Mohammed bin Ali bin Mohammed Al Mannai and the new President of the CRA, Eng. Ahmad Abdulla AlMuslemani, who participated in the panel discussion.

This report, a collaborative effort between Google Cloud, the Descartes Institute for the Future, and CRA, evaluated the digital transformation readiness of 124 countries based on their policies and regulations. A panel session, 'Building a Digital Economy: Is Your Country Future-Ready?' featured discussions by global leaders on the integration of traditional growth-promoting measures with forward-looking digital initiatives, the impetus for countries to shape their digital future, the link between future readiness and digital technology opportunities, and the crucial role of multilateralism in digital technology. Qatar's notable performance in the 'Digital Policies' sub-pillar of the FREI 2023 - thanks to a clear vision and detailed roadmaps - was commended, aligning with its Digital Agenda 2030 and underscoring the Middle East's potential as a future-ready region.

The report advocates for global cooperation in digital transformation as a necessity rather than a competition, emphasising investments in infrastructure, human capital, digital policies, and government services. The FREI 2023's launch at the Doha Forum highlights the pivotal role of digital policies in shaping the economic futures of nations. Accompanied by an interactive online tool, the report provides valuable insights into digital readiness. Additionally, Qatar's selection to host the Web Summit from 2024 to 2028 showcases its dedication to technological innovation and economic diversification, aligning with its strategic digital and economic goals.

Global Policy Contributions

Qatar's contributions to the ITU IDI Index and discussions on the FBB penetration indicator were recognised as valuable inputs to global telecommunications policies, reflecting Qatar's proactive stance on shaping the future of global ICT development.

Joint Initiatives and Achievements

CRA's engagement with the ITU on the IDI Index 2023 led to Qatar achieving its highest-ever score of 97.3, ranking it third worldwide. This milestone not only highlights Qatar's advanced ICT infrastructure but also its commitment to continuous improvement in the telecommunications sector.

Cross-Border Regulatory Coordination

CRA engaged in several cross-border regulatory coordination activities, notably within the Arab Indicator Group, focusing on mutual interests and common goals. These efforts facilitated a unified approach among Arab states regarding the ITU IDI Index, culminating in the GCC having four nations ranked among the top 10 in the index.

Capacity Building and Training

A notable capacity-building initiative was the collaboration with the United Nations University Operating Unit on Policy-Driven Electronic Governance (UNU EGOV) in Portugal. Aimed at enhancing Qatar's e-government services and e-participation activities, this program involved comprehensive workshops both internationally and in Doha, attended by various government entities. The goal was to elevate Qatar's standing in the UN DESA EGDI index, an internationally recognised benchmark for e-government services.

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CRA Announcements

Announcements

02 MAY '23 CRA Launches a New Version of "Arsel" Mobile App

The Communications Regulatory Authority (CRA) launched an updated version of the "Arsel" mobile application in 2023, designed to enhance the user experience with a more mobile-friendly interface and improved services. The app facilitates the submission of complaints and inquiries related to telecom services, ".qa" domain name registration, and radio spectrum services, alongside providing updates and follow-ups on user submissions. A key addition is access to the e-Spectrum Services Portal within the app, enabling users to handle frequency licences, such as applying for new licences, renewals, modifications, or cancellations, and to monitor application statuses and make payments.

12 NOV '23 CRA Encourages Telecom Consumers to Experience the New Digital Registration Service

The Communications Regulatory Authority (CRA) has made strides in advancing Qatar's Information and Communication Technology (ICT) sector with the launch of a new digital service developed in collaboration with Ooredoo Qatar and Vodafone Qatar. This initiative is a testament to CRA's commitment to fostering an inclusive, multi-stakeholder framework that not only enhances the telecom experience for consumers but also serves the interests of telecom service providers and bolsters the national economy.

By simplifying the process for telecom consumers in Qatar to purchase new SIM cards online, the service leverages the latest in Artificial Intelligence (AI) and facial recognition technologies for identity verification. It allows for streamlined digital registration using Qatar ID for residents or passports for visitors, thereby eliminating the need for customers to visit physical outlets. Available for both prepaid and postpaid services, including physical SIM cards and e-SIMs, with convenient delivery options for physical SIMs, this innovative service represents a significant leap forward in the telecom sector.

This framework and service are the result of CRA's keen interest in developing Qatar's ICT sector to reflect positively on consumers, telecom service providers, and the national economy at large. It underscores the authority's role in regulating and enabling the growth and evolution of the telecommunications landscape in Qatar.

20 NOV '23 Child Safety Campaign

The Child Safety Campaign, initiated to enhance the safety of children using mobile phones, provides a comprehensive set of guidelines aimed at both children and their guardians. The campaign emphasises the importance of using strong passwords, monitoring app usage, customising privacy settings, and educating children on the dangers of sharing personal information with strangers or opening links from unknown sources. It also advises caution in sharing content on social media platforms. Targeted at young mobile phone users and their guardians, the campaign seeks to raise awareness about the potential risks associated with mobile phone use and offers practical solutions to mitigate these risks.

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Consumer Satisfaction

CRA Consumer Satisfaction Survey Report 2022

Internet and telephone services

Overall satisfaction with telecommunication services in Qatar is high, with 79% of respondents rating it between '8' and '10' on an 11-point scale.

Customer satisfaction levels:

82%	83%	78%	74%
Mobile voice services	Fixed voice services	Fixed internet	Mobile internet

Satisfaction levels for service availability and quality/clarity of fixed services:

86%	83%	80%
Voice services	Internet services	fixed voice quality/clarity

Satisfaction levels for fixed and mobile services:

70%	59%	80%
Fixed services	Mobile services	Mobile voice network coverage

Consumers exhibit higher satisfaction levels for voice services over internet services. Fixed internet is perceived more favourably than mobile internet in terms of speed and quality of video access and streaming.

Value perceptions of telecommunication services are rated as average, with less than two-thirds finding them 'good value.' Specific services such as international calls, international roaming charges, and data charges for both fixed and mobile services are considered 'good value' by less than half of the users.

Plan and tariffs

Consumers in Qatar show higher satisfaction with fixed service rate plans and tariffs than with mobile services, with over 70% highly satisfied except for mobile internet price transparency and plan variety (68%).

Customer satisfaction levels with the variety of packages offered:

76%	71%
Fixed services	Mobile services

36% of telecom customers are aware of the requirement for service providers to publish tariffs.

Preferred channels for receiving tariff information are:

35%	35%	46%	62%
Retail stores	Social media	SMS with tariff links	Advertisements

High satisfaction levels are reported in the initial stages of purchasing telecommunication services, with fixed services slightly preferred over mobile services.

Satisfaction rates:

76% For mobile internet	80% For fixed internet	78% For Mobile voice	82% For purchasing fixed voice services
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Activation time satisfaction is higher for fixed internet (85%) compared to mobile internet (78%), with fixed services generally preferred over mobile services for activation time.

Mobile voice and internet prepaid users report high satisfaction with recharge options:

77% For voice	72% For Internet
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Mobile voice and internet prepaid users report lower satisfaction with recharge validity:

57% For voice	58% For Internet
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The majority prefer receiving telecommunication bills via SMS (77%), with service provider apps and email following.

Online bill payment methods are favoured with:

64% preferring the service provider app	45% preferring self-service machines	32% preferring retail store payments	42% preferring online payment via provider's website or bank transfer
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Satisfaction rates with regularity, ease of understanding and accuracy of internet bills:

80% Mobile internet services	78% Mobile voice services	80% Fixed services
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24% of respondents interacted with their service provider's customer service in the past three months, with 68% rating their satisfaction as '8' to '10'. 60% of respondents contacted customer service via phone.

Satisfaction rates with customer service via phone calls:

67% Overall customer satisfaction rate	73% Staff friendliness	68% Helpful Information	53% Timeliness of response
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Satisfaction rates with customer service at retail stores:

75% Overall customer satisfaction rate	78% Staff friendliness	77% Helpful Information	53% Waiting time
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Complaint resolution mechanism

Only 10% of surveyed consumers have lodged complaints with their telecommunication service provider in the past twelve months. Most complaints were related to mobile services, particularly mobile internet (42%) and mobile voice (31%). Complaints about fixed services were less common, with 25% related to fixed internet and 2% to fixed voice. Mobile voice complaints mainly focused on voice quality, billing, disconnection, and network coverage. Mobile internet complaints were primarily about network coverage, disconnection, and billing. For fixed internet services, disconnection and network coverage were the main reasons for complaints. Overall, customers who complained expressed moderate satisfaction with the complaint resolution process, with the highest satisfaction for the friendliness of the personnel and the lowest satisfaction for the time taken to resolve the issue.

Perceptions of CRA

Awareness of CRA among telecom consumers in Qatar is low, with only 25% of respondents being aware of CRA when prompted. The highest awareness levels are for CRA's role in protecting consumers from misleading and unfair practices (68%) and managing the complaint escalation process (66%). 60% of respondents aware of CRA also know about its roles in setting quality-of-service standards, monitoring compliance, ensuring a competitive and advanced telecommunications market, efficient resource management, and regulating the telecommunications market in Qatar. However, complaint escalation to CRA is minimal, with only 2% of respondents aware of the process having raised a complaint to CRA.

Consumer rights protection

Overall, the majority of surveyed respondents in Qatar (91%) do not feel that telecommunication service providers engage in misleading advertising. Only 9% claim to have encountered misleading advertisements, with half of them attributing these to Ooredoo Qatar Q.P.S.C. In contrast, 18% mention Vodafone Qatar P.Q.S.C as having misleading advertisements, and 31% believe both providers engage in such practices. Regarding satisfaction with telecommunication advertising factors, 70% express satisfaction with the clarity of advertising and communication, 67% with the ability to opt out of promotional messages, and 64% with reduced spamming and unwanted promotions.

Consumer perceptions of telecom market competitiveness

51% of respondents in Qatar feel the telecommunication market has sufficient competition, offering a good variety of products and services. 95% have not switched service providers; for the 5% who did, the main reasons were high prices and charges (32%) and dissatisfaction with offers/packages (25%).

Mobile number portability is recognised by 68% of respondents, compared to 50% for fixed number portability. Of those aware of number portability, 7% have utilised mobile number portability, while 2% have used fixed number portability. Satisfaction among mobile number portability users is high, with 74% rating it '8-10', compared to 67% satisfaction among fixed number portability users.

COVID-19 Pandemic: Impact On Consumer Experience

Only 12% of respondents observed changes in telecommunication services due to the COVID-19 pandemic, noting impacts on network performance, offer variety, prices, promotions, and service quality, alongside increased mobile and internet usage.

Satisfaction rates:

52%

perceived the overall performance of service providers during the pandemic as good or excellent.

13%

changed their telecommunication usage habits, mainly increasing both internet and voice services usage.

A notable proportion of respondents reported perceived improvements in service quality during the pandemic:

30%

Mobile voice

26%

Mobile internet

21%

Fixed internet

17%

Fixed voice

Despite some changes, most respondents believe the overall quality and value for money of telecommunication services have remained consistent since the pandemic.

Communications Regulatory Authority
State of Qatar

هيئة تنظيم الاتصالات
دولة قطر

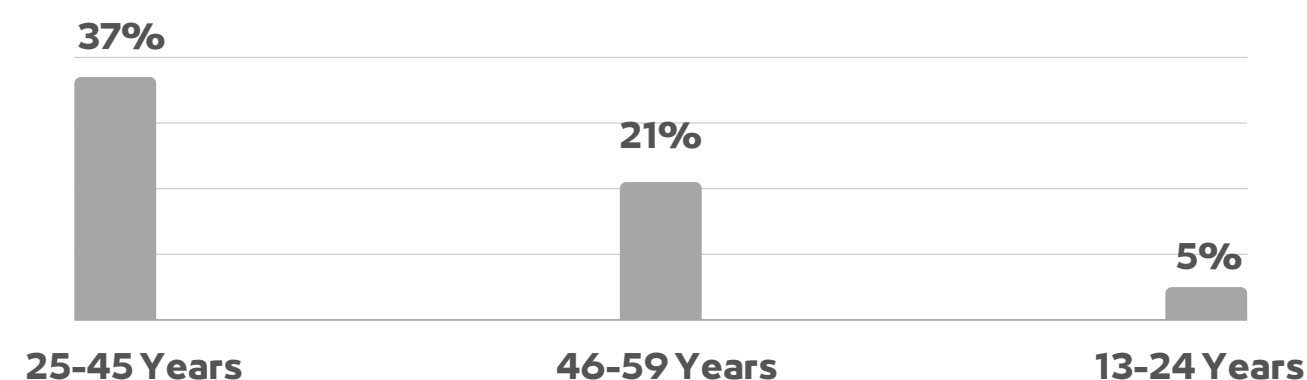
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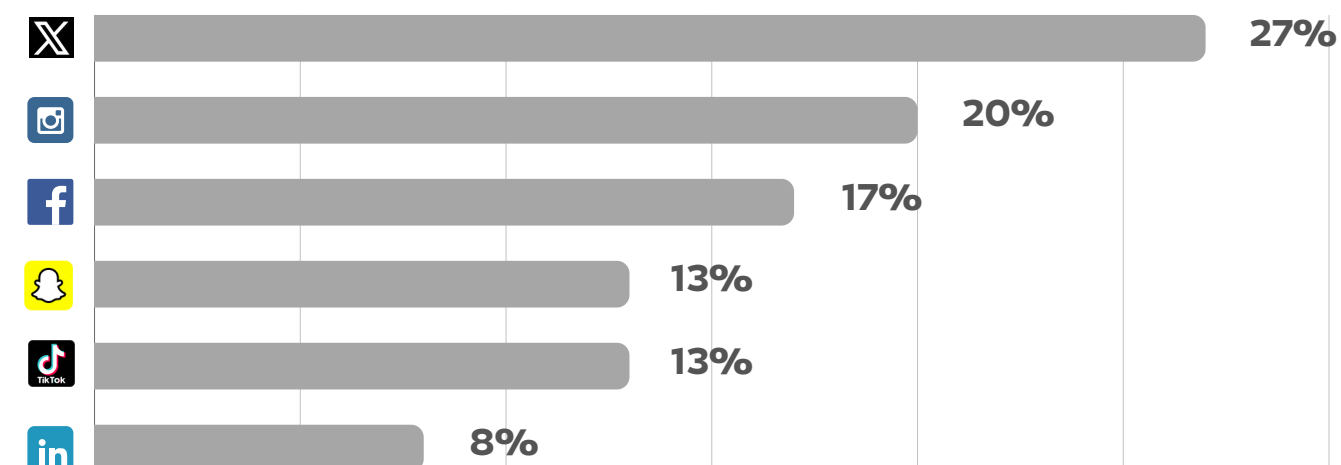
**Consumer Attitudes
to Social Media**

The Communications Regulatory Authority (CRA) conducted a bilingual social media survey from August 20 to September 7, 2023, to gather telecom consumers' feedback on social media safety and data security. The survey, visited by 7,220 people, received 135 completed responses. 98% of respondents used social media daily. Key findings from the survey include:

Age Demographics:



Social Media Usage:



Password Security:

76% did not use the same password across all their social media accounts.

Precautionary Measures:

75% of respondents took steps to protect themselves on social media
25% enabled two-factor authentication - the most common precaution.

Sharing Personal Information:

17% of respondents often shared personal information.
35% of respondents rarely shared personal information.
25% of respondents never shared such information on social media.

Awareness of Privacy Settings:

42% were fully aware of privacy settings on their platforms.
41% were somewhat aware of privacy settings on their platforms.
16% were not very aware of privacy settings on their platforms.
1% were completely unaware of privacy settings on their platforms.

Updating Privacy Settings:

40% occasionally updated their privacy settings.
35% rarely updated their privacy settings.
18% regularly updated their privacy settings.
7% never updated their privacy settings.

Accepting Friend Requests:

50% of the respondents never accepted friend/follower requests from strangers.
44% sometimes accepted friend/follower requests from strangers.
5% always accepted friend/follower requests from strangers.

Responding to Links and Spam:

64% deleted messages containing links from unknown senders.
53% reported or blocked senders of spam messages.

Privacy Issues Encountered:

35% faced issues related to scams and fraud.
17% encountered viruses and malware.
14% experienced hacking and identity theft.
7% were affected by cyberbullying.
13% experienced unwanted ads or data leaks.

ANNUAL REPORT



**Sector In Focus -
Postal Services**

New Postal Services Legislation

The new Postal Services Law in Qatar decreed by His Highness The Amir Sheikh Tamim bin Hamad Al Thani in September 2023 (Law No. (15) of 2023) represents a significant advance towards realising the Qatar National Vision 2030 by shifting from an oil-based to a knowledge-based economy.

This legislation is designed to reflect global technological progress and legislative advancements, drawing upon international trade agreements and the Universal Postal Union's recommendations. It aims to bolster e-commerce and digital transformation, thereby enhancing competitiveness, improving services, and attracting investments. The law positions CRA as a crucial entity for regulating and supervising the postal sector, enforcing licensing regulations for mail couriers, and safeguarding public interests. It mandates that all mail couriers in Qatar obtain a license, setting the stage for comprehensive and exclusive mail services within the country.

The new law sets the regulatory framework for the postal sector, overseen by the Ministry of Communications and Information Technology and the Communications Regulatory Authority (CRA), to stimulate investment, ensure policy compliance, and protect consumer rights. The law mandates licensing for all postal service providers and outlines the services of the public postal operator, including the sale of Qatar-themed postage stamps. It aims to enhance the postal sector's governance, competitiveness, and service quality, updating existing legislation in line with Qatar's economic growth and development goals.



Ministry's Role

Set sector strategy and align postal services with the latest global standards. Stimulate competition, attract investment and identify the market structure of the postal service.



CRA Oversight

Regulate and monitor postal sector compliance with the law. Establish strong policies for consumer protection



Licensing

Issue licenses to service providers within six months of the law's enforcement, as outlined by CRA. All postal service providers, including national operators and couriers, require licenses.



Service Providers

The law covers services provided by local and international couriers. Service providers must comply with the terms and conditions stated in the license.



National Operator

The national operator must ensure fair universal services, including home delivery. Exclusive sale of stamps imprinted with "Qatar".



Sector Prospects

Adapt to Qatar's rapid growth and economic transformation. Enhance competition and encourage innovation in the postal sector



Regulatory Framework

The legislation outlined procedures for overseeing the postal services industry, establishing service rates, promoting competition and access, addressing disputes, and imposing penalties for infractions

Overview of Postal services sector in Qatar



Qatar's postal sector is poised for significant transformation influenced by global market structure changes, liberalisation, and the entry of multiple players, including the strategic expansion of large global entities into direct delivery networks. These developments promise to enhance service variety and quality, enriching customer experience but also presenting competitive challenges.

The enactment of the new postal services law marks a pivotal shift, particularly for Qatar Post, necessitating strategic and operational adjustments to align with the new regulatory environment. This law aims to organise, monitor, and regulate market operations more effectively, fostering fair competition and safeguarding stakeholders' rights – with the aim of maintaining Qatar Post's leading position among postal systems in the GCC.

In response to these changes, Qatar Post has proactively formed an internal steering committee to revisit and update its policies, strategies, and procedures to comply with the new postal law's requirements. This initiative underscores Qatar Post's commitment to transparent governance and adherence to regulatory standards, aiming to improve service quality and customer experience amidst increasing competition and regulatory reforms. Qatar Post anticipates that the introduction of a new licensing system under the guidance of the Communications Regulatory Authority (CRA) will cultivate a more competitive landscape that benefits consumers by enhancing service quality and choices.

The shift towards digital shopping and the evolving demands for efficient distribution and last-mile delivery services are reshaping market dynamics, presenting both challenges and opportunities for postal and delivery services. As international merchants seek reliable distribution and last-mile delivery solutions, Qatar Post faces the dual challenge of competing with last-mile delivery and customs clearance operators while seizing the opportunities to meet these emerging market needs.

Growth and Strategic Direction

Over the past five years, Qatar's postal sector has exhibited significant growth patterns, primarily through the adoption and implementation of digital transformation initiatives. These efforts are closely aligned with Qatar's National Development Strategies and the National Digital Agenda, emphasising the enhancement of service availability and customer experience. Qatar Post has actively pursued digital transformation, process automation, and e-commerce integration within its operations. This includes the development of new digital channels and services, such as e-commerce shopping channels, fulfilment services, website services, and digital marketplace services, which facilitate access and delivery for both national and international merchants. The introduction of the Mekan-E service further supports Qatar companies in optimising their digital presence for customers.

In line with the Second National Development Strategy and the National Digital Agenda, Qatar Post's strategic direction focuses on improving the digital business environment, adopting best practices in digitalisation and process automation to boost operational efficiency. Efforts to develop human resources and advance Qatarisation also reflect the country's broader objectives, alongside Qatar Post's commitment to social responsibility initiatives.

2023 saw the introduction of significant technological innovations within Qatar Post, aimed at enhancing stakeholder engagement and service offerings. These innovations include the adoption of robotic parcel sorting automation to improve efficiency and reduce errors, the implementation of digital workers (bots) for customer inquiries, and the utilisation of process automation for daily activities. Real-time feedback mechanisms were established to capture customer experiences promptly, while customer interactions were automated using WhatsApp to improve response times and satisfaction.

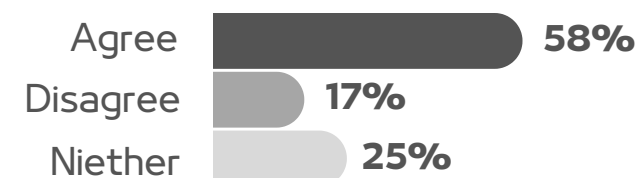
The launch of a multi-vendor e-commerce marketplace and the expansion of e-commerce shopping channels have broadened customer choices and improved experiences. Additionally, the development of the Makan-E service underscores Qatar Post's support for local businesses in enhancing their digital visibility, all contributing to a more dynamic and responsive postal sector.

Adequacy of cost and quality of Postal & Courier Services in Qatar for ICT Sector Business needs (% of respondents)

Startup - Agree/Disagree/Neither:



Mature Business - Agree/Disagree/Neither:



[Source: 2022 CRA ICT Sector Survey]



Universal Postal Union Regional Office opened in Doha



CAPTION: Eng. Ahmad Abdulla AlMuslemani, President of the Communications Regulatory Authority, and Masahiko Metoki, Director General of the UPU, jointly opened the regional office in Doha.

In a landmark development for postal service enhancement and regional collaboration, CRA signed a pivotal agreement with Masahiko Metoki, Director General of the Universal Postal Union (UPU), to establish the UPU's regional office in Doha, Qatar. This initiative underscores Qatar's unwavering commitment to promoting excellence in global postal services.

The inauguration of the UPU's Doha office marks a historic moment, symbolising a new era in postal collaboration across the region. The ceremony was graced by the presence of esteemed officials, including Eng. Ahmad Abdulla AlMuslemani, President of the CRA; Faleh Al-Naemi, Chairman and Managing Director of Qatar Post; along with other high-level representatives from CRA and Qatar Post.

The UPU's presence in Doha is set to play an instrumental role in overseeing activities in various countries, propelling them towards the achievement of the United Nations' Sustainable Development Goals (SDGs). His Excellency Mohammed bin Ali Al Mannai expressed, "Hosting the UPU's regional office is a testament to Qatar's leadership in fostering innovation and cooperation in the postal sector on both regional and global scales. Our goal is to align regional postal initiatives with the UPU's wider objectives, ensuring sustainable and inclusive growth." Qatar's advanced digital infrastructure and logistical capabilities are key to providing comprehensive support to the UPU's regional office. The country's strategic location further facilitates a dynamic exchange of expertise and collaborative ventures with member states, bolstered by existing cooperation with the UPU's regional office in Egypt.

The establishment of UPU's regional office in Doha not only reaffirms Qatar's dedication to advancing the postal sector through innovation and technology but also positions the country as a leader in supporting global postal sector ambitions. With the logistics market in Qatar projected to experience significant growth, this move is poised to contribute substantially to the region's economic and developmental aspirations.



UPU Council of Administration (CA) – May 2023

A Qatari delegation from CRA and Qatar Postal Services Company (Qatar Post) participated in the first regular session of the UPU's CA meeting of 2023, which is held at the UPU International Bureau (IB) in Berne, Switzerland from May 8-12, 2023.

Qatar participated in the meeting as a board member of the CA, which includes 41 member countries. The meeting included discussions about various matters related to the postal sector and the UPU. On the sidelines of the meeting, the Qatari delegation co-chaired, with the Republic of Belarus, the Development Cooperation and Technical Assistance Committee meeting. The meeting included discussions about various issues related to the Committee, which considers and implements Universal Post



UPU 4th Extraordinary Congress – October 2023

A Qatari delegation from CRA and Qatar Postal Services Company (Qatar Post) participated in the UPU 4th Extraordinary Congress, which was held from October 1-5, 2023, in Riyadh, Kingdom of Saudi Arabia. Over five days of plenary meetings and sessions, the Congress examined proposals associated with the further opening up of the Union to wider postal sector players, as well as other urgent postal sector issues. Other topics included postal financial services and climate action for the postal sector.

Attending such UPU events, Qatar contributes, along with other member countries, to shaping the future of the global postal sector for the better, which will have a direct effect on the development of the postal sector in Qatar and other local sectors associated with postal services. As a result, consumers will be able to access more advanced and high-quality postal services.

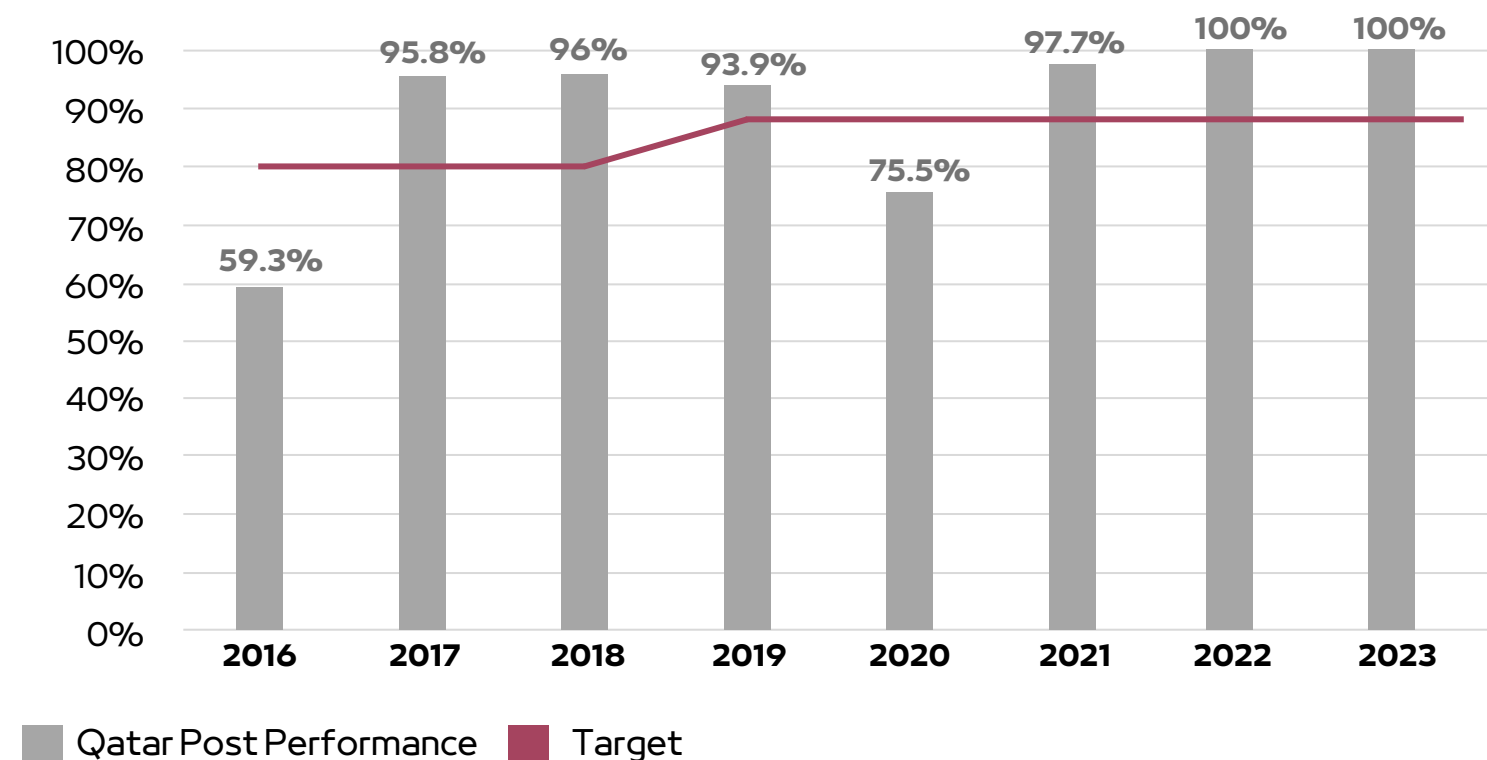
Customer Service and Quality of Service (QoS)

In 2023, Qatar Post made significant strides in enhancing customer experience and service quality within the postal sector, achieving notable success as measured by the Universal Postal Union (UPU). The focus on delivering exceptional customer service and ensuring high standards of quality has been pivotal in Qatar Post's operations, particularly in areas such as Global Mail System (GMS), Express Mail Service (EMS), and general customer service. The key indicators of customer satisfaction that underscored Qatar Post's achievements include:

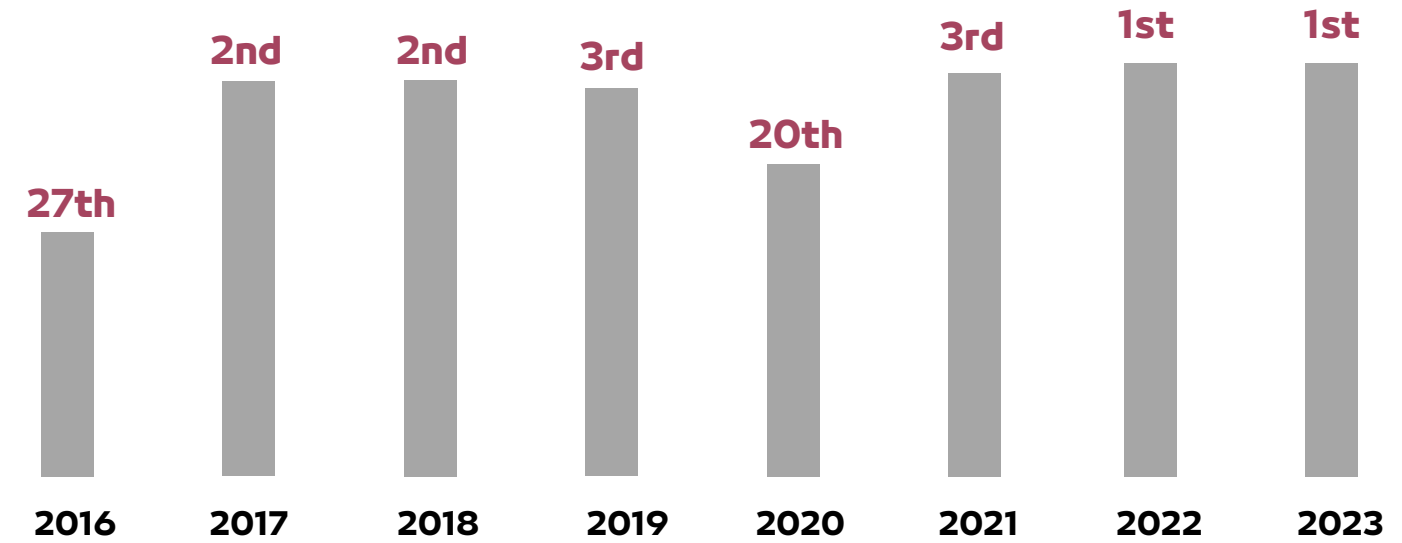
Global Monitoring System (GMS)

A system to track performance and quality improvement of postal services internationally, implemented by the Universal Postal Union (UPU). Since 2017 Qatar has maintained a score above 90% (with the exception of 2020 - due to the impact of the COVID-19) pandemic. For the last two years, Qatar has maintained a 100% score, positioning it as an international leader in postal sector performance & quality.

GMS Report Comparison 2016 - 2023



GMS Report Comparison Ranking 2016 - 2023

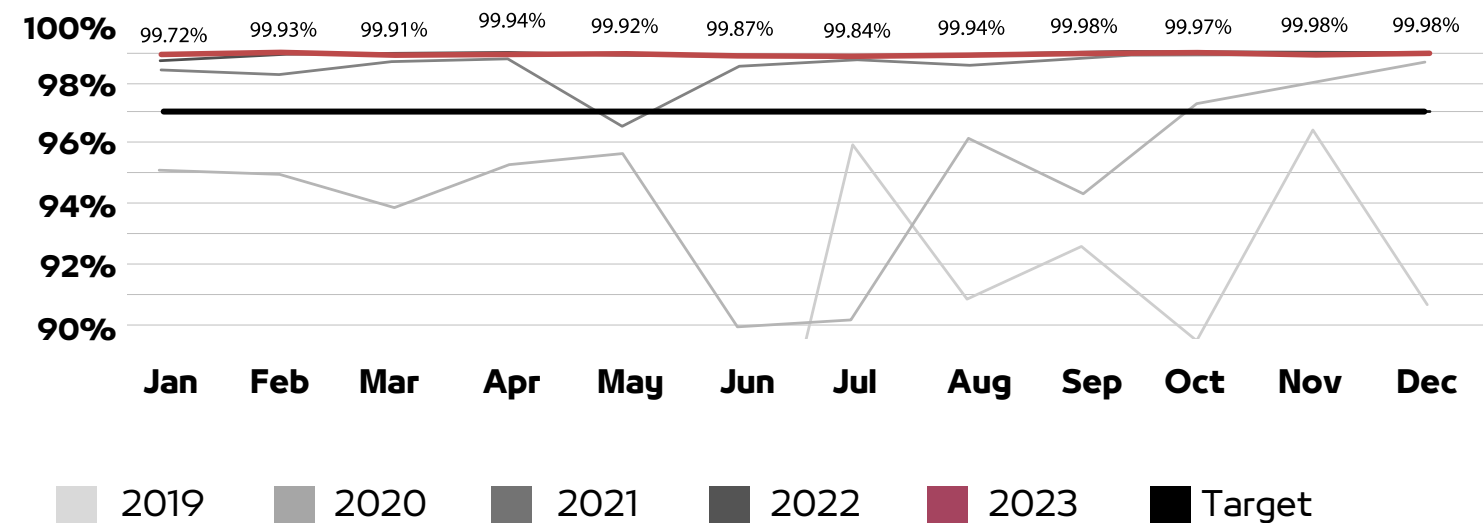


Express Mail Service (EMS)

A global brand designating the postal product with the fastest delivery. Postal services in around 200 countries and territories worldwide offer this premium end-to-end service for documents and merchandise. In 2023 Qatar Post achieved a delivery rate of 99.4%, well ahead of the targeted 98.0%.

EMS Delivered

Achievement for EMS Delivered (inbound) year to date = 99.94% (Target = (98.00))



Challenges and Future Outlook

In 2023, Qatar Post navigated a landscape marked by significant challenges, primarily driven by the rapid transformation of global supply chains, the entry of new competitors in the market, and the expansion of the grey market. These challenges underscored the need for strategic adaptation and innovation within Qatar's postal sector.

To address these challenges and capitalise on emerging opportunities, particularly in the context of digitisation and evolving global supply chain dynamics, Qatar Post has embarked on a comprehensive strategic plan. This plan emphasises enhancing cooperation and coordination with government entities to ensure the postal services provided align with the expectations and requirements of stakeholders and customers. Recognising its role as the national postal operator, Qatar Post is committed to delivering services that not only meet the current needs but also anticipate future demands.

A key component of Qatar Post's strategic vision involves expanding its international presence, thereby establishing a more substantial footprint on the global stage. This expansion is seen as crucial for competing effectively with new market entrants and addressing the challenges posed by the grey market. Furthermore, the strategy prioritises strengthening service quality and optimising costs to enhance overall efficiency and customer satisfaction.

By focusing on these strategic areas, Qatar Post aims to navigate the complexities of the postal sector's current landscape, leveraging digitisation and adapting to the shifting dynamics of the global supply chain. This forward-looking approach is designed to position Qatar Post as a resilient, competitive, and innovative player in both the local and international postal markets.



Digital Transformation at Qatar Post

Qatar Post has embarked on a profound digital transformation journey, revolutionising postal services in the digital age. This transformation has been facilitated through the strategic implementation of Power Automate and Azure Cognitive Services, enabling the automation of over 1,000 dispatch documents daily with the integration of RPA and OCR technology.

In partnership with SquareOne, an expert in robotic process automation (RPA) and Microsoft technologies, Qatar Post has enhanced its operational efficiency, accuracy, and time management across various facets of its services.

The Robotic Sorting Project enhances its postal service efficiency and productivity significantly. The cutting-edge project utilises 70 robots capable of processing 4,500 to 5,000 packages per hour—a fourfold increase in capacity, and sorting packages up to 30kg and 60cm. This development marks a substantial improvement in Qatar Post's operations, minimising human error and boosting processing speed.

The implementation of automation extends to real-time service quality dashboards and automated reporting tools, which allow management to monitor operations closely, ensuring the delivery of high-quality services, significantly reducing manual labour and freeing up employee time for more valuable tasks.

An expanded service portfolio, which now includes digital-first services such as virtual P.O. boxes tailored for e-commerce and specialised delivery services for medicine and ID cards highlights Qatar Post's foresight in leveraging technology to improve service delivery, customer experience, and operational efficiency.

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Future Outlook:

Envisioning a Connected,
Digital Qatar by 2030

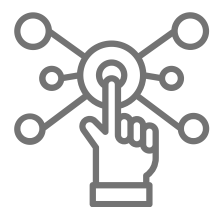
As we reflect on the past year and look forward to the challenges ahead, the Communications Regulatory Authority (CRA) stands at the cusp of a transformative era, embodying the spirit and aspirations of a connected, digital Qatar by 2030.

Under the guidance of President Eng. Ahmad Abdulla AlMuslemani and aligned with the Qatar National Vision 2030, CRA has embarked on a strategic journey to revolutionise the nation's ICT, telecom, and postal sectors. Our focus has not only been on fostering a competitive and innovative market environment but also on ensuring that these sectors contribute significantly to Qatar's holistic development and prosperity.

Our roadmap supports both the National Development Strategy 3 (NDS3) and the Digital Agenda 2030, charting a course towards enhancing connectivity, embracing digital transformation, and leveraging emerging technologies. This strategic direction is designed to drive economic growth, improve the quality of life for our citizens, and position Qatar as a leading technology hub in the region and beyond. Our focus, as we head towards 2030, is on six key areas.

- ✓ **Enhanced connectivity and digital transformation**
- ✓ **Innovation and competitive market environment**
- ✓ **Regulatory framework evolution**
- ✓ **Integration of emerging technologies**
- ✓ **Stakeholder engagement and collaboration**
- ✓ **Communication and transparency**





Enhanced connectivity and digital transformation

- Commitment to boosting Qatar's telecom and digital infrastructure to spur economic growth and improve life quality.
- Embracing digital transformation initiatives aimed at operational efficiency and improved service delivery.



Innovation and competitive market environment

- Fostering a competitive, innovative market through the development and implementation of robust competition policies and regulatory instruments.
- Stimulating market growth, enhancing consumer experiences, and ensuring the delivery of high-quality services.
- Supporting the country's transition into a knowledge-based economy, emphasising economic diversification and sustainable development.



Regulatory framework evolution

- Evolving CRA's regulatory framework to be more agile, enabling swift adaptation to technological advancements while ensuring robust consumer protection and market competitiveness.
- Implementing clear, fair, and effective regulatory practices to ensure a level playing field for all market participants.



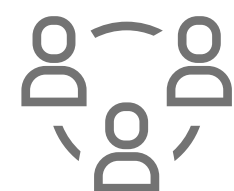
Integration of emerging technologies

- Focusing on the integration of emerging technologies such as IoT, AI, and blockchain to foster innovation within the telecommunications sector.
- Supporting the rollout of next-generation technologies, ensuring radio spectrum availability, and updating regulatory instruments as needed.



Stakeholder engagement and collaboration

- Prioritising stakeholder engagement through continuous dialogue with local and international industry stakeholders.
- Cultivating a culture of collaboration within CRA and with external stakeholders to develop solutions that benefit the telecom and postal environments.



Communication and transparency

- Maintaining open, transparent communication with all stakeholders, emphasising the importance of collaboration in achieving our strategic goals.
- Conveying key messages about CRA's commitment to fostering a competitive and innovative market, ensuring the benefits of high-quality, diverse, and affordable services reach consumers.

Communications
Regulatory Authority
State of Qatar

هيئة تنظيم
الاتصالات
دولة قطر

Looking towards the next decade, CRA envisions a journey marked by dynamic regulatory practices, deepened stakeholder engagement, and the seamless integration of technological advancements. The anticipated impact on the ICT, telecom, and postal sectors is profound, promising to drive economic growth, enhance service quality, and ensure that Qatar remains at the forefront of digital innovation globally.

We reaffirm our commitment to the vision of a connected, digital Qatar. With a strategic focus, alignment with national goals, and the collective dedication of our team and partners, we step into the future with confidence. Together, we will navigate the path towards 2030, unlocking the full potential of our nation's digital landscape and setting a new standard for excellence and innovation.

Fostering Qatar's Digital Future



Email: info@cra.gov.qa | www.cra.gov.qa