

CRA ICT Competition Framework Review and Update 2024-2026 – Reviewing the *ex-ante* Market Definition and Dominance Designation process (‘MDDD’) and *ex-post* Competition Policy

Consultation Document

The deadline to respond to this consultation is March 23, 2025

TABLE OF CONTENTS

1. INTRODUCTION	4
Purpose of this Consultation Document	4
Overview	4
2. THE GLOBAL PICTURE	6
Transformation in the digital economy	6
Recent developments in ICT regulatory practice	8
Relevance to Qatar and the CRA's update of the ICT Competition Framework	9
3. QATAR'S STRATEGIC OUTLOOK	9
Qatar's strategic outlook	9
Developments in Qatar's ICT market	11
4. THE CRA'S MANDATE AND OBLIGATIONS	13
CRA mandate and scope	13
ICT sector classification	13
5. POLICY AND REGULATORY BACKGROUND	15
2014 Policy Statement	15
CRA strategic outlook and key initiatives	16
Need for review of the ICT Competition Framework	17
6. ICT COMPETITION FRAMEWORK HISTORICAL OVERVIEW	18
Competition Policy	19
MDDD review cycle	20
Earlier MDDD reviews	21
7. PRINCIPLES FOR THE UPCOMING ICT COMPETITION FRAMEWORK REVIEW	22

8. CONSULTATION QUESTIONS	26
9. HOW TO RESPOND TO THE CONSULTATION DOCUMENT	26
Consultation procedures	26
Consultation response template	27
Publication of comments	27
APPENDIX A: ABBREVIATIONS	29
APPENDIX B: KEY DEFINED TERMS	30

1. Introduction

Purpose of this Consultation Document

The purpose of this Consultation Document is to outline the context and guiding principles of the current review of the Competition Framework for the Information and Communications Technology (“ICT”) sector (the “**ICT Competition Framework**”), which is being undertaken by the Communications Regulatory Authority of Qatar (“**CRA**”).

The detailed scope and purpose of this Consultation Document is:

- to outline the global market context, including recent developments in technological and regulatory trends worldwide;
- to explain how the update of the ICT Competition Framework aligns with the State of Qatar’s national strategic objectives and Qatar’s local market development;
- to elaborate on where the ICT Competition Framework fits into the CRA’s existing mandate and obligations, as specified by the relevant Qatari legislation;
- to outline the historical context underpinning the ex-ante and ex-post reviews; and
- to outline the regulatory principles which will guide the CRA’s ICT Competition Framework review and update.

Views and comments with relevant justification and evidence on any aspects of this Consultation Document are invited from industry participants, other stakeholders and interested parties. Herewith we ask stakeholders to provide views and comments on this Consultation Document generally and on several specific questions. A list of guiding questions is contained in Section 8 of this Consultation Document and the instruction for responses is detailed in Section 9.

Overview

The ICT Competition Framework review aims at establishing a core set of rules and regulations - or to lift unnecessary rules and regulations if needed - purposed at safeguarding competition for Qatar’s ICT sector. This is inclusive of an *ex-ante* regulatory approach for the telecommunications sector – including rules and regulations that are applied prospectively to dominant service providers (“**DSPs**”) to help promote competition and investment, and to protect consumer interests. It also comprises an *ex-post* approach related to the rules and processes of addressing anti-competitive behaviours by players in the ICT market if and when

they arise.

On 16th October 2024, the CRA held a workshop with industry stakeholders to launch the ICT Competition Framework review. At the workshop, the content of this document was presented and stakeholder's feedback provided has been incorporated into this version of it. Prior to publication, CRA invites industry stakeholders to provide any further comments and views on this document.

The CRA is authorised by Qatari law to impose regulations on the ICT sector. This is granted under **Article 4 of the Emiri Decision No. 42**, which states explicitly that the CRA is the regulator of:¹

- The Telecommunications sector
- The Information Technology ("IT") sector
- Postal services, and
- Access to Digital Media ("**ADM**").

Additionally, Decree-Law No. 34 of 2006 on the promulgation of the Telecommunication Law, ("**Telecommunications Law**"), grants the CRA authority to regularly review the competitive landscape of the telecommunications sector to determine the necessity for ex-ante regulation.² The Executive By-Law No.1 of 2009 ("**Executive By-Law**") also obliges the CRA to establish methodologies for assessing and determining market dominance.³ Collectively, these legal frameworks constitute the **Market Definition and Dominance Designation** ("**MDDD**") process.

In line with the strategic goals of the country and national digital agenda, the CRA is focused on facilitating economic diversification, innovation and investment in ICT to enhance the competitiveness and attractiveness of the State of Qatar as an international hub for global technology and communications services. The ICT Competition Framework is an essential

¹ Ministry of Communications and Information Technology, "Emiri Decision No 42 of 2014 - Establishing the Communications Regulatory Authority", Article (4), p. 2 (<https://www.cra.gov.qa/en/document/amiri-decision--42-of-2014-establishing-the-communications-regulatory-authority>).

² Ministry of Justice, "Decree-Law No. 34 of 2006, Promulgating the Telecommunications Law 34 / 2006", Articles 19(5), 23, 40(3) and 42 (<https://www.almeezan.qa/lawpage.aspx?id=4115&language=en>).

³ The Supreme Council for Information and Communication Technology, "Decision of the Board of the Supreme Council for Information and Communication Technology No. (1) of 2009 on the promulgation of the Executive By-Law for the Telecommunications Law", June 2009, Articles 72 and 73, pp. 23-24 (<https://www.cra.gov.qa/en/document/telecommunications-by-law-no-1-of-2009>).

tool as part of the CRA's mandate over-arching regulatory framework and broad programme of work to further the development of a thriving ICT and postal sectors in the country, contributing to Qatar's overall strategic development goals.

The current ICT Competition Framework review and update aims to reflect on the changing market and technological conditions and is part of CRA's continued periodic reviews. With the completion of the previous cycle in 2016⁴, and the ICT sector developing rapidly both in Qatar and globally, the current ICT Competition Framework review cycle has been initiated to cover for a comprehensive update to ensure that the ICT Competition Framework addresses the current and prospective state of competition and supports continued development of the ICT sector and digital economy growth in Qatar, and enables the pursuit of Qatar's broader strategic objectives.

2. The global picture

The CRA's upcoming review of the ICT Competition Framework must be understood in the context of global market and regulatory developments.

Transformation in the digital economy

Since the mass deployment and adoption of both fixed and mobile high-speed broadband networks, the global ICT sector has changed significantly. The sector has been dramatically disrupted by digital transformation and a transition to data-centric business models based on digital platforms. This disruption extends to many corners of the economy and is set to continue.

Demand for online services is soaring globally, with value increasingly being captured by digital platforms. Most global internet traffic is driven by online video, with most of that provided by a small number of global digital firms. Globally, competition has also emerged from digital platforms in the internet access connectivity segment.

⁴ The Executive By-Law stipulates that "[t]he General Secretariat shall, from time to time, review its designation of service providers as dominant in the relevant markets [...]." For more information, see The Supreme Council for Information and Communication Technology, "Decision of the Board of the Supreme Council for Information and Communication Technology No. (1) of 2009 on the promulgation of the Executive By-Law for the Telecommunications Law", June 2009, Article 74, p. 24 (<https://www.cra.gov.qa/en/document/telecommunications-by-law-no-1-of-2009>).

New segments of the ICT value chain have emerged, including enabling technologies such as Content Delivery Networks and cloud infrastructure, and hugely expanded online content such as media and streaming. We have also seen the dynamic emergence of a data driven economy led by new technologies and applications, such as Artificial Intelligence (“AI”), quantum computing, new applications managing big data, and the Internet of Things (“IoT”). These developments bring with them new emerging business models and put the ICT value chain in the context of a broader digital market.

As CRA follows closely the global developments in the ICT sector, several key trends have been identified:⁵

- Continued expansion of digitalisation across traditional industries, coupled with the growth of born-digital segments;
- Data proliferation driving the growing significance of data analytics and AI as key enablers of digital transformation and the knowledge economy;
- The growth of smart environments such as smart homes and smart cities, which continue to gain traction with developments in and adoption of emerging technology;
- The shifting market structure of the ICT sector through Mergers and Acquisitions (“M&A”) and shifting delivery models, which are driving demand for cloud solutions and Anything as a Service (“XaaS”);
- Intense competition for skilled tech workers globally, where demand outstrips supply;
- The growing importance of infrastructure such as 5G and data centres as enablers of the ICT market;
- The requirement for new governance models to create adaptive policies that enable innovation while mitigating risks; and
- The growing popularity of centralised innovation platforms and ecosystems as stakeholders seek to accelerate the pace of innovation.

Trends influencing the economy and the ICT sector globally have a strong impact on Qatar’s local context, and these trends must be taken into account when defining forward-looking strategies and updating the ICT Competition Framework to serve a fast-developing sector.

⁵ Communications Regulatory Authority, “Qatar’s ICT Landscape & Digital Trends 2022 – Supply-side Market Outlook”, May 2023, p. 28 (<https://www.cra.gov.qa/en/Document/ICT-Survey-Reports>). The highlighted trends are examples and are non-exhaustive.

Recent developments in ICT regulatory practice

Digital transformation, along with on-going market developments, is leading to significant changes in regulatory models globally. Some important examples include:

- **Greater regulatory attention on competition issues in digital platforms**

Some jurisdictions – including the European Union, the United Kingdom and Japan - have introduced specific *ex-ante* competition regimes to regulate digital platforms. There are also ongoing competition cases against digital platform firms in Europe and the United States. Significant fines have been imposed for competition law breaches on some firms.

- **In telecoms markets, access regulation is generally moving upstream, and away from retail products**

Wholesale regulation remains a key tool for regulators where service level competition is encouraged, but fewer markets are now regulated this way. Increasingly, infrastructure level competition is the chosen strategic priority, leading to obligations for co-investment models and passive infrastructure access.

- **A trend from asymmetric to more symmetric regulatory remedies in some countries has been observed** in specific areas, with obligations being imposed on all networks and service providers, not just market players with dominance.⁶

- **The definition of relevant markets is being adapted to account for the competitive impact of digital platform services**

Traditional tools for market definition are not easily applicable to digital markets. As such, market definition tools are incorporating a more holistic assessment of competitive constraints, including assessing the level of competition based on non-price factors, such as quality, innovation, investment and sustainability.

⁶ The European Electronic Communication Code (“EECC”) is an example, where symmetric regulation applies to electronic communications network providers in some very specific situations to ensure competition. See European Union (EUR-Lex), “European Electronic Communications Code” (<https://eur-lex.europa.eu/EN/legal-content/summary/european-electronic-communications-code.html>).

Relevance to Qatar and the CRA's update of the ICT Competition Framework

Global technological developments are key to economic growth and competitiveness in countries round the world, and Qatar aims to harness its ICT sector to support domestic growth, and the national ambition of becoming a leading global and regional digital hub. These developments in the global market context and regulatory practice will therefore be important in the CRA's upcoming review of the ICT Competition Framework.

Structural similarities between ICT markets around the world mean that regulatory models have often developed along similar lines in different jurisdictions, with global comparisons and benchmarking acting as a key tool for regulators alongside a thorough understanding and analysis of the specific markets and domestic strategy. The CRA will conduct a thorough review of the local market and its specific competitive conditions.

3. Qatar's strategic outlook

The CRA's upcoming review of the ICT Competition Framework must also be informed by Qatar's over-arching, and ambitious strategic objectives and development goals.

Qatar's strategic outlook

The country's long-term goals are defined by **Qatar National Vision 2030 ("QNV 2030")**, which provides a framework for all national strategies and implementation plans for development. It sets the goal of accelerating the country towards becoming an advanced society, a competitive and diversified economy and a sustainable environment. QNV 2030 has four interconnected pillars of development: human, social, economic and environmental.⁷

At a national level, the Qatar government's strategic priorities for the national economy and ICT sector are guided further by two other documents:

- **Third National Development Strategy ("NDS3") 2024-2030**, which outlines key goals for sustainable growth, fiscal stability, and societal cohesion - addressing challenges beyond 2030. It defines seven strategic national outcomes, including sustainable economic growth, and economic diversification through specialised clusters,

⁷ General Secretariat for Development Planning, "Qatar National Vision 2030", July 2008 (https://www.psa.gov.qa/en/qnv1/Documents/QNV2030_English_v2.pdf).

particularly in IT and digital services.⁸

- **National Digital Agenda 2030 (“NDA 2030”)** focuses on making Qatar a global tech hub by adopting advanced digital technologies to build a diverse, knowledge-based economy, supporting innovation and entrepreneurship. This document outlines six pillars that form the foundation of Qatar’s strategic plans for national digital growth and transformation. These pillars include:⁹
 1. **Cutting edge digital infrastructure:** Perfecting and expanding Qatar’s digital infrastructure.
 2. **Booming digital economy:** Diversifying the economy through widespread digital adoption and enhancing competitiveness beyond hydrocarbon exports.
 3. **Thriving digital innovation:** Driving technological advancements and advancing Qatar’s digital innovation ecosystem.
 4. **Seamless digital government:** Transforming government interactions with individuals and businesses through digital technologies.
 5. **Nurtured digital technologies:** Strengthening Qatar’s data and technological capabilities with timely and effective regulation.
 6. **Future leading digital society:** Recognising society as the driving force behind digital transformation.

In summary, the vision and strategic outlook of the State of Qatar is to embrace digital advancement to drive Qatar’s competitiveness and prosperity, which is leading to its mission to establish a leading digital economy powered by an attractive and efficient business environment with high-yield digital investments. Therefore, the updated review of the ICT Competition Framework will be closely aligned with Qatar’s national strategic objectives for transforming the digital sector. It will also aim to support the NDA 2030’s vision of contributing approximately USD 11 billion (QAR 40 billion) to the non-hydrocarbon economy by 2030,¹⁰ while fostering fair competition.

⁸ Planning and Statistics Authority, “Third Qatar National Development Strategy - 2024–2030” (https://www.psa.gov.qa/en/nds1/nds3/Documents/QNDS3_EN.pdf).

⁹ Ministry of Communications and Information Technology, “Digital Agenda 2030” (https://www.mcit.gov.qa/sites/default/files/digital_agenda_2030_full_version_english.pdf).

¹⁰ *Ibid*, p. 9.

Developments in Qatar's ICT market

Over the past decades, Qatar has built world class ICT infrastructure. This includes near universal coverage of “fibre to the premises” (“**FTTP**”) broadband and ubiquitous mobile broadband at a national level (3G, 4G and 5G) with high download speeds.¹¹

Internet usage in Qatar, particularly via smart mobile devices, is very high by international standards. Broadband internet access is virtually universal across the diverse population of Qatar. In recent years, there has also been a rapid growth in the use of the internet to access media content. This means that consumption of TV content via the internet has now overtaken traditional means of content distribution.¹²

The CRA has also previously noted increasing competition in the business fixed market as a result of Vodafone Qatar rolling out its own network and taking market share from Ooredoo. This has resulted in improved service offerings and more competitive pricing, though the CRA notes that prices for businesses are still high when compared to international benchmarks.¹³ Recent surveys conducted by the CRA also show relatively high customer satisfaction with the quality of services offered by telecom service providers, but only around half of the companies believe telecom services offer good value for money.¹⁴

National developments have driven significant changes in the competitive dynamics across a range of ICT market segments in Qatar. For example, Qatar's hosting of the 2022 FIFA World Cup helped propel fast-tracked investment in the nation's ICT sector, including the building of new infrastructure, such as fibre network infrastructure, which now covers 100% of the

¹¹ Communications Regulatory Authority, “Telecommunications market – Qatar No.4/2023”, June 2024 (www.cra.gov.qa/document/quarterly-report-no-4-2023).

¹² Qatar Development Bank, “Media & Production Sector in Qatar - Current State Assessment Series”, 2021. For example, during the first weeks of lockdown, the top seven subscription video-on-demand (“**sVOD**”) platforms in Qatar, experienced a 75% increase in daily sign ups. For more information, see, p. 23 (<https://ossform.qdb.qa/en/Documents/Media-and-Production-Sector-in-Qatar-Current-State-Assessment-Series.pdf>).

¹³ Communications Regulatory Authority, “2022 Annual Report”, pp. 28-31 (<https://www.cra.gov.qa/en/Reports-and-Publications/CRA-Annual-Reports>).

¹⁴ Communications Regulatory Authority, “Customers Satisfaction Survey 2022 – Survey Findings”, June 2023 (<https://www.cra.gov.qa/en/document/cra-consumer-satisfaction-survey-report-2022>). See also Communications Regulatory Authority, “Business Consumers Satisfaction Survey with the Telecommunications Services 2019 - Report of Survey Findings”, November 2019 (https://www.cra.gov.qa/en/document/cra_business-consumer-satisfaction-survey-report-2019-en). See also Communications Regulatory Authority, “Telecom Price Baskets Benchmarking Study for Qatar, GCC and OECD averages”, February 2024 (<https://www.cra.gov.qa/document/telecom-price-benchmarking-study-for-qatar-gcc-and-oecd-averages>). See also Communications Regulatory Authority, Qatar's ICT Landscape & Digital Trends 2022 – Supply-side Market Outlook”, May 2023 (<https://www.cra.gov.qa/en/Document/ICT-Survey-Reports>).

population, and the accelerated expansion of 5G services, which now cover 99% of the population.¹⁵ The event also ushered in a number of important technological innovations that will have positive impacts on the ICT sector in Qatar for years to come.¹⁶

Furthermore, the entry of new competitors into Qatar's ICT market has led to substantial advancements in the sector. These include the establishment in the country of large “hyperscalers”,¹⁷ including Microsoft (Azure),¹⁸ Google (Google Cloud),¹⁹ and Amazon Web Services (Amazon CloudFront).²⁰ Starlink Satellite Qatar has also recently been established in Qatar by the leading international company SpaceX and was issued a license by CRA for provision of public satellite telecommunications networks and services.²¹ These new investments in Qatar join existing infrastructure and data centres operations by firms such as Ooredoo, Meeza, SMIT, and Quantum Switch.²² In addition, the Qatar Investment Authority (“QIA”) recently announced the proposed merger of Gulf Bridge International (“GBI”), a provider of international connectivity solutions in the Middle East, and Qatar National Broadband Network (“QNBNet”), which provides passive dark fibre infrastructure in Qatar. The combined entity is planned to provide a gateway for global hyperscalers to provide access and interconnection within the Middle East.²³

These market developments align with NDA 2030's strategic goals to strengthen Qatar's digital infrastructure and make it a regional digital hub, aiming to build a leading digital economy that fosters innovation, entrepreneurship, and digital transformation across all

¹⁵ Communications and Regulatory Authority, “Telecommunications Market – Qatar, No.4 2023”, June 2024, pp. 5-6 (<https://www.cra.gov.qa/en/document/quarterly-report-no-4-2023>).

¹⁶ Ministry of Communications and Information Technology, “‘Connected Tournament’ Report Unveils Qatar's Technological Innovations at FIFA World Cup Qatar 2022”, October 2023 (www.mcit.gov.qa/en/media-center/news/connected-tournament-report-unveils-qatars-technological-innovations-fifa-world).

¹⁷ “Hyperscalers” are large data centres which provide cloud computing and data management services to organisations which have large-scale data processing and storage needs. For more information, see Red Hat, “What is a hyperscaler”, December 2022 (<https://www.redhat.com/en/topics/cloud-computing/what-is-a-hyperscaler>).

¹⁸ Microsoft, “Microsoft opens first global datacenter region in Qatar, bringing new opportunities for a cloud-first economy”, August 2022 (<https://news.microsoft.com/en-xm/2022/08/31/microsoft-opens-first-global-datacenter-region-in-qatar-bringing-new-opportunities-for-a-cloud-first-economy>).

¹⁹ Google Cloud, “Hayyakom, Doha! New Google Cloud region now open in Qatar”, March 2023 (<https://cloud.google.com/blog/products/infrastructure/new-google-cloud-region-now-open-in-qatar>).

²⁰ Amazon Web Services (“AWS”), “AWS announces new edge location in Qatar”, November 2024 (<https://aws.amazon.com/about-aws/whats-new/2024/11/aws-announces-edge-location-qatar/>).

²¹ Communications Regulatory Authority, September 2022 “CRA Issues a Telecommunications License to Starlink Satellite Qatar” (<https://www.cra.gov.qa/en/Press-Releases/CRA-Issues-a-Telecommunications-License-to-Starlink-Satellite-Qatar>).

²² Communications Regulatory Authority, “2022 Annual Report”, p. 25 (<https://www.cra.gov.qa/en/Reports-and-Publications/CRA-Annual-Reports>).

²³ QIA, “QIA to combine QNBNet and GBI as part of efforts to boost Qatar's digital infrastructure ecosystem”, October 2024 (<https://www.qia.qa/en/Newsroom/Pages/QIA-to-combine-QNBNet-&-GBI-as-part-of-efforts-to-enhance-Qatar%E2%80%99s-digital-infrastructure-ecosystem.aspx>).

sectors.

4. The CRA's mandate and obligations

CRA mandate and scope

The ICT sector, as referenced in the CRA's mandate comprises of telecommunications and IT. ADM is also included in CRA's mandate and logically regarded as a cross-cutting function across the ICT sector as a whole. The postal sector also falls under CRA's mandate; however, it is being addressed separately from the ICT Competition Framework review. Notably, in October 2024 the CRA initiated a public consultation on the newly drafted postal services regulation.²⁴

ICT sector classification

Based on the broad sector definitions set as per the above, CRA has further detailed an ICT sector classification that reflects in a more granular way the supply-side value chain in a Qatar market context. Overall, the ICT classification seeks, (i) to establish Qatar's national ICT sector taxonomy principles and categories to help better understand the ICT sector's business maturity in Qatar, (ii) to establish a national framework that supports further development of relevant policies, (iii) to provide guidance for companies in the ICT sector on mapping their ICT products and services against an established sector classification including where on the value chain their business stands, and (iv) to enable all stakeholders to better assess the overall sector and conduct outcome driven analyses.²⁵

The classification document details categories of ICT products and services along with their definitions organised in layers, each tailored to cover for particular use cases. The sector classification is summarised by **Figure 1** below.

²⁴ Communications Regulatory Authority, "CRA Launches Public Consultation on Postal Services Regulation Draft", October 2024 (<https://www.cra.gov.qa/press-releases/cra-launches-public-consultation-on-postal-services-regulation-draft>).

²⁵ Communications Regulatory Authority, "Information and Communications Technology (ICT) Sector Taxonomy Principles and Categories (ICT Sector Classification)", 2023, p. 4 (<https://www.cra.gov.qa/en/document/principles-and-categories-ict-classification>).

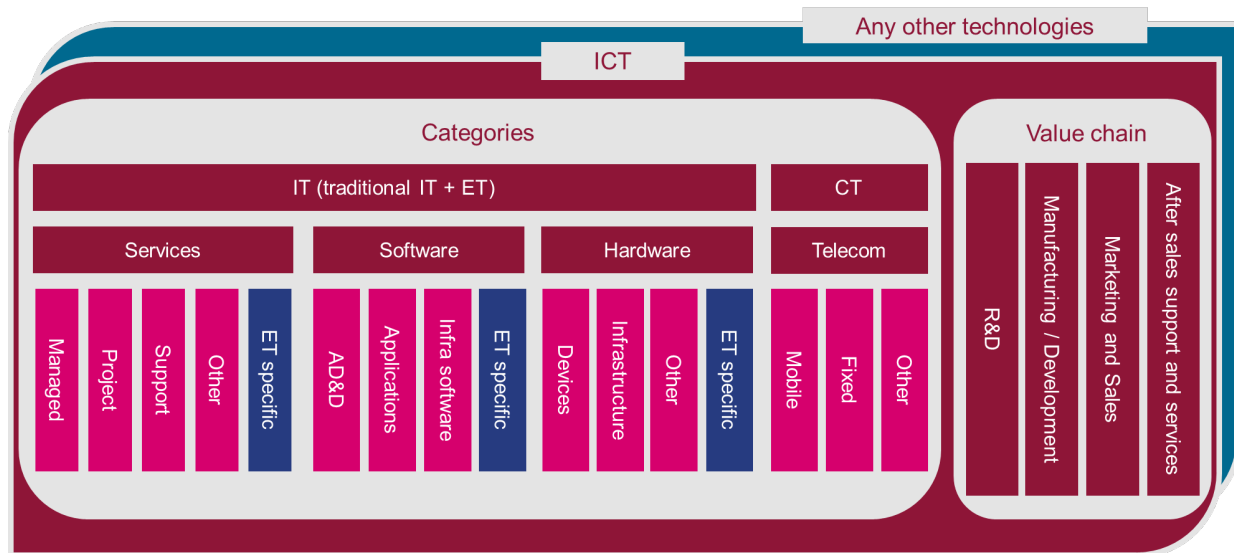


Figure 1: Overview of the ICT Classification Structure

Source: Communications Regulatory Authority, “Information and Communications Technology (ICT) Sector Taxonomy Principles and Categories (ICT Sector Classification)”, 2023, Figure 1, p. 5 (<https://www.cra.gov.qa/en/document/principles-and-categories-ict-classification>).

On the top layer, the classification defines the ICT components, i.e. IT and telecommunications, as follows:

1. IT, inclusive of:
 - a. Traditional IT - refers to the use of any computers, storage, networking and other physical devices, infrastructure, and processes to create, process, store, secure and exchange all forms of electronic data.
 - b. Emerging technologies (“**ET**”) – refers to innovative technologies that have been recently developed, are underdeveloped, or will be developed within the next few years, and that are creating, or are expected to create, significant social or economic effects.
2. Communications Technology (“**CT**”) are technologies related to offering services which provide access to voice, internet, and data services through telecommunications networks and inclusive of all telecommunications standards.

Further, the ICT classification goes into more granularity for the IT component, detailing categories on three more layers and also adds the value chain dimension, providing a more comprehensive tool for market maturity assessments.

As intended, the ICT Classification provides a framework that supports the ICT Competition Framework review and is a starting point for assessing and defining Qatar’s ICT markets.

5. Policy and regulatory background

The review of the ICT Competition Framework is being initiated as part of comprehensive and continuous efforts by the CRA to ensure that Qatar’s overall regulatory framework for ICT is fit-for-purpose. The updated ICT Competition Framework will also reflect the country’s strategic ambitions, and the global and domestic market context set out above. The review also aims to build upon previous and on-going CRA work and existing regulatory instruments and practice.

2014 Policy Statement

In 2014, the CRA published the document, “*Policy Statement - Regulating for the future*” – stating its priorities for regulation of the communications sector. This Policy Statement sets out the CRA’s intention to create “*a regulatory framework that will answer growing end-users’ expectations for the competitive delivery of innovative, diverse, fast, and reliable communication services at affordable prices.*”²⁶

The 2014 Policy Statement took a forward-looking view in guiding the CRA’s approach to regulating the sector and set out the principles to follow, seeking to promote regulatory certainty to industry stakeholders. The Policy Statement also stated the necessary communications infrastructure improvements in Qatar to ensure the country’s readiness for the 2022 FIFA World Cup.²⁷

The guiding principles of the 2014 Policy Statement are summarised in **Table 1** below.

Regulatory aspect	Policy principles
Balanced regulatory approach	<ul style="list-style-type: none"> • Provide transparency and certainty to stakeholders • Focus on long-term sustainable development of the communications sector

²⁶ Communications Regulatory Authority, “Policy Statement – Regulating for the future,” June 2014, p. 2 (<https://www.cra.gov.qa/en/document/policy-statement-regulating-for-the-future--june-2014>).

²⁷ *Ibid*, p. 2.

Regulatory focus	<ul style="list-style-type: none"> Focus on wholesale regulation to address major inhibitors to network and services-based competition Shift from retail regulation to wholesale regulation Apply specific rules to DSPs
Market monitoring & consumer protection	<ul style="list-style-type: none"> Conduct systematic monitoring of the market Protect consumer rights
Holistic and transparent regulation	<ul style="list-style-type: none"> Ensure a holistic approach, by targeting proportionate and justified regulatory interventions Engage with stakeholders
Strategic objectives	<ul style="list-style-type: none"> Recognise the importance of a knowledge-based economy and moving away from hydrocarbon dependence Promote broadband development
Implementation & Cooperation	<ul style="list-style-type: none"> Collaborate with stakeholders to implement the regulatory framework effectively

Table 1: 2014 Policy Statement principles

Source: Communications Regulatory Authority, "Policy Statement – Regulating for the future," June 2014 (<https://www.cra.gov.qa/en/document/policy-statement-regulating-for-the-future--june-2014>).

CRA strategic outlook and key initiatives

Recently, CRA's focus has been on bringing forward a range of strategic initiatives across the ICT domain. These involve current work on new regulatory frameworks and instruments to enable adoption of new technologies and relevant infrastructure, including cloud computing, data centres, net neutrality, IoT, blockchain and AI.²⁸ The Qatar Internet Exchange Point ("IXP") was launched in 2020, aiming at faster and more secure access to digital content for Internet users in Qatar, while currently there is an on-going consultation on the digital infrastructure development and sharing framework.²⁹

²⁸ Recent regulatory initiatives by the CRA to encourage adoption and growth of new technologies in Qatar include: the Cloud Policy Framework, Guidelines for Network Neutrality, Smart City Framework, etc. See Communications Regulatory Authority, "Cloud Policy Framework", June 2022 (<https://www.cra.gov.qa/en/document/cloud-policy-framework>); Communications Regulatory Authority, "Guidelines for Network Neutrality", September 2024 (<https://www.cra.gov.qa/en/document/guidelines-for-network-neutrality>); and Communications Regulatory Authority, "Smart Cities" (<https://www.cra.gov.qa/Services/Emerging-Technologies/Smart-Cities>).

²⁹ Communications Regulatory Authority, "Public Consultation – Framework for Infrastructure Development and Sharing", June 2022 (www.cra.gov.qa/document/framework-for-infrastructure-development-and-sharing).

The CRA continues to update its regulatory approach to Qatar's ICT market with a view to removing bottlenecks in the connectivity value chain and enabling an open and competitive market for players in the ICT and digital domain. The CRA has set out the circumstances under which it might allow a 5G private mobile network, and for granting a spectrum licence to enable an enterprise to do so.³⁰ Further to that, SpaceX was licensed in 2022 to provide satellite broadband services aiming at enhanced availability of internet and telecommunications services in remote areas and wider range of services for both individuals and business segment.³¹

In support of the development of world class international connectivity, recently the CRA consulted on a Reference Offer for Access to Submarine Cable Landing Station International Connectivity Services. This work aims to ensure open access to international connectivity services in support to Qatar's ambition to be a digital technology hub, regionally and globally.³²

Need for review of the ICT Competition Framework

As a main guiding principle, a regulatory framework needs to be adapted over time to suit changing market conditions and strategic intentions. The current period is characterised by dynamic changes in the ICT and digital markets globally. In a local context, these technological and commercial changes coincide with a period of ambitious targets set by Qatar's government for economic growth powered by increased domestic and foreign investment in digital innovation.

As mentioned earlier, the previous ICT Competition Framework review cycle took place between 2014 and 2016. Against the background of the highlighted major changes in the global and domestic markets over the past decade, the existing ICT Competition Framework requires a comprehensive review to ensure that it provides the tools to safeguard competition and enable continuous market development and growth, for the benefit of consumers, and to ensure that it remains aligned with Qatar's nationwide strategic agenda.

³⁰ Communications Regulatory Authority, "Policy Statement on Private Mobile Networks Using 5G Technology", November 2023 (<https://www.cra.gov.qa/en/document/decision-of-the-president-of-the-communications-regulatory-authority-no-53-of-2023>).

³¹ Communications Regulatory Authority, "CRA Issues a Telecommunications License to Starlink Satellite Qatar", September 2022 (www.cra.gov.qa/press-releases/cra-issues-a-telecommunications-license-to-starlink-satellite-qatar).

³² Communications Regulatory Authority, "CRA Reference Offer for Access to Submarine Cable Landing Station International Connectivity Services - Consultation Document", May 2024 (www.cra.gov.qa/en/press-releases/cra-launches-public-consultation-on-its-reference-offer).

6. ICT Competition Framework historical overview

The existing CRA's ICT Competition Framework has been developed based on well-established international best practice. It has two over-arching elements, as is typical in global ICT regulation:

- An '**ex-post**' regulatory regime, focused on addressing anti-competitive behaviour (and developments such as mergers that may reduce competition) in the ICT market. This applies to all firms in the ICT sector. In Qatar this is the CRA's **Competition Policy**; and
- An '**ex-ante**' regulatory regime, focused on addressing competition issues in specified markets where dominance is detected, and *ex-post* remedies are insufficient to address market problems. It applies to telecommunications services only. In Qatar this is referred to as the CRA's **MDDD review** and related obligations.

Figure 2 below summarises the elements of the existing ICT Competition Framework.

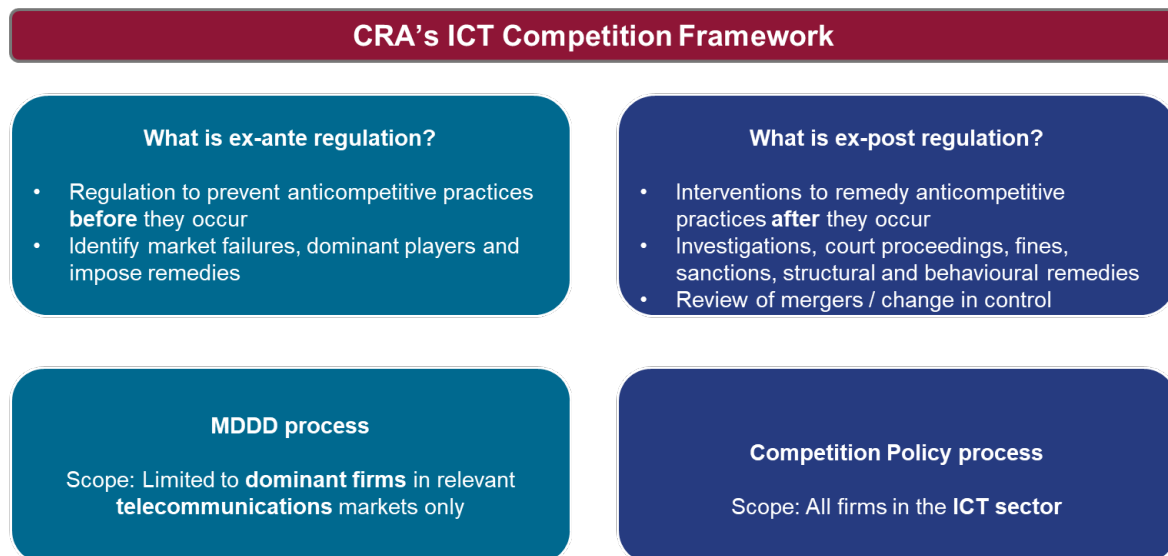


Figure 2: Elements of CRA's ICT Competition Framework

Source: CRA's legal mandate to impose ex-ante regulation on dominant firms in the telecommunications sector is outlined in the Telecommunications Law and the Executive By-Law. CRA's mandate to regulate firms in the ICT sector is covered by Article 4 of the Emiri Decision No. 42, which states explicitly that CRA is the regulator of the Telecommunications sector, the IT sector, Postal services and ADM. Ex-post regulation by CRA is outlined in the Statement for Competition Policy, which was published in October 2015.³³

³³ For specific provisions in the Telecommunications Law relating to CRA's mandate, see Ministry of Justice, "Decree-Law No. 34 of 2006, Promulgating the Telecommunications Law 34 / 2006", Articles 19(5), 23, 40(3) and

The implementation of *ex-ante* and *ex-post* elements of the ICT Competition Framework draws upon a published CRA methodology for defining relevant markets and determining which players have dominance.³⁴ This methodology is meant to be reviewed and updated as necessary in the current review cycle of the ICT Competition Framework.

Competition Policy

The Statement of Competition Policy was published in October 2015 in line with CRA's statutory objective *"to encourage and support an open and competitive ICT sector that provides advanced, innovative, and reliable communications services in the State of Qatar [...]"* The Competition Policy follows *"the principles of regulation set out in the Telecommunications Law and in the [CRA's] Policy Statement of June 2014, which focuses upon enhancing the role of competition as a catalyst for investment and innovation."*³⁵

The purpose of this document was to *"create a stable and certain environment in which market participants understand under what circumstances the [CRA] will undertake ex-post investigations in relation to potential anti-competitive behaviour as well as the main criteria guiding its decisions."*³⁶ The Competition Policy is therefore complementary to other regulatory measures imposed by the CRA, including *ex-ante* regulations placed on DSPs, which are the subject of the MDDD review detailed below. For the avoidance of doubt, the CRA notes that the *ex-ante* regulation applied through the MDDD review is a separate element of the ICT Competition Framework.

42 (<https://www.almeezan.qa/lawpage.aspx?id=4115&language=en>). For specific provisions in the Executive By-Law relating to CRA's mandate, see The Supreme Council for Information and Communication Technology, "Decision of the Board of the Supreme Council for Information and Communication Technology No. (1) of 2009 on the promulgation of the Executive By-Law for the Telecommunications Law", June 2009, Articles 72 and 73, pp. 23-24 (<https://www.cra.gov.qa/en/document/telecommunications-by-law-no-1-of-2009>). For more information on CRA's mandate as the regulator of the ICT sector, see Ministry of Communications and Information Technology, "Emiri Decision No 42 of 2014 - Establishing the Communications Regulatory Authority", Article (4) (<https://www.cra.gov.qa/en/document/amiri-decision--42-of-2014-establishing-the-communications-regulatory-authority>). For specific provisions relating to CRA's mandate to impose ex-post regulation, see Communications Regulatory Authority, "Statement of Competition Policy," October 2015 (<https://www.cra.gov.qa/document/competition-policy--statement--october-21-2015>).

³⁴ Communications Regulatory Authority, "Notice of the Standards, Methodology and Analysis to be applied in the Review of Market Definition and Dominance Designation and for Ex Post Competition Policy Investigations in the Telecommunication Sector in Qatar", October 2015 (<https://www.cra.gov.qa/en/document/notice--mddd-standards-methodology-and-analysis-for-market-review--october-21-2015>).

³⁵ Communications Regulatory Authority, "Statement of Competition Policy," October 2015, p. 3 (<https://www.cra.gov.qa/document/competition-policy--statement--october-21-2015>).

³⁶ *Ibid*, p. 3.

With the upcoming review of the *ex-post* Competition Policy, the CRA aims to ensure it has the necessary tools to address emerging issues of anti-competitive behaviour, aligned with the current ICT market developments and current context. The initial phase of the *ex-post* Competition Policy review will aim to identify both emerging issues of anti-competitive behaviour, and also developments in the market that reduce competition in the ICT sector as a whole.

The review will be carried out, supported by extensive industry engagement and market data collection, and will relate to CRA's regulatory approach and emerging international best practice. The targeted outcome includes developing the necessary tools to enable the CRA to carry out *ex-post* investigations effectively and to identify remedies for infringements as required in competition cases.

MDDD review cycle

The current MDDD review is the key instrument in enabling targeted *ex-ante* regulatory measures in the telecommunications sector. The CRA has adopted an appropriate regulatory process based on international best practice. It involves a comprehensive analysis of the telecommunications markets, determining the extent of any service providers' dominance in defined markets and, if required, recommending a set of remedies to address potential market problems caused by the existence of DSPs. The resulting regulation of DSPs through imposed remedies is designed to safeguard consumer interests and ensure continued development and competitiveness in Qatar's ICT sector.

The step-by-step approach of the MDDD review cycle conducted by CRA in 2016 is described in **Figure 3** below. This methodology and process will form the starting point of the upcoming MDDD review, subject to any revision or updating that the CRA determines is appropriate based on market evidence. The steps applied in the 2016 review were, as follows:³⁷

- (1) Definition of Candidate Markets;
- (2) Identification of Relevant Markets;
- (3) Market Analysis and Dominance Designation; and
- (4) Obligations on DSPs

³⁷ For the current MDDD methodology notice, please see Communications Regulatory Authority, "Documents Related to CRA's Competition Framework", October 2015 (<https://www.cra.gov.qa/document/documents-related-to-cra-competition-framework>).

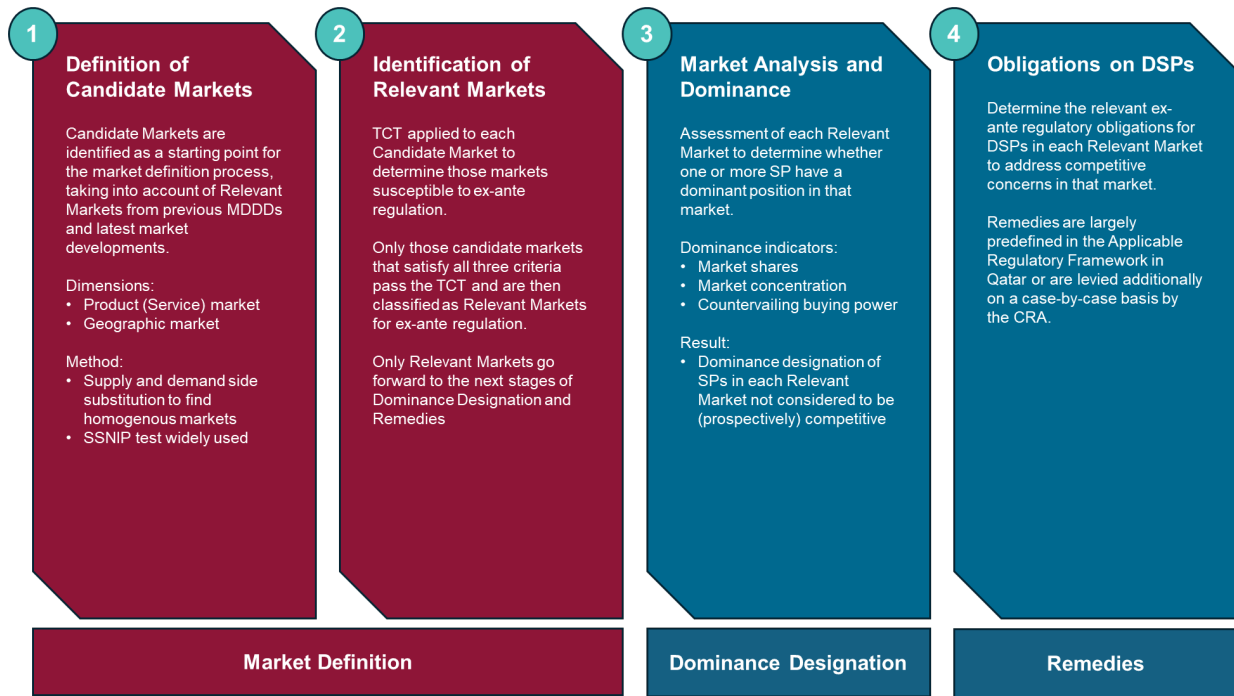


Figure 3: 2016 CRA MDDD process overview

Source: Communications Regulatory Authority, "Notice of the Standards, Methodology and Analysis to be applied in the Review of Market Definition and Dominance Designation and for Ex Post Competition Policy Investigations in the Telecommunication Sector in Qatar", October 2015, p. 5 (<https://www.cra.gov.qa/en/document/notice--mddd-standards-methodology-and-analysis-for-market-review--october-21-2015>).

Earlier MDDD reviews

Previous MDDD reviews have been conducted in three cycles - the first two by ictQATAR in 2008 and 2011,³⁸ and the most recent by the CRA in 2016.

The 2008 review established standards and methodology for identifying relevant markets and determining dominant operators, designating Ooredoo,³⁹ as a DSP in 15 markets.⁴⁰

The 2011 review identified 14 relevant markets for retail and wholesale services, designating Ooredoo as a DSP in all 14 and Vodafone Qatar in two. Obligations imposed on DSPs were

³⁸ In 2014, the Communications Regulatory Authority was established as a successor to the ictQATAR.

³⁹ Formerly Qatar Telecom ("Qtel") Q.S.C.

⁴⁰ Communications Regulatory Authority, "Notice and Orders of the Supreme Council of Information and Communications Technology ("ictQATAR") Setting Forth the Methodology and Standards for Determining Market Power and Initial Designation of Qatar Telecom (Qtel) Q.S.C as a Dominant Service Provider in Specified Relevant Markets for the Period 2007 to 2010", April 2008 (<https://www.cra.gov.qa/en/document/market-definition-and-dominance-designation-2008-consultation-document-ii-accompanying>).

specified in the **Applicable Regulatory Framework (“ARF”)** at this time.⁴¹

The 2016 review revised the CRA’s methodology and included the Three Criteria Test (“TCT”) to ensure that ex-ante regulation was not applied too broadly.⁴² It identified 11 relevant markets, designating Ooredoo as a DSP in all and Vodafone Qatar in two. It also removed retail regulations in the mobile market and introduced new wholesale remedies for passive and active infrastructure access.⁴³

7. Principles for the upcoming ICT Competition Framework review

The new review cycle will revise both the *ex-ante* and *ex-post* components of the ICT Competition Framework, aiming to ensure they align with the current market landscape and broader strategic goals of the State of Qatar.

The following principles are set to guide the CRA’s review:

Principle 1: Reflect relevant strategic initiatives of the State of Qatar

Since the ICT Competition Framework was last reviewed, new national strategic initiatives have been developed and introduced. The upcoming review of the ICT Competition Framework review will seek to make sure the competition framework is in alignment with Qatar’s ambitions of becoming a regional and global digital hub to drive greater investment in the ICT sector, and in support of the country’s ambition to diversify the national economy. This will include creating a business-friendly environment, to enhance Qatar’s competitiveness in

⁴¹ Communications Regulatory Authority, “Notice and Orders of the Supreme Council of Information and Communications Technology (“ictQatar”) Setting Forth the Methodology and Standards for Determining Market Power and Designation of Qatar Telecom (Qtel) Q.S.C. and Vodafone Qatar Q.S.C. as Dominant Service Providers in Specified Relevant Markets (ICTRA 2011/10/31)”, October 2011, pp. 8-9. The ARF includes specific provisions, as covered by (among others), the Telecommunications Law, the Executive By-Law, related regulations, rules, orders, notices decisions and instructions and any telecommunications licences issued.

⁴² The TCT, which is based on the model used by the EU, includes an assessment of the need for ex-ante regulation in a particular market, depending on whether that market exhibited (1) high and non-transitory barriers to entry, (2) no tendency to effective competition; and (3) insufficiency of competition law to address competitive concerns. For more information, see BEREC, “ERG Report on the Guidance on the application of the three criteria test”, June 2008

(https://www.berec.europa.eu/sites/default/files/files/documents/erg_08_21_erg_rep_3crit_test_final_080604.pdf)

⁴³ Communications Regulatory Authority, “Notice and Orders - Designation of Ooredoo Q.S.C. and Vodafone Qatar Q.S.C. as Dominant Service Providers in Specified Relevant Markets”, May 2016, p. 12

(<https://www.cra.gov.qa/en/document/notice-and-orders-designating-ooredoo-and-vodafone-as-dominant-service-providers--9-may-2016>).

the region and globally.

Principle 2: Consider the needs of the sector inclusive of ICT as a whole

The review will consider the needs of the sector, reflecting on the full CRA mandate for the ICT sector. This will be an important update compared to previous reviews which were focused on the telecommunications sector, while current trends of development require a broader context of the ICT and digital domain as a whole.

Principle 3: Focus on the positive outcomes for end-users of digital services

The review will be focused on achieving positive outcomes for end-users of digital services, (ie end-users across the ICT value chain), protecting them from potential harms and ensuring they have access to high-quality, affordable services.

Principle 4: Consider and align with relevant CRA frameworks and initiatives

The ICT Competition Framework is seen as a key element of the CRA's overall regulatory toolbox designed to work comprehensively to achieve the strategic outcomes for the sector and the national economy. The review aims to consider all relevant CRA regulatory instruments and initiatives and ensure a coordinated and holistic approach.

Principle 5: Adopt a balanced and evidence-based regulatory approach that provides transparency and certainty

The review of the ICT Competition Framework will seek to provide transparency and certainty for market participants and investors. It aims also to provide clarity on the circumstances under which the CRA would conduct *ex-post* reviews and investigations into possible anti-competitive behaviour.

The review will proactively and constructively engage stakeholders to enable the CRA to conduct an evidence-based assessment of the need for interventions in the Qatari ICT sector and to guide the design of potential regulatory remedies. As part of the ICT Competition Framework review, the CRA will engage stakeholders across the ICT value chain, including licensed operators, connectivity providers, data centre providers, hyperscalers, system integrators and managed services providers, e-commerce platforms, content providers, and government institutions. Public consultations, industry workshops and individual meetings with industry players will be conducted at all key phases of the review, covering both the ex-ante and ex-post components of the ICT Competition Framework update.

These engagements will also provide stakeholders with insights into the CRA's long-term vision for the Qatari ICT sector, emphasising consumer welfare and fostering a business-friendly environment for digital services to enhance Qatar's global competitiveness.

Principle 6: Prioritise wholesale remedies to address major network and service level-competition barriers, with retail remedies still potentially an option

The CRA intends to continue its shift from retail regulation to wholesale regulation. Wholesale regulation can generally be understood as a lighter form of regulation, less intrusive and giving space for innovation.⁴⁴ However, the choice of whether wholesale or retail remedies are appropriate will depend on an assessment of their effectiveness in addressing identified market problems. This will include an assessment of whether the problems identified during the last MDDD review still exist and whether the remedies identified to address them need to be revised.

Where specific problems or strategic objectives are identified to require new regulations, wholesale level approach would be the preferred first option. For example, this approach has been applied when the CRA introduced regulated duct access and reduced the cost of rolling out competing fibre network infrastructure, facilitating greater competition in the fixed broadband market.⁴⁵ More recently, the CRA has also sought to introduce policies to promote infrastructure sharing at the wholesale level with the aim of reducing the cost of network deployment.⁴⁶

Principle 7: Consider the impact of relevant emerging technologies on competition dynamics

The CRA has played a vital role in supporting Qatar's development and economic

⁴⁴ Communications Regulatory Authority, "Market Definition - Review of the list of the Relevant Markets", June 2014, p. 3 (<https://www.cra.gov.qa/en/document/review-of-the-list-of-the-relevant-markets---public-consultation-document>).

⁴⁵ Communications Regulatory Authority, "Notice and Orders - Designation of Ooredoo Q.S.C. and Vodafone Qatar Q.S.C. as Dominant Service Providers in Specified Relevant Markets", May 2016, p. 12 (<https://www.cra.gov.qa/en/document/notice-and-orders-designating-ooredoo-and-vodafone-as-dominant-service-providers--9-may-2016>). Regulated access to duct infrastructure was a remedy imposed under the previous MDDD review in 2016.

⁴⁶ For example, in June 2024, the CRA published a public consultation document, which provided guidance to industry stakeholders on the responsibilities and procedures related to the deployment and sharing of infrastructure, with a specific focus on, in-Building Wiring (fixed line services), in-Building Solutions (indoor mobile coverage) and Mobile Sites (outdoor mobile coverage). For more information, see Communications Regulatory Authority, "Public Consultation – Framework for Infrastructure Development and Sharing", June 2024 (<https://www.cra.gov.qa/document/framework-for-infrastructure-development-and-sharing>).

diversification goals. The forthcoming ICT Competition Framework review will consider the impact of broader strategic initiatives implemented to support development and adoption of emerging technologies. Relevant emerging technologies currently deployed by industry players in Qatar, (eg AI, 5G, and IoT) will be considered as part of the updated ICT Competition Framework review. These technologies have the potential to impact the competitive dynamics of the ICT sector by promoting innovation and efficiency within firms, thereby contributing to a more competitive digital economy.⁴⁷ Other emerging technologies (eg Quantum computing) may form part of the economic and competitive analysis for future ICT Competition Framework reviews – but are unlikely to have a material impact on the competitive dynamics of existing telecoms and ICT markets.

Principle 8: Consider global regulatory developments and best practice for the ICT sector

The CRA will research and assess the approach of other regulators related to introducing market analysis updates to reflect changing global and local market conditions. For example, the EU has issued revised guidance on market definition to reflect the growing digitalisation of the ICT sector and the broader economy.⁴⁸ This suggests that price may not always be the best, or indeed, only indicator of competitiveness in a market, and that other factors – such as quality of service and investment – should also be considered as part of a forward-looking market analysis.

Principle 9: The updated ICT Competition Framework will consider the impact on the ICT sector as a whole, whereas *ex-ante* remedies will be applicable solely to dominant players in telecommunications markets

The upcoming review will examine the ICT and digital market in a broad sense, considering all players and the competitive constraints they exert and experience. It is important to note that the CRA does not intend to extend and apply the existing *ex-ante* regime beyond DSPs in the telecommunications sector. Assessments on how to improve competitiveness in the telecommunications sector will be done in the wider context of achieving positive impacts on the broader ICT sector, particularly due to the increased convergence of telecoms and IT. If

⁴⁷ For example, in July 2024, the CRA held a joint workshop with the International Telecommunication Union (“ITU”) to discuss collaborative digital regulation. This session covered new technologies such as AI and big data. For more information, see Communications Regulatory Authority, “CRA and ITU Host Workshop on Collaborative Digital Regulation”, July 2024 (<https://www.cra.gov.qa/en/press-releases/cra-and-itu-host-workshop-on-collaborative-digital-regulation>).

⁴⁸ European Commission, “Commission notice on the definition of the relevant market for the purposes of Union competition law”, C/2024/1645, February 2024 (<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52024XC01645>).

any competition issues arise in the wider ICT market outside the telecom segment, these will be addressed by the *ex-post* Competition Policy as a regulatory instrument.

Principle 10: The updated *ex-post* Competition Policy will enhance the CRA's tools of enforcement

The upcoming review will focus on ensuring effective application of competition principles and enforcement across all ICT markets. The updated *ex-post* Competition Policy will also provide the CRA with the tools to address certain anti-competitive behaviours, including cartels and abuse of dominance cases, and the tools to investigate, and prevent anti-competitive mergers in the telecommunications sector.

8. Consultation questions

Stakeholders are invited and encouraged to provide justified views and comments on the Consultation Document across all its sections. However, CRA would be pleased to receive inputs in response to the following specific questions. Please provide full details with each answer:

Question 1: Do you agree with the ten regulatory principles outlined in this Consultation Document?

Question 2: Do you agree with the characterisation of market developments in Qatar and the region as set out in this Consultation Document?

9. How to respond to the Consultation Document

Consultation procedures

Stakeholders and interested parties are invited to provide their views and comments on any aspect of this consultation and to respond to the specific questions raised herein. When responding, interested parties are asked to make clear reference to the page and/or question number and to provide background, context and supporting information. This will enable CRA to understand why the submitted opinions are held by the respondent and take better account of the underlying reasoning.

All submissions received in response to this consultation will be carefully considered by CRA. However, it should be noted that nothing included in the consultation document is final or binding, and CRA is under no obligation to adopt or implement any comments or proposals submitted.

Responses to this consultation (and questions about this consultation) should be submitted by email to: raconsultation@cra.gov.qa. The subject reference in the email should be stated as “Consultation on CRA ICT Competition Framework Review and Update 2024-2026”. It is not necessary to provide a hard copy of the responses. The deadline to respond to this consultation is March 23, 2025

Consultation response template

Responses to this consultation must be provided in the template format provided below in **Table 2**. Responses that are not in this template format may be disregarded.

Respondent: [Name of company, organization, or individual]

Clause or question reference	Response/Comments
[If relevant, please specify the number of the question or the page number of the consultation]	[Please provide your responses and comments in relation to the question or page mentioned in the first column]
[....]	

Table 2: Consultation response template

Publication of comments

In the interests of transparency and accountability, CRA may publish the responses to this consultation on its website at (www.cra.gov.qa). All responses will be processed and treated as non-confidential unless confidential treatment has been requested by the respondents. In order to claim confidentiality of information in submissions, respondents must provide a non-confidential version of such material in which all information considered confidential has been redacted and replaced with “[CONFIDENTIAL]” or “[CONFIDENTIAL INFORMATION]”.

A comprehensive justification must be provided for each section of a response that respondents wish to be treated as confidential. Furthermore, respondents cannot request confidentiality for the entire response or whole sections of the response.

While CRA will endeavour to respect the wishes of respondents, in all instances the decision to publish responses (in full or in part) will be at the sole discretion of CRA.

By responding to this consultation, respondents will be deemed to have waived all copyright and/or intellectual property rights over the material provided.

Appendix A: Abbreviations

Abbreviation	Definition
ADM	Access to Digital Media
AI	Artificial Intelligence
ARF	Applicable Regulatory Framework
AWS	Amazon Web Services
CRA	Communications Regulatory Authority
CT	Communications Technology
DSPs	Dominant Service Providers
EECC	European Electronic Communication Code
ET	Emerging Technologies
FTTP	Fibre to the Premises
GBI	Gulf Bridge International
ICT	Information and Communications Technology
IoT	Internet of Things
IT	Information Technology
ITU	International Telecommunication Union
IXP	Internet Exchange Point
M&A	Mergers and Acquisitions
MDDD	Market Definition and Dominance Designation
NDA 2030	National Digital Agenda 2030
NDS3	Third National Development Strategy 2024-2030
QIA	Qatar Investment Authority
QNB	Qatar National Broadband Network
QNV 2030	Qatar National Vision 2030
Qtel	Qatar Telecom Q.S.C.
sVOD	Subscription Video on Demand
TCT	Three Criteria Test
XaaS	Anything as a Service

Appendix B: Key defined terms

Defined term	Definition
Article 4 of the Emiri Decision No. 42	The legislative instrument which gives the CRA the mandate to regulate the ICT & postal sectors
Competition Policy/Ex-post regulatory regime	Qatar's 'ex-post' regulatory regime, focused on addressing anti-competitive behaviour (and developments such as mergers that may reduce competition) in the ICT market. This applies to all firms in the ICT sector.
MDDD review/Ex-ante regulatory regime	Qatar's on-going regulatory regime for telecommunications services only, focused on addressing competition issues in specified markets where dominance is detected and ex-post remedies are insufficient to address market problems. In Qatar this is referred to as the CRA's MDDD review and related obligations
Executive By-Law	Executive By-Law No.1 of 2009, which obliges the CRA to establish methodologies for assessing and determining market dominance
ICT Competition Framework	The Competition Framework for the ICT sector in Qatar, comprising the ex-ante regulatory regime and the ex-post Competition Policy
Telecommunications Law	Decree-Law No. 34 of 2006 on the promulgation of the Telecommunication Law, which grants the CRA authority to regularly review the competitive landscape of the telecommunications sector to determine the necessity for ex-ante regulation