

Rising | *GULF COOPERATION COUNCIL (GCC) SERIES*

QATAR 2016

BUILDING INVESTOR CONFIDENCE IN THE REGION

**CELEBRATING QATAR'S
THOUGHT LEADERS**

09 *HE Sheikh Abdulla Saoud, Governor of QCB*

11 *HE Dr. Thani Abdulrahman Al-Kuwari Secretary
General of Qatar Olympic Committee (QOC)*

22 *HE Dr. Hessa Al-Jaber, Minister of Information
and Communication Technology*



DESIGNING, BUILDING & CREATING ICONIC
DEVELOPMENTS IS WHAT WE DO BEST.

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INTRODUCTION TO QATAR

A BASTION OF GROWTH

Qatar is a relatively young nation, with a small population of approximately 2.2 million people located between two regional giants, Iran and Saudi Arabia. The emirate, located in southwestern Asia, is situated on a peninsula that extends 160 kilometers (100 miles) into the Persian Gulf.

Qatar's landscape is predominately flat desert, where temperatures can run very hot. The western region of Qatar rises slightly up to a central plateau, and there are some cliffs on the eastern coast. Large sand dunes can be found in the southeastern region. Hills, or jebels, that can reach up to 99 meters (325 feet) in altitude can be found in the western region situated above its major oil fields.

Islam shapes Qatar's culture, laws and social structure and the majority of its population is Sunni Muslim. However, visitors will see Asian, Middle Eastern, European and Western influences in the capital of Doha, located on the eastern coast. Approximately 90 percent of the country's population lives in Doha, one of the most thriving urban metropolises in the Middle East. Arabic is the official language of business and government,

but the vast majority of business people speak English. Urdu (Pakistani) is also spoken in the city. For much of the twentieth century, the Qatari government was a constitutional emirate set up along patriarchal family lines; however, its Constitution, which was passed in a 2003 popular referendum, refers to the country as both a democratic state and a hereditary emirate. The Constitution affirms the country's Islamic law foundation. Historically, the Al Thani family has been the most powerful family in Qatar and succession to the throne has passed from one generation of Al Thani's to the next. In 2013, Sheikh Tamim bin Hamad Al Thani became the eighth Emir of Qatar.

Today, Qatar boasts the world's highest per-capita income and has quickly become one of the most influential regional actors in the Persian Gulf. The nation is constantly evolving and growing as it continues to embrace globalization. Qatar's geopolitical ambitions and appetite for prestigious, high-profile events like the 2022 FIFA World Cup have garnered ongoing attention from the media and the international community. All eyes remain firmly on Qatar and what it will do next.

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GGM would like to thank Grey Doha for photos.

DEFINING A VISION

QATAR'S NATIONAL DEVELOPMENT STRATEGY TARGETS FOUR PILLARS OF DEVELOPMENT

The Qatar National Vision 2030 (QNV 2030) defines the future trends, aspirations and objectives of Qatar. QNV 2030 rests on four pillars of development: human, social, economic, and environmental. It also provides the framework for Qatar's National Development Strategy (NDS) 2011-2016. The aim of the NDS 2011-2016 is to balance five major challenges identified in the QNV 2030, which include the following:

- Preserving Qatari culture and traditions.
- Balancing current needs with those of future generations.
- Managing growth and avoiding uncontrolled expansion.
- Matching the size and quality of the expatriate labor force to the selected path of development.
- Aligning economic growth with social development and environmental management.

The NDS 2011-2016 is an amalgamation of 14 sector development strategies, each one of which was prepared individually for specific sectors. Focus is centered on sustaining economic prosperity, promoting human development, integrating sound social development, managing environmental development and developing a modern public sector. Under each objective, the government outlined specific target areas, objectives, and desired outcomes. For instance, concerning sustaining economic prosperity, attention was directed at:

➤ Expanding the “Productive Base”

This objective centers on expanding the “productive base”, which is the value of all the country's resources: man-made capital (infrastructure), human capital, natural resources, technology and institutions (i.e.,

markets and systems). Targets include formulating a national infrastructure strategy and master plan, and reviewing institutional arrangements to support growth and the diversification of the economy beyond hydrocarbons.

➤ Enhancing Economic Stability

QNV 2030 desired “to choose and manage a pathway that delivers prosperity yet avoids economic imbalances and stresses.” To secure this pathway, investors willing to make long-term commitments designed to expand the country's productive base and economic stability will be sought. Capital assets quality and enhanced services fall under this focus, as does reducing economic volatility.

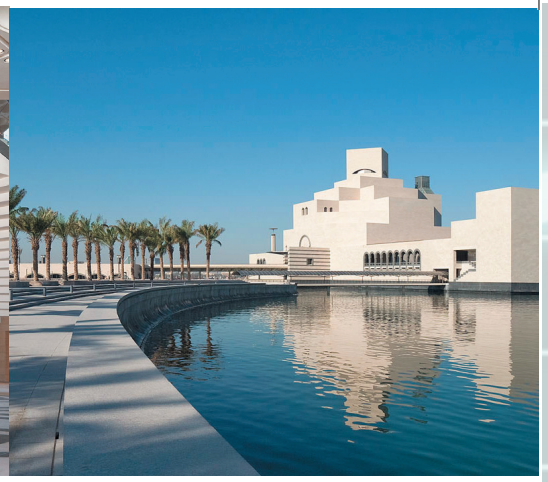
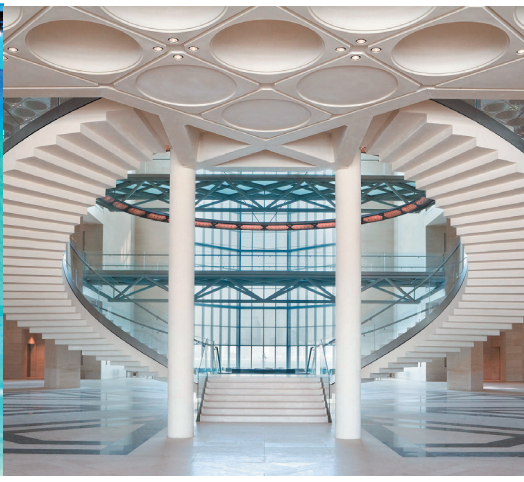
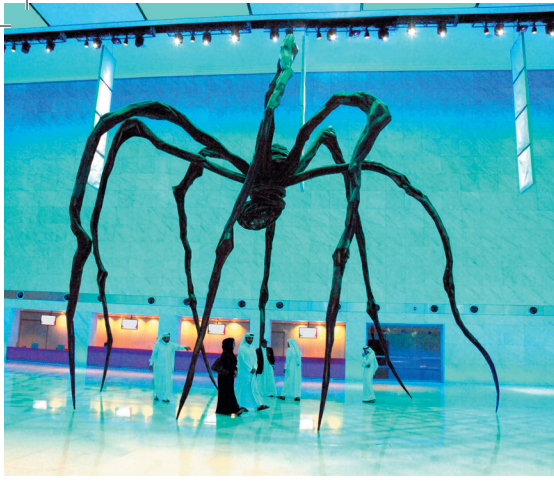
➤ Enhancing Technical and Economic Efficiency

By reducing inefficiencies in technology, physical infrastructure, institutions and processes, the government would be able to improve the use of resources over time. Multiple targets were set in the sectors of energy and gas, water, infrastructure, and land use. For example, one project outcome is to enhance efficiency in the use and conservation of freshwater resources. Another outcome involves improving energy efficiency, environmental quality, and value creation.

➤ Building a Diversified Economy

One of the primary motivations for QNV 2030, as set forth by the Ministry of Development Planning and Statistics (MDPS), is to build “a diversified economy that gradually reduces its dependence on hydrocarbon industries, enhances the role of the private sector and maintains its competitiveness.” A diversified economy is beneficial in improving stability, creating opportunities and jobs, and in reducing vulnerability to boom and bust cycles of oil and natural gas prices.

Outcomes desired include strengthening the private sector and entrepreneurial capabilities, increasing capabilities and expanding opportunities for innovation, skills, and discovery, and expanding financial sector market opportunities and capabilities. The NDS 2011-2016 is a plan of action. It offers new proposals and areas of focus while building on the goals of the QNV 2030. NDS 2011-2016 offers added focus, motivation and direction for Qatar as it moves forward in achieving its goals.



QATAR'S TOP 5 MEGAPROJECTS

➤ Hamad Port Project

The \$7.4-billion New Port Project, located off the coast of Doha, will vastly increase Qatar's import and export capacity of raw goods. The port's three container terminals will have the capacity to receive over 500,000 ships per year, totaling over 1.7 million tons in annual goods. The first phase of New Port Project will come online in 2016, with the entire project entering completion as early as 2020.

➤ Doha Metro Expansion (Red Line)

The planned expansion of the 42 kilometer Red Line—which is one of four segments within the construction of Doha's rapid transit system—is one of the most ambitious projects of its kind globally. On the Red Line alone there are 13 underground stations of a total 30 that is planned; the entire metro expansion will require immense underground tunneling to meet

its original design, connecting the northern and southern tips of the city.

➤ Barzan Gas Project (Phase 2)

The \$10.3-billion Barzan Gas Project is a joint venture between Qatar Gas and ExxonMobil that will connect Qatar's massive North Field gas formation to foreign LNG import markets. The first phase of the project, which includes two rail lines totaling around two billion Bcf/d export capacity, finished completion in 2015, and four additional train lines are planned for completion in coming years. The project will eventually have a nameplate capacity of 6.2 Bcf/d.

➤ Lusail Iconic Stadium

The 86,000-seat Lusail Iconic Stadium is planned for construction in Lusail, slightly north of Doha, and will host the final match of the 2022 FIFA World Cup Qatar. The stadium will

be built from scratch as part of a broad \$4-billion plan to build five new facilities in the country; the Lusail facility itself comes with a price tag of \$662 million. British firm Foster + Partners designed the Lusail Iconic Stadium, which is slated for completion in 2020.

➤ Hamad International Airport

The \$8-billion international airport expansion will include two new terminals that is set to substantially improve the ease of transportation for premium flyers. The \$8-billion expansion will include 45,000 square meter recreational center that will house a spa, gym, library, children's play area and numerous restaurants and lounges. Expansion of the airport's main terminal will increase its capacity from 30 million people per day currently to as much as 86 million by the time construction is completed in 2020.



MARKET WATCH

POISED FOR GROWTH

DESPITE LOW COMMODITY PRICES,
QATAR IS WELL POSITIONED GOING FORWARD

The IMF had projected that economic growth for Qatar could accelerate to above 4.5 percent in 2015 and 2016 largely driven by its massive public infrastructure program and the opening of the Barzan natural gas field. However, in December 2015, Qatar's Ministry of Development Planning and Statistics revised the GDP growth forecast to 3.7 percent, down from its earlier prediction of 7.3 percent projected in June 2015. The ministry also further projected that the economy would grow 4.3 percent in 2016 and 3.9 percent in 2017.

The sizeable decline in revenue caused by lower oil and gas prices is expected to leave a gap of QAR 46.5 billion in next year's budget. In response to what would be the first financial shortfall in 15 years, Qatar's Emir approved dramatic cuts to the 2016 budget. Qatar now plans to spend approximately QAR 202.5 billion in the 2016 fiscal year, which is 7.28 percent less than its current fiscal year. To cover the financial shortfall, Qatar has indicated that it will borrow money rather than tap into the sizeable savings held by the Qatar Investment Authority, which is earmarked for economic diversification.

Qatar's Finance Minister, HE Ali Shareef Al Emadi, assured citizens that the cuts would not negatively impact them or alter the quality of government services they receive. The additional savings are expected to come from trimming excess from government operations. In a recent interview, the Minister said, "the current situation provides an opportunity to achieve further efficiency, especially in the operating costs of various government departments."

Qatar has worked diligently to diversify its economy and strengthen the non-oil sector. Upon completion

of the expansion of Qatar's liquid natural gas (LNG) capacity, the government shifted its attention to diversifying its economic base by bolstering spending on key industries such as petrochemicals and transportation, as well as on infrastructure for the 2022 FIFA World Cup. Its efforts continue to pay off as Qatar remains one of the fastest growing countries in the region.

QATAR'S ECONOMY

OIL & NATURAL GAS

Qatar's proven oil reserves are estimated at approximately 24.5 billion barrels, making it the second-smallest oil producer in OPEC. Oil has dominated the Qatari economy for more than fifty years and has played a major role in diversifying the country's economy. Unlike many neighboring countries, Qatar has allowed for foreign investment and partnerships (ExxonMobil, Chevron, and Total) in the exploration of oil even though no significant new reserves are expected to be discovered in the future. Qatar has thus turned its efforts to exploiting its massive gas reserves and expanding crude production capacity.

Qatar has the third-largest proven gas reserves in the world estimated at over 25.5 trillion cubic meters. Supplies are forecasted to last for 100 years at current extraction levels, and Asian demand for LNG is expected to continue to rise. As Qatar pushes forward with plans to boost output to 77 million tons per year, natural gas revenues are expected to generate significant export revenues for many decades to come. Given current forecasts, the sector will continue to play a significant role in the economy despite the low short- to mid-term growth prospects as international commodities markets languish.



INTRODUCTION TO THE THOUGHT LEADERS SERIES

A Celebration of Qatar's thought leaders, innovators and thinkers, problem solvers, and drivers of Qatar's growth and development.

INDUSTRIAL

Qatar's industrial sector contributes roughly 15 percent to GDP and employs 25 percent of the nation's workforce. Heavy industries, which typically include petrochemicals, fertilizers, cement and plastics, are largely state-owned joint companies. These industries have expanded in recent years thanks to increased government investment.

The government is interested in developing and expanding light industry, which includes food processing, building materials, household items and furniture. Incentives are being offered for such projects. The government has also invested heavily in developing industrial plants, most of which are concentrated in the industrial city of Mesaieed.

INFRASTRUCTURE SPENDING & CONSTRUCTION

Estimates suggest that the government will spend between US \$180 and \$200 billion on infrastructure by the early 2020s. Large public projects in the works include the Qatar Rail at a cost of US \$40 billion and the New Doha Port at US \$7.4 billion. Other projects include mixed-use real estate developments like Lusail City, a waterfront development north of Doha to be completed by 2019 at a cost of US \$45 billion.

FINANCIAL SYSTEM

BANKING

Qatar's central bank has taken steps to improve its capacity to implement a market-based monetary policy, which includes the liberalization of interest rates and the simplification of reserve requirements. Qatar has a fixed exchange-rate regime, and the Qatari riyal has been pegged to the U.S. dollar since 1980.

The country's banking sector consists of 15 commercial banks, including seven locally owned banks that account for roughly 80 percent of the sector's total assets. The Qatar National Bank (QNB) is part publically owned, and holds nearly 50 percent of total deposits. It also handles most of the government's business. No investment bank has yet been established in Qatar.

INSURANCE & FINANCE

There are 12 insurance companies operating in Qatar. The majority is foreign owned, but the largest locally owned company is Qatar Insurance Company (QIC). In 2005, Qatar Financial Center (QFC) was established to create a competitive financial market. QFC is managed by an independent set of regulations that are considered on par with international financial standards. The government hopes that QFC will attract a large number of international financial service firms to aid in facilitating foreign investment. Several major international firms have already received operating licenses from QFC, but the market faces strong competition from Dubai International Financial Center.

One major shortfall with the country's financial system centers on transparency. An underdeveloped legal structure and the obscure nature of the region's family-owned businesses lie at the center of the transparency issue. Regulators have increased their efforts to combat these issues – albeit in small ways. For instance, companies are now penalized for not delivering earnings reports on time. Many companies are also taking steps on their own to become more transparent, hiring experienced international managers rather than family and friends.

Q&A

with

HE SHEIKH ABDULLA BIN SAOUD AL THANI, GOVERNOR OF QATAR CENTRAL BANK

The Qatar Central Bank has been in the spotlight ever since commodity prices took a tumble and created economic uncertainty the world over. QCB sat down with Wall Street Investment Guide to explain how it believes Qatar has the flexibility to use the large fiscal and financial buffer it built over the years to support growth and stability, despite uncertainty.



Wall Street Investment Guide: Volatile oil prices are a concern throughout the region. How can Qatar's economy maintain its resilience during uncertain times?

Qatar Central Bank: There are a number of positive factors, which support the resilience of the economy. First, Qatar's growth is increasingly being led by the non-hydrocarbon sector reflecting our ongoing economic diversification strategy. In 2014 (first three quarters), real GDP growth was robust at around 6 percent, driven by double-digit non-hydrocarbon sector growth, notably in construction, trade, transportation and communication, as well as the financial services sector. In fact, the non-hydrocarbon sector now accounts for over 60 percent of real GDP. Second, Qatar is more reliant on gas exports than oil, and most of its exports go to Asia, a region, which is expected to record robust growth. Third, continued high capital spending through the budget, and implementation of large projects by public enterprises as part of preparedness towards the FIFA World Cup 2022 will ensure that non-hydrocarbon GDP growth remains comfortable. Fourth, inflation has been benign, averaging around 3 percent in 2014.

WSIG: Qatar has made significant progress in diversifying government revenues beyond hydrocarbons. But does the transition need to happen faster, as some critics have suggested?

QCB: Indeed, non-hydrocarbon sector growth is significant in Qatar's economy and has led GDP growth in 2014. In addition to building a robust financial sector to support our economic growth and diversification goals, QCB, under Law No. 13 of 2012, is leading the coordination efforts with Qatar Financial Markets

Authority and Qatar Financial Centre Regulatory Authority to provide a stable financial environment to a broad range of businesses. In this context, the Financial Stability and Risk Control Committee was established in 2013 to facilitate regulatory coordination and augment management of systemic risk. As envisaged in the Strategic Plan and conforming to international standards, QCB has been moving to risk-based

regulation, expanding macro-prudential oversight, enhancing transparency, strengthening market infrastructure, and improving consumer and investor protection.

WSIG: There have been increasing discussions lately around many longstanding economic policies in Qatar, particularly currency pegs. Is Qatar giving serious consideration to changing its dollar currency peg?

QCB: Qatar's decision to keep its exchange rate pegged to USD rates is based on key considerations that encompass the economic realities of the country. The dollar peg provides a credible anchor for our monetary policy as almost all of Qatar's export contracts and invoicing are done in the U.S. Dollar. Thus, a stable exchange rate renders stability to our foreign export earnings, which is the main component of government revenue.

WSIG: You were part of a Qatari delegation that visited the U.S. to promote trade and investment between the U.S. and Qatar. Were those meetings successful with regard to stimulating investment in Qatar?

QCB: Indeed, a senior Qatari delegation visited the U.S. in January 2015 to focus on finance and investments between the State of Qatar and the U.S. and to strengthen bilateral economic relationships. On January 26, the delegation participated in the US-Qatar Finance and Investment Forum, held at the American Chamber of Commerce and attended by more than 200 U.S. officials, senior executives, and investors. This forum underscored the industrial and economic alliance between the U.S. and the State of Qatar.

Q&A

with

MR. ABDULAZIZ BIN NASSER AL KHALIFA, CEO OF QATAR DEVELOPMENT BANK



Qatar Development Bank has been appointed by the government to be part of the diversification of Qatar away from the oil and gas sector. It has been an intrinsic player in the development of programs such as Silatech, Qatar Incubation Center (QBIC), and Bedaya.

Wall Street Investment Guide: How challenging is this task of diversification, and how are these challenges overcome?

Qatar Development Bank: The challenge is that we are an energy-dependent economy. However, QDB and the whole entrepreneurship and private sector SME ecosystem is getting the pieces together to solve the puzzle and create a vibrant private sector that will contribute to the economy and GDP. With a young, hyper-connected population and world-class education and training institutions in this country, I think all the ingredients are here. In Q3 of 2014, Qatar's non-hydrocarbon sector accounted more than half of GDP so indeed we are making progress in the face of this mighty task.

WSIG: Qatar's development depends on long-term economic stability. How can this be encouraged and how is Qatar Development Bank contributing to this long term Qatar National Vision 2030 vision?

QDB: QDB focuses on accelerating the development and diversification of the economy of Qatar in line with the Qatar National Vision for the year 2030. To achieve this goal, the bank invests in the private sector by supporting local entrepreneurs, as well as providing housing and development related initiatives on behalf of the government of Qatar. We approved QAR 146 million in loan guarantees through Al Dhamee in 2014, which provided access to loans for 62 SMEs who otherwise had no access to capital.

THE BOOSTER

QATAR BUSINESS INCUBATION CENTER HELPS TO FOSTER UP-AND-COMING ENTREPRENEURS

QBIC is a leading business incubator that provides business support services to help entrepreneurs and companies who either have an idea to start a business or want to grow an existing business. QBIC was founded by Qatar Development Bank and the Social Development Center, and both continue to provide valuable support as our two founding partners. Our purpose-built facilities located in the New Industrial Area have an area of 20 thousand square meters that can accommodate office space for 150 businesses, as well as 16 industrial workshops.

With a mission of developing the next QAR 100 million companies in Qatar, QBIC's wide-ranging services help committed entrepreneurs, startups and scaleups to successfully achieve their business goals. QBIC empowers entrepreneurs to start and grow companies by incubating, developing, investing and connecting. We are a team of professionals with big aspirations and our mission is to develop the next Qatari companies valued at QAR 100 million.

Q&A

with

BEDAYA CENTER

The Bedaya Center for Entrepreneurship and Career Development was established in 2011 as a partnership between the Qatar Development Bank and Silatech. It helps to develop and support young entrepreneurs so they can succeed with their business idea. The real value of Bedaya Center lies in helping the youth of Qatar to reach their full potential and succeed in whatever path they choose, so that they can take pride in realizing the country's national vision.

WSIG: Bedaya has a stream of entrepreneurs looking to start their own businesses. How do you match them with technical expertise?

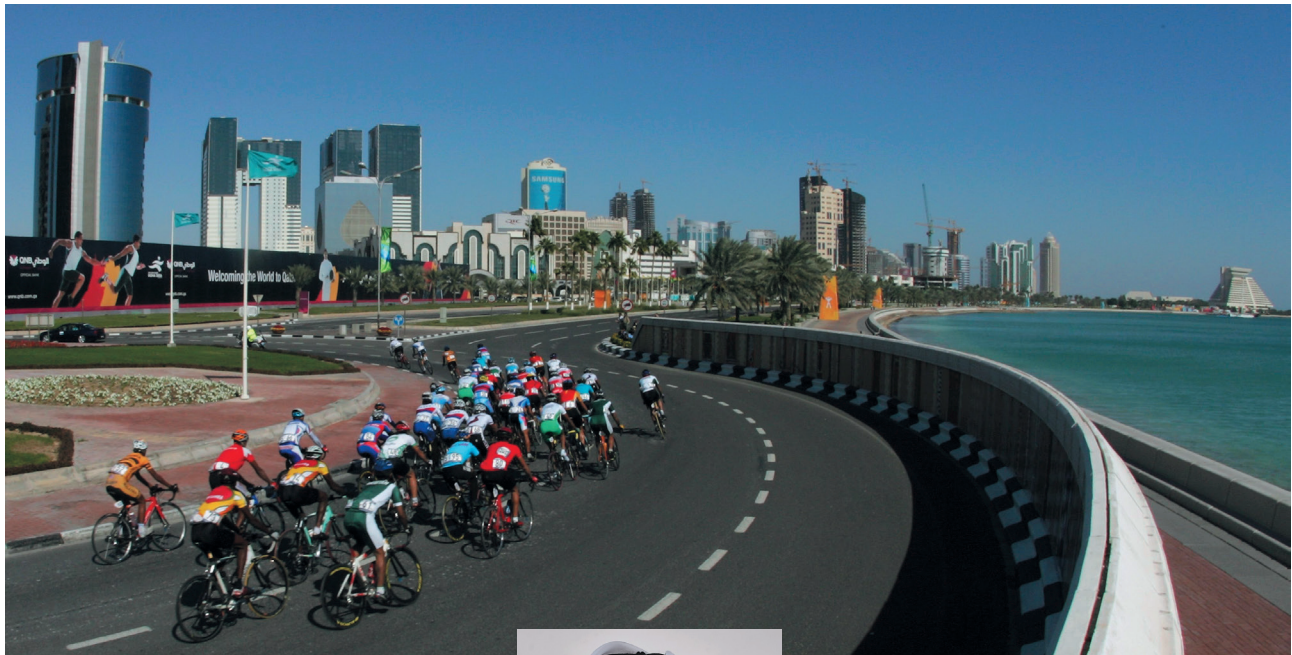
BC: For the budding entrepreneur, Bedaya offers access to entrepreneurial training services each month, during the day, in the evenings or on weekends. Bedaya develops and supports them to succeed in the business environment by evaluating their business idea to find their market niche. We then help them to produce a strategic business plan with market analysis and projections. We also help would be entrepreneurs promote their ideas through social media. Finally, Bedaya advises them through the incubation and growth stages.



with

HE DR. THANI ABDULRAHMAN AL-KUWARI, SECRETARY
GENERAL QATAR OLYMPIC COMMITTEE (QOC)

BECOMING A SPORTS HUB



Sport is a fundamental aspect of Qatar's National Vision 2030 and economic diversification plans. What is your current mandate in alignment with these development plans?

Qatar is a nation passionate about sport and we understand that sport is an incredibly powerful tool for building a healthy and cohesive society. The Qatar Olympic Committee (QOC) aims to increase community participation in sport, connect more young people to sport at a grassroots level, develop more elite athletes and further progress Qatar's development as a global sports hub, whilst ensuring that the spirit of Olympism is at the heart of everything that we do.

The President of the International Handball Federation, Dr. Hassan Moustafa declared that the 15th Men's Handball World Championship held in Qatar last February was "the best World Championship ever held." What other milestones has QOC achieved in recent years?

Qatar's hosting of the 2006 Asian Games saw its emergence as a true global sports hub. This was



the largest Asian Games ever held, with 45 countries represented and a huge TV audience. Since then, Qatar has continued to host a multitude of world-class sports events, including the 2010 IAAF World Indoor Championships in Athletics, 2014 FINA World Swimming Championships, and 2015 World

Championships in IHF Men's Handball, AIBA Boxing and IPC Athletics - many of which were declared as the most successful in history and all of which took place in the Middle East for the first time in their history.

What are some of the key challenges facing QOC and sports in Qatar today?

In this digital age where there are many competing demands on young people's attention, Qatar faces the same challenges as countries around the world in capturing their imagination through sport and encouraging them to be more active. Qatar aims to address these challenges through the hosting of world-class sport, which showcases the excitement of live sport and inspires through sporting heroes in Qatar and around the world.



SUPREME COMMITTEE FOR DELIVERY & LEGACY

The Supreme Committee for Delivery and Legacy (SC) is tasked with building the stadiums and other infrastructure for the 2022 FIFA World Cup™, ensuring both that the tournament leaves a lasting legacy for Qatar and aligns with Qatar's other imperatives, as described in the QNV 2030 and the NDS 2011-2016. In addition to overseeing the timely delivery of infrastructure and competition and non-competition venues, the SC is also responsible for ensuring that the voices of local communities are factored into the country's preparations for the tournament via its Community Engagement program, and for nurturing a regional sports and events management industry through the Josoor Institute.

Six years remain until the 2022 FIFA World Cup™ kicks off and the SC maintains that plans are on schedule. Six venues are currently under construction: Al Bayt Stadium - Al Khor City, Al Wakrah Stadium, Al Rayyan Stadium, QF Stadium, Khalifa Stadium and Lusail Stadium, the host of the World Cup final. Construction of Khalifa Stadium will be completed in the later half of 2016. Two additional stadium locations have been identified in the areas of Ras Abu Aboud and Al Thumama, but construction is yet to begin.

➤ Innovation

One innovation arising from Qatar's preparations for the 2022 FIFA World Cup™ lies in the area of cooling technologies. In its original bid, Qatar proposed the use of advanced cooling technologies to ensure a cool and comfortable tournament for players and visitors alike. While FIFA's decision to

move the tournament to November and December means play will now take place during Qatar's temperate winter, the SC has committed to continue developing its revolutionary technology to ensure the legacy aspects of its bid promise will still be met.

➤ Uniting Through Football

Driving preparations for an historic first Middle Eastern World Cup is the SC's Secretary General, Hassan Al Thawadi. He has been instrumental in keeping preparations for the tournament on track and for increasing the world's awareness of Qatar's unique hosting plans, such as this being the first FIFA World Cup™ at which fans will be able to watch two live matches in one day. But beyond hosting the world's most popular tournament, Al Thawadi also hopes to use the 2022 FIFA World Cup™ to break down barriers in an increasingly tense global political climate and to present the vibrant culture of Qatar and the Middle East to the world.

In a recent comment the Secretary General said: "People from all corners of the world will come together on Arab soil, to celebrate and enjoy the world's greatest sporting event and we consider this a precious opportunity to enhance cultural understanding between people of different cultures and backgrounds, uniting through a shared passion for football."

"There is nothing in the world that unites people the way football does. It builds bridges, it brings people closer to each other. When you look at some of the issues the world is facing right now, this World Cup has never been more important."

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BUILDING BLOCKS

ASHGHAL: QATAR'S PUBLIC WORKS AUTHORITY IS OVERSEEING A MASSIVE INFRASTRUCTURE BUILDOUT



The Public Works Authority (Ashghal) was founded in 2004 as an autonomous company, but has since become the state-owned enterprise that designs, procures, constructs and manages all of Qatar's notable infrastructure projects. Over that period it has assumed the position of Qatar's leading engineering, procurement and construction company. Between 2015 and 2022, Ashghal plans to invest no less than \$22 billion in new infrastructure projects.

Those projects include 32 major contracts under its Expressways Program as well as other major developments including road construction, hospitals, schools, water treatment plants, sewer systems and much more. In mid-2015 Ashghal's massive Local Roads and Drainage Program (LRDP) included 237 individual projects that spanned over 751 square kilometers of land. Under the Inner Doha Re-Sewerage Infrastructure Strategy, Ashghal has at least \$4.5 billion in construction contracts locked in by 2020.

Ashghal faced struggles in August of 2015, when heavy rainfall caused a shutdown of the Lebsayyer Interchange and delayed construction. President of Ashghal, HE Nasser bin Ali Al Mawlawi told *Qatar Tribune* that such delays were necessary as part of a broader design for Qatar's infrastructure buildout. "This network of infrastructure can't be built in parts, we need to go as per the master plan, which is why we are seeing large-scale construction activity, including development of roads, expressways, bridges and so on. All this will make Qatar a much better place to live in."

Despite struggles, many projects are on schedule. Qatar cut its economic growth forecast to 7.3 percent from 7.7 percent at the beginning of 2015, but even as the country faces the possibility of a fiscal deficit in the coming years, most analysts expect construction to be completed on time. Ashghal's past performance suggests The Public Works Authority is well placed to meet future expansion demands.

Q&A

with

CHAKIB NAYFE, GM, MEDGULF CONSTRUCTION COMPANY

Medgulf brings more than 40 years of experience to the Qatari construction industry. The company used to have its core business in oil and gas, but has gradually diversified its portfolio to include civil construction.

Wall Street Investment Guide: Congratulations on your 40-year anniversary milestone. What are your short to medium term goals regarding your two major business units?

Medgulf Construction: We set aggressive targets in 2014 and in 2015. We have exceeded our targets in 2014 and we were confident that we will continue to do the same in 2015-2016. The reduction of oil prices has resulted in the cancellation of a number of projects, which in turn impacted our forecast. We have revised our strategy during the first quarter of 2015 to ensure our growth strategy and our planned financial targets for 2015-2016 remain on track. We will keep our focus on both sectors and tackle any opportunity that fits our profile; however, I expect that more opportunities will be available in the civil and infrastructure sector.



WSIG: How are you coping with this standstill and reaching your margins?

MC: Some companies are calling this period a survival phase. We don't see it this way. Medgulf's diversified business model, as well as our strong relationship with various clients, has assisted us in securing new jobs. Our previous delivery records and

excellent relations with main clients have given us an edge over our competitors.

WSIG: Who are your strategic partners and whom are you looking to attract in terms of partnerships and joint ventures?

MC: There are some mega projects planned for Qatar, including the long distance rail project and the Expressways Program. Such projects will require international expertise, and as such we are currently investigating the opportunity to form a joint venture with experienced and reputable companies who have an interest in getting involved in the Qatari construction industry.



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Committed to Safety and Quality



Q&A

with

MR. ALI AL KHALIFA, CEO OF ASTAD PROJECT MANAGEMENT



ASTAD Project Management is Qatar's leading project management consultancy for building and infrastructure. It is a 100 percent Qatari-owned enterprise that manages some of the country's most complex, large-scale national projects.

Wall Street Investment Guide: Congratulations on winning Sustainability Initiative of the Year for your Solar Smart Grid project with QF. How important is green technology for your company?

ASTAD: We are very proud of our many achievements, and they are merely a reflection of the fact that sustainability is at the heart of ASTAD's corporate ethos. We have always understood the importance of adhering to environmental protection standards when delivering our projects. We ardently seek to use environmentally-friendly products to reduce our carbon footprint. ASTAD has received a number of accreditations and awards such as the LEED Platinum Status for Male and Female Student Housing at Education City, as well as other awards, to speak to its dedication to sustainability.

WSIG: What major projects are you currently focused on?

ASTAD: Some of the most prominent, large-scale endeavors currently under construction include Qatar's Economic Zones, which will be the center of Qatar's economic diversification. They will house homegrown small and medium enterprises that will become the backbone to Qatar's economy. The project is comprised of three separate zones, Ras Bufontas, Umm Al Houf and Al Karaana.

We are also currently overseeing the National Museum of Qatar, which will become one of the most iconic structures in the country. The project will be a cultural hub reflecting the ideals and traditions of a proud and progressive nation. And, as the World Cup nears, we are very proud to have been entrusted with the Qatar Foundation Stadium and Health and Wellness Precinct, which will become one of the host venues for the 2022 FIFA World Cup.

Q&A

with

DR. ABDULAZZIZ AL HORR, CEO OF QATAR FINANCE AND BUSINESS ACADEMY



The Qatar Finance and Business Academy was established in the aftermath of the 2008 financial crisis, which riddled many GCC markets to over-exposure and losses in international mar-

kets. As such, the QFBA was established in 2009 as a subsidiary of the Qatar Financial Authority (QFCA) to create a knowledge-based economy that centers on a world-class talent pool.

Wall Street Investment Guide: KAFA'A was described as a champion model to elevate the Qatari banking and finance sector to world-class levels. How so?

QFBA: The QFBA launched KAFA'A this year in a mandate by Qatar's Financial Markets Development Committee (FMDC) as part of an initiative to elevate and advance Qatar's financial services sector. Under the joint sponsorship of the Qatar Central Bank, Qatar's Financial Markets Authority and the Qatar Financial Centre Regulatory Authority, KAFA'A is a quality-centered initiative aimed at elevating banking professionals' performance and personal growth.

WSIG: What is the Qatar Institute for Public Finance's role in advancing the field of public financial management in the MENA region?

QFBA: The Qatar Institute for Public Finance (QIPF) is spearheading a region-wide initiative aimed at actively tackling knowledge, talent, expertise, and market intelligence gaps in the MENA region's public finance field. As such, it equips public finance controllers in the MENA region with training and competency development, as well as market intelligence and access to international resources to guide informed, efficient and effective budget planning and management.




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with

MR. MOATAZ AL KHAYYAT, CEO URBACON TRADING AND CONTRACTING (UCC)



Urbacon Trading and Contracting (UCC), a group of companies, is one of the largest and most prominent contractors in its region. It was founded in 1983, by Mohamad Raslan Al Khayyat, and over time it has grown to incorporate many other companies

Wall Street Investment Guide: You have been ranked one of the top 250 global contractors and UCC recently became the first company in the GCC to receive recognition of its global standards of practice by the British Standard Institution. What do these achievements mean to you?

Mr. Khayyat: We are very proud of being ranked one of the top 250 Global Contractors and for the recognition bestowed on us by BSI in regards to our Integrated Management Systems. This recognition is a result of the hard work and endeavors of all our employees, not just formulating our procedures but also in ensuring their proper implementation. This has in turn provided controlled growth leading to the global ranking.

WSIG: With several companies under your group, including general contracting companies, commercial and residential developments, building materials and various trading companies. Can you tell us about

UCC and how you have become a leading contractor in Qatar?

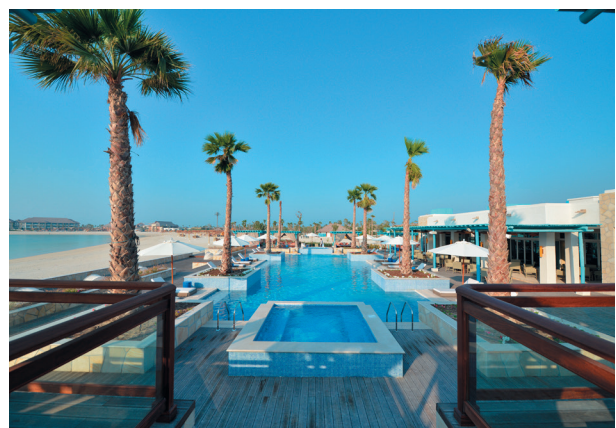
Mr. Khayyat: Our heritage of excellence has enabled UCC to rapidly establish itself here in Qatar ever since its formation in 2011. The success of UCC in the local market is of course influenced by a number of key elements. These include the leadership of the Al Khayyat family, the dedication of our employees and of course a good amount of hard work, attention to detail, sound strategic planning, marketing and related business development.

WSIG: The prestigious Mall of Qatar, scheduled to open at the end of 2016, will become one of the largest shopping mall complexes in the world. What was the vision behind this megaproject and how does it feel to see your hard work come to fruition?

Mr. Khayyat: Projects such as the Mall of Qatar are very much aligned with QNV 2030. The substantial investment currently underway in Qatar's infrastructure, like the development of its Ports and Economic Zones, all allow for planned population growth and economic development.

The Mall project is essential in providing an environment where business can flourish while also catering to the nation's social and human development.

The Mall presented quite a design challenge, however with the right deployment of experienced professional staff at all levels we can now start to see the fruits of our effort. Of course, behind the scenes





we also have a very active operations unit, which has already engaged with major tenants and have completed the leasing arrangements for substantial portions of the Mall. This team will continue with the operation of the Mall once it is fully commissioned and handed over.

WSIG: Rising inflation, higher material costs and increasing recruitment costs are some of the major challenges facing Qatar. What are the major concerns and challenges facing your organization? How do you reach your margins and deliver projects on time without compromising quality?

Mr. Khayyat: Resources are always a critical element of any operation, whether these are materials or employees. We realized early in our operations here in Qatar that to be able to ensure timely delivery and quality to our clients; we need to self-perform a significant portion of our works. Hence, we have over the last five years established a substantial base of experienced professional staff and likewise a substantial skilled workforce.

The companies we work with, coupled with our core company resources, are continually reviewed to ensure they are fully aligned with our planned growth and any shortfalls addressed by our in-house recruitment division, which has a continual presence in the overseas market.

For materials, we have established a substantial centralized procurement team, which in turn has developed a strong supply chain within both the local and international market. With this in-house capability, we are currently able to cater for all material and human resource requirements. UCC believes that the ability to draw on the international

market is currently the most effective solution to rising costs.

To further support and safeguard our operations, we have established our PMV division, within which we have invested significantly to build up a fleet of over 2,000 units to support our projects and minimize our exposure to tight local market.

WSIG: How are you diversifying your company's portfolio alongside the principles of QNV 2030? What should we expect from your organization in the next five years in terms of partnerships, technology, architecture, sustainability and innovation?

Mr. Khayyat: Qatar's National Vision 2030 is founded on four key pillars, these being economic development, social development, human development and environmental development. Our core companies are fully engaged in the economic development of Qatar, with major contracts ongoing in infrastructure, as well as the design build of hotels, resorts, mixed-use developments and schools.

As a group, we have also diversified into hotels and resorts, hospitality, facility management, medical institutions, real estate, retail and agriculture. We are currently reviewing opportunities within the manufacturing sector and considering the expansion of our international operations, which currently exist in Oman, GCC, Morocco, etc.

UCC is continually on the lookout for opportunities and partnerships in any field; we have a team of experienced business development professionals dedicated to exploring current and new markets and we look forward to participating in Qatar's development over the coming years together with the development of the region.

HE DR. HESSA AL-JABER, MINISTER OF INFORMATION AND COMMUNICATIONS TECHNOLOGY

Dr. Hessa Al-Jaber is the third woman to assume a ministerial position in Qatar, and the first to become Minister of Information and Communications Technology. Under her leadership, she plans to implement high-speed, high-quality broadband networks for the country, move 100 percent of government services online by 2020 (e-Government 2020), develop infrastructure to keep Qatar's networks secure and generally improving the country's ICT sector. Wall Street Investment Guide sat down with her to learn more about her vision as Minister.



investments in ICT. In terms of government spending, total ICT spending in Qatar is predicted to increase at a rate of 7.4 percent a year, to QAR 17.1 billion by 2018.

WSIG: Qatar is among the top five Arab states and top 60 countries globally in the ICT Development Index (IDI). Can you tell us your major breakthroughs in innovation?

HE: We need to capitalize on emerging technologies and establish Qatar as a leading state when it comes to innovating technologies that enrich human lives and propel the digital economy. To that end, ictQATAR established a Digital Incubation Center (DIC) in 2011 to boost ICT innovation in Qatar, particularly among young people at the critical early stages of starting or growing a technology-related business. The Center's objectives are to help young entrepreneurs transform innovative ideas into viable businesses by offering expertise, professional guidance and other services.

Wall Street Investment Guide: What role does ICT play when it comes to Qatar National Vision 2030?

HE Dr. Hessa Al-Jaber: Nearly a decade ago, Qatar's leaders recognized that the future belonged to countries that could harness the power of ICT for economic and social good. They envisioned the Qatar of 2030 as an advanced society capable of sustaining its own development and providing a high standard of living for current and future generations. And ICT plays a critical role in achieving the four pillars outlined in that vision.

WSIG: What foreign investment opportunities are in the ICT sector?

HE: Firstly, ictQATAR has developed a comprehensive roadmap for the development of a "digital cluster" in Qatar within the context of the Smart Nation program. This roadmap will guide the acceleration of an evolving digital ecosystem in Qatar and also help in diversifying the economy away from the traditional hydrocarbon-based economy. Recently the laws have been relaxed for investment of non-Qatari capital in the economic activity of the state of Qatar. Foreign investors may now exceed the former 49 percent cap on

We are particularly interested in entrepreneurs who are working with emerging technologies such as smart city solutions and applications; cloud computing; the "Internet of Things;" drones or robotics; machine-to-machine (M2M) technologies; big data and analytics; predictive analysis; cyber security; mobility and wearable solutions; and e-commerce and telecommunications services.

We are capitalizing on the research ecosystem in Qatar by collaborating with institutions such as Qatar University, Qatar National Research Fund, Carnegie Mellon University Qatar and others to harness the power of various advanced technologies and solutions to transform research and innovation into reality.

CONNECTING THE UNDERPRIVILEGED

MADA IS IMPROVING THE LIVES OF DISABLED PEOPLE WITH THE HELP OF TECHNOLOGY

Mada (Qatar Assistive Technology Center) is a non-profit organization established in 2010 by ICT Qatar, with a simple mandate: “to connect people with disability to technology.” Establishing Mada reflected the recognition of the state that access to information and technology was a major pillar of an inclusive and fair society.

Between 2010 and 2015, Mada successfully met the needs of a diverse and varied range of people with disabilities. Over 4,000 people have received technology assessment and support including assistive technology from Mada. This included people with hearing loss, learning disabilities, physical disability, vision loss, and multiple needs and communication impairments. The ages of those using Mada have varied, ranging from pre-school to seniors. Sixty-five percent were under the age of 18, reflecting both the demographics of Qatar and the importance of early intervention.

Mada was inspired by the Qatar National Vision “QNV” 2030, the UN Convention on the Rights of People with Disabilities (to which Qatar is a signatory) and the commitment by Qatar’s leadership to human development. Mada designs all of its programs to improve accessibility to education, employment, and more independent living in order to include people with disability in the community and to increase equal opportunities for them.

Mada’s close relationship with the Ministry of Transportation and Communication enables it to work with different stakeholders to ensure that

all major digital platforms in the country meet e-accessibility standards. It continues to work on a consultative level to conduct training and audits with content developers and designers to create a nationwide trend of accessible mobile apps and websites in Qatar.

An Audited Process

In 2015, Mada undertook a review of its approach. The success of that review fed demand and it eventually became critical that the organization investigate how it could ensure that all stakeholders played a crucial role in ensuring that technology reached those in need. As a result, a new Mada strategy was established, which was founded on the principle of inclusion, that seeks to ensure people with a disability both benefit from and participate in the National Vision for 2030. The organization’s mandate and strategy is clear with a vision that “All people with disabilities in Qatar reach their full potential through Information and Communication Technology”

The organization’s future strategy recognizes that there is a need to undertake new forms of activity, and as a result it is undertaking a wide-ranging policy landscape review across all parts of public policy and is seeking to investigate in detail the prevalence of disability and additional needs within the community. As an organization committed to a model of disability that is created by barriers and not conditions, it understands that it needs to identify the number of people facing barriers daily, not simply those in receipt of a medical diagnosis.



FOUNDATION OF KNOWLEDGE

THROUGH INNOVATION AND EDUCATION,
QATAR FOUNDATION IS TRAINING THE NEXT
GENERATION OF LEADERS



In many ways, Qatar is at a crossroads. For over a decade it enjoyed an economic windfall as its LNG industry grew, rapidly becoming the world's largest exporter of LNG within a very short time. But today, as the growth of international demand for natural gas slows, Qatar is becoming aware of the need to shift away from a commodity-driven economy and towards a knowledge-based one.

That shift will require a massive amount of capital and public support, and Qatar Foundation, a non-profit organization, is at the center of that transition. The foundation invests and supports the prosperity of Qatar through three main pillars: education, science and research, and social development programs. As the country progresses both socially and economically, Qatar Foundation is striving to make the country an international hub of innovation that will forge the next generation of leaders.

Qatar Foundation was founded in 1995, when His Highness Sheikh Hamad Bin Khalifa Al Thani, the Father Amir, conceived of a plan for the future development of the country. He approached Her Highness Sheikha Moza bint Nasser, now the foundation's chairperson, with his vision, and together they molded a path forward. Emblazoned on the Qatar Foundation's logo is the Sidra tree, a symbol seen across the Arab world

that demonstrates growth is always possible – even amid the most unyielding environments. As part of its mission statement, Qatar Foundation says the tree “reminds us that the goals of this world are not incompatible with the goals of the spirit.”

Today, as the company surpasses its 20-year anniversary, there are numerous examples of what the foundation has accomplished. It established a total of eight branch campuses of international universities between 1998 and 2011, making Qatar a global leader in post-secondary education. The foundation also established the internationally-acclaimed Qatar Faculty of Islamic Studies, a center for Islamic thought and debate. Qatar Foundation invests heavily in science and research, including the creation of the Qatar National Research Fund, which provides substantial capital for research projects in various industries. Its areas of investment also include initiatives to improve social development and preserve Qatar's cultural history.

In 2008, the foundation published the Qatar National Vision 2030. Under the vision, the Qatar Foundation aims to unlock the potential of Qatar by “unlocking human potential” and making human capital its main priority for the next 15 years.

Discover what we are doing today
to help take care of tomorrow



Qatar University is ever-conscious of its responsibility to play a key role in national efforts towards preserving the environment. We have risen to this challenge and implemented a number of initiatives ranging from academic programs and research studies to innovative platforms for sustainability that will serve as the foundation for a greener tomorrow. Discover what QU is doing today via its undergraduate and graduate programs in environmental studies, energy and environmental law forum, research centers on environmental science and gas processing, and a wide range of activities within its diverse university community.

A PRIMARY NECESSITY

A PROGRAM UNDER QNV 2030 PROVIDES PRIMARY EDUCATION TO THOSE IN NEED

BY DR. MARY JOY PIGOZZI, PHD,
EXECUTIVE DIRECTOR OF EDUCATE
A CHILD



Educate A Child (EAC), a programme of the Education Above All Foundation is an education programme framed within the context of QNV 2030. No country has succeeded econo-

mically or as a player in the global community without investing in the education of its citizens. A quality education opens doors and encourages exploration. It facilitates linkages and connections both personal and intellectual. Research demonstrates that primary education provides significant economic, social, health, political, psychosocial, and environmental benefits at all these levels. It is a smart investment.

Educate A Child is a startup launched in November 2012. It is a Qatari initiative consistent with the QNV 2030. EAC ambitiously seeks to provide 10 million out of school children with access to a quality education programme by the end of 2016. Already it supports 46 projects in 40 countries. To date, EAC's partners have enrolled over 3.3 million children-out of current commitments of more than 6.7 million. EAC is on track to meet its goal. EAC is not a donor or a charity it is a partner that uses a co-funding model. EAC looks to partners with deep roots in communities for sustainability. Investment in education is a critical engine to drive growth and development.

www.educateachild.org

YOUTH OF THE NATION

RAED AL EMADI, DEPUTY
CEO AND CHIEF
OPERATIONS OFFICER OF
SILATECH

Silatech is a dynamic social initiative that works to create jobs and expand economic opportunities for young people throughout the Arab World.



Unemployment among young Arab men and women is the highest in the world. Moreover, the rate continues to climb throughout the region—rising from 24 percent in 2009 to 30 percent in 2015. Millions of young Arabs are unable to afford marriage, find independent housing or start a family. In short, unemployment prevents them from becoming productive adults fully integrated into society. This causes tremendous social stresses, and has contributed to the instability our region has experienced in recent years.

Recognizing the need to address this challenge, in 2008 HH Sheikha Moza bint Nasser founded Silatech to create jobs and expand economic opportunities for young people throughout the Arab world. Since then, Silatech has financed and supported over 90,000 youth-owned businesses, and created or sustained over 140,000 jobs. We currently work with over 100 partners and have programs in 14 Arab countries.

At Silatech, we view our role as that of a catalyst to mobilize the wider community on behalf of Arab youth. Whether it involves opening access to financing and training for young entrepreneurs, helping young people make smart career choices and become more employable, linking job seekers with openings, or researching which policies and programs work most effectively, we work through partners at the local, national, regional and international levels.

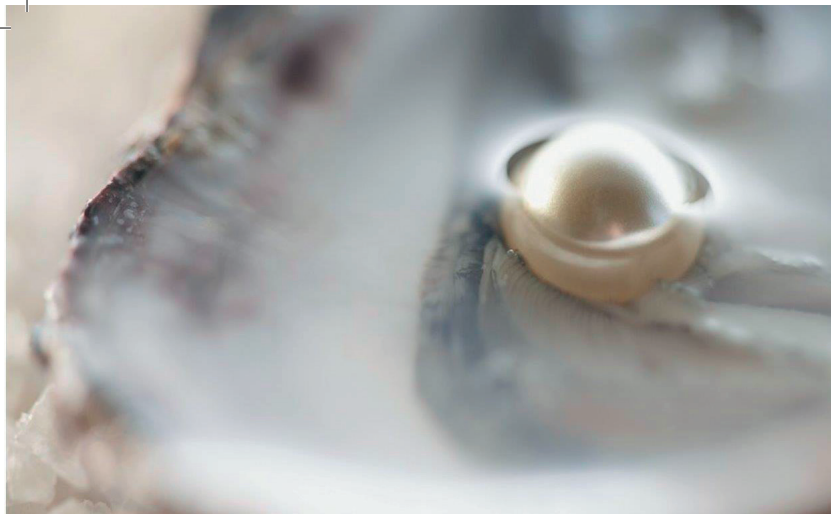


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TOURISM BY THE NUMBERS

THE NUMBER OF TOURIST VISITORS TO QATAR IS ALREADY SUBSTANTIAL, BUT IT IS ABOUT TO GET A WHOLE LOT BIGGER

Travel and tourism directly contributed US \$4.2 billion to Qatar's GDP in 2014, or approximately two percent of total GDP. This is forecasted to increase by 7.3 percent to US \$4.6 billion in 2016. Tourism is instrumental to Qatar's plan for economic diversification and in realizing QNV 2030. Tourism receives strong government support. It is estimated that approximately US \$1.9 billion was invested in travel and tourism during 2015. Projected investment in travel and tourism between 2015 and 2025 is expected to be US \$30.5 billion.

Since being named as a priority area in the country's master plan, Qatar has worked to reinvent itself as

a luxury market. The Qatar Tourism Authority (QTA) is very active in destination marketing within the GCC and beyond, and western markets will be increasingly targeted in the run up to the 2022 World Cup. According to QTA, regional and international visitors to Qatar during the first half of 2015 totaled 1,528,718. This represented a seven percent increase year-over-year. The primary source regions for visitors are the GCC, Arab countries, Asia, and Europe.

World Cup

Qatar has over 85 hotels and 17 other types of lodging establishments which have a total capacity of around 85,000 rooms. Considerable new hotel investment is underway or planned and is forecasted to double by 2022. According to the Euromonitor, much of the hotel stock is of a luxury quality and provided by international operators rather than regional or local businesses.

Qatar's tourism industry is expected to continue exhibiting robust growth. While much of the growth in the tourism industry to date has been related to the FIFA World Cup, the QTA has ambitious plans to continue expanding the tourism market far beyond the games in 2022.



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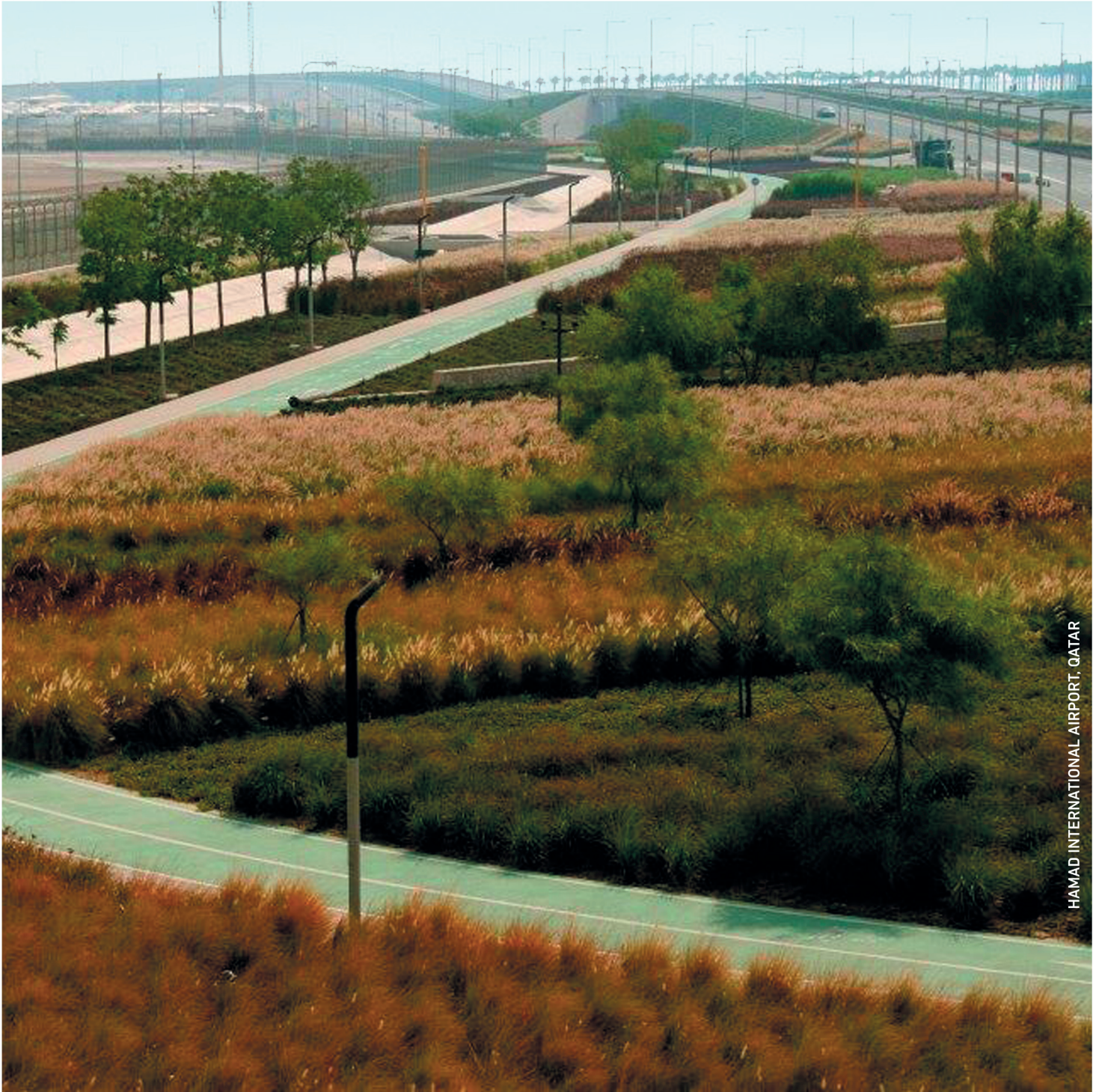


Nakheel

LANDSCAPES

AlNakheel Agriculture & Trading (now Nakheel Landscapes) was born in 1998 and today is one of the leading companies in the Middle East for the construction of landscapes in arid climate.

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