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Trade Policy Review Body

TRADE POLICY REVIEW

REPORT BY THE SECRETARIAT

QATAR

This report, prepared for the second Trade Policy Review of Qatar, has been drawn up by the WTO Secretariat on its own responsibility. The Secretariat has, as required by the Agreement establishing the Trade Policy Review Mechanism (Annex 3 of the Marrakesh Agreement Establishing the World Trade Organization), sought clarification from Qatar on its trade policies and practices.

Any technical questions arising from this report may be addressed to Ms Denby Probst (tel.: 022 739 5847).

Document WT/TPR/G/296 contains the policy statement submitted by Qatar.

Note: This report is subject to restricted circulation and press embargo until the end of the first session of the meeting of the Trade Policy Review Body on Qatar. This report was drafted in English.

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SUMMARY

1. Since the last review of Qatar, its economy has exhibited significant economic growth and development. GDP growth remained in double-digits, in real terms, ranging from 12% to 26% during most of the period. Qatar ranks second in the world in terms of GDP per capita. With emphasis on diversification of its economy, Qatar has invested in a knowledge-based infrastructure including improvements in education, infrastructure, and healthcare.

2. A strong and growing trade surplus in goods during the review period drove the current account increasingly upward, to a peak of QR 224 billion in 2012. The services trade balance remained slightly negative. The capital and financial account were generally large and negative in recent years owing to Qatar's growing investments abroad, but the balance of payments remained positive during the period except for 2011.

3. Developments in trade have been dominated by significant export growth, reaching their highest level on record at QR 484,065 million in 2012. Exports have nearly tripled since 2007 due to strong oil and gas exports, including relatively strong energy prices. Non-energy exports also expanded during the period, reaching 12% of exports in 2012. Imports have grown, albeit at a slower pace than exports, and are generally more diversified. Imports of machinery and transportation equipment dominate, reflecting capital investments and supporting infrastructure development.

4. A new government was formed in 2013 when the new Emir took over, however no major policy shifts or changes have occurred. Qatar continues to encourage an open trade and investment climate. It also plans to create a more competitive economy by reducing entry barriers and strengthening competition. As part of its National Development Strategy it plans to further liberalize trade in services under the GATS.

5. Since the 2001 GCC Economic Agreement, Qatar and other GCC members have been working towards a level of higher integration, most notably through the establishment of a customs union, which commenced in 2003. At present, there is a common external tariff (CET) among GCC members but internal border posts are still in operation, and each GCC member maintains autonomy through its individual customs administration. While MFN trade still dominates for Qatari imports and exports, GCC trade increased during the period and now accounts for approximately 15% of Qatar's imports and 7% of exports. Main trading partners among the GCC are the UAE and the Kingdom of Saudi Arabia.

6. Pursuant to Qatar's foreign investment laws, foreign investors are generally limited to a minority ownership of 49%, although 100% foreign ownership is allowed in certain sectors after authorization (agriculture; industry; health; education; tourism; developing and exploitation of natural resources, energy and mining; consulting services; technical services; IT services; cultural services; sport services; leisure services; and distribution services). Certain rights are also guaranteed to foreign investors such as unrestricted transfer of funds and assurances against expropriation. Qatar uses bilateral investment agreements to encourage investment; currently there are 22 such agreements.

7. Developments in customs during the period of review were concentrated on the establishment of the customs clearance single window project, *Al Nadeeb*. Since gradual introduction began in 2011, the single window has reduced customs clearance to 15 minutes, lowered the inspection rate to 5%, and provided high-quality value-added services to traders. More than 90% of registered importers and exporters use the system to facilitate trade. It is expected to be integrated into a wider GCC level single window system in the future.

8. In terms of import protection, tariffs remain low and Qatar maintains few non-tariff barriers. As of 2013, the simple average applied tariff rate was 4.7% with few peaks; most tariffs are at 5% under the GCC CET. Peak tariffs occur on 20 tariff lines of tobacco products and 6 tariff lines of steel products; the steel tariffs currently exceed the WTO bindings. There are also 27 tariff lines of prohibited goods and 50 tariff lines requiring special import procedures. Qatar does not maintain any legislation on import licensing, pre-shipment inspection, or contingency measures (anti-dumping, countervailing measures, and safeguards).

9. During the review period, Qatar created its first export development agency in order to promote and diversify its export base. An export development strategy was created under its stewardship in 2012; it includes provisions to evaluate companies' export readiness and setting target goals for Qatari exports. There are few rules or measures imposed on exports; Qatar does not impose taxes, levies, or licensing upon exportation. Further, there are few restrictions or prohibitions, but the prohibitions imposed on imports are also imposed on exports.

10. The Qatari economy is still heavily reliant on state-owned enterprises despite significant efforts to encourage private sector investment and business establishment. According to a 2009 study, the public and mixed sector accounted for approximately 60% of GDP. The establishment of businesses in Qatar is regulated by several laws, including investment laws, which determine the type of business entity and the share of foreign ownership, thus many businesses must be established with a Qatari partner. Changes to the laws in 2010 relaxed certain provisions for sole proprietorships and LLCs. The establishment of an industrial project requires submission of a proposal and issuing of a licence by the respective authorities.

11. In terms of intellectual property protection, Qatar enacted several laws during 2002-06 to put in place the necessary rules for, *inter alia,* patents, trade marks, geographical indications, and integrated circuits, but many of these laws remain non-operational as the necessary implementing regulations have not been issued.

12. The energy sector, in particular natural gas, remains the backbone of Qatari industrial output and trade. With the world's third largest reserves, Qatar increased production output consistently during the review period, and exports reached their highest level in 2012. As the majority of natural gas is exported as LNG, there are capacity limitations and investment in infrastructure necessary to keep export levels rising. Furthermore a 2005 moratorium on further development of Qatar's largest gas field, which has been continually extended, has the potential to limit future production growth.

13. Qatar's banking and insurance sector underwent some growth and development during the review period, especially with respect to the establishment of the Qatar Financial Centre (QFC), commencing in 2005, and the development of the Islamic finance subsector. The QFC operates under free-trade-zone provisions in order to attract international banking companies, insurance business, and related financial services to Qatar. Reforms were initiated in 2012 to create one regulatory authority for financial services in Qatar, but there are still several authorities, and separate rules and regulations for those operating in the QFC.

14. Diversification and investment in several service sectors such as transportation, construction, and tourism has helped boost the economy in recent years and is expected to continue in the lead-up to the 2022 FIFA World Cup, as Qatar is expected to expand hotel capacity, develop a rail network, and invest in large-scale construction infrastructure projects. Investment in education and healthcare sectors, as part of the Qatar National Vision 2030, is expected to develop Qatar's knowledge-based economy.

1 ECONOMIC ENVIRONMENT

1.1 Introduction

1.1. Qatar, a strategically located peninsula along one of the world's busiest shipping routes, has relied on trade for much of its history. The trade in pearls in the early days, the discovery of oil, and the commercialization of liquefied natural gas during the past 20 years has allowed Qatar to prosper and experience significant structural economic change. More recently, with development and investment in non-energy sectors, such as banking and other services, Qatar is pursuing new pathways that have not yet reached their full potential.

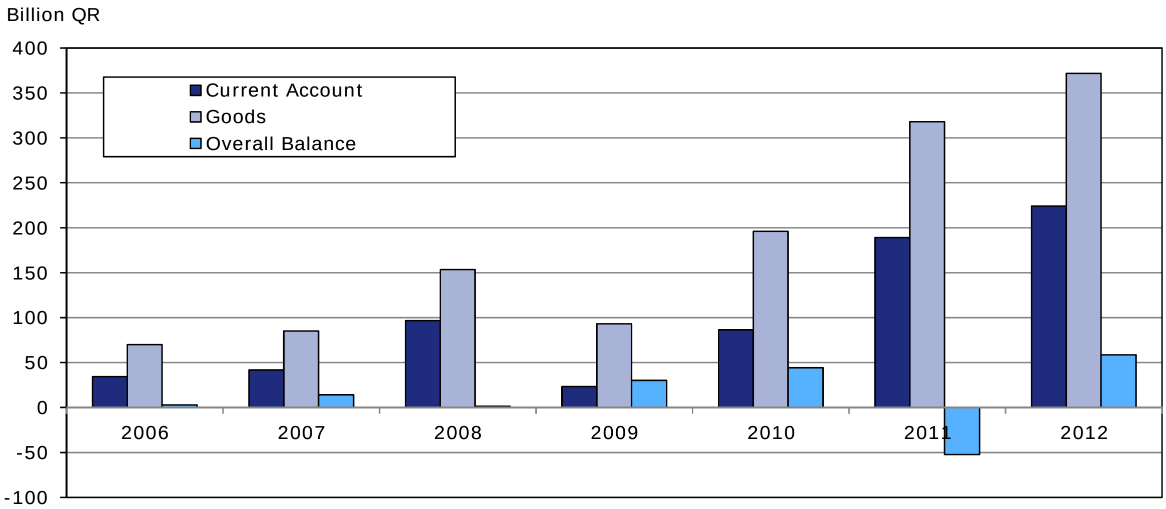
1.2. Qatar exhibited significant economic growth over the review period. GDP increased from QR 220 billion at end 2006 to QR 724.3 billion in second quarter 2013. In real terms, GDP growth remained in double digits, ranging from 12% to 26.2%, during the period, with the exception of 2012 when it fell to 6.2%. (Table A1.1) According to the IMF, Qatar ranks second in the world in terms of GDP per capita.[1] With one of the highest standards of living, and substantial economic growth, Qatar is keen to use its growing energy wealth to invest in its future and diversify its economy away from hydrocarbons towards a knowledge-based economy. It is investing in its people by improving education, infrastructure, and healthcare, promoting innovation and sustainable development, and continuing its policy toward international cooperation and openness.

1.2 Recent economic developments

1.3. Strong fiscal surpluses, accommodative monetary policy, and low inflation have supported Qatar's strong growth in recent years. Development and investment in the non-hydrocarbon sector has contributed towards diversification and fuelled alternative sources of growth.

1.4. The current account grew considerably over the period, with a rising positive trade balance driven by strong, mostly hydrocarbon, exports (Chart 1.1, Table A1.2). The balance of services trade remained slightly negative. The capital and financial account were large and negative in recent years owing to Qatar's growing investments abroad. Nevertheless, the balance of payments remained positive during the period, except in 2011.

Chart 1.1 Balance of payments, 2006-12



Source: *National Accounts Bulletin 2012* (3rd edition). Viewed at: http://www.qsa.gov.qa/eng/index.htm, Statistics Authority (2012); and Qatar Central Bank.

[1] IMF, 2012 rankings.

1.3 Planning and strategy

1.3.1 Qatar National Vision 2030

1.5. In 2008 the Government created its first national strategic document for future development, the Qatar National Vision 2030 (QNV). It defines trends that reflect the aspirations, objectives, and culture of the people of Qatar. According to the QNV, the main goal is to transform Qatar into an advanced country by 2030, capable of sustaining its own development and providing for a high standard of living for future generations.[2] Four main developmental pillars are analysed: human, social, economic, and environmental.

1.6. The economic development dimension builds on sound economic management, responsible exploitation of oil and gas, and suitable economic diversification. As part of Qatar's economic strategy, it plans to pursue reasonable and sustained rates of economic growth supported by a sound financial policy. Maintaining open and flexible economic structures is an important part of its strategy along with coordination of trade, investment, and financial ties with the Gulf Cooperation Council (GCC) and other Arab or other regional organizations.

1.7. Qatar is committed to maintaining its strategic reserves of crude petroleum and natural gas and intends to keep a balance between reserves and production. Further expansion of downstream industry where a competitive edge is obtained from energy production is envisioned.

1.8. Other aspects of the QNV include Qatar's desire to play a larger role in the economics, politics, and culture of the GCC, the Arab League, and the Organization of Islamic Cooperation. It is also cognizant of maintaining a balance between development needs and protecting the environment.

1.3.2 Qatar National Development Strategy, 2011-16

1.9. Qatar's National Development Strategy (NDS), 2011-16 builds upon the QNV and is a plan of action towards achieving its goals. With respect to sustaining economic prosperity, the NDS highlights the importance of expanding the country's domestic productive base, enhancing economic stability and efficiency, safeguarding market efficiency, and building a diversified economy. Furthermore, certain targets are set in the NDS in order to take concrete steps, including, the establishment of a forward-looking and coordinated budget process, a public investment programme, the introduction of policy instruments to manage domestic liquidity, and pursuing foreign investment liberalization. At end 2013, some of these targets had been met.

1.4 Macroeconomic policies

1.4.1 Inflation

1.10. With a rapidly growing economy, Qatar's inflation rates were high during 2006-08 (as measured by the CPI), mostly driven by housing rents, followed by low or negative inflation during 2009-11. Inflation varied between 12% and 15% during 2006-08 and -5 to 2% during 2009-11 (Table A1.1). High housing and food costs fuelled inflation in the early period, followed by a cooling off period due to softening of the real estate sector. Inflation rose slightly to 1.9% in 2011 due to high transport and communication prices driven by high oil prices; it remained at this higher level in 2012.

1.11. Temporary price controls were applied on housing and construction material during the period under review. As at late 2013, these controls are no longer in place. However, product specific price controls are still in place for goods supported by public subsidies (section 3.3.7.2 for information on specific product price controls).

1.4.2 Labour, employment, and the expatriate workforce

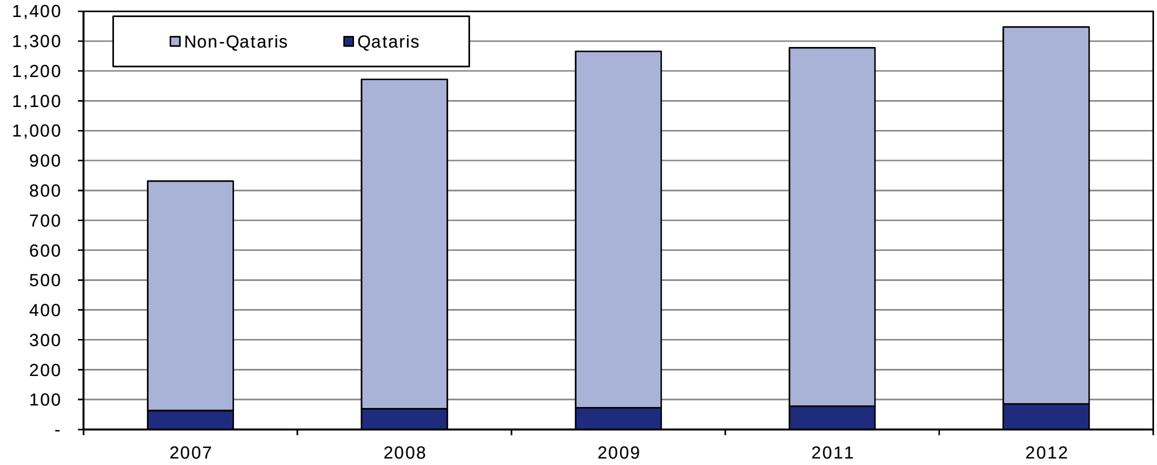
1.12. Qatar has relied heavily on the growth of its workforce to support its economic growth. While the population is small relative to its GDP, it expanded significantly (76%) over 2006-12,

[2] Qatar National Vision 2030.

and the unemployment rate remained very low (averaging less than 0.5%). Furthermore, the share of expatriates far outnumbers that of Qataris, and has been growing at a faster pace (65% growth rate for expatriates versus 33% for Qataris) (Chart 1.2). This phenomenon has had far-reaching consequences also affecting the current account transfers, as workers send more and more remittances back home.

Chart 1.2 Economically active population (15 years and above) by nationality, 2007-12

Number ('000)



Source: Bulletin Labour Force statistics, 2012.

1.13. Qatar has a programme, known as Qatarization, to support the hiring and career development of Qataris in the workforce. According to the National Development Strategy, Qatarization should be pursued with Qataris receiving the support and mentorship to fill their roles.[3] There is a general target of 50% Qatarization across the economy. Furthermore the QNV acknowledges the need to increase the labour force participation of its citizens but also recognizes that Qatar will not have the necessary labour force among its citizens to manage the requirements of a rapidly growing society.

1.4.3 Exchange rate policy

1.14. Qatar's exchange rate policy has resulted in the Qatari riyal being pegged to the dollar at a fixed exchange of QR 3.64 per US$ for the duration of the period under review. This policy has been in place for more than a decade, to provide stability to the riyal and to reduce price volatility. It has also provided relatively stable rates of interest.

1.15. The GCC countries, including Qatar, have been working towards a single monetary union and common currency. As envisioned, a single currency would be put in place among the six GCC countries. Work continues towards this goal.

1.4.4 Treasury bills

1.16. Qatar issued sovereign debt for the first time in 2000. Since then it has put out other bond issues, most recently in 2013. Qatar is pursuing this to support the development of a domestic capital market, not to service any government debts.[4]

1.5 Fiscal situation

1.17. Qatar has consistently produced significant fiscal surpluses as high global energy prices have produced higher than expected revenues. The latest figures available show a surplus of QR 54 billion for fiscal year 2011/12 up from QR 32 billion in 2007/08. At the same time, expenditures have also increased, mostly due to increases in salaries and wages and the initiation of significant

[3] Qatar National Development Strategy, 2011-16.
[4] Qatar Ministry of Development and Planning Statistics (2013).

publically financed infrastructure projects. In 2012/13, hydrocarbon revenues accounted for 62% of total revenues, and the fiscal surplus amounted to 12% of GDP.[5]

1.6 Developments in trade

1.6.1 Trade in goods

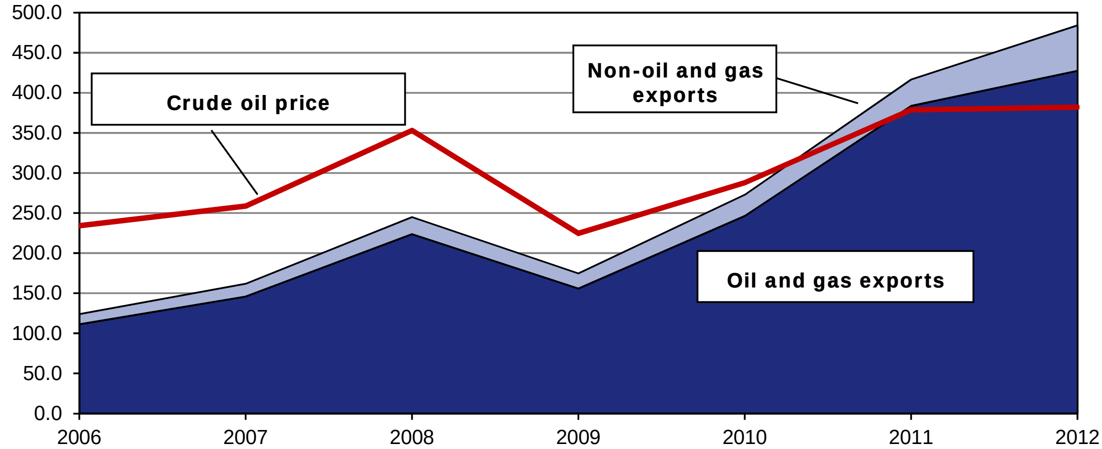
1.6.1.1 Exports

1.18. Since 2007, exports have nearly tripled, reaching QR 484,065 million in 2012, their highest level on record.[6] Year-to-year export growth was steady and consistent over the period, with the exception of 2009 when exports dipped slightly as a result of weak world demand at the time of the financial crisis. In 2012, the mineral product sector accounted for over 88% of total exports.[7] Of this, natural gas accounted for 62% and crude petroleum, 20%. (Table A1.3) Qatar was the world's 23rd largest exporter in 2012.[8]

1.19. Exports started to diversify slightly over 2006-12, as non-energy product exports rose from 10% to 12%. The quantity of energy goods exported increased over the period, but the growth was also a result of relatively high energy prices. Export levels generally mirrored the price of crude petroleum over the period. (Chart 1.3).

Chart 1.3 Composition of exports, including re-exports (f.o.b.), 2006-12

(QR billion for exports; QR per barrel for crude oil)



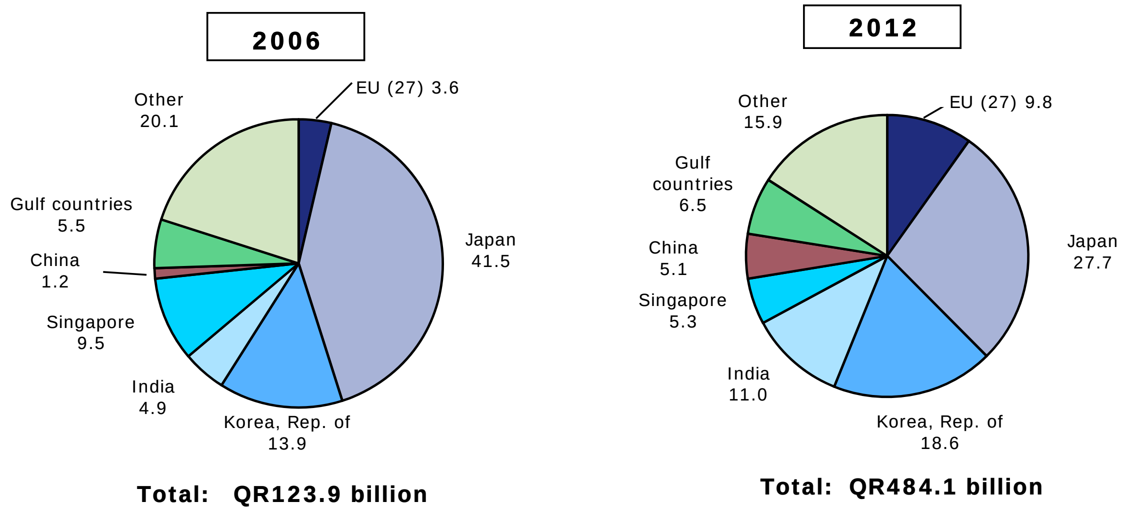
Source: WTO calculations, based on data provided by Foreign Merchandise Trade System. Viewed at: http://ftp.qsa.gov.qa:8088/; and World Bank Commodity price Data.

1.20. The majority of exports are destined to Asia. Japan and the Republic of Korea are the major markets, accounting for 28% and 19% of total exports, respectively in 2012. Exports to these two countries are dominated by liquefied natural gas (LNG). India and the EU are also significant markets for Qatari exports, also mostly energy products. Since 2006, the export shares to the EU, India, and China have more than doubled, whereas Japan's share has declined. (Chart 1.4) Among Gulf countries, the UAE accounts for more than half of the exports to the region (Table A1.4).

[5] Qatar Central Bank (2013).
[6] Foreign merchandise trade system. Viewed at: http://ftp.qsa.gov.qa:8088/[23/08/2013].
[7] Foreign merchandise trade system. Viewed at: http://ftp.qsa.gov.qa:8088/[23/08/2013].
[8] WTO (2013).

Chart 1.4 Direction of merchandise exports including re-exports (f.o.b.) 2006 and 2012

(%)



Source: WTO calculations based on data provided by Foreign merchandise Trade System. Viewed at: http://ftp.qsa.gov.qa:8088/.

1.6.1.2 Imports

1.21. Merchandise imports are more diversified than exports, and they have generally increased over the period although not at the same pace as exports; they increased 59% between 2006 and 2012. (Table A1.5) Machinery and transport equipment account for about half of imported products, and base metal and chemicals also account for significant shares (Chart 1.5). The majority of transport equipment imported is vehicles, while machinery comprises both mechanical and electrical machinery (HS chapters 84 and 85).

1.22. Imported products come primarily from the EU, Gulf countries, and the United States, which together accounted for over half of the total in 2012 (Chart 1.5). Germany, Italy, and the U.K. were the main sources of EU goods, and the UAE among Gulf countries (Table A1.6). Since 2006, the share of imports from China, EFTA, Gulf countries, and the United States has increased, while that of Japan and the EU has decreased (Chart 1.5).

1.6.2 Trade in services

1.23. Services exports grew significantly in the last two years of the review period, largely as a result of increased exports of transportation and travel services (Table 1.1). However, the services trade balance remained largely negative due to higher growth in services imports. (Table 1.2) During the period, exports more than doubled, but imports more than tripled, from a larger base, hence the growing services deficit. Imports of services were dominated by transportation and other commercial services, in particular other business services.[9] Travel services were the third largest category, accounting for 24% of imports.

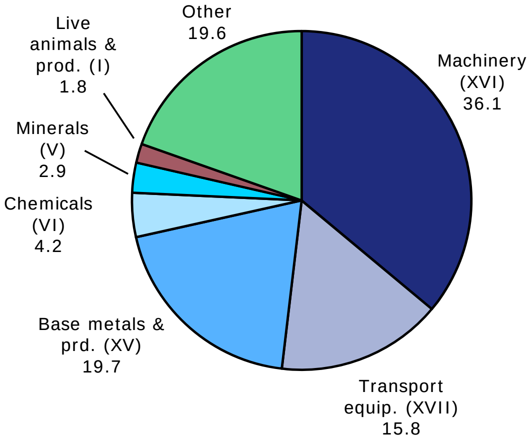
[9] These services include royalties and license fees, trade-related services, research and development, advertising and market research, personal, cultural, and recreational services, security and investigative services, translation and interpretation, photographic services, and building cleaning services.

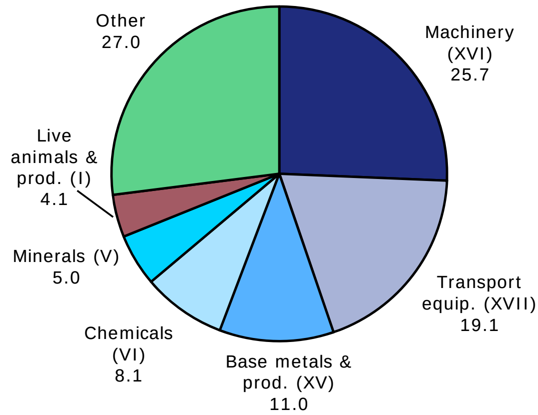
Chart 1.5 Imports by composition and origin, 2006 and 2012

(%)

2006 | **2012**

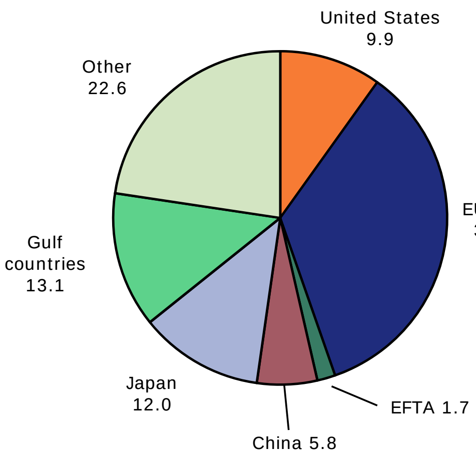
(a) By composition

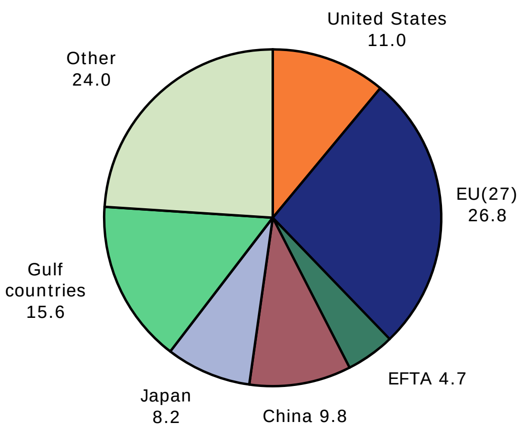




Note: **Data in parenthesis refer to the HS Section number.**

(b) By origin





Total: QR 59.8 billion | **Total: QR 94.9 billion**

Source: WTO calculations based on data provided by Foreign Merchandise Trade System. Viewed at: http://ftp.qsa.gov.qa:8088/.

Table.1.1 Qatar services export statistics

(QR million and %)

	Exports (Qatari riyal million)						
	2006	2007	2008	2009	2010	2011	2012
Services	15,263	13,075	12,468	7,288	10,961	26,913	36,117
Commercial services (services excl. government services)	12,681	11,389	8,286	7,073	10,287	20,312	32,219
Transportation	9,233	10,293	7,259	5,765	6,378	14,300	17,004
Travel	3,181	101	529	650	2,124	4,257	10,400
Other commercial services (commercial services minus travel & transport)	267	995	498	658	1,785	1,755	4,815
Communications services	193	238	239	209	653	415	1,495
Insurance services	74	757	259	449	1,132	1,340	2,243
Other business services	..	..	..	..	..	..	..
Personal, cultural and recreational services	..	..	..	..	..	..	1,077
Government services, n.i.e.	2,582	1,686	4,182	215	674	6,601	3,898
	(% of total)						
Services	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Commercial services (excl. government services)	83.1	87.1	66.5	97.0	93.9	75.5	89.2
Transportation	60.5	78.7	58.2	79.1	58.2	53.1	47.1
Travel	20.8	0.8	4.2	8.9	19.4	15.8	28.8
Other commercial services (excl. travel & transport)	1.7	7.6	4.0	9.0	16.3	6.5	13.3
Communications services	1.3	1.8	1.9	2.9	6.0	1.5	4.1
Insurance services	0.5	5.8	2.1	6.2	10.3	5.0	6.2
Other business services	..	..	..	..	..	..	..
Personal, cultural and recreational services	..	..	..	..	..	..	3.0
Government services, n.i.e.	16.9	12.9	33.5	3.0	6.1	24.5	10.8

.. Not available.

Source: UNCTAD-ITC-WTO Trade in Services Database.

Table 1.2 Qatar services import statistics

	Imports (Qatari riyal million)						
	2006	2007	2008	2009	2010	2011	2012
Services	25,322	27,149	26,287	21,543	31,961	61,395	87,019
Commercial services (excl. government services)	24,986	26,748	25,725	20,608	27,906	56,596	80,540
Transportation	5,391	18,345	12,281	14,195	20,960	35,837	35,991
Travel	13,652	4,594	5,288	1,752	1,959	6,579	20,560
Other commercial services (excl. travel & transport)	5,943	3,809	8,156	4,661	4,987	14,180	23,989
Communications services	889	1,041	1,041	2,117	1,327	922	5,044
Insurance services	54	768	915	1,381	1,529	4,031	3,691
Other business services	..	..	..	..	..	4,029	10,164
Personal, cultural and recreational services	..	..	..	..	..	5,198	5,090
Government services, n.i.e.	336	401	562	935	4,055	4,799	6,479
	(% of total)						
Services	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Commercial services (excl. government services)	98.7	98.5	97.9	95.7	87.3	92.2	92.6
Transportation	21.3	67.6	46.7	65.9	65.6	58.4	41.4
Travel	53.9	16.9	20.1	8.1	6.1	10.7	23.6
Other commercial services (excl. travel & transport)	23.5	14.0	31.0	21.6	15.6	23.1	27.6
Communications services	3.5	3.8	4.0	9.8	4.2	1.5	5.8

	Imports (Qatari riyal million)						
	2006	2007	2008	2009	2010	2011	2012
Insurance services	0.2	2.8	3.5	6.4	4.8	6.6	4.2
Other business services	..	..	..	..	..	6.6	11.7
Personal, cultural and recreational services	..	..	..	..	..	8.5	5.8
Government services, n.i.e.	1.3	1.5	2.1	4.3	12.7	7.8	7.4

.. Not available.

Source: UNCTAD-ITC-WTO Trade in Services Database.

1.7 Foreign direct investment trends

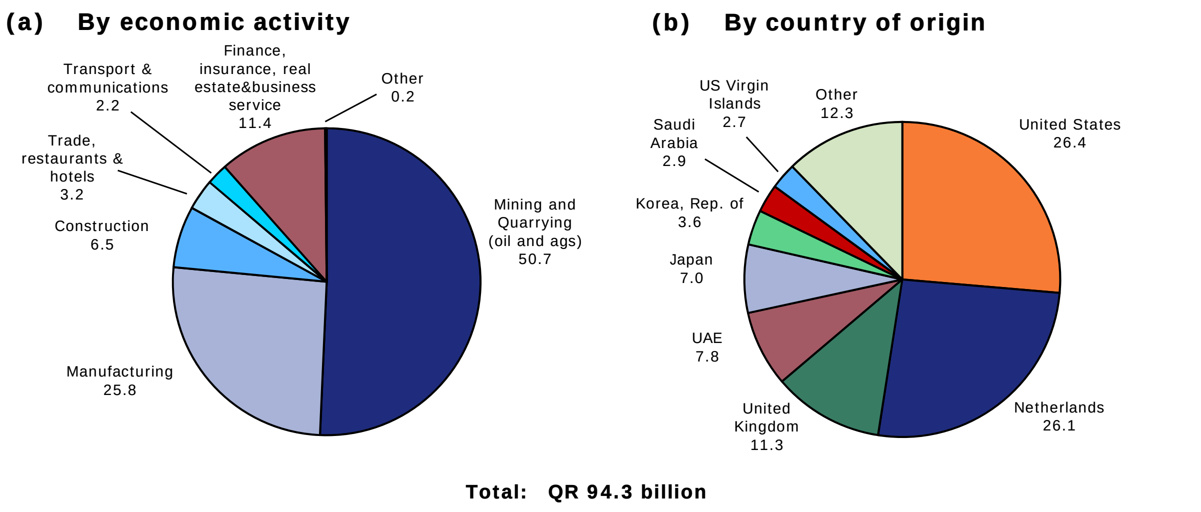
1.24. According to preliminary estimates by the authorities, Qatar inward foreign direct investment increased during 2010-12 compared to the baseline survey results of 2009. However, there are no official comparable figures after 2009.

1.25. In terms of source of inflows for 2009, the United States and the Netherlands each accounted for over one quarter of FDI inflows. The United Kingdom was the next largest source, with 11.3% (Chart 1.6).

1.26. Inflows were heavily concentrated in two main industry sectors. Just over half of the 2009 inflows were in the oil and gas sector, and another quarter were in manufacturing (25.8%). The remainder accounted for less than 24.3% and included finance, insurance, real estate, and other business; construction; trade, restaurants, and hotels; and transport and communications sectors.

Chart 1.6 Inward FDI stocks, 2009

(%)



Source: Foreign investment survey 2010, Economic Statistics Department, Qatar Statistics Authority, February 2010.

1.8 Outlook

1.27. The immediate future looks promising for Qatar, especially as exports of its main products are expected to continue at current levels with persistent high world energy prices. GDP expanded at an estimated 6.0% in Q2 2013.[10] The ongoing construction, centred around large infrastructure projects, and the lead-up to the 2022 FIFA World Cup, is expected to drive the economy over the

[10] Qatar Statistical Authority (2013). National Accounts. Available from http://www.qsa.gov.qa/eng/index.htm.

next decade. Imports are expected to remain strong but significant exports should still provide a significant but smaller trade surplus.[11]

1.28. Qatar is working towards a public-private partnership initiative that will allow the private sector to participate in key infrastructure projects.

[11] Qatar Economic Outlook, 2013-14, Ministry of Development Planning and Statistics.

2 TRADE POLICY REGIME: FRAMEWORK AND OBJECTIVES

2.1 Introduction

2.1. Since its first review, conducted in 2005, Qatar has amended a number of its laws relating to trade and investment and introduced a few new instruments, but the basic framework on customs and investment remains intact. Some changes have been implemented to make doing business more attractive, for example on simplifying the corporate tax system and establishing special zones for their operations.

2.2 General constitutional and legal framework

2.2.1 Constitution and legal overview

2.2. Since gaining independence in 1971, Qatar has been guided by its main law, or constitution. For much of its history, it was guided by the Amended Provisional Constitution which was replaced in 2005 by its first Permanent Constitution. The Permanent Constitution consolidated the basic foundations of society and aligned them with the requirements of contemporary society. Its 150 Articles contain provisions on the State and the bases of rule, guiding principles of the society, public rights and duties, and organization of powers. The constitution grants legislative authority to the Al-Shoura Council, executive authority to the Emir, and judicial authority to the courts. According to the provisions of Article 143, the enforcement of the constitution shall not affect the provisions of treaties and international agreements to which Qatar is a party.

2.3. The State of Qatar, as a constitutional monarchy, headed by the Emir of Qatar, is represented internally and externally in all international relations by the Emir. The Emir is head of state and commander-in-chief of the armed forces, and his functions include ratification and promulgation of laws, summoning and presiding over the Council of Ministers, drawing up general policy of the State, appointing civil servants and military personnel, accrediting heads of diplomatic and consular missions, conferring civilian and military orders, granting pardons, and overseeing functions of the consultative bodies.

2.4. Qatar’s legal system is a combination of civil law and Islamic sharia law. Two separate court systems and rules are in place, for sharia law on the one hand, and for civil, commercial, and criminal law on the other. Trade and commercial matters are covered by civil law, whereas the sharia system administers matters mostly relating to family law.

2.5. In 2004 a new law on the judicial system unified the courts and changed significantly the judicial process by establishing three levels of litigation: the courts, the appeals courts, and the court of cassation. Further changes in the judiciary, in 2008, established the Supreme Constitutional Court to hear constitutional matters referred from other courts.

2.2.2 Recent developments

2.6. In June 2013, a new government was formed when the Emir abdicated in favour of the Heir Apparent after 18 years as Emir. Since then, no major policy shifts have taken place; the new Emir indicated that his top priority is to promote the development of Qatar. However, there have been a number of organizational changes as well as new appointments to decision-making positions.

2.7. The new constitution empowers the Al-Shoura Council to supervise and make decisions in three major areas: the national budget, ministers’ performance, and to draft and vote on proposed legislation. Furthermore, an important change was introduced in that the Council be partially elected by the people; two thirds are to be elected by universal suffrage and one third appointed by the Emir. Elections were scheduled to take place in 2007, 2010, and 2013 but were postponed, again, to 2016. To date, as these elections have not taken place, the majority of Council members remain appointed officials.

2.3 Development and administration of trade policy

2.3.1 Main trade laws

2.8. As a member of the GCC and its customs union, a part of Qatar's trade policy and legal structure is now influenced by this regional body. For example, Qatar's customs law is the Common GCC Customs Law. Cooperation and harmonization also occur in other areas such as intellectual property, and in transport and other services sectors. After approval at the level of the GCC, matters are incorporated into Qatari law. The main Qatari laws impacting trade are on business, investment, and services (Table 2.1). As GCC decisions and agreements require prior ratification by all member countries, GCC-level ratification, undertaken by the Emir, in effect ratifies the decision in Qatar. Under the constitution (Article 68), a decree is required for it to be implemented in Qatar. GCC decisions take precedence in the absence of, or conflict with, Qatari laws (GCC Decree No. 81, 2008 Article 33).

Table 2.1 Main trade laws

Main trade laws	Reference
Foreign Investment Law	Law No. (13) of 2000
Customs Law	Law No. (40) of 2002
Proxy Law	Law No. (25) of 2004
Commercial Companies Law	Law No. (5) of 2002
Commercial Agencies Law	Law No. (8) of 2002
Tax Law	Law No. (21) of 2009
Trademarks Law	Law No. (9) of 2002
TBT	Law No. (4) of 1990
SPS	Law No. (12) of 1991
E-Commerce Law	Law No. (16) of 2010
Competition Law	Law No. (19) of 2006
Contingency Measures	Law No. (4) of 2006

Source: Compiled by WTO Secretariat from various sources.

2.3.2 Agencies involved in trade policy implementation

2.9. The Qatar Government undertook reforms in 2008-09 to create a ministry portfolio-based approach whereby ministries were held accountable for their policies and outcomes.[1] The Ministry of Business and Trade was given responsibilities for developing programmes necessary to execute policies on the development of business and trade, including supporting and developing exports, proposing and implementing policies on attracting investment, protecting consumers, and preventing monopolistic practices.[2] Changes were initiated in 2013 and the Ministry became the Ministry of Economy and Commerce (MEC), and includes many of the same functions of the old Ministry of Economy and Finance.

2.10. In addition to the Ministry of Economy and Commerce, there are a number of other Ministries responsible for certain aspects of trade policy. The Ministry of Environment contains a Department on Agriculture Affairs that is concerned with agricultural policy, and the Ministry of Energy and Industry is responsible for policies on energy product exports.

2.11. A National Committee on WTO Affairs was established in 2001 to coordinate and liaise on WTO policy matters.[3] Its main purpose was to enable Qatar to optimize its membership in the WTO by providing a forum for the public and private sectors to communicate. This body has representatives of the MEC, Ministry of Foreign Affairs, Ministry of Finance, Ministry of Environment, Cabinet of Ministers, Ministry of Energy and Industry, Ministry of Development Planning and Statistics, Ministry of Information and Communications Technology, Qatar Chamber of Commerce and Industry, Qatar Central Bank, and Qatar Petroleum. By law it meets at least twice a month.

[1] Qatar Legal Portal. Online information. Viewed at: http://www.almeezan.qa/CustomPage.aspx?id=3&language=en.
[2] Decree No. (16) of 2009, Article 12.
[3] Cabinet Resolution No. (4) of 2001.

2.12. In addition to the National Committee on WTO Affairs, a number of other Committees have been established with respect to various ministries to consult on other policy matters. The private sector's main representative body is the Qatar Chamber of Commerce and Industry. Prior to 1990, when it acquired private status, the Chamber operated as part of the Government. Since 1996, Members freely elect the Chamber's Board members based on proportional representation of sectors, determined by the Ministry of Economy and Commerce. All private sector entities must be registered with the Chamber of Commerce to perform commercial and industrial activities in Qatar. The Chamber is financed through contributions from its members and through events that it hosts.

2.4 Trade policy objectives

2.13. Qatar has promoted an open investment and trade policy in recent years, in part to help diversify its economy from being heavily dependent on energy-sector exports. One aspect of Qatar National Vision 2030 is to promote competition, trade, and investment. Through the National Development Strategy (NDS) 2011-16, Qatar aims to create a more competitive economy by reducing barriers to entry and strengthening competition. One aspect is to continue the progressive liberalization of foreign investment restrictions by opening up more sectors that currently have restrictions. The Government also intends to expand services liberalization under the auspices of the GATS. The NDS envisions improving or streamlining regulations to create better efficiencies, in particular with respect to improving burdensome customs regulations and inefficiencies in the business licensing processes.

2.14. There are no specific trade policies that target sectors of the economy although the Government has indicated broad plans to encourage investment and development of industry outside the oil and gas sectors through the NDS and Qatar National Vision 2030.

2.5 Qatar and the WTO

2.15. Qatar became a contracting party to the GATT 1994 at the end of the Uruguay Round pursuant to the procedures of Article XXVI:5(c), prior to which it applied the GATT on a *de facto* basis.[4] Qatar established its commitments on goods and services as part of the Uruguay Round, in which it bound all tariffs on goods and made specific commitments in six services sectors. Decree No. 24 of 1995 ratified Qatar's acceptance of the WTO Agreements. Qatar has not joined the plurilateral Civil Aircraft Agreement or Government Procurement Agreement, but recently became a participant in the Information Technology Agreement in 2013.

2.16. During the Doha Round, Qatar has made proposals in the non-agricultural market access and environmental goods negotiations on gas-related goods.[5] It has also made an initial offer in the services negotiations covering five subsectors.[6] Qatar has not been active in other areas of WTO work such as the monitoring exercise, dispute settlement, and Aid for Trade. Since its last review, Qatar has made notifications in a number of WTO areas, but mainly on standards (Table A2.1). A number of notifications require updating or renewal, for example on quantitative restrictions and state trading (section 3).

2.6 Trade agreements and arrangements

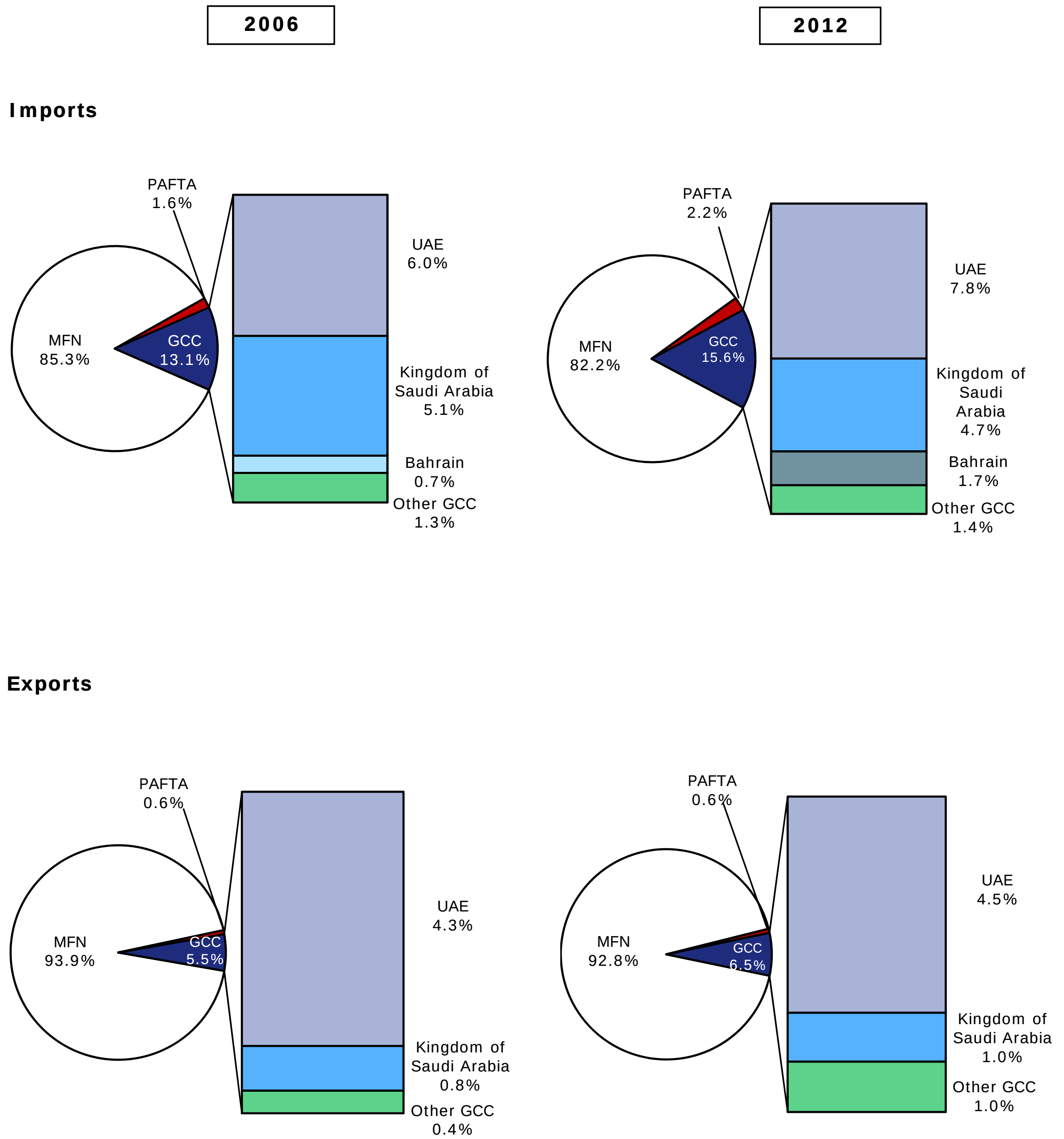
2.17. While MFN trade continues to dominate Qatari imports and exports, trade with GCC partners increased from 13.1% to 15.6% of total imports, and from 5.5% to 6.5% of total exports during 2006-12. The relatively small amount of intra-GCC trade reflects the relatively narrow and similar production base in most GCC countries, which is concentrated in energy and some light capital-intensive manufacturing. Trade is expected to increase with the diversification of the industrial base. The UAE, and to a lesser degree the Kingdom of Saudi Arabia, are Qatar's most significant trading partners among GCC countries. The other main trading block in which Qatar participates, the Pan-Arab Free Trade Area (PAFTA), accounts for a very small share of trade for Qatar. Qatar's exports to PAFTA members amounted to less than 1% of total exports, and imports from PAFTA were 2.2% of total imports in 2012 (Chart 2.1).

[4] L/7441 and L/3588.

[5] TN/TE/W/27, TN/MA/W/33, TN/TE/W/19, TN/MA/W/24, TN/TE/W/19/Corr.1, TN/MA/W/24/Corr. 1 and TN/TE/W/14.

[6] TN/S/O/QAT.

Chart 2.1 Overview of reciprocal trade, 2006 and 2012



Note: PAFTA excluding GCC countries.

Source: WTO calculations, based on data provided by Foreign Merchandise Trade System. Viewed at: http://ftp.qsa.gov.qa:8088/.

2.6.1 Regional agreements

2.6.1.1 Gulf-Cooperation Council (GCC) Customs Union

2.18. The GCC set out to create a customs union through its adoption of the GCC Economic Agreement in 2001. At a minimum, the customs union was designed to establish a common external tariff (CET), common customs regulations and procedures, single-entry point, elimination of all tariff and non-tariff barriers, and national treatment provisions.[7] The Economic Agreement also contains provisions for the establishment of a GCC Common Market and Economic and Monetary Union. In addition to Qatar, the GCC comprises the neighbouring gulf states of Bahrain, Kuwait, Oman, the Kingdom of Saudi Arabia, and the United Arab Emirates.

2.19. The GCC began implementation towards a customs union in 2003; work on achieving full integration is still ongoing. The major elements of the union include a CET, and common model laws on customs and trade remedies. There is also increasing cooperation and information exchange. However, uniform policy on how to share customs revenues, uniform tax rates such as VAT, licensing, and regulatory matters are still outstanding.

2.20. Intra-GCC trade has been growing rapidly since the inception of the customs union. GCC external trade reached US$9 trillion in 2010. As a whole, the GCC ranks 8th in total global trade flows, just behind the United Kingdom.[8] Qatar ranks 3rd among GCC countries in terms of trade, behind the Kingdom of Saudi Arabia and the United Arab Emirates.

2.21. The GCC CET is generally set at four tariff levels, 0%, 5%, 100%, and 100% or a specific duty, whichever is higher; plus a number of tariff lines are designated as "prohibited" or "special goods". There are 810 duty-free tariff lines and 20 tariff lines on tobacco products with tariffs of 100% or 100%/specific duty, whichever is higher; however the vast majority are at 5%. Different provisions are in place for a number of "prohibited" and "special goods" depending on the country concerned, mostly concerning pork and alcohol products.

2.22. The agreement establishing the customs union, of which Qatar is a signatory, was notified by the Kingdom of Saudi Arabia to the WTO in 2006 pursuant to the provisions of Article XXIV of GATT 1994 and its Understanding.[9] Thereafter, the Kingdom of Saudi Arabia notified it under paragraph 4 (a) of the Enabling Clause in 2008[10]; and notified the GCC Agreement under Article XXIV:7(a) of the GATT 1994 on 6 October 2009.[11]

2.23. Qatar allows the free movement of GCC nationals, allowing them to work in all sectors. Furthermore, there are no restrictions for investment by GCC nationals except in a small number of sectors currently being negotiated.

2.6.1.2 GCC free-trade agreements

2.24. The GCC has negotiated two free-trade agreements between its members and third parties. The first FTA, negotiated with Singapore, recently entered into force and, is a comprehensive agreement covering trade in goods and services, government procurement, rules of origin, and customs procedures among others.[12] A FTA has also been negotiated with EFTA but has not been ratified by all the parties.[13] GCC leaders have temporarily halted negotiations on further FTAs pending the outcome of an impact study on the matter.

2.6.1.3 Pan-Arab Free Trade Area (PAFTA or GAFTA)

2.25. The Pan-Arab Free Trade area was established in 1997 and entered into force in 1998.[14] It provides for the facilitation and development of inter-Arab trade in goods with a view to establishing a Pan-Arab trade area. A separate framework on the liberalization of trade in services is currently under negotiation. Customs duties have been gradually reduced since 1997 with final elimination in 2009 for all agricultural and industrial products with a temporary exemption accorded to Sudan and Yemen.[15] The agreement also provides for the products to be free from

[7] Article (1) of the GCC Economic Agreement.

[8] Total trade exchange ranks the United States first, followed by China, Germany, Japan, France, Netherlands, United Kingdom, and GCC (8th). The Cooperation Council for the Arab States of Gulf Secretariat General, "Statistical Bulletin, 2012". Viewed at: http://sites.gcc-sg.org/DLibrary/index-eng.php.

[9] WT/REG222/N/1.

[10] WT/REG222/N/1/Corr.1 and WT/COMTD/N/25.

[11] WT/REG276/N/1/Rev.1.

[12] The Agreement was concluded in 2008 and entered into force on 1 September 2013.

[13] Qatar has not ratified the agreement.

[14] Declaration Pan-Arab Free Trade Area Economic and Social Council's Resolution No. 1317-O.S. 59 of 19 February 1997.

[15] Extended liberalization until 2010 for Sudan and Yemen.

other taxes and non-tariff restrictions (Article VI). However tariff-rate quotas and seasonal duties on agricultural products remain for certain members. Article X provides for the facilitation of financing and funding for trade with preferential and concessional terms. A transitional mechanism for rules of origin is in place pending final adoption of rules of origin (section 3.1.5).

2.26. Trade among PAFTA members has increased steadily.[16] The main products that benefited from PAFTA duty-free trade with Qatar in 2012 were insulated wire & cable, furniture, and worked building stone on the import side; and polyethylene, light oils, and natural gas for exports.

2.27. There are currently 17 members, including GCC member states, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Palestinian Authority, Sudan, Syria, Tunisia, and Yemen. In 2006 the agreement was notified, pursuant to Article XXIV of GATT 1994, by the Kingdom of Saudi Arabia.[17]

2.6.2 Preferential trade

2.28. In 2010, Qatar passed legislation to adopt the Protocol on the Preferential Tariff Scheme (PRETAS) for the Trade Preferential System among members of the Organization of the Islamic Cooperation (TPS-OIC). This agreement provides for reciprocal preferential tariff access, i.e. providing a margin of preference on current MFN rates of duty for a certain per cent of tariff lines. Each party will have its specific tariff reduction programme. There are also provisions for the removal of para-tariffs (i.e. border charges and fees), elimination of non-tariff barriers, establishment of rules of origin, and provisions related to trade remedies. As of January 2014, PRETAS is not yet operational pending ongoing procedural work.

2.29. Qatar does not grant unilateral preferences to any country.

2.30. Qatar has received preferential access for its exports under the GSP schemes of Canada, the EU, Turkey, and the Customs Union comprising of Belarus, Kazakhstan, and Russia during the period under review.[18]

2.7 Trade disputes and consultations

2.7.1 Dispute settlement in the WTO

2.31. Qatar has not been involved in WTO dispute settlement procedures in any capacity to date; neither as a complainant, respondent, nor third party. Thus far it has not encountered any significant trade problems requiring its use.

2.7.2 GCC and PAFTA dispute settlement mechanisms

2.32. Article 27 of the Economic Agreement between GCC States provides a mechanism for the settlement of disputes. In the first instance, the Secretariat General shall hear and seek settlement of the dispute. If the matter is not settled by the Secretariat General, it may be referred to the GCC Commercial Arbitration Center; failing agreement, in referring the matter to arbitration, a specialized judicial commission may be formed to settle the dispute. This mechanism has not been used.

2.33. Article 10 of the GCC Cooperation Council Charter provides for the establishment of a Commission for the settlement of disputes among GCC members. The Commission is established by the Supreme Council on an ad hoc basis when a dispute arises. The Commission submits its recommendation or opinion on the matter to the Supreme Council for action.

2.34. Article XIII of PAFTA provides for a dispute settlement mechanism. Disputes are reported to the Council, whereby they may be referred to a committee or sub-committee for examination. The Council may also refer the matter to the dispute settlement provisions of the United Agreement for the Investment of Arab Capital in Arab States.

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[16] Online information. Viewed at: xa.yimg.com/kq/groups/23355551/846958677/name/PAFTA.doc.
[17] WT/REG223/N/1.
[18] Qatar was a GSP eligible country under the EU scheme up until 1 January 2014.

2.8 Foreign investment regime

2.8.1 Legal framework

2.35. Qatar's foreign investment regime is provided for in its Foreign Investment Law of 2000, including amendments and related laws (Table 2.2). The Law's two main elements determine the percentage of foreign ownership allowed in a given sector, and provide other rules or exceptions for investments. Generally, foreign investors are limited to a minority ownership in a business, i.e. a maximum of 49% for most sectors; except commercial agencies, banking, insurance, and real estate, in which non-Qataris may not invest.

Table 2.2 Investment legal framework

Law	Reference	Summary
Law Regulating the Investment of Foreign Capital in Economic Activities (Foreign Investment Law)	Law No. (13) of 2000	Main foreign investment law
Amendments to the Foreign Investment Law	Law No. (2) of 2005	Amends the terms "Qatari" and "non-Qatari", and reference to the relevant Ministry
Amendments to the Foreign Investment Law	Law No. (1) of 2010	Amends the law to allow 100% ownership in a larger number of sectors
Organization of the Business of Commercial Agents	Law No. (8) of 2002	Regulations pertaining to commercial agents
The Proxy Law	Law No. (25) of 2004	Prohibits a natural or legal person from "harbouring" a non-Qatari

Source: Compiled by the WTO Secretariat.

2.36. In particular, Law No. 1 of 2010 allows up to 100% foreign ownership in agriculture, industry, health, education, tourism, developing and exploitation of natural resources, energy and mining, consulting services, technical services, IT services, cultural services, sport services, leisure services, and distribution services, upon the authorization of the Ministry of Economy and Commerce. The law also states that the Council of Ministries may expand upon this list. Authorization is dependent on the project being aligned with the development plans of the State, in particular if they utilize local raw materials, introduce new technologies, promote exports, set up well-known companies, or train and promote Qatari nationals. Reportedly, the authorization for 100% ownership is seldom given.[19] The number of joint Qatari-foreign-owned companies rose steadily between 2000 and 2012 from 10% of all registered companies to 31%. Foreign ownership in some of these companies exceeds 49%. Moreover, majority foreign-owned companies have a significant presence in consultancy services, QFC-based banks as well as QSTP-based companies.

2.37. Other exceptions to the 49% ownership rule may be granted on a case-by-case basis to businesses involved in contracts with the State, if this would facilitate the performance of a public service or utility. These regulations are currently being reviewed for possible changes to the guidelines and criterion. Exceptions to the foreign investment law are made for companies incorporated by the Government and companies assigned by the State to extract, exploit, or manage natural resources.

2.38. The type of business entity a foreign investor may establish depends on the ownership share and related laws on types of business entities (section 3.3.1.1). In practice, the limited liability company and single person company are often used.

2.39. The law also gives certain rights or guarantees to foreign investors, allowing for the unrestricted transfer of funds, and assurances against expropriation. While expropriation may be possible if it is in the public interest, it must not be discriminatory and compensation shall be equivalent to the real economic value. Monetary transfers related to the investment do not face any obstacles, as proceeds, returns, and compensation may be freely repatriated without currency exchange controls. The law also provides for the settlement of investment disputes through

[19] Latham & Watkins (2012),"*Doing Business in Qatar*", Second Edition. Viewed at: www.lw.com/thoughtLeadership/doing-business-in-qatar.

domestic or international arbitration panels. The dispute settlement process has not been used thus far, as disputes have been resolved through consultations with the parties concerned.

2.40. At the level of the GCC, there is no provision for coordinating investment policies and laws, thus it remains a matter of domestic policy. However, GCC nationals are given certain advantages with respect to investing in Qatar, in comparison to other nationals. Where the foreign ownership component comprises a GCC national or GCC entity, the ownership share may be raised to 50%.

2.8.1.1 Incentives

2.41. Pursuant to Qatar's goal to diversify its economy away from heavy dependence on the energy sector, it has pursued various initiatives to promote and encourage foreign direct investment. These include subsidized gas prices; tax holidays; land at non-market rents; favourable electricity rates; exemption of taxes on exports; loans at competitive rates; and no import duties on machinery, equipment, and spare parts for industrial projects.

2.8.1.2 Bilateral investment agreements

2.42. Qatar has 22 bilateral investment agreements with a number of trading partners, some of which have not been ratified in order to provide a framework and facilitate investment (Table 2.3). Additional agreements are being negotiated. The agreements are based on different negotiating models for developing and developed countries. The specific content remains confidential to the parties concerned.

Table 2.3 Bilateral investment agreements

Partner	Date of signature	Entry into force
Belarus	17 February 2001	6 August 2004
Bosnia-Herzegovina	1 June 1998	5 February 2009
China	9 April 1999	1 April 2000
Croatia	12 November 2001	..
Cuba	6 November 2001	..
Egypt	12 February 1999	1 April 2000
Finland	12 November 2001	8 May 2003
France	8 July 1996	27 July 2000
Germany	14 June 1996	19 January 1999
India	7 April 1999	15 December 1999
Iran	20 May 1999	5 November 2001
Italy	22 March 2000	8 January 2004
Former Yugoslav Republic of Macedonia	20 May 2011	13 February 2012
Morocco	20 February 1999	21 May 2001
Pakistan	6 April 1999	..
Romania	6 June 1996	27 April 1997
Russian Federation	12 February 2007	4 June 2009
Senegal	10 June 1998	..
Republic of Korea	16 April 1999	16 May 1999
Sudan	3 June 1998	..
Switzerland	12 November 2001	15 July 2004
Turkey	25 December 2001	12 February 2008

.. Not available.

Source: UNCTAD.

3 TRADE POLICIES AND PRACTICES BY MEASURE

3.1 Measures directly affecting imports

3.1.1 Customs procedures

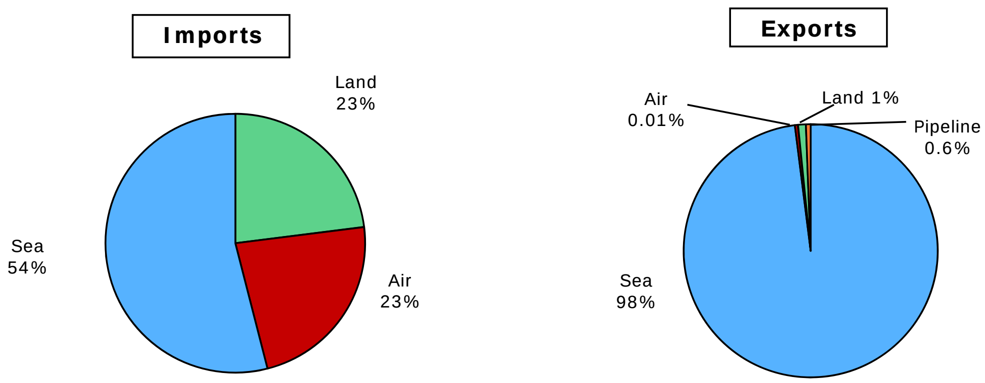
3.1.1.1 Main laws and organization

3.1. The General Administration of Customs of Qatar is responsible for the control and entry/exit of goods. Since 2009, it has been incorporated into the organizational structure of the Ministry of Finance, which became the Ministry of Economy and Finance.[1] Although the GCC has been notified as a customs union to the WTO, the respective customs administrations of GCC members, including Qatar, retain their autonomy and there is no integration of functions at present. Customs posts also still operate at the internal borders, in this case between Qatar and the Kingdom of Saudi Arabia at Abu Samra. Cooperation among the customs authorities of the GCC is mainly in the form of sharing information and processes.

3.2. Qatar operates 23 customs posts for the entry or exit of goods over land, sea, air, and by pipeline. Nearly all exports are by sea; and nearly half of imports are by sea, about one quarter arriving by air and land. (Chart 3.1) The significant increase in growth of trade and the economy has started to strain the existing infrastructure, in particular port capacity. Thus, Qatar has invested in its ports infrastructure to create the New Doha Port, with estimated completion in 2025, and to increase operations at Al Ruwais Port, estimated to be completed in 2014. Qatar's port operations are managed by the Qatar Ports Management Company (Mwani), but operations are contracted out to private companies.

Chart 3.1 Imports and exports by type of entry port, 2012

(%)



Note: Percentages may not add up to 100% due to rounding.

Source: Qatar Statistics Authority.

3.3. The overall customs framework for Qatar is contained in the Customs Law and its Executive Regulations; both are modeled on or essentially reproduce the GCC Common Customs Law.[2] There have been no changes since these entered into force. The Customs Law has 16 main elements covering a range of customs matters (Table 3.1).

[1] Amiri Decree No. 31 of 2009 incorporated it into the Ministry of Economy and Finance. In late 2013, a new decree was expected to transform it into the Ministry of Finance. The Ministry of Economy and Finance is being separated into a single Ministry of Finance, with other economic functions being transferred to the Ministry of Economy and Commerce.

[2] A notable exception is that the Qatar Customs Law does not include Section XII of the GCC Customs Law. Law No: (40) for the year 2002 and Ministers Council Decree No: (21) for the year 2004; GCC Customs Law adopted by the Supreme Council at the 20th Session.

Table 3.1 Overview of the Customs Law

Customs provision	Summary
Part 1: Definitions and General Provisions	Definition of terms
Part 2: Customs Tariff	Goods are subject to the respective tariff in the unified customs tariff of the GCC; other provisions concern the timing of entry
Part 3: Prohibition and Restriction	Restricts the entry/exit of goods, or certain goods, to certain sea ports, air ports, and land border points; prohibited goods may not enter, exit, or transit
Part 4: Distinguishing Elements of the Goods	Proof of origin rules; customs valuation for import and export; proof of valuation by submission of original invoice; classification of goods
Part 5: Importation and Exportation	Import and export procedures by mode of transport
Part 6: Customs Clearance Stages	Process of clearance including declaration, examination, passengers, adjustment to value, payment, and withdrawal
Part 7: Cases Pending Customs Duties & Cases of Refund	Provisions for goods in transit, warehousing, duty-free shops & free zones, temporary admission, re-exportation, and drawback
Part 8: Exemptions	Goods exempt from customs, including diplomatic provisions, military, personal effects, charitable organizations, and returned goods
Part 9: Service Charges	Service charges for warehousing including storage, handling, insurance, and other charges
Part 10: Customs Agents	Requirements and responsibilities for customs agents or brokers
Part 11: Rights & Duties of the Authority Officers	Appointment of officers and other authorities to assist customs officers, and the provision of weapons
Part 12: Customs Legal Actions	Includes investigation of smuggling, seizure report, precautionary measures, customs offences and penalties, smuggling and penalties, pursuance, liability, and trials procedures
Part 13: Sale of the Goods	Authority to sell defective, seized, or warehoused goods, and how to distribute the proceeds
Part 14: Privilege of the Customs Administration	Privilege of the duties, fines, compensations, and refunds over movable or unmovable property
Part 15: Prescription	No refund of customs duties after three years
Part 16: Final Provisions	Final provisions

Source: Customs Law and Executive Regulations.

3.1.1.2 Multilateral Agreements on customs

3.4. Qatar became a member of the World Customs Organization (WCO)[3] in 1992. It became a contracting party to the WCO Harmonized System (HS) Convention[4] in 2004, which entered into force on 1 January 2006 for Qatar, and joined the Revised Kyoto Convention on Customs Procedures in 2009.[5] It is not a contracting party to any of the other WCO conventions on customs matters.

[3] Formally known as the Customs Co-operation Council.
[4] International Convention on the Harmonized Commodity Description and Coding System.
[5] International Convention on the Simplification and Harmonization of Customs Procedures.

3.1.1.3 Bilateral cooperation on customs

3.5. During the past few years, Qatar Customs has negotiated a number of bilateral customs agreements with a view to aiding enforcement and combatting customs fraud. Most of the agreements are based on a WCO model and cover exchange of information, procedures, and customs fraud. The agreements are bilateral and are not negotiated at the GCC level.

Table 3.2 Bilateral agreements on customs matters

Partner	Agreement
Iran	Cooperation agreement for the optimal application of the customs law and to control irregularities
Pakistan	Mutual administrative assistance for the proper application of the customs law, including investigation and enforcement
Morocco	Mutual administrative assistance for the proper application of the customs law and to prevent, investigate, and combat crimes and offenses
Congo	Mutual administrative assistance for the proper application of the customs law and for the prevention, investigation and combating of customs offences
Sudan	Mutual administrative assistance to enable the proper application of the customs law and for the prevention, investigation, and combating of customs offenses
Cuba	Joint cooperation for the optimum application of the customs law and to prevent violations of the customs legislation
Singapore	Joint cooperation for the optimum application of the customs law and to prevent violations of the customs legislation
Burkina Faso	Joint cooperation to combat violations of the customs legislation
Kazakhstan	Joint cooperation to combat violations of the customs legislation
Armenia	Joint cooperation to combat violations of the customs legislation
Greece	Joint cooperation to combat violations of the customs legislation
Japan	Joint cooperation to combat violations of the customs legislation

Source: Customs website, http://www.customs.gov.qa.

3.1.1.4 Single-window clearance

3.6. The customs clearance single window programme, known as Al Nadeeb, was designed to obtain several objectives, including enhancing the role of customs, meeting objectives of Qatar Vision 2030, and strengthening Qatar's commitments to the WCO and WTO. In addition to facilitating trade and enhancing customer satisfaction, the single window has reduced customs clearance to 15 minutes, lowered the inspection rate to 5%, and provided high quality value-added services to traders. The single window design phase was launched in 2008 and has gradually become functional for the different types of trade since 2011, when sea port trade was included in the system; air cargo trade was added in late 2012, followed by land ports in 2013.

3.7. The single window has achieved success and now has more than 90% of registered importers and exporters. Seventeen government authorities are integrated in the automated system to control goods. The single window includes an analytical risk management component and has replaced all paper-based trade processes. The system is operating domestically in Qatar currently, but has been built to integrate into a future GCC-wide system.

3.1.1.5 Import procedures and trading rights

3.8. Only established Qatari businesses or enterprises are permitted to import goods. A copy of the commercial register and the form of business activity issued by the Ministry of Economy and Commerce is required to be approved on the importers' registry (the same applies for exports). A certificate of membership in the Qatari Chamber of Commerce and Industry is also required. Thus, due to the rules of the commercial registration law and investment law, foreigners or foreign companies would have to meet commercial registration procedures to be able to import (section 3.3.1).

3.9. A customs declaration must be accompanied by a detailed original invoice and certificate of origin. The original invoice and certificate of origin must be certified in the country of export by the appropriate authorities. Other documentation depends on the mode of transport. For example, shipment by sea requires that goods be registered in the manifest. A bill of lading, proof of payment, or packing list may also be required. Pre-approval by specific ministries is required for certain products.

3.1.1.6 Customs brokers

3.10. Part (10) of the Customs Law allows for licensed customs brokers or agents to perform customs clearance procedures on behalf of an importer or exporter. There are essentially two types of brokers, those that work privately in companies and public brokers. Public brokers must be listed on the commercial register, have a Qatari or GCC manager, and speak English and Arabic. Both types of brokers must pass an exam and are responsible for keeping records of the transactions for five years, and these are subject to inspection by the authorities.

3.1.1.7 Free trade zones

3.11. Articles 76-87 of the Customs Law provide the legal framework for the establishment of free trade zones. Most foreign goods may be taken in or out of a free zone to locations outside the State without incurring customs duties; exceptions include flammable goods, radioactive materials, arms, ammunition, explosives, narcotic drugs, goods originating in a boycotted country, and goods prohibited from entering the State. Goods may be imported into Qatar from a free zone following normal import procedures. Plans are underway to establish a free zone in 2014.

3.1.1.8 The 2013-16 Customs Strategic Plan

3.12. The Customs Strategic plan for 2013-16 aims to improve performance, offer better services, protect society and the environment, and combat fraud. Its goals are aligned with other government plans such as the National Development Strategy. Particular objectives include plans to develop electronic and paperless services, implement and expand customs agreements, develop customs legislation with a view to attracting investments, and apply appropriate legislation to prevent the violation of intellectual property rights.

3.1.2 Tariff schedule

3.13. Qatar's tariff schedule, based on the unified customs tariff of the GCC, is not published or available to the public. Furthermore, different country-specific provisions or exceptions apply, particularly for special and prohibited goods among the GCC member states. Thus the GCC customs tariff is not applied uniformly. The tariff schedule has one rate of duty, applicable to each tariff line, whether supplied by WTO Member countries or not. The GCC CET includes the HS2012 nomenclature changes, and therefore Qatar applies the 2012 version of the HS. Customs revenues are relatively small, accounting for approximately 1.5% of total government revenues.

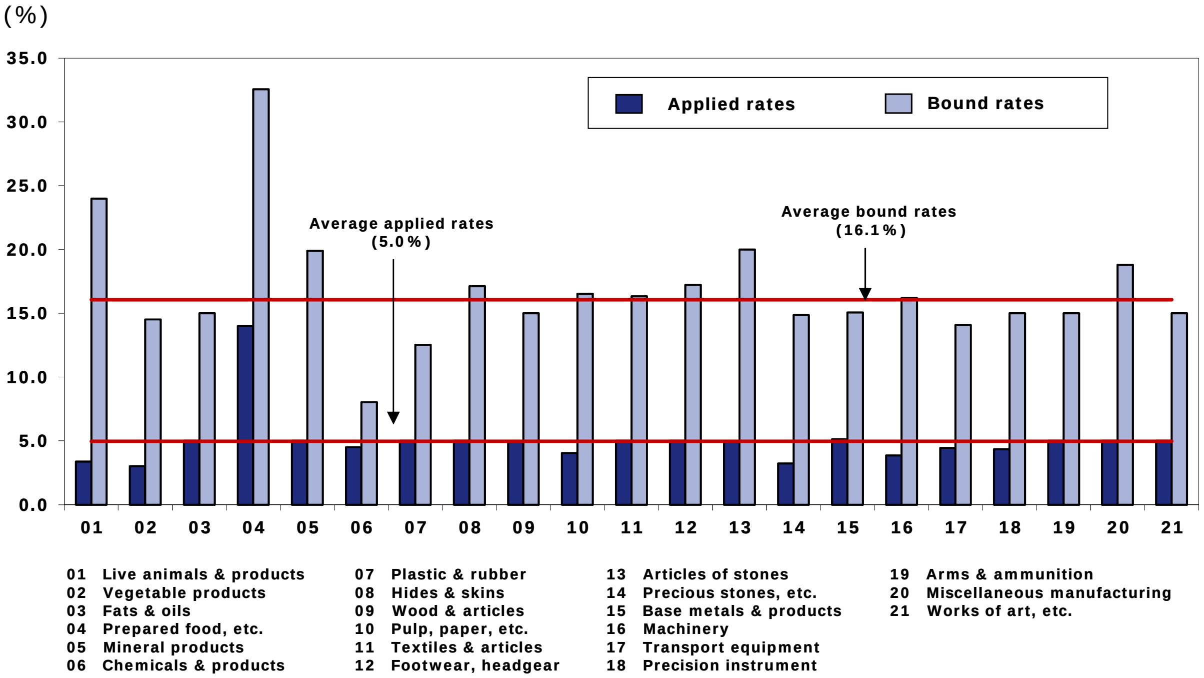
3.1.2.1 Applied rates

3.14. Qatar’s applied tariffs remained low and relatively constant over the review period. In 2007, tariffs averaged 5% and remained at this same average level in 2013. There was a slight increase in the number of duty-free lines during the period. Agricultural tariffs averaged approximately three percentage points higher than industrial goods; i.e. 7.1% versus 4.6% in 2013 (Table 3.3 and Chart 3.2).

3.15. Qatar maintains a simple tariff system whereby there are only five differing rate categories: duty-free, 5%, 20%, 100%, and non-*ad valorem* duties. In addition, a number of products are treated as prohibited or special goods (section 3.1.6 and Tables A3.1 and A3.2). These products face special provisions for importation, but the duty rate charged is either 5% or 100% depending on the product.

3.16. The vast majority of tariffs are at 5%, with only six tariff lines at 20%, one at 100%, 19 with non-*ad valorem* duties, and several hundred duty-free lines. The tariff peaks are with respect to six tariff lines of steel products and 20 tariff lines of tobacco products. Duty-free products are mainly ITA products, pharmaceuticals, seeds, and some agricultural products.

Chart 3.2 Average applied MFN tariff rates and bound rates, by HS section, 2013



Note: Calculations exclude specific rates and include the *ad valorem* part of alternate and compound rates.

Source: WTO Secretariat calculations, based on data provided by the authorities.

Table 3.3 Structure of applied MFN tariffs in Qatar, 2013

(% of total)

		2007[a]	2013	Final bound[b]
1.	Bound tariff lines (% of all tariff lines)	100.0	100.0	100.0
2.	Simple average tariff rate	5.0	5.0	16.1
	Agricultural products (WTO definition)	7.1	7.1	24.2
	Non-agricultural products (WTO definition)	4.6	4.6	14.5
	Agriculture, hunting, forestry and fishing (ISIC 1)	3.2	3.1	16.5
	Mining and quarrying (ISIC 2)	4.9	4.9	22.0
	Manufacturing (ISIC 3)	5.2	5.1	15.9
3.	Duty-free tariff lines (% of all tariff lines)	9.4	11.1	0.9
4.	Simple average rate of dutiable lines only	5.5	5.6	16.2
5.	Tariff quotas (% of all tariff lines)	0.0	0.0	0.0
6.	Non-*ad valorem* tariffs (% of all tariff lines)	0.3	0.3	0.0
7.	Non-*ad valorem* tariffs with no AVEs (% of all tariff lines)	0.3	0.3	0.0
8.	Domestic tariff peaks (% of all tariff lines)[c]	0.5	0.6	0.8
9.	International tariff peaks (% of all tariff lines)[d]	0.5	0.6	19.6
10.	Overall standard deviation of applied rates	7.0	7.2	16.8
11.	Nuisance applied rates (% of all tariff lines)[e]	0.0	0.0	0.0

a Prohibited items are not taken into account in calculations for 2007.
b Final bound rates are based on the 2013 tariff schedule in HS12 nomenclature.
c Domestic tariff peaks are defined as those exceeding three times the overall simple average applied rate.
d International tariff peaks are defined as those exceeding 15%.
e Nuisance rates are those greater than zero, but less than or equal to 2%.

Note: The 2007 tariff is based on HS07 nomenclature consisting of 7,101 tariff lines (at 8-digit tariff line level). The 2013 tariff is based on HS12 nomenclature consisting of 7,300 tariff lines (at 8-digit tariff line level). In case of non-*ad valorem* tariffs, the *ad valorem* part is used for alternate rates.

Source: WTO Secretariat calculations, based on tariff information provided by the authorities, and WTO CTS database.

3.1.2.2 WTO bindings

3.17. Upon joining the WTO, Qatar bound all tariffs, most of which are at a 15% ceiling binding. The simple average is 16%, due to a number of rates above the ceiling binding. On average, the bindings on agricultural products average 24.2% and industrial products, 14.5% (Table 3.3 and Chart 3.2).

3.18. In terms of sectoral initiatives, Qatar became a participant in the WTO Information Technology Agreement in July 2013.[6] It did not participate in any of the other Uruguay Round sectoral initiatives, or in the Agreement on Trade in Civil Aircraft.

3.19. As part of its schedule, Qatar bound "other duties and charges" for a stamp duty at 3%. Currently no stamp duty is applied on imports.

3.1.2.3 Applied rates exceeding bound rates

3.20. The six tariff lines of steel products have an applied rate of 20% and a bound rate of 15%, thereby exceeding the bindings.[7] The authorities indicate that the steel duties have been applied on a temporary basis, and the matter is currently under examination.[8] In addition, tobacco products have a mixed duty that is not directly comparable with the binding of 200%, so there may be anomalies.

3.1.2.4 Preferential tariffs

3.21. There is no separate schedule or column for preferential duties. All imports from GCC and PAFTA members are duty free if they meet the origin criteria.

3.1.2.5 Exemptions from customs duties

3.22. The Customs Law and its reference to the unified customs tariff allow for customs duties exemptions for specified items or certain individuals (Table 3.4). In addition, exceptions may apply for imports of machinery and raw materials; owners of industrial projects may apply to the Ministry of Energy and Industry.[9] Duty-free imports are also allowed for the Qatar Financial Centre, Qatar Science and Technology Park, and the Qatar Foundation.

Table 3.4 Customs duty exemptions

Exemption	Details	Reference
Diplomatic	Imports by the diplomatic corps, consulates, international organizations and their members accredited by the Government, on a reciprocal basis	Customs Law, Part 8, Chapter 2
Military	Imports for all sectors of the military forces and internal security forces, such as ammunitions, arms, equipment, military transport, and any other materials	Customs Law, Part 8, Chapter 3

[6] Fax of ITA Committee Chairman, Aaron Fowler, dated 4 July 2013.
[7] HS 72141020, 72142020, 72143020, 72151020, 72155020, and 72159020.
[8] As of March 2014, a decision was taken by the Council of Ministers to lower the tariffs, however, changes to the law await ratification.
[9] Request for Customs Duty Exemption on Imported shipment. Online information. Viewed at: http://portal.www.gov.qa/wps/portal/services/inviduallandingpages/!ut/p/c5/rZDBlmtAAES_JR8g3TQiS0YLoWVCk7BxBEmQFsFE-PqXd2Y9s5qqZS1uVYEYvN2kz_KSDuW9SW_gCGI5We-UD15R4GbnYAQtX7U0lxg8pAgcwBGKiV9NrTXXs1fNezTomkNO-5HoBiEBN1HdsKnu2n7wmCnuZ_ekWWTOHZ6s-dDYY9U4f14_xgXYgvhyu5_e1MP_HnICf5AKv3MZrgWVKGLgOZoCLduUJHcjILiRgGveWQH8ogERiFc_LkAI0D9c8CtrK_wp6_1WeWLLMWNLuESiuIJIEqEkCqKAkAwObjRJem-NGHtJ7DdZNBRQ3eP8crcrkmDf2djPPs_qREfONoAvVuUy9yg_Qy6CAUzjyCtZcp2Ysw9vr0E37_VsS1vvdSthgqeOBswnHebOpLO4bvdwbbOKxBdLHf7I3Okxj8k8OlHbmjGfFEY-6CshNKvBGpov2l5TFmDtIBgaY6dY7PhL5LT0WnFF2KzUiPhUMPBm0uvmS8Z6lvVtgXBfhoieqR89XVIx-7JYgJY96_qs8gqvjP8AzOEqIA!!/dl3/d3/L2dBISEvZ0FBIS9nQSEh/

Exemption	Details	Reference
Personal effects and household items	Personal effects and used household items of nationals residing abroad or foreigners arriving for the first time	Customs Law, Part 8, Chapter 4 Executive Regulation, Articles 19-21
Charitable organizations	Goods needed by charitable organizations registered with the government authorities and not involved in political activity	Customs Law, Part 8, Chapter 5 Executive Regulation, Articles 22-25
Returned goods	Goods of national origin previously exported; returned foreign goods proven to have been re-exported if returned within one year; and goods temporarily exported for completion or repair	Customs Law, Part 8, Chapter 6

Source: Customs Law.

3.1.3 Other charges affecting imports

3.23. No other fees or charges are imposed on imports entering Qatar.

3.1.4 Customs valuation

3.24. Article 1 of the Executive Regulations to the Customs Law provides the rules for the determination of customs value. The transaction value is set as the principle basis for appraisal of customs, followed by the hierarchal application of the transaction value of identical goods, transaction value for similar goods, deductive value, and calculated value. The reverse application of deductive and calculated value methods may occur upon the request of the importer. When value cannot be determined through one of these means, value may be determined using logical means, and based on the provisions of the Customs Valuation Agreement, but with greater flexibility in application. In practice, transaction value is the most common method used.

3.25. Qatar values on the c.i.f. basis, including the cost of customs, insurance, and transport.

3.26. Qatar notified its customs valuation legislation to the WTO Committee on Customs Valuation in 2005.[10] It also responded to the checklist of issues in 2005.[11] Qatar does not require pre-shipment inspection. In 1999 a notification to the WTO stated that Qatar did not maintain any laws or regulations relating to pre-shipment inspection.[12]

3.1.5 Preferential and non-preferential rules of origin

3.27. Article 23 of the Customs Law provides for origin determination by reference to agreements concluded within the framework of international or regional economic organizations. For Qatar, the WCO and the Arab League provide guidance for origin determination. For both preferential and non-preferential trade, the origin rule is a 40% value added rule. Furthermore, importation also requires the submission of a certificate of origin from the exporting or producing country.

3.28. In 1999 Qatar notified its preferential and non-preferential rules of origin to the WTO Committee on Rules of Origin.[13]

3.1.6 Import prohibitions, restrictions, and licensing

3.1.6.1 Prohibitions and restrictions

3.29. Qatar prohibits the importation of flammable goods, radioactive materials, ammunition and explosives, narcotic drugs, goods from economically boycotted countries, generally prohibited

[10] G/VAL/N/1/QAT/1.
[11] G/VAL/N/2/QAT/1.
[12] G/PSI/N/1/Add.8.
[13] G/RO/N/25.

goods, and goods that infringe rules relating to commercial, industrial, artistic, or intellectual property rights.[14]

3.30. According to the customs tariff, a number of other items are prohibited or require special import procedures. The 27 tariff lines of prohibited goods include coca leaf, poppy straw, poppy seeds, ivory, swine, mace, opium, cocaine, used and re-treaded tyres, asbestos, and certain articles containing asbestos (Table A3.1).

3.31. Special import procedures are applicable to 50 tariff lines; these include meat and lard of swine, alcohol, chocolate containing alcohol, and hides and other items of swine (Table A3.2). There is a general import prohibition on pork products and alcohol, but one state entity, the Qatar Distribution Company (QDC), a subsidiary of the Qatar Airways Group, has exclusive rights with respect to imports and distribution in Qatar. Purchase of alcohol is allowed, by permit, for individuals or by licence for businesses and restaurants. Distribution to individuals is also regulated through a monthly quota system based on income. The QDC sells through one shop in Qatar. A 100% landing tax is added to the sales price of the product. From 2012, the QDC began selling a number of pork products to expatriate customers under the same procedures.

3.32. In 2008, 2010, and 2012 Qatar notified the WTO that it did not maintain any quantitative restrictions on imports.[15]

3.1.6.2 Licensing

3.33. Qatar has notified the WTO Import Licensing Committee that it has no laws or procedures for import licensing, nor does it require import licences upon importation.[16]

3.1.7 Contingency measures

3.34. The GCC has developed a Common Anti-dumping, Countervailing Measures, and Safeguards Law, which some GCC member states have implemented. However, Qatar has not adopted these rules nor does it have domestic legal instruments to implement them.

3.35. However, the GCC Law establishes that anti-dumping, countervailing measures, and safeguards investigations be carried out at the level of the GCC customs union and not at the level of individual states.[17] Thus, despite having no legal framework, Qatar has indicated it would participate in such investigations and cooperate in the process for investigations initiated in other GCC member states.

3.36. Qatar notified the Committees on Safeguards, Anti-dumping Practices, and Subsidies and Countervailing Measures in 1998 that it did not maintain any laws or regulations on these matters.[18] There have been no new notifications or updates notified since that time.

3.1.8 Standards

3.1.8.1 Standards and other technical requirements

3.37. Qatar's Standards and Metrology Department, part of the Ministry of the Environment, prepares standards based on international standards. The WTO enquiry point, also under the

[14] http://portal.www.gov.qa/wps/portal/topics/!ut/p/c5/rc7LmYIwAIXRWihAE4giLsNLRUAlASIbPgiID0AdlCjVj1OAu7l_AfeABHxqs_5UZY_Ttc1qwECipiqcK9jTJmHg6hpcrZfTqb9QEFxAEAMGJyk5v2-r4TIE5yFYd_DokcESnmlBj-4EOZMXNfeQhjfXD7WB0MAnQ7SSu7kc2TsLO2_YFVwCDkiq-pp_XuM_h5rCL8MQ-MtrUwJStmAPktlXoaEC-r_CU96MBW_GcIzkiQbnUJ4pMwUhJIN4u3-_jG4lLEtPnUB-5vFUeRh4Y1aq8RM9Mx1DpVBt5BxY7wY5Xz5TvZt4Bbv_1Bgf95mCaGP32wUzfUvUVUMvWL8Xm-07NMpT5t-2-auSo4eJjiXqxLRhHaf5AfWCaDysR5sXZCQI7PPar-j1wkclYm625gVq65hHnLmMdkoz2sx2D0dIErg1_aUV_sHDkvQLXIBLuA!!/dl3/d3/L2dBISEvZ0FBIS9nQSEh/.

[15] G/MA/NTM/QR/1/Add.11, Letter of 16 June 2011 from the Permanent Mission of the State of Qatar to the WTO, and Letter of 14 June 2012 from the Permanent Mission of the State of Qatar to the WTO.

[16] G/LIC/N/1/QAT/1, G/LIC/N/3/QAT/1, G/LIC/N/3/QAT/4, G/LIC/N/3/QAT/5, G/LIC/N/3/QAT/6, G/LIC/N/3/QAT/7, G/LIC/N/3/QAT/8, and G/LIC/N/3/QAT/9.

[17] Law No. (4) of 2006.

[18] G/SG/N/1/QAT/1, G/ADP/N/1/QAT/1, G/SCM/N/1/QAT/1.

Standards and Metrology Department, regularly notifies Qatar's technical regulations to the WTO TBT Committee. The Standards and Metrology Department is also involved in developing Qatar's TBT policy.

3.38. Qatar is a member of the GCC's Gulf Standardization and Metrology Organization (GSMO), which helps to harmonize and promote coherence among members for standardization and related matters such as conformity assessment procedures. As such, Qatar adopts all GSMO standards and technical regulations. In addition, Qatar may initiate its own processes for national standards. It has adopted approximately 11,000 standards and technical regulations at the international or regional level, and about 30 national standards.

3.39. Qatar adopted the WTO Code of Good Practice in 2006. It is a member of ISO, Codex, and the IEC, and utilizes their international standards. Qatar has approximately 15 ISO accredited laboratories.

3.40. Qatar's legal framework for standards and technical regulations includes: Law No. (4) of 1990, which provides the basis for technical regulation for all products in Qatar, including imports; Law No. (16) of 2002, which provides the basis for standards and its institutional framework; and Law No. (39) of 2009, which provides for laboratory standards and accreditation. Conformity assessment procedures are also in place.

3.1.8.2 SPS

3.41. Similar to the framework on standards and technical regulations, the GSMO plays an important role in the field of SPS in Qatar. It is involved in developing food and related standards for the GCC member states. Qatar's, Supreme Council of Health Food Safety Department performs most functions related to food safety and importation. A national food safety committee was established to coordinate and develop food safety and control policy.

3.42. Law No. (8) of 1990 is the main law on food safety. It contains provisions to prohibit the circulation of foodstuffs if they are not in line with standard specifications, if unsuitable for human consumption, or if tampered with or contaminated. It also provides for the regulation of food control, trade, and preservation of food, and provisions for seizure and penalties. The importation of live animals and plants is governed by more than 300 technical regulations and standards.

3.1.8.3 Marking and labelling rules

3.43. Marking and labelling is required on all products imported into Qatar. In addition, special rules apply for food products. Meat requires a health certificate and a halal slaughter certificate in the country of export. Labelling is required in Arabic, and where another language is used, an accompanying Arabic translation must also be available. The relevant regulations are set by the General Standards Organization of Qatar.[19]

3.1.9 Other measures

3.44. National security exceptions on imports may be granted by the Ministry of Defence or Ministry of the Interior through a formal process coordinated with the Customs Authority.

3.2 Measures directly affecting exports

3.2.1 Procedures

3.45. Customs procedures for exports include the filing of a bill of export and submission of a bill of lading if transport is by air, or shipping permit for transport by ship. The single window system is used to facilitate the export process (section 3.1.1.4).

3.46. Depending on the destination, exports may require a certificate of origin. The Qatar Chamber of Commerce and Industry issues these certificates of origin for export from Qatar.

[19] QS/GSO 9/2007 and QS/GSO 9/2013.

3.2.2 Export taxes, charges, and levies

3.47. There are no taxes, charges, or levies charged on exports from Qatar.

3.2.3 Export prohibitions, restrictions, and licensing

3.48. Products that are prohibited from importation are also prohibited for exportation (section 3.1.6.1). Export controls, i.e. permits, may be required for certain products for environmental, security, or safety reasons.[20] There are no export licensing requirements.

3.2.4 Duty and tax concessions, EPZs, export performance requirements

3.49. Qatar does not maintain any tax concessions, export processing zones, or export performance requirements except as provided for in the free zones (section 3.3.3.4) and as incentives for investment (section 2.7.3.2).

3.2.5 Export finance, promotion and marketing assistance, insurance and guarantees

3.50. TASDEER, Qatar's export development agency under the Qatar Development Bank (QDB), a government agency, was launched in 2011. It provides export finance, insurance, development, and promotion services. As part of its export development and promotion activities, TASDEER introduces companies to prospective buyers in foreign markets and supports participants in international and regional trade fairs. As for insurance, TASDEER provides export credit guarantees in the form of risk cover before consignment and after consignment. TASDEER also provides trade information to potential exporters through the ITC's Trade Map and has recently produced an export guide in conjunction with the ITC to aid small and medium size businesses export.[21] TASDEER's activities are financed through the QDB budget.

3.51. In 2012, TASDEER prepared an export development strategy for Qatar; it focuses on the development and promotion of non-hydrocarbon exports. As part of the strategy, companies are being evaluated for their export readiness, and major export product categories have been identified to increase exports.[22] Target goals are being set for Qatari exports, especially for SMEs. TASDEER has also commenced work on market studies, an exporters' directory, workshops and seminars, and trade reports. As a result, a number of new market opportunities have been identified to increase Qatari exports.

3.3 Measures affecting production and trade

3.3.1 Legal framework for businesses

3.3.1.1 Types of business entities, registration, and foreign company ownership restrictions

3.52. The Commercial Companies Law is the main law governing the operation and registration of businesses in Qatar (Table 3.5).[23] It regulates the type of company ownership or structure, and registration in the business registry. The number and type of business establishment is determined by the law; there are currently 11 different possibilities (Table 3.6).

3.53. The Investment Law, in combination with the Commercial Companies Law, essentially limits foreign business operations in Qatar unless they take on a Qatari partner with a majority stake. Following revisions to the Investment Law in 2010, the option of using the sole proprietorship or an LLC is possible with a foreign owner in certain sectors, but subject to approval by the Ministry of Economy and Commerce.

[20] Oil and Gas Regulation Qatar 2013, online information. Viewed at: http://www.iclg.co.uk/practice-areas/oil-and-gas-regulation/oil-and-gas-regulation-2013/qatar.
[21] ITC and Qatar Development Bank, (2013).
[22] These include plastic products, certain medical products, electric wires and cables, valves, parts of heat and cooling machinery, flour, and soap products.
[23] Law No. (28) of 2006.

3.54. Registration of a business entity in the commercial register requires articles of association; notarized, legalized, and authenticated copies of non-Qatari company documents; notarized, legalized, and authenticated power of attorney from the non-Qatari company to its incorporation representative in Qatar; confirmation letter from bank indicating deposit of share capital; and registration with the Qatar Chamber of Commerce and Industry.

Table 3.5 Main business laws

Law	Reference	Overview
Commercial Companies Law	Law No. (28) of 2006	Regulates commercial activities, commercial contracts, and the rights and obligations of buyers and sellers
GCC Common Industrial Law	Law No. (20) of 2006	Law governing industrial project establishment
E-Commerce Law	Law No. (16) of 2010	Regulates all e-commerce activities
Commercial Companies Law	Law No. (5) of 2002	Regulates the structure and operation of companies in Qatar
Regulations on GCC Nationals Practicing Free Professions	Law No. (7) of 1998	Allows GCC nationals to have businesses in certain sectors
Law Regulating Control of Accounts	Law No. (30) of 2004	
The Proxy Law	Law No. (25) of 2004	Prohibits a natural or legal person from "harbouring" a non-Qatari
Organization of the Business of Commercial Agents	Law No. (8) of 2002	Governs commercial agent activities
Trading Regulation Law	Law No. (27) of 2006	

Source: Compiled by the WTO Secretariat.

Table 3.6 Types of business establishments

Type	Ownership	Liability
Establishment	100% Qatari or GCC nationals	Unlimited
Foreign company	Only for companies that work with the State of Qatar for the duration of their contract. Approval by the Ministry of Economy and Commerce.	
General partnership company	Minimum 51% Qatari	Joint and several
Holding company	Dependent on company	Limited
Limited liability company	100% Qatari in all sectors 100% GCC in many sectors 100% foreigners in limited sectors	Limited
Limited partnership with shares	Minimum 51% Qatari	General partners have joint and several liability, and limited partners have limited liability
Particular partnership	Minimum 51% Qatari	Limited
Private shareholding company	Minimum 51% Qatari	Limited
Public shareholding	Minimum 75% Qatari	Limited
Simple partnership company	Minimum 51% Qatari	General partners have joint and several liability, and limited partners have limited liability
Sole proprietorship company	100% Qatari in all sectors 100% GCC in many sectors 100% foreigners in limited sectors	Limited

Source: Ministry of Economy and Commerce.

3.3.1.2 Industrial projects

3.55. In addition to the general business framework, additional provisions are in place for the establishment of an industrial project, i.e. involving manufacturing, assembly, packaging, and similar processes, pursuant to the GCC Common Industrial Law.[24] Special exemptions in the implementing regulations for Qatar exempt projects for oil exploration and extraction, and metal ore extraction. A licence is required in order to establish an industrial project or change the terms of an existing project. Licensing requires the submission of the proposal for the project to the Department of Industrial Development of the Ministry of Energy and Industry, which has 30 days to decide on the matter. In the case of a rejection, the applicant may appeal to the Ministry within 60 days.

3.56. In order to encourage the development of certain industrial projects, Article 16 prioritizes projects producing domestic consumer goods that compete with foreign goods, and projects producing export goods. Articles 17 and 18 provide for special privileges or exemptions, including full or partial exemption of customs duties; full or partial exemption of all taxes; allocation of an appropriate lot for the project; and the supply of electricity, water, and other utilities at advantageous prices.

3.3.1.3 Business climate for foreign companies

3.57. Commercial registrations of main offices and branches of businesses have grown significantly in recent years, and the share of foreign companies increased from 14% of total registrations in 2005 to 31% in 2012. This can be attributed to the increase in government expenditure on infrastructure projects and to strong growth in projects associated with the energy sector, as well as a significant rise in the resident population. The limited liability form of company has grown the fastest followed by sole proprietorships. Particular partnerships and establishments have been in decline in recent years.[25]

3.3.1.4 Business dispute resolution

3.58. As part of the Qatar Chamber of Commerce and Industry, the Qatar Centre for International Arbitration (QCIA) is the main body for business dispute resolution through arbitration. Foreign and Qatari companies may use this arbitration process.

3.59. In addition, the Qatar International Court and Dispute Resolution Centre, established under the QFC, may also settle disputes in Qatar, outside the QFC, if the parties to the dispute agree.

3.3.1.5 Enterprise Qatar

3.60. Enterprise Qatar, a government agency, was created in 2009 to help develop SME businesses and diversify the economy. It has several objectives under the National Development Strategy including to support the creation and expansion of small and medium size enterprises. It carries out most of its work through targeted grants and vouchers, and equity financing and guarantees. Its work includes business skills development, incubation, and marketing and other services. It is financed through allocations from the Ministry of Finance.

3.3.2 State trading enterprises

3.61. Certain laws or decrees appear to grant exclusive privileges to a number of state-owned or controlled enterprises for importation or exportation. Qatar Chemical and Petrochemical Marketing and Distribution Company (Muntajat) was established in 2012, and given exclusive rights with respect to the purchase, marketing, distribution, and sales of certain chemical and petrochemical products to global markets.[26] As at April 2013, it was reportedly responsible for almost 69% of Qatar's total chemical and petrochemical exports.

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[24] Law No. (20) of 2006 and its implementing rules, Decision of the Minister of Energy and Industry No. (4) of 2009.

[25] Qatar Ministry of Economy and Commerce (2012).

[26] Decree Law No. (11) of the Year 2012 and information viewed at: http://muntajat.qa/index.php?page=company-profile.

3.62. A law from 2003 provides exclusive rights to WOQOD, a joint stock company formed in 2002, for the marketing, sales, transportation, and distribution of gas and petrochemicals within Qatar for a period of 15 years.[27]

3.63. Alcohol and pork products are imported and distributed exclusively through the state-owned Qatar Distribution Company (section 3.1.6).

3.64. During the review period, Qatar has twice notified the WTO that it does not maintain any state enterprises that meet the definition in paragraph 1 of the Understanding on the Interpretation of Article XVII of GATT 1994.[28]

3.3.3 Incentives

3.3.3.1 Tax regime

3.65. The tax law was revised and simplified as a result of the 2009 Tax Law, which entered into force in 2010.[29] The law generally applies a 10% flat rate of tax on net income of businesses, but oil and gas operations are subject to a rate of 35%. Prior to its entry into force, foreign-owned resident firms were subject to differential rates based on tax brackets, generally at higher rates. There is no tax on dividends, interest on bonds, or on personal income.

3.66. The 2009 law also introduced a new withholding tax regime: a withholding rate of either 5% or 7% of the gross amount of payments is withheld for non-resident companies delivering services in Qatar. QFC and QTSP companies are not subject to the withholding tax. Special tax exemptions may be granted to industrial projects (section 3.3.1.2).

3.3.3.2 Subsidies

3.67. A number of industries or services are supported by the State, or the State subsidizes them to allow for more affordability. Water is subsidized for residential use. Land is subsidized for agriculture and many commercial ventures. The State is also involved in subsidizing credit for some commercial firms.[30] These subsidies are available only to locally owned companies.

3.68. In the energy sector, fuel and power are subsidized below production costs or true market conditions. In particular, the Government pays the electricity bill of all Qatari households. Where a citizen owns more than one house, the provision applies to only one. Electricity is subsidized for commercial and productive activities at a different rate than the one used for residences.

3.69. In 2011, Qatar notified the WTO that it did not maintain or grant any subsidy within the meaning of Article 1.1 of the Agreement on Subsidies and Countervailing Measures, which is specific in terms of Article 2, or operates directly or indirectly to increase exports or reduce imports within the meaning of Article XVI:1 of GATT 1994.[31]

3.3.3.3 Strategic food reserves

3.70. Qatar maintains strategic food reserves for wheat, rice, sugar, oil, milk, and barley, to ensure there are no supply shortages. The production of some of these products is supported by public subsidies. Products are distributed through standard market channels.

3.3.3.4 Special free zones

3.71. Qatar's 2005 law on free zones regulates the establishment of zones for special purposes.[32] Two zones are in operation, the Qatar Science and Technology Park (QSTP) and Qatar Financial

[27] Law No. (4) of 2003.
[28] G/STR/N/11/QAT/Rev.1, G/STR/N/12/QAT, and G/STR/N/13/QAT.
[29] Law No. (21) of 2009.
[30] National Development Strategy, 2011-16.
[31] G/SCM/N/220/QAT.
[32] Law No. (34) of 2005.

Centre (QFC). (See discussion on QFC in section 4.3.1.3.) The zones provide certain advantages to attract businesses and technology institutes, and are supported by the State.[33]

3.72. The QSTP was established in 2009 to execute applied research and deliver commercial technologies in energy, environment, health sciences, and information and communication technologies. It plans to diversify Qatar's economy by encouraging companies and research institutes to develop and commercialize their technology in Qatar. The QSTP offers: 100% foreign ownership; no taxes; duty-free imports of goods, equipment, and tools into the zone; ability to hire expatriate workers; unrestricted movement of capital and profits; and the possibility to operate as a local or as a branch of a foreign company.

3.73. As of 2012, the QSTP hosted 50 companies with approximately 1,000 employees. Companies located in the QTSP have access to the New Enterprise Fund, which has US$30 million in assets, supporting start-up companies through equity investments. These investments range from US$500,000 to US$3 million.

3.3.4 Intellectual property rights

3.74. The Ministry of Justice, through its Intellectual Property Centre, is currently responsible for intellectual property matters in Qatar. It develops policy as well as carries out work on the various IP issues of copyright, patents, trade secrets, etc. Work is under way to restructure the intellectual property portfolio in the Government, but no decree has been issued to date.

3.75. As a member of the GCC, Qatar adheres to the GCC Patent Law and Regulations; patents granted by the GCC Patent Office apply to all GCC members including Qatar. A member of WIPO since 1976, Qatar adheres to the main intellectual property treaties, and has recently acceded to the Patent Convention Treaty (Table 3.7).

Table 3.7 IP treaties and conventions

Treaty or Convention	Signature	Entry into force
Beijing Treaty on Audiovisual Performances	24 June 2013	Not yet in force
Patent Cooperation Treaty	3 May 2011	3 August 2011
WIPO Copyright Treaty	28 July 2005	28 October 2005
WIPO Performances and Phonograms Treaty	28 July 2005	28 October 2005
Berne Convention for the Protection of Literary and Artistic Works	5 April 2000	5 July 2000
Paris Convention for the Protection of Industrial Property	5 April 2000	5 July 2000
Nairobi Treaty on the Protection of the Olympic Symbol	23 June 1983	23 July 1983
Convention Establishing the World Intellectual Property Organization	3 June 1976	3 September 1976

Source: Information provided by the authorities.

3.76. Qatar has a number of laws on the protection of intellectual property (Table 3.8).

[33] Qatar Development Bank, online information. Viewed at: http://www.qdb.qa/english/investing/pages/qatartax.aspx.

Table 3.8 Main Intellectual Property Laws

Laws or Decrees	Reference
Border Measures for the Protection of Intellectual Property Rights	Law No. (17) of 2011
Law on Copyrights and Related Rights	Law No. (7) of 2002
Law on Trademarks, Commercial Indications, Trade Names, Geographical Indications, Industrial Models and Designs	Law No. (9) of 2002
Trade Secrets Law	Law No. (5) of 2005
Integrated Circuits Law	Law No. (6) of 2005
Patents Law	Law No. (30) of 2006
Decree on the Establishment of the Intellectual Property Protection Centre	Decree No. (53) of 2009

Source: Compiled by the WTO Secretariat.

3.3.4.1 Trade marks

3.77. The trade mark law, established in 2002, provides protection for 10 years from the date of filing and is renewable thereafter. In 2007, legislation was passed adopting the GCC Unified Trademark Regulation in Qatar. It provides foreigners the same rights as Qatari nationals provided they are nationals or residents of states granting reciprocal treatment to Qatar.

3.3.4.2 Patents

3.78. A patent law was passed in 2006, but its implementation is tied to implementing regulations that have not yet been issued. Thus, the operation and structures envisioned to provide domestic patent are not operational per the legislation. However, the Ministry of Justice has indicated that it is in the process of considering approximately 300 patent applications without the regulations in place.

3.79. The 2006 patent law provides for the establishment of a patents office in the Ministry of Economy and Commerce, which will be the operational Ministry for patent examination and issuing patents. The subject matter to be patented may be in the form of material product, industrial process, or manufacturing technique, but must not include scientific theories, computer programs, plant and animal research, diagnostic or surgical methods. Foreign persons who have an activity centre in a WTO member state may apply for a patent and receive the rights accorded in the law. Patent protection is granted for 20 years from the filing date. The law recognizes the compulsory licensing principle but several conditions must be met before the third party can proceed.

3.3.4.3 Copyright

3.80. Similar to the situation with patents, copyright legislation has existed since 2002 but is not operational due to lack of implementing regulations. The law foresees the establishment of an Office of the Protection of Copyrights and Neighbouring Rights under the Ministry of Economy and Commerce, however copyright activities are currently under the Ministry of Justice. The Ministry of Justice allows the submission of copyright works to its the Copyright Protection Office, but no filing certificates are issued, and the office will keep applications until the implementing regulations are issued.

3.81. Pursuant to the law, protection is conferred on authors of original literary and artistic works, irrespective of the value, quality, purpose or mode of expression of these works. Protection is for books and other writings; works delivered orally; dramatic musical works; musical works; choreographic works; audio-visual works; photographic works; works of applied art; works of drawing and painting; and computer programs. Economic rights are protected during the life of the author plus 50 years. The law also has provisions for economic and moral rights; restrictions on copyright and neighbouring rights; and enforcement provisions through preventative measures and sanctions.

3.3.4.4 Geographical Indications and Industrial Designs

3.82. The 2002 law on trademarks, also covers provisions on geographical indications (GIs). It includes the protection of GIs even if not registered, a system of registration, and penalties for improper use or counterfeiting.

3.83. Industrial designs are protected under the same law, but the lack of implementing regulations means that no protection is in place. The law provides for initial protection of five years for industrial designs, renewable for two further periods of five years.

3.3.5 Government procurement

3.84. The Central Tenders Committee (CTC), is the government agency under the Ministry of Finance, coordinates and carries out public procurement in Qatar. It provides procurement services for public works, services, and supplies for many ministries, government services, and public institutions; exclusions exist for Qatar Petroleum, the armed forces, and the police (Table 3.9). Other government entities may also procure through other means, depending on their respective legislation. The CTC procures for some sub-central institutions, such as the municipal council of Doha and other bodies. Tenders greater than the QR 5 million are through the Central Tenders Committee, while those below this threshold are through the Local Tenders Committee, or local tenders. Foreign and local companies may bid for central tenders.

Table 3.9 Overview of Government procurement, 2012/13

Type of procurement[a]	No. of tenders	QR
Total tenders, direct agreements, practices, and variation orders	**386**	**2,160,663,551**
Total auctions	**39**	**84,837,787**
Central Tenders Committee		
Tenders	45	1,662,701,325
Direct agreements	61	203,724,956
Variation orders	52	60,968,857
Practices	5	2,171,300
Auctions	11	82,012,947
Local Tenders Committee		
Tenders	192	226,883,967
Variation orders	31	4,213,143
Auctions	28	2,824,840

a Figures are only for procurement through the Central Tenders Committee and Local Tenders Committee. They do not include tenders for government entities that procure directly through other procedures.

Source: Central Tenders Committee.

3.85. The main functions of the CTC are to announce, receive, and award tenders, and conduct auctions. It acts as a neutral middleman between the purchasers and sellers and ensures fairness. The CTC oversees:

- Local Tenders Committee, which carries out tenders and auctions for less than QR 5 million, restricted to local suppliers only;
- Auctions Committee, which inspects and values items, rental of real estate, and movable objects for sale and lease; and
- Classification Contractors Committee which classifies and re-classifies contractors into grades and categories.

3.86. There are three types of tenders: general, limited, and local. General and local tenders are publicly announced and subject to free competition, whereas limited tenders are restricted to designated suppliers on pre-approved lists. Local tenders are for procurement of less than QR 5 million and for companies listed on the Commercial Register.

Table 3.10 Government entities procuring through the CTC

Government entity
Ministry of Finance
Ministry of Foreign Affairs
Ministry of Justice
Ministry of Environment
Ministry of Labour and Social Affairs
Ministry of Endowment and Islamic Affairs
General Secretariat of the Council of Ministries
Ministry of Energy and Industry (Industrial Development Department, small and medium Industrial areas Department)
Ministry of Culture, Arts and Heritage
Advisory Council
Supreme Judiciary Council
Municipal Council
Public Persecution
Qatar News Agency
General Retirement & Social Insurance Authority
Qatar Racing & Equestrian Club
Qatar Motor & Motorcycle Federation
General Tourism Authority
General Administration of Customs
Qatar Financial Markets Authority
General Authority for Minors Affairs
Ministry of Development Planning & Statistics[a]
Ministry of Information & Communication Technology[a]
Ministry of Transportation[a]
Ministry of Administrative Development[a]
Ministry of Youth & Sports[a]

a New Ministry where laws have not yet been issued, so procurement through the CTC is pending.

Source: Information provided by the Central Tenders Committee.

3.3.5.1 Requirements

3.87. According to the General Tender Conditions, in order to participate in the tendering process, bids must be submitted in Qatari riyals and include a fixed lump-sum price. The conditions also allow for bids to be discarded if the bidder is not registered in the Commercial Register. Other reasons for exclusion include not abiding by the laws and provisions of the boycott of Israel.

3.3.5.2 Legal framework

3.88. Law No. 26 of 2005, the Tenders and Bids Regulatory Law, forms the basis of procurement in Qatar. Two amendments, in 2008 and 2010, further defined the procedures and rules on government tendering. The 2008 amendments mainly concerned the change in name of the Ministry, and therefore did not change the original 2005 law significantly. The amendments of 2010 were concerned with changing threshold levels, i.e. changing the level of QR 1 million to QR 5 million for local/central tenders, the threshold for sale or lease from QR 300,000 to QR 500,000, and requiring that tenders in excess of QR 50 million be approved by the Prime Minister.

3.3.5.3 E-procurement

3.89. The CTC has been working towards electronic means to conduct its work. For example all tenders are announced electronically and the company awarded the contract is also announced through the CTC website; full electronic bidding and tendering processes are not in place.

However, ictQatar has initiated work on e-procurement and has established an e-procurement process for its tendering.

3.3.5.4 Preferences

3.90. The provisions of Law No. (6) of 1976 cover preferences for national products and products of GCC origin. A preference of 10% is granted for national products and of 5% to GCC products. Small and medium-sized business also benefit from a 10% preference.

3.91. The General Tender Conditions provide that if a tender requires the shipment of commodities, priority is to be given to the national Qatari Navigation Companies, followed by the United Arab Navigation Company.

3.92. Qatar does not have any special set-asides for small businesses or any other group.

3.93. Qatar is not a party, nor an observer, to the WTO Agreement on Government Procurement.

3.3.6 Role of state-owned enterprises, and privatization

3.94. State-owned enterprises (SOEs) are very prevalent in major sectors of the economy (Table 3.11). The majority of state-owned enterprises are under the Qatar Petroleum group. While the private sector has been growing, the public and mixed sector of Qatar contributes a higher share of GDP. In 2009, the public and mixed sector accounted for 60% of GDP.[34] The water, gasoline, and electricity distribution have been fully or partially privatized in recent years.

Table 3.11 State-owned enterprises

Enterprise	Sector	Ownership level
Qatar Petroleum	Oil and gas	100% state-ownership
Ooredoo	Telecommunications	76% state-ownership
Qatar General Electricity and Water Corporation (Kahramaa)	Water and electricity	90% state-ownership
Qatar General Postal Corporation	Postal services	100%
Qatar Airways	Commercial air services	100%
Qatar Investment Authority	Investment activities	100%
Qatar Aluminium	Aluminium	100%
Qatar Primary Material Co.	Primary materials	100%
Qatar National Broadband Co.	Broadband services	100%
Qatar Solar Technologies	Solar energy	100%
Hassad Food	Foodstuffs	100%
Qatar Chemical and Petrochemical Marketing and Distribution Co.	Chemicals/petrochemicals	100%
Qatar Steel Company	Steel	100%
Qatar Fertiliser Company	Fertilizer	100%
Qatar Petrol Global Marketing Company	Petroleum products	100%
Qatar Hospitality	Hospitality services	100%
Al Jazeera	Broadcasting/media	100%
Diar Real Estate Development	Real estate	100%
Qatar Central Deposit of Paper Money	Currency	100%
Qatar Satellite Company	Satellites	100%
Qatar Port Administration Company	Port services	100%
Qatar Metallurgy	Metallurgy	100%
Wadi Al Asil Trading Company	Trading activities	100%
Qatar Melamine Company	Melamine production	100%
Mowasalat	Taxis and buses	100%
Qatar Fuel	Fuel and petroleum products	100%

Source: Compiled by the WTO Secretariat from various sources, and information provided by the authorities.

[34] Qatar Statistics Authority (2012).

3.95. There are currently no privatization plans. Any privatization would involve a government decision through an Amiri decree or law.

3.3.7 Competition policy and price controls

3.3.7.1 Competition law and framework

3.96. Since 2006, Qatar has instituted a framework for protecting competition and preventing monopolistic practices.[35] The law applies to both goods and services, but exceptions are made for sovereign ventures of the State and entities subject to state control or supervision.

3.97. The law contains three main elements – identifies acts that violate the rules of competition and are forbidden (Table 3.12); identifies unlawful practices for persons who exercise control or domination (Table 3.13); and covers the notification of mergers or acquisitions that control or dominate the marketplace. Upon receipt of a merger or acquisition notification, there is an examination period of 90 days to approve or deny the request. Two merger requests have been processed by MEC and approved by the committee on competition protection and monopoly prevention, one in retailing and the other in taxi services.

Table 3.12 Competition provisions, Article 3

	Acts that violate the rules of competition and are forbidden
1.	Manipulating the prices of the products being handled, either by raising, lowering or fixing those prices, or by any other means.
2.	Limiting the freedom of products to enter or exit markets, either completely or partially, by concealing them, refusing to handle them despite the fact that they are available, or stockpiling them without justification.
3.	Deliberately provoking a sudden glut of products, which causes them to circulate at a price that affects the economic performance of other competitors.
4.	Preventing or hindering any person from practicing economic or commercial activity on the market.
5.	Unjustifiably concealing from a particular individual, either completely or partially, the products available on the market.
6.	Restricting production, manufacture, distribution or marketing of products; or limiting the distribution, volume or kind of services, or placing conditions or restrictions on their supply.
7.	Dividing or allocating product markets on the basis of geographical area, distribution centres, type of customers, seasons or time periods, or goods.
8.	Coordination or agreement among competitors with regard to presenting, or failing to present, bids in public tenders, negotiations and calls for procurement. This does not include joint offers previously announced by the participating parties, as long as this is not in any way intended to prevent competition.
9.	Knowingly distributing false information about products or their prices.

Source: Competition Law, Article 3.

3.98. The law also covers enforcement. Article 7 creates the Committee for the Protection of Competition and Prevention of Monopolistic Practices; it is tasked, among other things, with receiving reports of violation and taking appropriate measures. Article 9 confers the status of law enforcement officers on members of the Committee and allows them to enter the place of business and perform searches and examine documents. Those found in violation of the law are subject to a fine of between QR 100,000 and QR 5,000,000. During 2010-2013, remedial and/or legal actions were taken in six cases where violations to Law No. 19 were proven.

3.99. The NDS identifies the importance of developing competition for the future of Qatar. During 2012-14 it plans to design an implementation programme for the existing competition law, including providing the necessary capabilities. This initiative is currently under review.

[35] Decree No. (19) of 2006, For the Protection of Competition and the Prevention of Monopolistic Practices (Competition Law).

Table 3.13 Competition Law, Article 4

	Unlawful practices
1.	Refraining from, limiting or hindering the handling of products, either for sale or purchase, in such a way as leads to the imposition of artificial prices.
2.	Reducing or increasing the available quantities of a product so as to provoke an artificial lack or glut of the product.
3.	Refraining, without lawful justification, from concluding product sale or purchase agreements with any person, selling the products being handled for less than their effective cost, or ceasing to handle them altogether in such a way as limits that person's freedom to enter or exit markets at any time.
4.	Imposing the obligation not to manufacture, produce or distribute a product for a set period or set periods of time.
5.	Imposing the obligation to limit the distribution or sale of a product or service, on the basis of geographical areas, distribution centres, clients, seasons or periods of time, among persons with a vertical relationship.
6.	Making the conclusion of a sale or purchase contract or agreement for a product conditional on the acceptance of obligations or products unrelated by their nature or by commercial custom to the original transaction or agreement.
7.	Relinquishing the principle of equality of opportunity among competitors, differentiating some competitors from others in the conditions of sale or purchase agreements, without lawful justification.
8.	Failing to make a scarce product available when its availability is economically viable.
9.	Obliging a supplier not to deal with a competitor.
10.	Selling products below their marginal cost or average variable cost.
11.	Obliging one's associates not to allow a competitor access to utilities or services of theirs that the competitor may need, despite this being economically viable.

Source: Article 4, Competition Law.

3.3.7.2 Consumer protection laws and price controls

3.100. A consumer protection law was implemented in 2008 to provide rights to consumers, in particular to the safety and quality of products.[36] The Ministry of Economy and Commerce Consumer Protection Department oversees the implementation of this law and related regulations, as they pertain to consumer protection. It also collects statistics, monitors prices, and addresses violations.

3.101. The Consumer Protection Law specifies certain rights for the consumer, including rights to health and safety, accurate information and data, freedom of choice, respect religious values, protection of legal rights, consumer protection activities, and legal proceedings.

3.102. Suppliers also have certain obligations under the law, including the obligation to refund or replace faulty goods, announce the price, disclose information about the product, notify hazards, provide an invoice, provide details and maintenance in Arabic, notify the Consumer Protection Department in case of defect, provide after sales service, provide details on service, and honour terms and conditions such as warranties, and provide spare parts.

3.103. In addition to the main Consumer Protection Law, a number of ministerial orders and regulations also protect consumers. The Ministry of Economy and Commerce monitors prices of a number of consumer goods in the market place. Pursuant to the regulations, the Ministry may impose price controls. A number of products are already subject to maximum prices (Table 3.14). The public may report concerns or perceived violations to the Ministry for examination.

[36] Law No. (8) of 2008.

Table 3.14 Consumer protection legal framework and orders on maximum prices

Law	Reference
Consumer Protection Law	Law No (8) of 2008
Prescribed Pricing and Profit Calculation	Law No (12) of 1972
Selling through Sales, Promotions and Discounts	Ministerial Order No (5) of 1984
Promoting goods and services through prize draws and distributions	Ministerial Order No (19) of 2002
Defining the price, weight and specifications of Lebanese and Iranian bread	Ministerial Order No (2) of 1980
Setting the maximum allowed price for state-subsided flour and regulating its trade	Ministerial Order No (9) of 1983
Naming Arabic and Baladi bread instead of Lebanese and Iranian bread	Ministerial Order No (6) of 1986
Setting and regulating trade of Australian lamb meat produced by the automatic butchery	Ministerial Order No (2) of 1988
Amending certain provision of Order No (2) of 1988 with respect to setting and regulating trade of Australian lamb meat	Ministerial Order No (260) of 2006
Setting the maximum allowed price for cement blocks	Ministerial Order No (125) of 2004
Regulating brokerage activities in the Central Market for vegetables and fruits	Ministerial Order No (3) of 1922
Setting the maximum allowed prices of certain soft drinks	Ministerial Order No (90) of 2009
Delegating some pre-defined responsibilities under Law No. (8) of 2008 with respect to consumer protection	Ministerial Order No (291) of 2008
Setting the maximum allowed prices of certain commodities and foodstuff during Ramadan	Ministerial Order No (191) of 2010

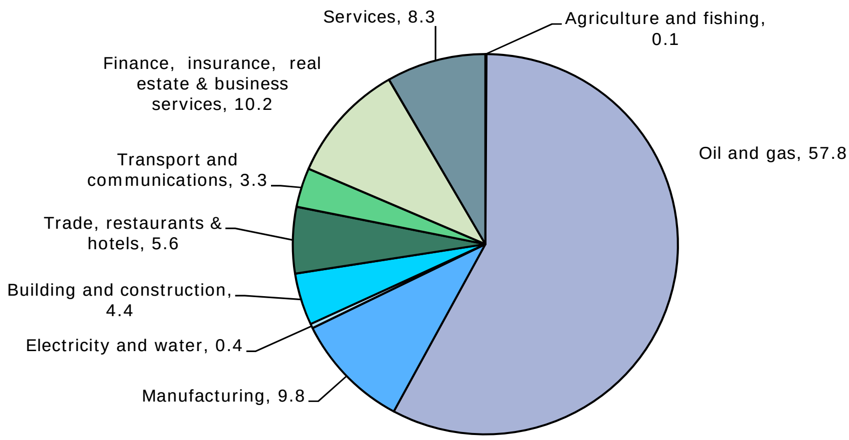
Source: Ministry of Economy and Commerce, Consumer Protection Departments. Online information. Viewed at: http://www.mbt.gov.qa/English/Departments/Consumerprotection/Pages/default.aspx.

4 TRADE POLICIES BY SECTOR

4.1. Qatar continues to pursue diversification and encourage development of non-energy sectors, including many services sectors. In recent years, development of downstream energy industries and in particular those that have synergies with this sector have grown, for example fertilizers, aluminium, and chemicals. In terms of GDP, oil and gas still dominates accounting for 58% of output, followed by finance, insurance and real estate, and manufacturing (Chart 4.1).

Chart 4.1 Services sector by GDP at current prices, 2012[a]

(% of GDP)



a Preliminary figures.

Source: Qatar Central Bank (2013), *Quarterly Statistical Bulletin*, March.

4.1 Energy

4.2. State-owned Qatar Petroleum (QP) and its subsidiaries are involved in all aspects of up-stream and down-stream energy development, including transport and trade. Major operations generally have involvement of QP but most of its subsidiaries involve private partners. About 40% of oil production, 5% of gas production, and 30% of refining are 100% owned by QP (Chart 4.2). Each partnership is governed by its own agreement; however there is still a controlling state interest in most entities. Qatar often partners with foreign oil and gas companies for exploration and production, especially off-shore fields, where production-sharing agreements are the norm. Downstream industries also have a foreign partner with equity interest.

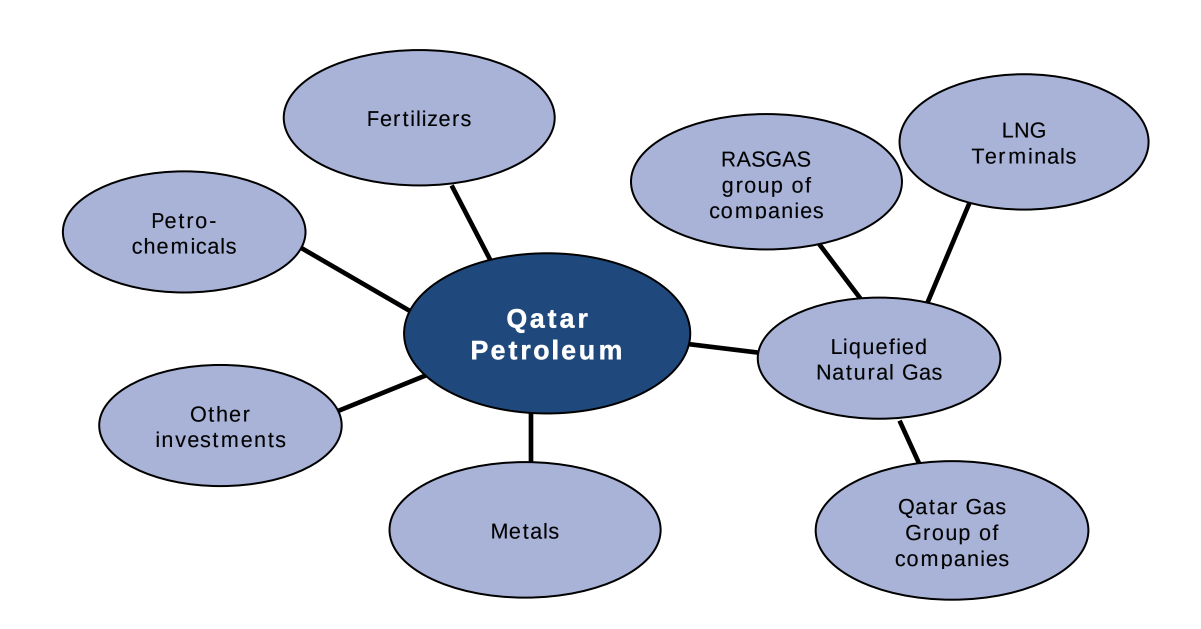
4.1.1 Policy objectives for the sector

4.3. Qatar has been promoting diversification to create alternative sources of economic growth and thus reduce over-exposure to world energy markets. Diversification has been pursued in a number of sectors, especially services, but also in the downstream value-added petrochemical and industrial sector. While non-energy sectors have grown, the relatively high energy prices have so far maintained the prominence of energy industries as a major source of revenue and backbone of the economy.

4.4. The most significant policy affecting the sector is Qatar's moratorium on further development of its North Field, the largest single non-associated gas field in the world. The moratorium was instituted in 2005, and it has been continually extended ever since. Based on the latest information available, it is not expected to be lifted before 2015.

4.5. According to Qatar National Vision 2030, Qatar intends to pursue responsible exploitation of oil and gas. To this end, it plans to establish a balance between reserves and production, and between economic diversification and the degree of depletion. It also intends to pursue technological innovations and fully develop the gas industry to provide clean energy. Long-term maintenance of its reserves is important for national security and sustainable development.

Chart 4.2 Overview of Qatar Petroleum major operations



Source: Qatar Petroleum.

4.1.2 Natural gas

4.6. Unlike many of its neighbours that have large reserves of crude petroleum, natural gas dominates in Qatar. Qatar has the world's third largest reserve of natural gas, behind Russia and Iran. It is by far the largest supplier of liquefied natural gas (LNG). Since commencing the first LNG shipment operations in 1997, it has grown tremendously in the intervening years. Qatar has continually invested in LNG technologies and gradually brought on new production capacity; LNG development correlates with natural gas exports; it has allowed Qatar to export natural gas to world markets. Trans-border pipeline transmission is very limited, with connections only to the UAE and Oman.

4.7. The strength of Qatar's natural gas sector has been magnified by strong world energy prices. While most of Qatar's exports of LNG are sold under long-term contracts, prices are adjusted per the contract at the time of shipment to take into account oil prices according to specific equations.

4.1.2.1 Production, consumption, and trade

4.8. Natural gas production has seen phenomenal growth over the period, more than doubling between 2007 and 2012 (Chart 4.3). In 2012, production grew approximately 8% from 2011 levels. Exports have also grown but levelled off in 2012, reflecting trends in trade of natural gas in world markets. World trade in natural gas was up only 0.1% in 2012, and LNG trade fell for the first time, mostly in response to weak demand in Europe.[1] However, Qatar maintained growth of approximately 5% in LNG exports despite the difficult global market. Exports of LNG from Qatar go to all regions of the world; the Asia Pacific region accounts for about two thirds of total exports; Japan, India, and the Republic of Korea are the largest markets. Europe is the second most important market, with about 30%, the U.K. accounting for the largest share.

4.1.2.2 Dolphin project

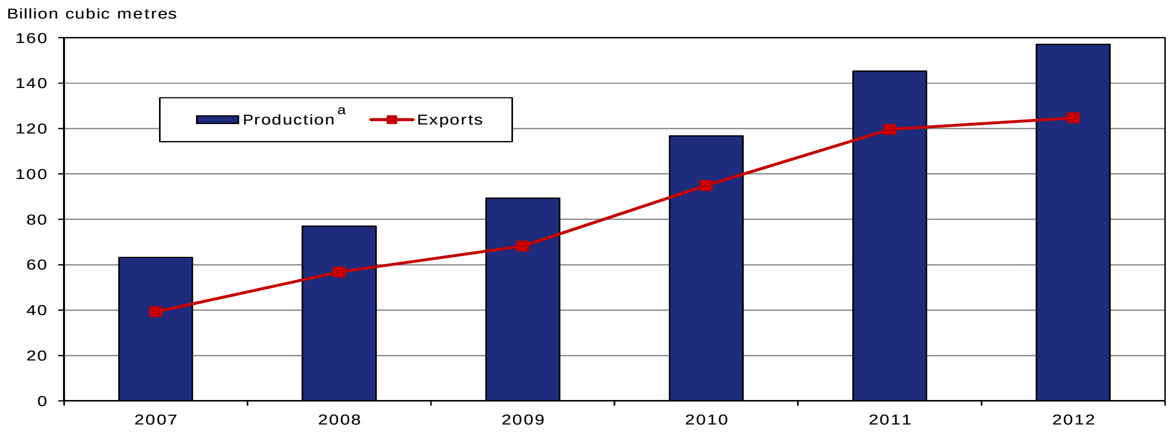
4.9. The first gulf area natural gas pipeline project was launched in 2001 to connect neighbouring markets for Qatar's gas. The Dolphin project connects the UAE, Oman, and Qatar by pipeline, and there are plans for expansion to other neighbouring countries. Current exports amount to 2 billion standard cubic feet per day.

[1] British Petroleum (2013).

4.1.2.3 Gas exporting countries forum

4.10. In 2008, a group of gas exporting countries established the Gas Exporting Countries Forum as an Agreement under Article 102 of the Charter of the UN. The Forum host is Qatar and its headquarters are in Doha. The main operation of the Forum is to promote the interest of the world's major gas producing countries. No controls on prices, production, or trade are imposed by the Forum. However, there is an exchange of experience, views, and information with the view to bringing stability and security to the supply and demand of natural gas in global markets. Membership of the Forum comprises Algeria, Bolivia, Egypt, Equatorial Guinea, Iran, Libya, Nigeria, Qatar, Russia, Trinidad and Tobago, and the Bolivarian Republic of Venezuela.

Chart 4.3 Natural gas production and exports, 2007-12



a Excluding gas flared or recycled.

Source: British Petroleum (2013), *Statistical Review of World Energy, 2008-2013*. Viewed at: http://www.bp.com/en/global/corporate/about-bp/energy-economics/statistical-review-of-world-energy-2013.html.

4.1.3 Crude petroleum

4.11. While the crude petroleum sector is not insignificant to Qatar, it accounts for only 2% of world production, and Qatar is OPEC's third smallest producer. In terms of proven reserves, it ranks 13th in the world.[2] Exports are from three terminals; Mesaieed, Halul Island, and Ras Laffan.

4.12. As a member of OPEC, Qatar's production levels are determined by the organization's production allocations. Crude production levels have increased each year, with a record production in 2012. While production has levelled, consumption has increased and slightly outpaced production. Qatar remains a significant exporter of crude petroleum, but exports slightly declined over 2007-12 (Chart 4.4).

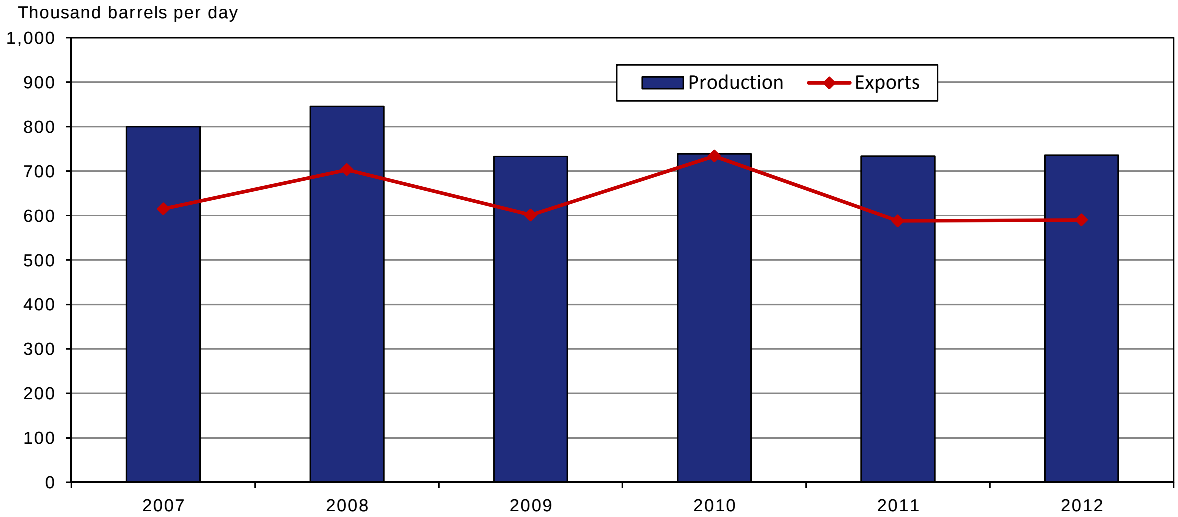
4.1.4 Downstream petrochemical industries

4.13. Qatar has encouraged the development of the downstream petrochemicals and related industries in recent years. It is now a leading supplier of petrochemicals, plastics, and fertilizers. Moving into these industries is expected to develop Qatar's industrial capacity as it continues to move further downstream into more finished products. However, its competitiveness in these sectors relies on land availability to develop, low power costs, and most importantly feedstock costs and availability. As Qatar brought many new and expanded petrochemical projects online in recent years, it is the availability of feedstocks that is crucial and will likely determine further development. Furthermore, as Qatar subsidizes gas for local consumption, the cost of these feedstocks will also be critical to global competitiveness.[3]

4.14. Foreign companies are allowed 100% ownership in this sector.

[2] British Petroleum (2013).
[3] Oxford Business Group (2012).

Chart 4.4 Crude petroleum production and exports, 2007-12

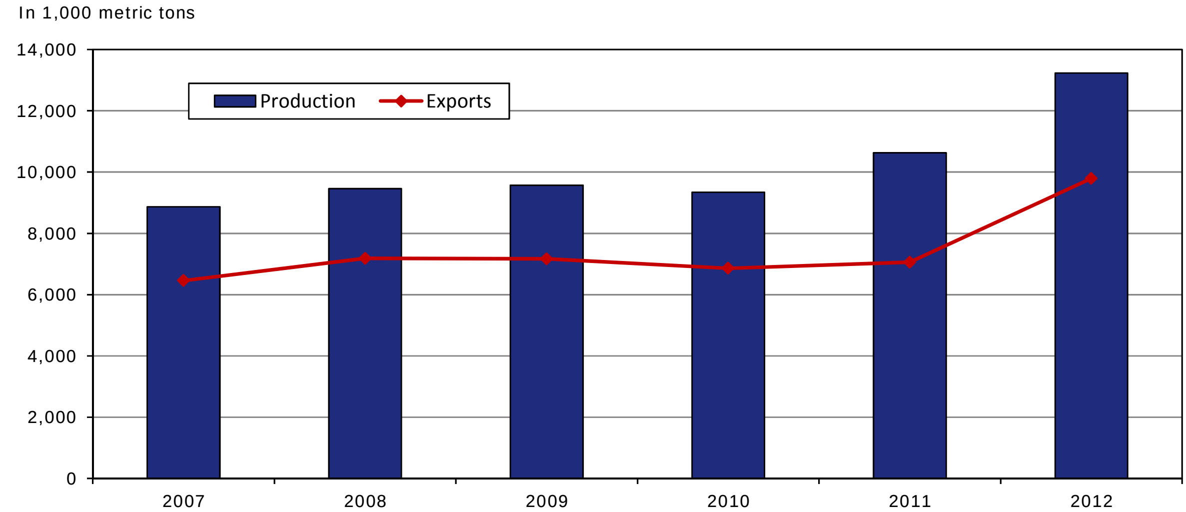


Source: Information provided by Qatar Petroleum authorities.

4.15. Major downstream operations include basic petrochemicals, plastics, fuel additives, and fertilizers (Table 4.1). Steel and aluminium production has also been established in Qatar in order to support the development of the construction industry. In order to support development of these downstream industries, direct lending or load guarantees are provided from the Qatar Development Bank at rates typically below market rates.

4.16. Rising production and exports of downstream petrochemicals during 2007-12 reflect the new production capacity brought on-line, in particular during the last two years. Qatar is a major exporter of fertilizers (ammonia and urea), exporting nearly all urea production. With plant expansion in 2012, Qatar became the 4th largest producer and the world's largest exporter of urea[4] (Chart 4.5).

Chart 4.5 Petrochemicals - production and exports, 2007-12



Source: Information provided by Qatar Petroleum authorities.

[4] Qatar Petroleum, Annual Report 2012.

Table 4.1 Major downstream operations

Operation/Industry	Companies	Ownership	Capacity
First level downstream:			
Crude petroleum refining	QP Refinery; Laffan Refinery	100% QP, 51% QP	80,000 bpd
Gas-to-liquids facility	Pearl GTL; Oryz GTL	51% QP	140,000 bpd 34,000 bpd
Second level downstream:			
Ammonia, urea fertilizers	QAFCO	38% QP	3.8 mmt/a 5.6 mmt/a
Chemicals	Qatar Melamine Company	63% QP	
Chemicals	Qatar Vinyl Company	68.2% QP	n.a.
Olefins	Qatar Chemical Company, Qatar Chemical Company II, Ras Laffan Olefins Company	40.5% QP	700,000 mt/a ethylene
Olefins	Qatar Petrochemical Company	40.8% QP	800,000 kt/a ethylene 70 kt/a sulfur
Third level downstream:			
MTBE fuel additives	Qatar Fuel Additives Company	25.5% QP	1,830 mt/d
LDPE	QAPCO	80% IQ	700 ktpa
HDPE and MDPE	Qatar Chemical Company, Qatar Chemical Company II	51% QP	350,000 mt/a
LLDPE		64% QP and QAPCO, 36%	450,000 mt/a
	Qatofin Company	36.6% QP	
LAB	Seef Limited	80% QP	100,000 mt/a
Plastic film	Qatar Plastic Products	13.5% QP	n.a.
Energy intensive industries:			
Steel	Qatar Steel Company	70% QP	8.4 million tonne production
Aluminium	Qatar Aluminium Company	50% QP	600,000 tonnes

n.a. Not applicable.

bpd Barrels per day.
mmt Million metric tons per annum.
mt/a Metric tons per annum.
mt/d Metric tons per day.
kt/a/ktpa Kilo ton per annum.

Source: Information provided by Qatar Petroleum and Qatar Petroleum Annual Reports 2011 and 2012.

4.2 Services

4.17. The growth and development of many services sectors has driven the growth of Qatar's non-hydrocarbon sector. Investment and liberalization in telecommunications, education, transportation, and financial services have all played an important role. High capital spending on infrastructure in the coming years is expected to bring strong growth to the construction and transportation sectors in particular.

4.18. Qatar made relatively few specific service commitments upon joining the WTO, and it has not joined further liberalization initiatives on financial services or telecoms (Table 4.2).

Table 4.2 Qatar GATS Commitments

Sectors (CPC Classification)	GATS Sectoral commitments (except as indicated in the horizontal commitments)
1. Business services	**Partial**
A. Professional services	Partial
B. Computer and related services	Partial
C. Research and development services	Partial
D. Real estate services	No commitments
E. Rental/leasing services without operator	No commitments
F. Other business services	Partial
2. Communication services	
A. Postal services	No commitments
B. Courier services	Partial
C. Telecommunication services	No commitments
D. Audiovisual services	No commitments
E. Other	No commitments
3. Construction and related engineering services	
A. General construction work for buildings	Partial
B. General construction work for civil engineering	Partial
C. Installation and assembly work	Partial
D. Building completion and finishing work	Partial
E. Other	No commitments
4. Distribution services	No commitments
5. Education services	No commitments
6. Environmental services	Partial
7. Financial services	
A. All insurance and insurance-related services	Partial
B. Banking and other financial services	Partial
C. Other	No commitments
8. Health related and social services	No commitments
9. Tourism and travel related services	
A. Hotels and restaurants (incl. catering)	Partial
B. Travel agencies and tour operators services	No commitments
C. Tourist guides services	No commitments
D. Other	No commitments
10. Recreational and cultural and sporting services	No commitments
11. Transport services	No commitments
12. Other services not included elsewhere	No commitments

Source: Compiled by the Secretariat from WTO GATS schedule.

4.2.1 Financial services

4.2.1.1 Banking

4.19. Despite the financial crisis and growing uncertainty in the sector worldwide, Qatar's banks have remained stable and well capitalized in recent years. This is due in part due to little exposure to the troubled markets and to the Qatar Government's efforts to guarantee deposits and provide an inflow of capital to banks. During the crisis, the QCB and the Government were involved in increasing liquidity to banks. Since 2011 the sector has been growing steadily.

4.20. There is a small but growing Islamic finance sector in Qatar. This sector underwent significant changes during the review period as banking regulators closed the "Islamic windows". Banks that dealt with traditional and Islamic products were required to separate these assets and divest or create separate institutions. By the end of 2011 Islamic assets were divested from traditional banks. Islamic financial products are Sharia compliant and have a separate regulatory framework, i.e. a different set of regulations overseen by the Islamic Financial Services Board. Islamic products are also offered for insurance through the takaful sector and for financial products through non-banking finance companies.

4.21. Qatar's banking sector is quite diverse with seven Qatari banks, seven foreign bank branches, four Islamic banks, and one representative office. There are also approximately 20 foreign banks operating mostly as foreign subsidiaries in the Qatar Financial Centre (section

4.3.1.3). In terms of total assets, Qatari banks account for approximately 72%, followed by Islamic banks (22%), and foreign banks (about 5%) (Table 4.3).

4.22. Legislative developments in the banking sector include the new money-laundering legislation in 2010 and the Qatar Central Bank Law of 2012. The Central Bank Law covers three broad areas: the organization of the QCB; the use of currency and the role of the QCB in monetary and exchange rate policies; and the regulation of financial institutions. The money-laundering legislation follows international practice on this matter. New regulations were also introduced to limit credit growth by putting limits on consumer loans (Table 4.4).

Table 4.3 Registered banks in Qatar, September 2013

	Total assets (million QR)	Ownership	Branches or subsidiaries In Qatar/Outside Qatar	
Traditional banks	636,805			
Qatar National Bank	393,622	..	76	17
Commercial Bank	93,295	..	28	3
Doha Bank	59,834	..	62	4
Al Ahli Bank	23,172	..	18	n.a.
Qatar International Bank	30,716	30% foreign	7	n.a.
Qatar Development Bank	4,443	100% state	1	n.a.
Khaliji Bank	31,722	..	2	2
Foreign banks	41,149			
Arab Bank	5,772	100% foreign	3	n.a.
Mashreq Bank	4,327	100% foreign	4	n.a.
Standard Chartered Bank	7,769	100% foreign	2	n.a.
HSBC Bank Middle East	19,165	100% foreign	7	n.a.
United Bank Limited	990	100% foreign	2	n.a.
Bank Saderat Iran	768	100% foreign	1	n.a.
Banque Paribas	2,357	100% foreign	1	n.a.
Islamic National banks	205,813			
Qatar Islamic Bank	75,052	..	36	1
Qatar International Islamic Bank	32,936	..	15	n.a.
Masraf AL Rayan	68,640	..	12	n.a.
Barwa Bank	29,184	..	8	n.a.
Representative offices				
Ithmaar Bank	..	100% foreign	n.a.	n.a.

.. Not available.

n.a. Not applicable.

Source: Information provided by Qatar Central Bank.

Table 4.4 Legal framework for the financial sector

Law	Reference
Anti-money Laundering Law	Law No. (4) of 2010
Qatar Central Bank Law	Law No. (13) of 2012
Doha Securities Market Law	Law No. (14) of 1995
Amendments to the Doha Securities Market Law	Law No. (26) of 2003
Law establishing Qatar Central Bank	Law No. (15) of 1993
Qatar Financial Markets Authority and the Securities Market	Law No. (33) of 2006
Establishing the Qatar Financial Centre	Law No. (7) of 2005
Qatar Financial Markets Authority and Qatar Securities Market	Law No. (14) of 2007
Regulating Control of Accounts	Law No. (30) of 2004

Source: Compiled by the WTO Secretariat.

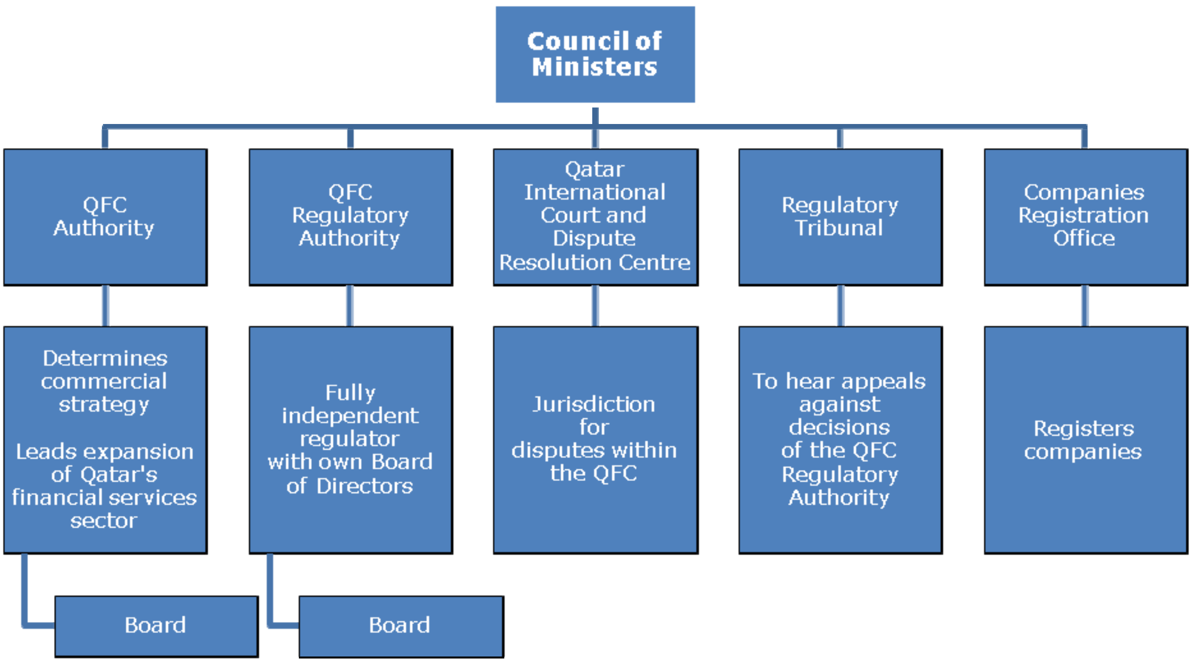
4.2.1.2 Qatar Investment Authority

4.23. The Qatar Investment Authority (QIA) is the Government's sovereign wealth fund established in 2005 to strengthen the economy and build long-term strategic investments for the State. It invests in a variety of assets, both domestically and abroad, and is considered a global investor for the State of Qatar. During the financial crisis it intervened to provide capital injections to local banks and strengthen confidence in the financial sector.

4.2.1.3 Qatar financial centre

4.24. The Qatar Financial Centre (QFC) was established by the Government in 2005 to attract international banking companies, insurance business, and related financial services to Qatar. It operates under free trade zone provisions, and thus is not subject to normal Qatari rules or laws of the financial sector. Furthermore it has its own regulatory arm and judiciary system (Chart 4.6).

Chart 4.6 Qatar Financial Centre



Source: Qatar Financial Centre Authority online information. Viewed at: http://www.qfc.com.qa.

4.25. In addition to allowing 100% foreign ownership and investment in the financial sector, QFC offers certain incentives to businesses that establish in the QFC. Special tax rules apply and the QFC has its own immigration and employment laws, as well as free movement of currencies. Furthermore, Qatar allows retail services from the zone to the domestic market. The QFC's current focus is the development of three key subsectors: asset management; captive insurance; and re-insurance.

4.26. In order to establish in the zone, enterprises must be licensed by the QFC Authority, receive authorization from the QFC Regulatory Authority, and must register as a legal entity at the QFC Registration Office. The QFC legal framework also includes rules and regulations on arbitration, contracts, data protection, insolvency, companies and partnerships, security, and trusts. Over 170 companies are registered in the QFC, including 20 banks.

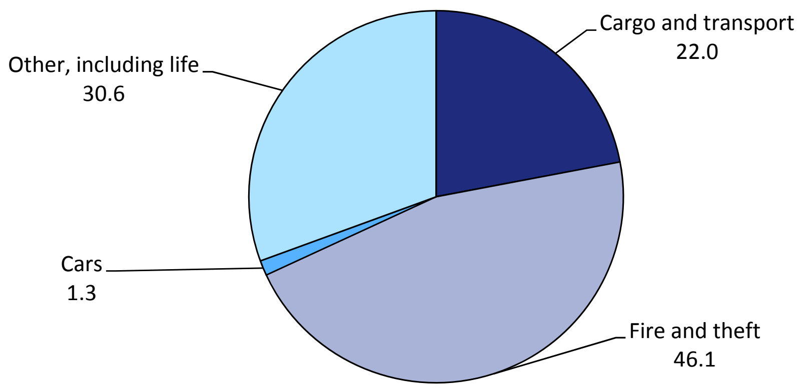
4.2.1.4 Insurance

4.27. There is no specific law on insurance, but the new Qatar Central Bank Law contains aspects relating to insurance, in particular to regulation.[5] Article 95 of the law provides that money and property in Qatar cannot be insured outside of Qatar, thus insurance providers should be local companies or foreign companies that have established a branch in Qatar. Foreign insurers may provide services through a branch or representative office, and domestic firms are to be established through a joint-stock company. The QCB law also requires prior approval of the types of insurance policies to be sold on the market.

4.28. Non-life subsector of insurance is dominant in Qatar, although the life insurance subsector is expanding. Insuring against fire and theft is the largest subsector market segment in terms of value of policies (Chart 4.7). Both Qatari and foreign insurance companies are active, with some of the larger Qatari firms listed on the Qatar Exchange (Table 4.5).

Chart 4.7 Qatar insurance market by type (value of policies), 2011

(%)



Source: The Qatar Statistics Authority (2011). *The Annual Bulletin of Banks and Insurance, 2011*. Viewed at: http://www.qix.gov.qa/portal/page/portal/qix/subjectarea/publications?Subject_area=190.

[5] Law (13) of 2012.

Table 4.5 Insurance and re-insurance companies

Company	Nationality	Ownership	Public/Private
Qatar Insurance Company (QIC)	Qatari		Public joint-stock company
Qatar General Insurance and Reinsurance Company	Qatari		Public joint-stock company
General Takaful Company	Qatari	Subsidiary of Qatar General Insurance and Reinsurance Company	Private joint-stock company
Al Khaleej Insurance Company	Qatari		Public joint-stock company
Qatar Takaful Company	Qatari	Subsidiary of Al Khaleej Insurance Company	Private joint-stock company
Qatar Islamic Insurance Company	Qatari		Public joint-stock company
Doha Insurance Company	Qatari		Public joint-stock company
Arabia Insurance Company Ltd.	Arab		Branch of private joint-stock company
Libano-Swiss Insurance Company	Arab		Branch of private joint-stock company
Misr Insurance Company	Arab		Branch of private joint-stock company
The American Life Insurance Company (MetLife Alico)	U.S.		Branch of public joint-stock company
Qatar Unified Company	Qatari		Private joint-stock company
Al Koot Insurance and Reinsurance Company	Qatari	Subsidiary of Gulf International Services	Private joint-stock company
Damaan Islamic Insurance Company (Beema)	Qatari		Private joint-stock company

Source: Information provided by the authorities.

4.2.1.5 Capital markets

4.29. The Qatar capital market has undergone a number of changes and developments in recent years. In 2009, the Qatar Exchange (QE) replaced the Doha Securities Market as the principle securities exchange in Qatar; QIA is the majority shareholder. Currently, 42 companies are listed on the exchange, including 13 banking and insurance companies. Market capitalization was at QR 460 billion at the end of 2012 (Table 4.6). Foreign participation on the QE is limited to 25% of the outstanding stock of a company.

Table 4.6 Capital markets overview, 2008-12

(QR million)

	2008	2009	2010	2011	2012
Number of listed companies	43	44	43	42	42
General index	6,886	6,959	8,681	8,779	8,359
Market capitalization	279,038	320,081	450,203	457,352	459,884
Total:					
Number of shares	3,893,519,719	3,450,086,784	2,094,391,542	2,302,769,616	2,428,190,041
Value of shares	175,552	92,165	67,185	83,419	70,674
Industrial sector:					
Number of shares	374,438,768	312,332,172	257,454,729	218,017,369	260,387,473
Value of shares	26,655	15,411	12,222	13,821	12,173
Services sector:					
Number of shares	1,711,767,585	1,715,908,258	1,192,498,405	1,286,900,627	1,556,042,826
Value of shares	65,823	40,185	29,383	34,824	34,875

	2008	2009	2010	2011	2012
Insurance sector:					
Number of shares	50,774,453	33,849,232	24,087,667	22,537,602	15,889,724
Value of shares	4,427	1,470	1,281	1,259	836
Banking & finance sector:					
Number of shares	1,756,538,910	1,387,997,122	620,350,741	775,314,018	595,870,018
Value of shares	78,647	35,099	24,299	33,515	22,790

Source: Qatar Central Bank (2012), *Quarterly Statistical Bulletin*, December. Viewed at: http://www.qcb.gov.qa/English/Publications/Statistics/Pages/Statisticalbulletins.aspx.

4.30. New regulations were instituted in 2009 for brokerage activities. Prior to this date, one investment holding company operated and conducted all brokerage activities in Qatar. Regulations by the Qatar Financial Markets Authority have classified brokerage services as part of financial services, and now allow banks to establish their own brokerage services if they obtain a licence. Brokerage activities, while linked to banks, require an independent capital base, separate board of directors, independent compliance, and independent seats on the exchange.

4.31. In late 2011, the QE expanded beyond securities to trade government and corporate bonds. Qatar is planning to develop a fixed income market and has started to issue local currency T-bills. Work on incorporating ETFs and REITs into the capital markets is also under way but remains pending. Furthermore a new exchange, or junior market, for SMEs known as the QE Venture Market was announced in 2012. The exchange will reportedly have less stringent criteria than the QE and will be open to foreign and domestic companies for listing. The exchange is not yet operational but work continues on processes and infrastructure for implementation.

4.2.1.6 Regulation of banking, finance, insurance, and capital markets

4.32. Various bodies have regulatory responsibility in the sector, depending on the service and where it is located:

- QFC Regulatory Authority and QFC Authority, for banks and insurance companies operating in the QFC;
- Ministry of Economy and Commerce and the Qatar Central Bank (QCB) have roles in regulating insurance and re-insurance for those established in Qatar, but outside the QFC;
- QCB regulates banks in Qatar, but outside the QFC;
- Qatar Credit Bureau was established in 2011 to oversee credit records; and
- Qatar Financial Markets Authority (QFMA) supervises capital market regulations.

4.33. As regulatory authority is spread around a number of regulators, Qatar took steps in 2012 towards creating one regulatory authority for the future. It intends to merge the functions of the QFC Regulatory Authority, QFMA, and the QCB to create one national authority with harmonized regulations. This process has been initiated but not finalized.

4.2.2 Education services

4.34. Qatar Vision 2030 and National Development Strategy place high importance on education for the development of Qatar. The first pillar, human development, outlines that Qatar should: create a world-class educational system that equips citizens to achieve their aspirations and the needs of Qatar's society; have a national network of formal and non-formal educational programmes that equip Qatari children with the skills and motivation to contribute to society; and have well-developed, independent, self-managing and accountable educational institutions operating under centrally determined guidelines.[6]

[6] Qatar Vision 2030, page 16.

4.35. Qatar has continued to support its education sector with increasing budget allocations and by promoting reforms. Qatar has updated the curriculum, created a long-term vision, implemented new regulations, and improved teacher training. According to the WEF, Qatar now ranks 10th out of 144 countries for its primary education system.[7]

4.2.2.1 Primary, secondary, and tertiary education structure

4.36. During the last 10 years Qatar has been reforming its education system, starting at the primary level – a process that continues today. Two significant changes have been the replacement of the Government-run schools with independent schools, and the creation of the Supreme Education Council (SEC) to oversee the reform process. The independent schools now dominate the primary and secondary school sector, and are complemented by semi-independent schools, and private schools. Semi-independent schools are former government schools still transitioning to independent schools. Private schools comprise private Arabic schools and international schools.

4.37. Education is obligatory up to the end of middle school (9th school year) and free for residents (Qatari and non-Qataris), through the public and semi-public education systems. Education costs for private schools require payment of fees that vary by establishment but may be paid for Qatari nationals by the Government.[8] In 2004, a voucher system was put in place to allow the movement of students across schools, and to encourage competition; it was subsequently expanded to cover private schools in addition to independent schools. Qatar University is Government run and has been supplemented in recent years by a number of well-known foreign universities that opened campuses in Qatar. Higher education is also free for Qataris and others eligible for public education.[9]

4.38. While there has been growth across all sectors of education, the most significant growth during 2006-11 was in the number of students attending private higher education establishments, which grew 91% (Table 4.7). Significant growth also occurred in the private primary sector, up 48%.

Table 4.7 Education statistics

	2006/7	2007/8	2008/9	2009/10	2010/11
Pre-primary, Primary, and Preparatory:					
Public					
Establishments		..	..	..	185
Students	61,543				68,321
Teachers					7,394
Private					
Establishments					370
Students	64,268	74,076	83,197	..	94,802
Teachers					7,433
Secondary:					
Public					
Establishments					49
Students	19,247	19,610	20,054	21,205	22,350
Teachers					2,050

[7] The Global Competitiveness Report, 2012-13. Viewed at: http://www3.weforum.org/docs/WEF-Global/CompeitivenessReport-2012-13.pdf.

[8] The Government pays QR 28,000 for each student for private schools or full expenses for semi-public schools.

[9] Qatar University is free for Qataris. A full scholarship is provided by the Supreme Education Council to Qataris if proper verification of acceptance to Education City based universities is provided. Other private universities charge enrolment fees.

	2006/7	2007/8	2008/9	2009/10	2010/11
Private					
Establishments	..	..	..	..	65
Students	9,029	10,652	10,524	10,906	11,782
Teachers	..	..	..	..	742
Universities:					
Public					
Establishments	2	2	2	2	2
Students	8,184	8,529	8,687	8,706	9,793
Teachers	608	641	616	657	721
Private					
Students	2,917	3,951	4,446	5,233	5,559

.. Not available.

Source: Qatar Statistics Authority online information. Viewed at: http://www.qsa.gov.qa/eng/publication/annabs/2012/4_Education.xlsx.

4.2.2.2 Regulation, accreditation, and quality assurance

4.39. The SEC provides oversight, regulation, and guidelines for the education sector. It has three main pillars, each with specific mandates (Chart 4.8). It also oversees job training, provides information to parents and students, and regulates pre-schools/nursery facilities.

Chart 4.8 Supreme Education Council

Education Institute	Evaluation Institute	Higher Education Institute
Overseas and supports independent schools Issues licences Develops curriculum standards	Manages student examinations Monitors learning Evaluates school performance	Advises on career options and opportunities for higher education in Qatar and abroad Administers scholarships and grants

Source: Online information. Viewed at: http://www.sec.gov.qa.

4.40. On the regulatory side, the SEC oversees a number of provisions or requirements for both public and private schools. The main elements are outlined in Table 4.8, however a detailed list of specifications is available from the SEC.[10] The SEC enforces the regulations, which are only applicable for primary and secondary schooling.

4.41. In terms of accreditation, the SEC has established the Qatar National Schools Accreditation (QNSA) initiative to elevate standards of education through regular assessment and benchmarking of academic, educational, and administrative standards. It applies to public and private schools. Schools are subject to periodic internal and external reviews in order to receive accreditation, which is given for a 3-or 5-year term. The SEC has also established the National Professional Standards for Teachers and School Leaders, which aims to improve the quality of teachers and school leaders. The Qatar Office of Registration, Licensing and Accreditation is involved in the accreditation aspect in order for teachers to receive a permanent licence to teach in Qatar.

[10] Ministerial Decision No. (8) of 2009.

4.42. Private education establishments operate as commercial entities, and are subject to operation and registration pursuant to the Commercial Companies Code. The same applies to schools established in Education City.

Table 4.8 SEC requirements for schools

	Independent schools	Private schools
To establish	Initial contract of 5 years	Licence to be obtained from SEC
Curriculum	Established standards in English, Arabic, mathematics, and science	Qatari curriculum standards or international curriculum standards. If international curriculum, weekly hours allocated to teach Arabic, Qatari history, and Islamic studies.
Financial audits	Periodically performed	n.e.r.
Facilities	n.e.r.	Compliance with school building specifications and security, safety, and health requirements
Compliance assessment reviews	Performed regularly	SEC has right to inspection and evaluation visits
School organizational structure	n.e.r.	A principal and administrative structure to be in place
Students with special needs	n.e.r.	Need to provide support and programmes for students with special needs
Teaching staff	n.e.r.	Registration and a professional teaching licence
Assessment	Qatari assessment criteria to be adhered to (QNSA)	Qatari assessment criteria to be adhered to (QNSA)
Oversight	SEC maintains an information centre to review complaints	Elected board of trustees to be established and have accountability
Student conduct policy	Adherence to Ministerial Decision No. 32	n.e.r.
Voucher system	Participation allowed	Participation allowed
School calendar	Commitment to the calendar of the SEC	Commitment to the calendar of the SEC

n.e.r. No equivalent requirement.

Source: SEC documents. Viewed at: http://www.sec.gov.qa.

4.2.2.3 Qatar Foundation – Education City

4.43. Qatar Foundation (QF) was established in 1995 by the former Emir to support the Qatari people in three main areas: education, science and research, and community development.[11] It supports an innovative and open society that aspires to develop sustainable human capacity, social and economic prosperity for a knowledge-based economy. Furthermore, the Qatar National Vision 2030 provides that the QF is to be the "engine" driving the development of the Qatari people, with the aim of unlocking human potential. The Foundation is a non-profit organization under Qatari law but it receives government support and funding.

4.44. Education City was established by QF to provide a common education facility for the establishment of world renowned universities in Qatar and to facilitate interaction with research institutions and industries also located on the campus. It also hosts primary and secondary schools, research institutes, specialized academies, and other learning institutes. Education City University was created recently to unite a number of higher education institutions. There is no automatic right to establish in Education City, it is by invitation only.

[11] http://www.qf.org.qa/about.

4.45. According to a study on the establishment of international branch campuses, Qatar ranks fourth in the world as a host for international branch campuses.[12] Currently nine branch offices operate under the Qatar Foundation, most of which have a physical presence in Education City (Table 4.9).

Table 4.9 Establishments in Education City

Branch	Source	Information/speciality
Virginia Commonwealth University School of the Arts in Qatar	United States	Bachelor and master programmes specializing in design
Weill Cornell Medical College in Qatar	United States	Health and medicine
Texas A&M University in Qatar	United States	Bachelor and master programmes in engineering
Carnegie Mellon University in Qatar	United States	Bachelor programmes in business, computer science, and information systems
Georgetown University-School of Foreign Service in Qatar	United States	Bachelor programme in foreign service
North Western University in Qatar	United States	Bachelor programmes in journalism and communications
HEC Paris in Qatar	France	Executive management training and MBA programmes
University College London in Qatar	United Kingdom	Postgraduate studies in archaeology and museum studies
Qatar Faculty of Islamic Studies	Qatar	Masters programmes in Islamic studies

Source: http://www.qf.org.qa.

4.46. A number of other universities have established in Qatar, in addition to those part of Education City. The University of Calgary operates a nursing school, the College of the North Atlantic a technical college, and Stenden University, a school of applied sciences. Such schools may be eligible for government support.

4.47. Qatar is also host to over one hundred private schools at the primary and secondary levels. Many of these schools follow non-Qatari country-specific languages, curricula, and accreditations while others are international schools that cater to a variety of nationalities. Private primary and secondary schools need to follow the licensing and other standards outlined above in order to operate a school in Qatar.

4.2.2.4 Distance learning or online education

4.48. In addition to establishing a school in Qatar, a number of foreign schools offer schooling to persons in Qatar through distance learning. However, the state of Qatar does not recognise distance learning.

4.2.2.5 Foreign faculty movement

4.49. There are no special provisions to allow for the transfer and work of foreign teachers or faculty. They must follow the normal procedures for working in Qatar, like expatriates in other industries.

[12] Lawton and Katsomitros (2012).

4.2.2.6 Students studying abroad

4.50. The SEC, through the Higher Education Institute (HEI), helps students to pursue higher education in Qatar or around the world. It oversees the scholarship programme. HEI maintains a list of best universities around the world that Qatari students can attend with scholarship support from the Government.

4.2.3 Telecommunications and postal services

4.2.3.1 Telecommunications

4.51. During 2007-12, Qatar's telecom sector developed significantly, with the ending of the Government monopoly on telecommunications and a number of important legal and regulatory changes. In 2009, Vodafone Qatar commenced operations in the mobile market, and now accounts for an estimated 20-30% of the market. Mobile penetration in Qatar remains very high, at 142%, and other subsectors exhibit strong growth (Table 4.10). Furthermore, in 2010, the telecom regulator, ictQATAR, proceeded with its second licence to a foreign operator in the fixed-line market. Vodaphone was awarded this fixed-line network licence for exclusive operations for the Pearl residential development complex, which also included fixed broadband and fixed voice services. In 2012, Qatar National Broadband Network Company received a 25-year licence to provide fibre-optic broadband throughout Qatar.

4.52. The 2006 Telecommunications Law provides the basic legal framework for the telecommunications sector, including the mandate to issue new licences. It also sets the terms of interconnection, promotes universal service, encourages competition, and promotes advanced and innovative technologies.

Table 4.10 Telecommunications indicators

	2007	2008	2009	2010	2011	2012
Fixed telephone lines	237,368	265,865	287,942	270,000	309,000	394,407
Mobile cellular lines:						
Number	1,264,206	1,429,486	1,948,770	2,186,447	2,302,225	2,601,210
	(%)					
Penetration rate	..	92	119	134	135	142
Internet users per 100 population	..	67.5	74.6	81.6	86.2	88.1
Households with computers	..	71.0	80.2	87.0	90.2	91.5
Households with TVs	..	90.3	92.6	94.9	95.2	95.3

.. Not available.

Source: Information provided by the Supreme Council of Information & Communication Technology.

4.53. New developments in the legal framework include Qatar's first e-commerce law, which provides Qatar with its first rules for electronic transactions, electronic signatures, e-documents, and authentication.[13] It also contains provisions on consumer protection, enforcement, and crimes and penalties. A draft policy regulation on telecommunication consumer protection has been released for public comment, but as of January 2014 had not been approved in its final form (Table 4.11).

[13] Law No. (16) of 2010.

Table 4.11 Telecommunications legal framework

Law	Reference
ICT Qatar	Law No. (36) of 2004
ICT Qatar, Dispute Resolution Rules	..
Telecommunications Law	Of 2006
General Postal Authority	Law No. (16) of 2009
Regulating Postal Services	Decree No. (1) of 2007
Telecommunication Executive By-law	Law No. (1) of 2009
Promulgation of the Telecommunications Law	Law No. (34) of 2006
E-commerce law	Law No. (16) of 2010

.. Not available.

Source: Compiled by the WTO Secretariat.

4.54. A national ICT plan was developed in 2011 in order to create a knowledge-based economy to drive sustainable development and societal benefits in five years. Its main elements are: improving connectivity, boosting capacity, fostering economic development, enhancing public services, and advancing benefits to society. The plan aims to double the ICT sector's contribution to GDP, double the ICT workforce, achieve high-speed broadband access, achieve mass ICT and internet adoption by society, and achieve wide accessibility of key government services.

4.2.3.2 Regulatory framework

4.55. In a 2004 decree ictQatar was established as the Government regulator and policymaker for telecommunication services. It also has roles relating to broadcasting and cyber security. One of its primary goals is to create the core engine of the information-based economy. It is involved in regulatory policy and planning, licensing, tariffs, spectrum management, interconnection management, consumer protection, and dispute resolution.

4.56. Qatar made further steps to promote competition in 2013 when it approved its first mobile number portability policy. The ictQatar, in cooperation with Qtel[14] (now rebranded as Ooredoo) and Vodaphone, established an agreement to allow customers to apply to retain their mobile number when switching service providers.

4.57. Qatar's first comprehensive radio spectrum policy was issued in 2012 to provide a transparent and non-discriminatory approach to spectrum management. It indicates that a national frequency allocation plan will be established, guided by the ITU Radio Regulations and international technical standards. The policy has provisions on frequency assignment, licensing requirements, spectrum fees, and monitoring and enforcement.

4.58. In 2009, ictQatar issued its Type Approval Policy for radio equipment and telecommunications terminal equipment.[15] A number of developments have followed in order to improve the efficiency and transparency of the type approval process for manufacturers and importers, and to promote competition. In particular, the new procedures change the previous policy that allowed only the importer submitting the application to exclusively import that product to a policy that de-links the type approval application and the importer, thus any approved importer may import once a type approval is issued.

[14] Former national telecom service provider.
[15] ICTRA 08/09-TA-Policy.

4.59. Article 112 of the Telecommunication Law provides for site sharing and co-location of the telecommunications network in Qatar. In 2009, the two mobile operators, Ooredoo (then Qtel) and Vodaphone reached agreement on a site sharing framework agreement. However, the matter was subsequently taken to the dispute resolution mechanism of ictQatar for a decision. In 2012, ictQatar ruled that an amended site sharing agreement was necessary and would need to include a number of provisions and amendments.[16] The regulatory strategy provides a policy framework for site sharing, although the specific regulations have not yet been formulated.

4.2.3.3 Postal services

4.60. For many years, Qatar's postal services were operated by the General Postal Corporation, which was a government agency and had an exclusive monopoly on postal services in Qatar. From 2009, the General Postal Corporation was transformed into a shareholding company, Qatar Postal Services Company, which was given exclusive concession rights for 15 years as the only provider of postal services inside and outside Qatar.[17] The concession was given with the obligation to pay the Government annual fees of 25% of net profits; the fee was waived for three years from 2010.

4.61. The General Postal Corporation, and now the Qatar Postal Service Company, is a member of the Universal Postal Union. Government Decree No. (1) of 2007 regulates Qatar's postal services**.** No special rules apply to express mail couriers.

4.2.4 Tourism

4.62. The tourism sector has developed significantly in recent years. Companies servicing the tourism industry have grown by over 10% annually since 2000. The growth has been buoyed by international sports events, cultural events, and conferences and exhibitions (Table 4.12). Qatar has invested in the tourism industry by adding a number of significant tourist attractions in the last ten years, such as museums, art galleries, and festivals.

Table 4.12 Main tourism indicators, 2008-13

	2008	2009	2010	2011	2012	2013
Tourists						
GCC	..	..	..	845,633	952,856	1,090,239
Rest of world	..	..	..	197,301	217,540	237,329
Hotels						
Number of hotels	48	58	66	74	81	83
Number of rooms	5,783	9,310	7,826	11,341	13,407	13,577
Number of occupants or % occupancy	1,404,850	1,658,569	1,866,471	2,905,300	60%	65%
Travel agencies, tour operators, and tour guides						
Number of establishments	90	115	130	157	165	141
Foreign owned	0	0	1	1	1	1

.. Not available.

Source: QTA Annual Report 2011/12 and Qatar Statistics, Bulletin of Restaurant and Hotel Statistics, 2011 and information provided by the authorities.

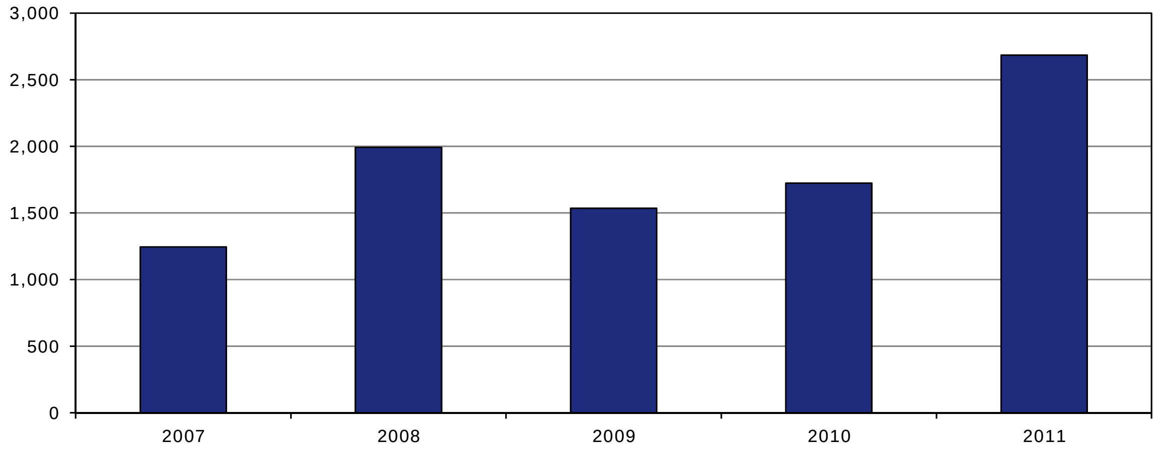
4.63. The subsector of business tourists, i.e. meetings, incentives, conventions, and exhibitions is the strongest segment of Qatar's tourism industry. The opening of the Doha Exhibition Centre in 2007, and the Qatar National Convention Centre in late 2011, have been important for continuing the growth of business tourism, and a new convention centre is to open soon. Hotel demand remains strong and occupancy levels remain high. Some fluctuations have occurred in occupancy rates as Qatar consistently added hotel supply during the period. (Chart 4.9) This trend is

[16] ictQatar Decision of 10 May 2012.
[17] Law No. (16) of 2009.

expected to continue as Qatar boosts capacity gradually in the lead-up to the 2022 FIFA World Cup. Qatar is expected to boost hotel capacity from approximately 32,000 hotel rooms in 2013 to an expected 90,000 by 2022.

Chart 4.9 Hotel occupancy and tourist nights, 2007-11

('000)



Source: Information provided by the authorities; and World Tourism Organization (2012), *Yearbook of Tourism Statistics*, Data 2006-2010.

4.2.4.1 Legal and regulatory framework

4.64. Qatar has a number of laws on tourism (Table 4.13). Pursuant to the recent Tourism Organizing Law of 2012, a number of implementing regulations are under preparation but not yet in force. They will cover all aspects of tourism, including hotel and accommodation providers; desert activities, safaris, and camps; marine activities including boat and yacht cruise industry; events, conferences, conventions, and exhibitions; travel agents, inbound/outbound tour operators, and excursion operators; tour guides; entertainment centres, theme parks, and circuses; and social and night clubs. Investment in the tourism sector by foreigners is generally allowed up to 100% ownership, except in travel agents conducting air ticketing business.

Table 4.13 Tourism legal framework

Law	Reference
Tourism Organizing Law	Law (6) of 2012
Exhibitions Law	Law (17) of 2013
Qatar Tourism Authority	Amiri Decree No. (46) of 2009

Source: Compiled by the WTO Secretariat.

4.2.4.2 Qatar Tourism Authority

4.65. The Qatar Tourism Authority (QTA) was created in 2009 through a decree of the Emir in order to organize, promote, and provide a common structure for tourism. It provides information and conducts promotional activities. The QTA has identified five pillars for the promotion and growth of Qatari tourism: meetings, culture, education, sports, and leisure. A tourism strategic plan is expected to be implemented in early 2014, and will provide the main strategic objectives for the sector, including marketing and destination branding, corporate and industry development programme, and tourism developments. QTA is financed by the Ministry of Economy and Commerce.

4.2.4.3 Licensing

4.66. Tourism activities, including the operation of hotels, tourism establishment, and practicing any tourism activity requires a licence from the appropriate government body, the QTA Licensing Department. An applicant must generally be a company[18] and comply with various provisions, such as meeting professional standards, insurance standards, safety and civil defence standards, and submitting a bank guarantee. The application is submitted to the QTA which will decide on the matter within 30 days. Licences are issued for three years for hotels and for one year for tourism establishments and tourism activities. These may be renewed for similar periods subject to the terms and conditions. There are a number of obligations for persons obtaining a licence (Table 4.14). At present there are no fees for obtaining a licence, although the matter is under consideration.

Table 4.14 Tourism licence obligations

Obligations of Tourism Licensees	
1.	Observe the regulations and terms of the licences, specified in this law and its executive regulation and the implementing decrees
2.	Bring the establishment or the licensed activity under a unified department
3.	Not make any amendments to the facilities and constructions without consent from the department
4.	Not change the trade name of the establishment nor its ownership or management unless notifying such change to the authority in writing
5.	Provide the client with an invoice listing the services rendered and the value of it
6.	Take necessary precautions to preserve the environment
7.	Obtain necessary licences and approvals from the concerned authorities before holding any events in hotels or tourism establishments, and notify the authority of such licences and approval before holding any events
8.	Observe the instructions issued by the authority, based on the mutual coordination between the authority and the concerned agencies in the state, regarding work regulations in tourism activities and establishments

Source: Tourism Law.

4.2.4.4 Classification of hotels and tourist establishments

4.67. All hotels and tourism establishments are to be classified according to rules and provisions outlined in the classification guidelines; these are not yet publically available. The guidelines are based on international standards for tourism establishments, and provide for minimum building requirements for hotels and hotel apartments. The classification of hotels is one to five stars, or boutique hotels. QTA is responsible for classification, and in the case of disagreement, the matter can be further discussed with the QTA. There are no QTA classification guidelines for restaurants which are under the regulatory authority of municipal authorities.

4.2.4.5 Tourist guides and tour operators

4.68. Under the 2012 tourism law, all tourist guides require a licence, like all tourism activities, but this has not yet been implemented; it is expected in early 2014 when an accreditation, qualification, and licensing programme is instituted through the regulations. In addition, guides need to be registered in the tourist guide registry maintained by QTA. The Executive Regulations define the terms for obtaining a licence, but the official regulations will only be made available in 2014.

[18] Except for tour guides.

4.2.4.6 Travel agents

4.69. Travel agents in Qatar are regulated either by the QTA or by the Civil Aviation Authority if they issue air tickets. Pursuant to the Law on Organizing Air Travel Agencies, all travel agency businesses are prohibited unless they receive prior authority from the Civil Aviation Authority.[19] The requirements to qualify to operate a travel agency are to be a Qatari or GCC national, not have been sentenced by a court, have the ability and experience to run a travel agency, present a design by an authorized engineering firm, and pay a warrant of QR 200,000. The licence to operate a travel agency is valid for one year upon payment of an annual fee.

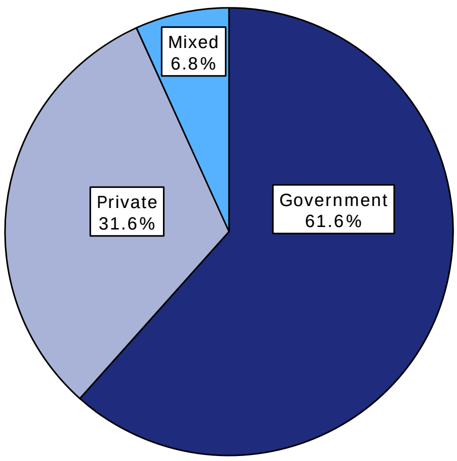
4.70. Travel agencies that provide other tourism services, separately or in addition to selling air tickets, must also be licensed by the QTA. They are classified as retail travel and tour agents if they provide hotel booking, transfer, car-hire, or associated services.

4.2.5 Construction and infrastructure projects

4.71. The building and construction sector is a significant non-energy sector for Qatar, but during the period under review growth was weak, and there were several years of decline. It has been negatively affected by the financial crisis and the resulting impact on the real estate sector, which has been plagued by excess capacity and falling prices. High prices of raw materials and declining margins have also had an impact on the sector.

4.72. However, the sector is expected to improve in the near term as many infrastructure projects are anticipated, and in the gradual build-up to the 2022 FIFA World Cup games projects will commence. The Government expects to spend QR 130 billion through 2016 on construction projects. The purchases of construction services in Qatar is dominated by government main infrastructure projects (Chart 4.10).

Chart 4.10 Building and construction projects[a] by sector, 2011



a By enterprises with 50 or more employees.

Source: Statistics Authority, the Annual Bulletin of Building and Construction Statistics 2011, 25th issue.

4.73. A number of large infrastructure projects are planned and the outlook for the coming years looks positive (Box 4.1).

4.74. A commercial presence in Qatar is generally required to perform construction services. Due to laws on investment and commercial activities, this would generally require establishment with a Qatari partner and maximum ownership of 49%. The majority of construction firms in Qatar are established as limited liability companies with a Qatari partner. Furthermore, restrictions are in place on land ownership by foreigners. Policies relating to investment and procurement also heavily affect the construction sector, (sections 2.8 and 3.3.5, respectively).

[19] Law No. (26) of 2006.

Box 4.1 Major planned construction projects

Lusail City	Pearl-Qatar
Qatar Integrated Rail Project	Ras Laffan Complex
Hamad International Airport	Msheireb
Local Roads and Drainage Scheme	Transmission Project
Barzan Gas Development	World Cup stadiums
Barwa City Development Implementation Strategy	Inner Doha Re-sewerage
	Al-Waab City
Doha, Lusail and Dukhan Highways	Doha Festival City
Education City	Al-Jawhara City
New Doha Port	Barwa al-Baraha
Ras Laffan Olefins Project	

Source: MEEP, Middle East Business Intelligence, online information. Viewed at: http://www.meed.com/countries/qatar/ambitious-qatar-megaprojects-surge-ahead/3163797.article Issues and considerations.

4.2.5.1 Market structure

4.75. Large firms, i.e. with 50 employees or more, accounted for 95% of the construction industry's revenues in 2011. Employment in the sector is heavily dominated by non-Qatari workers, as Qataris account for less than 1% of employees. In recent years, the building and non-building construction subsectors each accounted for about 44% of the market, in terms of value, and partial constructions accounted for the remaining 12%. Non-building construction was dominated by electricity and water works followed by roads and bridges. While the sector contracted in 2011-12, it has seen substantial growth overall since 2007 (Table 4.15).

Table 4.15 Building and construction statistics, 2007-11

	2007	2008	2009	2010	2011
Value of all works (QR 000)	41,628,840	66,810,580	67,336,970	80,297,309	72,093,580
Number of projects[a]	n.a.	4,181	4,822	6,815	6,753
General construction for buildings					
Establishments	571	601	639	740	798
Employment	120,103	117,550	150,476	167,958	159,068
General construction for non-buildings					
Establishments	174	210	207	247	225
Employment	117,194	139,173	163,480	132,842	155,513
Partial construction					
Establishments	855	1,034	1,071	1,122	1,211
Employment	40,842	50,241	52,154	82,357	78,874

n.a. Not applicable.

a Only for firms with 50 or more employees.

Source: Annual bulletins of building and construction statistics, 2007-2011 http://www.qix.gov.qa/portal/page/portal/qix/subject-area/Publications?subject_area=1q0.

4.2.5.2 Regulatory measures

4.76. Engineering activities in Qatar, including architectural, civil, electrical, mechanical, chemical, mines and mining, and other engineering services are regulated by the Engineering Law of 2005, and its related regulations. All engineers must be registered and accredited to work in Qatar, and engineering enterprises must be registered. The Ministry of Municipality and Urban Planning oversees the registration of engineers and maintains the Engineers and Consulting Offices Accrediting Committee.

4.77. Regulations for registration as an engineer, either Qatari or foreign, require the applicant to: be a Qatari national or resident in Qatar; hold a bachelor of engineering or equivalent degree from a recognized university or institution; have full capacity; be of good reputation and character, and not have been convicted of a crime or punished for a crime related to morals or honesty; and pass the technical skills test.

4.78. Engineering consultancy firms must be registered on the Register of International Engineering Consultancy Office or the Register of Local Engineering Consultancy Office, depending on the enterprise. Local companies must be of Qatari origin, i.e. at least 51% Qatari ownership, engineers in the firm must be in the engineer registry, and the office must designate one or more engineers to have supervisory responsibility of the regulations. For foreign entities, the following is required: establishment as a branch office of a main office established and licensed abroad; main office to have branch offices operating in four other countries outside the home country; main office to have been licensed for at least ten years in the home country and remain active in the engineering consultancy business; the enterprise needs to have a certified document by the Qatari embassy in the home country providing an obligation to support the office applying for the licence and be held responsible for all obligations arising from practicing in Qatar; the enterprise is to provide all documents demonstrating its activities, financial ability, and work performed outside of Qatar; the engineer responsible for managing the branch office must be in the engineer registry, possess a certificate from an internally recognized institution, and have more than ten years of work experience in the field; and other engineers in the office must meet the conditions outlined in the Engineer Law.

4.2.5.3 Codes and standards

4.79. Building codes or rules in Qatar are specified in the Qatar National Building Specification, which provides rules on plot size, density, distance from boundaries, and height limits. In addition, the Qatar Construction Specifications provide standards for building materials and regulate the procedures for construction projects. It is not uncommon to have the incorporation of foreign building code provisions in the approved building permits of Qatar. Qatar is also in the process of adopting a number of provisions towards green building regulations.

4.2.5.4 Movement of labour

4.80. The construction industry is heavily dependent on the movement of its labour force in order to carry out construction projects. Enterprises are allowed to bring foreign workers to Qatar through a quota system if they provide a valid work contract and sponsor them. Sponsorship requirements require the worker to have an appropriate professional qualification, pass a medical check-up, submit fingerprints, submit a birth certificate, submit a marriage certificate; a fee is payable by both the employee and employer. The same requirements apply to Qatari and foreign construction companies. In 2009, Qatar introduced its new Immigration Law, which sets out rules for expatriates to enter, exit, reside, and work in Qatar.

4.2.5.5 Temporary importation of machinery

4.81. Chapter 5 of the Qatari Customs Law provides rules for the temporary admission of goods without the collection of import duties under certain conditions. Article 89 provides a list of eligible items for temporary import under licence and includes "heavy machinery and equipment for projects", which would allow for the special importation of most construction-related equipment. This provision is subject to government approval and there must be no local supplier in Qatar. The Law does not impose time-limits on the temporary importation of such equipment.

4.2.6 Transportation

4.82. With the growth of the economy, population, and trade, the Government has been vigorously investing in Qatar's transportation infrastructure, and the sector grew significantly during 2007-12 (Table 4.16). Currently, four main ports are in operation for maritime transport, and one small one mainly for fishing. Two of the four main ports, Doha and Ras Laffan, are undergoing significant, lengthy upgrades and expansion, which will be ongoing for a number of years.

4.83. Infrastructure for air transport is also undergoing significant expansion with the creation of the New Doha International Airport/Hamad International Airport. This project has been ongoing for many years and is in its final stages. The Government has an ambitious plan for rail transport, and a number of projects are in the planning stage.

Table 4.16 Transport statistics

	2008	2009	2010	2011	2012
Vessels:					
Arrivals	5,035	4,869	5,037	..	..
Departures	5,035	4,869	5,038	..	..
Number of establishments	..	..	..	3	..
Employees	..	..	..	925	..
Aircraft:					
Arrivals	46,354	50,603	59,088	68,734	77,846
Departures	46,354	50,623	59,105	68,755	77,826
Number of establishments	..	..	..	2	1
Employees	..	..	..	12,459	17,000

.. Not available.

Source: The Annual Bulletin of Transport & Communications Statistics, Qatar Statistics Authority, and information provided by authorities.

4.84. A number of laws or regulations form the legal framework for transportation (Table 4.17).

Table 4.17 Transport laws and regulations

Law or Regulation	Reference
Civil Aviation Law	Law (15) of 2002
Civil Aviation Security Control Regulations	2010
Doha International Airport By-law	2010
Cargo Agencies	Law (6) of 2010
Organizing Air Travel Services	Law (26) of 2006
Amending Civil Aviation Law	Law (21) of 2008
Amending Civil Aviation Law	Law (3) of 2011
Organizing Civil Aviation Authority	Decree (47) of 2009

Source: Compiled by the WTO Secretariat from information provided by the authorities.

4.2.6.1 International maritime transport

4.85. Freight transport is dominated by oil and gas tankers to and from Qatar (Table 4.18). The rise in exports of these products is mirrored in the transport figures. Container and loose material vessel traffic also rose over the period.

Table 4.18 Maritime transport, 2008-11

Arriving and departing vessels	2008	2009	2010	2011
	Number of vessels / gross tonnage			
Oil tankers	640	..	954	1,203
	83,840,745	..	121,766,372	100,344,480
Gas tankers	579	..	851	1,491
	52,822,051	..	97,100,631	129,745,130

Arriving and departing vessels	2008	2009	2010	2011
General goods	771	..	512	281
	18,716,229	..	131,807,863	34,95,076
Containers	648	..	821	980
	25,146,249	..	130,471,384	7,961,484
Loose materials	339	..	366	799
	6,679,262	..	15,817,994	15,888,378
Live sheep	10	..	10	15
	299,622	..	145,205	433,729
Vehicle vessels	312	..	231	236
	14,070,977	..	11,822,772	12,322,532
Passenger vessels	17	..	12	5
	334,835	..	93,039	32,296
Other	1,719	..	1,399	343
	559,134,737	..	2,430,898,881	2,485,383

.. Not available.

Source: Qatar Statistics Authority (2011), *Annual Bulletin of Maritime Navigation Statistics*.

4.86. Qatar's ports are quite specialized in the vessels and shipments they handle. Ras Laffan port is the main port for oil and gas shipments. Doha port is used mainly for imported products, in particular non-energy goods. Halul port is a small port exclusive to oil shipments, and Mesaieed handles oil and gas trade as well as the trade of many downstream industrial products.

4.87. Vessels from over 50 countries are active in international maritime transport in Qatar, however Qatari registered or flagged vessels account for the largest share, approximately 18% of total vessels in 2011.[20] The large amount of Qatar Petroleum gas shipments through Nakilat accounts for this high percentage of Qatar flagged vessels. With the diversification of the economy and increased demand for transport services, the percentage of Qatari flagged vessels is expected to decline.

4.88. In addition to expanding its merchandise capacity, the New Doha Port project is expected to expand the country's capacity for passenger vessel traffic. The number of passenger vessels arriving in Qatar has been falling in recent years, in part due to the substitution for air travel (Table 4.18).

4.89. Since 2009, all port services in Qatar have been provided by Qatar Ports Management Company, a Qatari state-owned enterprise. Established by law in 2009, the Qatar Ports Management Company was given exclusive concession rights for 15 years to manage the ports, docks, dry ports, and container terminals; undertake guidance work, towing, and moorings; and operate shipping, discharging, handling, and storage of goods and containers.[21] The concession was given with the obligation to pay annual fees to the Government of 25% of net profits, although the fee was waived for three years from 2010.

4.2.6.2 Air transport

4.90. The Law of Qatar on Civil Aviation provides the main framework for air transport services including standards and regulatory aspects.[22] Its provisions include authorization and conditions for aircraft operations, rules of the air, issuing of licences, registration of aircraft, certificates of airworthiness, and provisions for crimes, liabilities, and penalties. In particular it gives authority

[20] Qatar Statistics Authority (2011).
[21] Law No. (17) of 2009.
[22] Law No. (15) of 2002 on Civil Aviation.

for most of the oversight and requirements to the Civil Aviation Authority. Amendments made in 2008 and 2011 modified certain provisions, mostly with respect to crimes and punishment.[23]

4.91. Other regulations pertaining to air services are the Civil Aviation Security Quality Control Regulations and the Doha International Airport By-Law. The first regulation concerns security matters and the second covers airport rules and conduct, including penalties.

4.92. Doha International Airport is Qatar's only international airport, serving both passengers and freight. Its expansion is ongoing and final phases are to be completed in 2020, thereby doubling runway capacity and increasing cargo capacity by 75%. The new facilities and infrastructure are needed to keep up with the growing air transport sector.

4.93. Currently, 33 passenger and cargo airlines use Doha International Airport. Passenger traffic increased by 123% over 2007-12, rising from 9.5 million to 21.2 million passengers. Cargo traffic increased at an even faster pace, from 247 million in 2007 to 827 million in 2012 (235%).[24]

4.94. Qatar Airways is the Government owned flagship carrier. Its fleet and its route network have expanded significantly in recent years and continued investment in its future growth is expected.

4.95. Qatar has air transportation agreements with 131 countries. These cover issues such as traffic rights, designation of carrier, fair competition, safety and security, airport charges, tariffs, customs duty exemptions, commercial activities, and mutual recognition of licences.

4.96. All ground services in Qatar are under Qatar Airways Ground Services, which oversees terminal staff for all airlines flying to Qatar as well as 120 passenger outstations across the world that provide services for Qatar Airways.

4.97. The New Doha International Airport is expected to have the largest free span hangar with the capacity to accommodate 13 aircraft. Thus, Qatar is investing in the infrastructure for aircraft maintenance and repair services. Foreign companies are not allowed to perform these services.

4.2.6.3 Pipeline transmission

4.98. There is currently one international natural gas pipeline that connects Qatar with the UAE; current capacity is 2.0 billion standard cubic feet per day. A number of domestic pipelines connect offshore oil and gas fields to the mainland and to export terminals. There are over 3,100 kilometres of transmission and distribution pipelines for crude petroleum, natural gas, and liquids, also owned and operated by Qatar Petroleum.[25]

4.2.6.4 Rail transport

4.99. There are currently no national or international rail networks in Qatar. A major rail network initiative launched in 2009 contains three main elements: the Doha metro, a long distance (and trans-border) freight and passenger service, and a high speed rail south of Doha. A further rail line to connect with Bahrain remains pending pursuant to the outcome of the Bahrain causeway.

4.100. All work on the rail network is currently under construction; no lines are yet in operation, and no legislation is in place. However, Qatar Railways, a government entity, has been created to oversee the project. Phase one of the project, concerning the Doha metro project, commenced in 2011 and is expected to be completed in 2019. Work is underway on 20 of the envisioned 25 metro stations and the Government has contracted US$30 billion to the project.

[23] Law No. (21) of 2008 and Law No. (3) of 2011.
[24] Statistics provided by Doha International Airport.
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5 APPENDIX TABLES

Table A1.1 Selected macroeconomic indicators, 2006 to 2nd quarter 2013

	2006	2007	2008	2009	2010	2011	2012	2013 Q1-Q2[a]
Miscellaneous								
Current GDP (Qatari riyal billion)	221.6	290.2	419.6	356.0	455.4	624.2	700.3	364.4
Current GDP (US$ billion)	60.9	79.7	115.3	97.8	125.1	171.5	192.4	100.1
GDP growth rate at constant (2004) prices	26.2	18.0	17.7	12.0	16.7	13.0	6.2	5.9
GDP per capita at current market price (QR 1,000)	212,6	239.0	290.1	217.2	265.6	360.2	..	..
GDP per capita at current market price (US$1,000)	58.4	65.7	79.7	59.7	73.0	99.0	..	..
Unemployment rate (%)	..	0.5	0.3	0.3	..	0.6	0.5	..
GDP by type of expenditure at current prices	**(% of current GDP, unless otherwise indicated)**							
Household consumption expenditure	16.3	17.1	15.4	19.3	16.2	12.8	..	..
Government final consumption expenditure	14.7	12.4	10.2	15.6	14.0	12.3	..	..
Gross capital formation[b]	41.9	46.0	41.1	43.0	31.4	29.5	..	..
Net exports	27.0	24.5	33.3	22.1	38.4	45.5	..	..
GDP by economic activity at current prices								
Agriculture and fishing	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Mining and quarrying (including oil & gas)	53.0	51.7	54.9	44.8	52.6	59.3	57.8	56.4
Manufacturing	9.3	9.2	10.7	9.4	9.0	9.1	9.8	9.5
Electricity and water	0.7	0.6	0.5	0.5	0.5	0.4	0.4	0.4
Building and construction	4.9	5.5	6.5	7.2	6.0	4.5	4.4	4.9
Services	30.7	31.5	26.5	37.1	30.9	26.0	26.9	28.2
Trade, restaurants & hotels	6.7	7.2	5.6	8.4	6.9	5.7	5.6	5.6
Transport and communications	3.1	3.0	3.5	4.6	4.0	3.4	3.3	3.4
Finance, insurance, real estate & business services	13.3	14.5	12.3	16.3	13.2	10.5	10.2	11.1
Social services	0.8	1.0	0.8	1.2	1.0	0.8	0.8	0.9
Imputed bank services charges (FISIM)	-2.4	-2.3	-2.4	-2.9	-2.8	-2.1	-2.1	-2.2
Government services	8.8	7.6	6.3	9.0	8.2	7.4	8.7	9.2
Household services	0.6	0.5	0.4	0.5	0.4	0.3	0.3	0.4
Imports duties	1.2	1.4	0.8	0.9	0.8	0.6	0.6	0.6
GDP	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Mining and quarrying	53.0	51.7	54.9	44.8	52.6	59.3	57.8	56.4
Non-mining and quarrying	47.0	48.3	45.1	55.2	47.4	40.7	42.2	43.6
GDP by economic activity at 2004 prices	**(% change)**							
Agriculture and fishing	16.5	10.0	36.7	-17.0	19.7	5.4	4.5	6.1
Mining and quarrying (including oil & gas)	11.7	13.8	13.2	4.5	28.9	15.7	1.7	0.3
Manufacturing	4.7	6.8	18.9	13.7	17.6	10.4	11.8	9.4
Electricity and water	10.1	3.4	12.3	-0.4	13.5	7.9	10.5	6.9
Building and construction	64.7	40.7	79.2	6.9	9.5	10.5	10.6	11.5
Services	54.8	22.1	11.2	24.2	5.7	11.4	9.3	10.7
Trade, restaurants & hotels	92.3	30.1	6.4	15.7	2.5	12.9	7.7	9.9
Transport and communications	28.3	29.2	51.0	22.7	10.2	12.4	12.1	9.4
Finance, insurance, real estate & business services	60.4	24.1	8.9	25.8	7.4	6.3	6.7	12.9
Social services	87.4	66.0	4.5	21.5	1.9	3.0	7.9	8.0
Imputed bank services charges (FISIM)	61.3	20.4	35.6	1.0	20.0	0.2	8.0	8.3

	2006	2007	2008	2009	2010	2011	2012	2013 Q1-Q2[a]
Government services	43.6	7.6	8.9	23.6	8.7	13.1	11.5	9.5
Household services	12.7	17.9	3.8	4.3	2.2	0.8	6.0	9.1
Imports duties	45.7	35.2	-21.4	-11.3	17.8	-1.1	13.7	-4.4
GDP	26.2	18.0	17.7	12.0	16.7	13.0	6.2	5.9
Mining and quarrying	11.7	13.8	13.2	4.5	28.9	15.7	1.7	0.3
Non-mining and quarrying	42.1	21.6	21.3	17.6	8.6	10.8	10.0	10.4
GDP by economic activity at 2004 prices	**(% of GDP)**							
Agriculture and fishing	0.2	0.2	0.2	0.1	0.2	0.1	0.1	0.1
Mining and quarrying (including oil & gas)	46.4	44.7	43.0	40.2	44.4	45.5	43.5	42.0
Manufacturing	9.6	8.7	8.8	8.9	9.0	8.8	9.2	9.4
Electricity and water	1.1	1.0	0.9	0.8	0.8	0.8	0.8	0.8
Building and construction	6.7	8.0	12.2	11.6	10.9	10.7	11.1	11.9
Services	34.4	35.6	33.6	37.3	33.8	33.3	34.3	34.9
Trade, restaurants & hotels	8.4	9.3	8.4	8.7	7.6	7.6	7.7	7.5
Transport and communications	4.4	4.8	6.1	6.7	6.3	6.3	6.7	6.7
Finance, insurance, real estate & business services	11.3	11.9	11.0	12.3	11.4	10.7	10.7	11.4
Social services	1.0	1.5	1.3	1.4	1.2	1.1	1.1	1.2
Imputed bank services charges (FISIM)	-3.2	-3.2	-3.7	-3.4	-3.5	-3.1	-3.1	-3.2
Government services	11.7	10.7	9.9	10.9	10.2	10.2	10.7	11.0
Household services	0.7	0.7	0.6	0.6	0.5	0.5	0.5	0.5
Imports duties	1.6	1.8	1.2	1.0	1.0	0.8	0.9	0.8
GDP	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Mining and quarrying	46.4	44.7	43.0	40.2	44.4	45.5	43.5	42.0
Non-mining and quarrying	53.6	55.3	57.0	59.8	55.6	54.5	56.5	58.0
Public finance	**(% of current GDP, unless otherwise indicated)**							
Total government revenues	36.5	37.9	32.2	45.6	35.0	32.7	..	..
Total government expenditures	28.5	28.1	23.0	32.6	30.4	25.4	..	..
Government deficit or surplus	8.1	9.8	9.2	12.9	4.6	7.2	..	..
Prices and exchange rate								
Inflation (CPI, %age change)	11.9	13.6	15.2	-4.9	-2.4	1.9	1.9	3.5
QR/$ (annual average)	3.64	3.64	3.64	3.64	3.64	3.64	3.64	3.6
Nominal exchange rate (2005=100)	99.6	94.9	92.0	95.3	94.6	90.9	93.9	95.1
External sector								
Current account	15.5	14.4	23.1	6.5	19.0	30.3	32.0	35.5
Goods balance	31.6	29.3	36.6	26.1	43.1	51.0	53.1	55.0
Exports (f.o.b)	55.9	55.8	58.4	49.1	58.9	66.7	69.1	70.0
Imports (f.o.b)	-24.3	-26.5	-21.8	-23.0	-16.7	-15.7	-16.0	-15.0
Services balance	-4.5	-4.9	-3.3	-4.0	-4.6	-5.5	-7.3	-8.0
Exports	6.9	4.5	3.0	2.0	2.4	4.3	5.2	5.4
Imports	-11.4	-9.4	-6.3	-6.1	-7.0	-9.8	-12.4	-13.3
Central bank reserves, gross (in billion U.S. dollars)	5.4	9.8	9.8	18.4	30.7	16.3	32.7	..
In months of imports and services[c]	2.4	3.3	3.9	5.8	7.7	3.9	..	..
Total external debt (excluding banks, in % of GDP)	32.2	31.1	29.0	51.4	55.6	50.5	..	..

.. Not available.

a Preliminary estimates.
b Includes statistical discrepancy.
c Next 12 months.

Source: Qatar Information Exchange online information. Viewed at: http://www.qix.gov.qa/portal/page/portal/qix/subject_area/Statistics?subject_area=190; Statistics Authority (2013), *National Accounts Bulletin 2012 (3rd edition)*. Viewed at: http://www.qsa.gov.qa/Eng/publication/economic_publications/2013/NAB_2012.pdf;

Qatar Central Bank online information. Viewed at:
http://www.qcb.gov.qa/English/PolicyFramework/ExchangeRatePolicy/Pages/ExchangeRatePolicy.aspx;
Qatar Central Bank online information. Viewed at:
http://www.qcb.gov.qa/English/Publications/Statistics/BalanceofPayments/Documents/Q1-2013_Balance%20of%20payments.pdf and
http://www.qcb.gov.qa/English/Publications/Statistics/BalanceofPayments/Documents/Q2-2013.pdf.
IMF Country Report No. 10/62 (March 2010), No 11/64 (March 2011), No. 12/18 (January 2012), and No. 13/14 (January 2013).
IMF International Financial Statistics.
Viewed at: http://elibrary-data.imf.org/[23 July 2013]; and World Bank World Development Indicators. Viewed at: http://databank.worldbank.org/data/databases.aspx[23 July 2013].

Table A1.2 Balance of payments, 2006-12

(QR million)

	2006	2007	2008	2009	2010	2011	2012	2013 Q1-Q2[a]
A. Current account	34,433	41,706	96,804	23,256	87,184	189,200	224,171	129.435
Goods	70,037	84,989	153,507	93,019	196,661	318,037	371,938	200,260
Exports (f.o.b.)	123,948	161,821	244,999	174,745	272,871	416,047	484,003	255,012
Imports (f.o.b.)	-53,911	-76,832	-91,492	-81,726	-76,210	-98,010	-112,065	-54,752
Services	-10,059	-14,074	-13,819	-14,255	-21,000	-34,482	-50,902	-29,003
Services (credit)	15,263	13,075	12,468	7,288	10,961	26,913	36,117	19,505
Travel	3,181	101	529	650	2,124	4,257	10,400	5,899
Transportation	9,233	10,293	7,259	5,765	6,378	14,300	17,004	10,097
Others	2,849	2,681	4,680	873	2,459	8,356	8,713	3,509
Services (debit)	-25,322	-27,149	-26,287	-21,543	-31,961	-61,395	-87,019	-48,508
Travel	-13,652	-4,594	-5,288	-1,752	-1,959	-6,579	-20,560	-11,072
Transportation	-5,391	-18,345	-12,281	-14,195	-20,960	-35,837	-35,991	-18,929
Others	-6,279	-4,210	-8,718	-5,596	-9,042	-18,979	-30,468	-18,507
Income	-11,941	-15,430	-24,614	-34,262	-47,115	-48,306	-44,154	-18,610
Income (credit)	7,207	4,978	5,646	3,594	8,698	22,445	23,726	14,604
Compensation of employees	0	21	21	44	0	0	0	0
Investment income	7,207	4,957	5,625	3,550	8,698	22,445	23,726	14,604
Income (debit)	-19,148	-20,408	-30,260	-37,856	-55,813	-70,752	-67,880	-33,214
Compensation of employees	-181	-206	-247	-326	-380	-475	-493	-218
Investment income	-18,967	-20,202	-30,013	-37,530	-55,433	-70,277	-67,387	-32,996
Current transfers	-13,604	-13,779	-18,270	-21,247	-41,362	-46,048	-52,711	-23,212
Credit	648	9,249	12,402	7,913	14,651	6,498	7,172	1,930
Debit	-14,252	-23,027	-30,672	-29,160	-56,013	-52,546	-59,883	-25,142
of which workers' remittance	-14,252	-16,264	-19,546	-25,827	-29,577	-37,543	-38,971	-17,266
B. Capital and financial account	-37,315	-24,779	-87,308	2,197	-38,868	-227,805	-162,001	-112,758
Capital account	-3,608	-4,118	-4,949	-6,538	-7,489	-13,121	-22,631	-7,381
Financial account[b]	-33,707	-20,661	-82,359	8,735	-31,379	-214,685	-139,370	-105,377
Direct investment	..	..	..	..	..	-22,256	-5,508	-11,431
Abroad	..	..	..	..	..	-21,940	-6,698	-11,373
In Qatar	..	..	..	..	..	-316	1,190	-58
Portfolio investment	..	..	..	..	..	-68,872	10,190	-30,746
Assets	..	..	..	..	..	-62,501	-27,698	-29,812
Liabilities	..	..	..	..	..	-6,371	37,888	-934
Financial derivatives, net	..	..	..	..	..	5,767	-5,614	3,528
Other investment	..	..	..	..	..	-129,323	-138,438	-66,728
Assets	..	..	..	..	..	-150,471	-134,414	-32,468
Liabilities	..	..	..	..	..	21,148	-4,024	-34,260
C. Net errors & omissions	5,706	-2,782	-7,873	4,806	-3,923	-13,605	-3,640	-5,500
D. Overall balance	2,824	14,145	1,623	30,258	44,393	-52,211	58,529	11,177
E. Change in reserves (Increase -)	-2,824	-14,145	-1,623	-30,258	-44,393	52,211	-58,529	-11,177

.. Not available.

a Preliminary estimates.
b Breakdown of this heading available from 2011 onwards.

Source: Statistics Authority (2013), National Accounts Bulletin 2012 (3rd edition). Viewed at: http://www.qsa.gov.qa/Eng/publication/economic_publication/2013/NAB_2012.pdf; and Qatar Central Bank online information. Viewed at: http://www.qcb.gov.qa/English/Publications/Statistics/BalanceofPayments/Documents/Q1-2013_Balance%20of%20payments.pdf. http://www.qcb.gov.qa/English/Publications/Statistics/BalanceofPayments/Documents/Q2-2013.pdf.

Table A1.3 Merchandise exports by product group, including re-exports, 2006-12

(QR million, US$ million, and %)

HS Section	HS Chapter/Code	2006	2007	2008	2009	2010	2011	2012
Total (QR million)		123,948.4	161,821.3	244,998.2	174,746.0	272,870.7	416,591.6	484,065.1
Total (US$ million)		34,051.8	44,456.4	67,307.2	48,007.2	74,964.5	114,448.2	132,984.9
					(% of total)			
01 Live animals and products		0.0	0.0	0.0	0.1	0.1	0.0	0.0
02 Vegetable products		0.0	0.0	0.0	0.0	0.0	0.0	0.0
03 Fats and oils		0.0	0.0	0.0	0.0	0.0	0.0	0.0
04 Prepared food, beverages and tobacco		0.0	0.0	0.0	0.0	0.0	0.0	0.0
05 Mineral products		89.8	90.2	91.3	89.2	90.3	92.1	88.3
	27 Fuels of which:	89.7	90.1	90.9	89.1	90.1	91.8	88.0
	2711 Petroleum gases and other gaseous hydrocarbons	38.2	43.3	49.9	52.9	55.7	62.3	62.1
	2709 Petroleum oils (crude)	46.9	43.1	38.3	32.8	26.9	23.1	19.6
06 Chemicals and products thereof		4.5	4.5	4.6	4.5	3.1	2.7	3.9
	29 Organic chemicals	1.8	1.9	1.8	2.1	1.3	1.1	1.8
	31 Fertilizers	2.0	2.0	2.2	1.6	1.1	1.1	1.6
07 Plastics and rubber		3.3	3.1	2.2	2.4	2.0	2.1	3.3
	39 Plastics and articles	3.3	3.1	2.2	2.4	2.0	2.1	3.3
08 Raw hides and skins; leather		0.0	0.0	0.0	0.0	0.0	0.0	0.0
09 Wood, cork, straw		0.0	0.0	0.0	0.0	0.0	0.0	0.0
10 Pulp of wood; paper and paperboard		0.0	0.0	0.0	0.0	0.0	0.0	0.0
11 Textiles and textile articles		0.1	0.0	0.0	0.0	0.0	0.0	0.0
12 Footwear, headgear, etc.		0.0	0.0	0.0	0.0	0.0	0.0	0.0
13 Articles of stone, plaster, cement		0.0	0.0	0.0	0.0	0.0	0.0	0.1
14 Precious stones and metals, pearls		0.0	0.1	0.0	0.0	0.0	0.0	0.0
15 Base metals and articles thereof		1.3	1.0	0.6	1.7	2.0	1.8	3.4
	76 Aluminium and articles	0.0	0.0	0.0	0.0	0.5	1.0	2.0
	72 Iron and steel	0.8	0.7	0.4	1.0	1.0	0.4	1.0
16 Machinery, electrical machines		0.4	0.4	0.4	0.9	1.0	0.5	0.4
17 Transport equipment		0.4	0.5	0.7	0.9	1.3	0.6	0.5
18 Precision equipment		0.1	0.0	0.0	0.0	0.0	0.0	0.0
19 Arms & ammunition		0.0	0.0	0.0	0.0	0.0	0.0	0.0
20 Miscellaneous manufactured articles		0.0	0.0	0.0	0.0	0.0	0.0	0.0
21 Works of art, etc.		0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Qatar Ministry of Development Planning and Statistics online information, "Foreign merchandise trade system". Viewed at: http://ftp.qsa.gov.qa:8088/[23/08/2013].

Table A1.4 Merchandise exports by destination, including re-exports, 2006-12

(QR million, US$ million, and %)

	2006	2007	2008	2009	2010	2011	2012
Total (QR million)	123,948.4	161,821.3	244,998.2	174,746.0	272,870.7	416,591.6	484,065.1
Total (US$ million)	34,051.8	44,456.4	67,307.2	48,007.1	74,964.5	114,448.2	132,984.9
	(% of total)						
America	0.5	1.0	0.2	1.1	1.8	2.3	2.1
United States	0.4	0.7	0.1	0.8	1.1	0.9	0.9
Other America	0.1	0.3	0.1	0.3	0.8	1.4	1.2
Brazil	0.0	0.1	0.1	0.1	0.1	0.2	0.7
Europe	4.0	4.4	5.3	9.5	14.5	16.5	10.9
EU (27)	3.6	4.3	5.0	9.2	13.4	15.9	9.8
United Kingdom	0.0	0.2	0.2	2.8	4.7	7.0	3.4
Spain	2.5	2.1	2.1	3.0	4.3	3.8	3.3
Belgium	0.3	1.4	2.2	2.8	1.8	1.7	1.3
France	0.1	0.1	0.2	0.1	1.6	1.5	1.2
EFTA	0.0	0.0	0.2	0.1	0.0	0.0	0.2
Other Europe	0.3	0.0	0.1	0.3	1.0	0.6	0.9
Turkey	0.1	0.0	0.1	0.2	1.0	0.6	0.9
Commonwealth of Independent States (CIS)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Africa	0.9	0.6	0.3	0.9	1.1	1.3	1.3
South Africa	0.4	0.3	0.1	0.4	0.3	0.7	0.8
Middle East	5.9	5.3	6.1	7.5	8.7	6.1	6.9
Gulf countries	5.5	4.8	5.9	7.0	8.0	5.7	6.5
United Arab Emirates	4.3	3.8	5.0	5.5	5.7	3.8	4.5
Saudi Arabia, Kingdom of	0.8	0.7	0.4	0.7	1.4	0.8	1.0
Kuwait	0.1	0.1	0.2	0.3	0.4	0.8	0.6
Asia	78.9	81.2	79.0	73.6	73.5	73.6	78.1
China	1.2	0.8	1.1	1.9	3.0	3.9	5.1
Japan	41.5	38.4	34.5	32.2	28.7	26.1	27.7
Six East Asian Traders	27.9	32.8	36.0	26.4	30.2	31.6	30.8
Korea, Rep. of	13.9	16.5	20.2	14.4	16.0	17.6	18.6
Singapore	9.5	10.7	10.9	7.0	7.8	7.1	5.3
Chinese Taipei	1.6	1.1	1.6	1.9	2.5	3.2	4.0
Thailand	2.7	4.3	2.9	2.8	2.9	2.1	2.0
Malaysia	0.2	0.1	0.3	0.3	0.9	1.5	1.0
Other Asia	8.4	9.3	7.3	13.0	11.7	12.0	14.3
India	4.9	6.0	4.8	8.4	8.6	9.5	11.0
Indonesia	0.1	0.1	0.0	0.4	0.9	0.4	1.1
Australia	0.6	0.4	0.1	0.7	0.6	0.4	0.6
Philippines	0.5	0.9	0.1	1.3	0.6	0.4	0.5
Other	9.8	7.6	9.1	7.3	0.3	0.1	0.7

Source: Qatar Ministry of Development Planning and Statistics online information, "Foreign merchandise trade system". Viewed at: http://ftp.qsa.gov.qa:8088/[23/08/2013].

Table A1.5 Merchandise imports by product group, 2006-12

(QR million, US$ million, and %)

HS Section	HS Chapter/Code	2006	2007	2008	2009	2010	2011	2012
Total (QR million)		59,845.9	85,283.6	101,556.3	90,715.9	84,593.0	81,293.5	94,940.8
Total (US$ million)		16,441.2	23,429.6	27,900.1	24,921.9	23,239.8	22,333.4	26,082.6
		(% of total)						
01 Live animals and products		1.8	1.7	2.1	2.5	3.2	3.9	4.1
02 Vegetable products		1.3	1.4	2.0	2.0	2.3	2.8	2.7
03 Fats and oils		0.2	0.2	0.3	0.3	0.3	0.4	0.3
04 Prepared food, beverages and tobacco		2.0	1.6	1.7	2.2	2.7	3.0	3.2
05 Mineral products		2.9	3.2	3.6	2.9	3.8	6.4	5.0
06 Chemicals and products thereof		4.2	4.1	4.6	5.7	7.2	8.3	8.1
07 Plastics and rubber		2.2	2.2	2.3	2.8	2.8	3.1	3.0
08 Raw hides and skins; leather		0.2	0.2	0.2	0.2	0.3	0.4	0.4
09 Wood, cork, straw		1.0	1.1	1.0	0.8	1.0	1.0	1.1
10 Pulp of wood; paper and paperboard		0.7	0.7	0.8	0.9	1.0	1.1	0.9
11 Textiles and textile articles		2.1	1.6	1.5	1.9	2.2	2.5	2.5
12 Footwear, headgear, etc.		0.4	0.3	0.3	0.4	0.5	0.5	0.5
13 Articles of stone, plaster cement		2.3	2.2	2.5	3.2	3.2	2.9	2.6
14 Precious stones and metals, pearls		1.1	1.4	0.8	0.5	1.9	2.5	3.3
15 Base metals and articles thereof		19.7	20.1	19.7	14.9	13.0	10.9	11.0
16 Machinery, electrical machines		36.1	39.5	37.4	42.6	32.8	27.6	25.7
17 Transport equipment		15.8	13.8	14.7	11.3	15.7	16.1	19.1
	87. Vehicles	14.7	12.0	12.5	8.5	10.7	10.5	14.9
18 Precision equipment		3.0	2.5	2.0	2.5	2.7	2.7	2.6
19 Arms & ammunition		0.0	0.0	0.1	0.0	0.2	0.1	0.1
20 Miscellaneous manufactured articles		3.0	2.2	2.2	2.3	3.0	3.3	3.6
21 Works of art, etc.		0.0	0.0	0.1	0.1	0.1	0.6	0.4

Source: Qatar Ministry of Development Planning and Statistics online information, "Foreign merchandise trade system". Viewed at: http://ftp.qsa.gov.qa:8088/[23/08/2013].

Table A1.6 Merchandise imports by origin, 2006-12

(QR million, US$ million, and %)

	2006	2007	2008	2009	2010	2011	2012
Total (QR million)	59,845.9	85,283.6	101,556.3	90,715.9	84,593.0	81,293.5	94,940.8
Total (US$ million)	16,441.2	23,429.6	27,900.1	24,921.9	23,239.8	22,333.4	26,082.6
	(% of total)						
America	12.2	12.9	10.9	14.7	15.1	15.4	14.4
United States	9.9	11.2	9.0	12.3	11.8	11.5	11.0
Other America	2.3	1.7	1.9	2.4	3.3	4.0	3.3
Brazil	0.9	0.6	1.0	1.3	1.7	2.4	1.6
Mexico	0.4	0.3	0.3	0.3	0.4	0.5	0.8
Europe	38.8	38.0	39.3	37.4	34.9	34.0	33.0
EU (27)	34.8	34.2	33.4	32.4	31.6	29.9	26.8
Germany	9.3	7.8	8.4	7.5	7.2	6.9	6.6
Italy	9.3	10.4	7.4	7.5	6.5	5.7	4.9
United Kingdom	5.0	4.9	4.7	4.5	5.1	5.0	4.5
France	3.9	3.6	3.7	4.9	4.8	3.4	2.9
The Netherlands	1.3	1.6	2.2	1.5	1.6	1.5	1.4
Spain	1.0	1.1	1.6	1.2	1.1	1.3	1.2
Austria	0.6	0.5	0.6	0.6	0.6	0.6	0.9
EFTA	1.7	1.4	1.7	2.7	1.9	2.7	4.7
Switzerland	1.5	1.4	1.6	2.2	1.6	2.4	3.9
Other Europe	2.2	2.4	4.2	2.2	1.5	1.4	1.5
Turkey	2.0	2.1	3.8	1.6	1.2	1.1	1.4
Commonwealth of Independent States (CIS)	0.1	0.2	0.3	0.2	0.4	0.5	0.5
Africa	1.0	0.9	1.0	1.7	1.8	1.7	1.6
Egypt	0.5	0.5	0.6	1.2	1.2	1.2	1.2
Middle East	14.4	15.3	15.7	16.8	17.3	18.4	16.6
Gulf countries	13.1	14.2	14.3	15.6	16.1	17.2	15.6
United Arab Emirates	6.0	7.0	6.6	7.1	6.9	8.1	7.8
Saudi Arabia, Kingdom of	5.1	4.9	4.9	5.3	5.3	5.2	4.7
Bahrain	0.7	0.9	1.3	1.7	2.3	2.2	1.7
Asia	33.5	32.7	32.7	29.2	30.5	30.0	33.9
China	5.8	5.8	7.2	7.9	9.1	9.6	9.8
Japan	12.0	10.1	9.6	7.3	7.5	5.6	8.2
Six East Asian Traders	10.0	10.9	9.7	7.7	7.6	7.1	7.6
Korea, Rep. of	5.5	6.1	5.5	3.6	3.1	2.5	3.1
Thailand	1.6	1.3	1.5	1.6	1.6	1.7	2.0
Malaysia	1.4	1.4	1.3	1.4	1.5	1.3	1.2
Other Asia	5.7	5.9	6.1	6.3	6.2	7.6	8.4
India	2.7	2.8	3.2	3.7	3.0	3.3	3.6
Australia	1.3	1.1	0.9	0.9	1.5	2.3	2.8
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Qatar Ministry of Development Planning and Statistics online information, Foreign Merchandise Trade System. Viewed at: http://ftp.qsa.gov.qa:8088/[23/08/2013].

Table A2.1 Selected notifications to the WTO, 1 January 2007-31 December 2013

WTO Agreement	Description of requirement	Periodicity	Document symbol/Date
Agreement on Implementation of Article VI of the GATT 1994 (Anti-dumping Agreement)			
Article 16.4	Anti-dumping actions taken	Semi-annual	G/ADP/N/166/Add.1, 23/04/2008 G/ADP/N/180, 13/01/2009 G/ADP/N/180/Add.1/Rev.2, 23/11/2010 G/ADP/N/188, 10/07/2009 G/ADP/N/195, 15/01/2010 G/ADP/N/195/Add.1/Rev.1, 20/10/2010 G/ADP/N/202, 01/07/2010 G/ADP/N/202/Add.1/Rev.1, 24/11/2011 G/ADP/N/209, 5/01/2011 G/ADP/N/209/Add.1/Rev.1, 25/10/2011
Agreement on Agriculture			
Articles 10 and 18.2	Export subsidies (outlays and quantities)	Annual	G/AG/N/QAT/6, 20/04/2010 G/AG/N/QAT/7, 21/06/2011 G/AG/N/QAT/9, 26/06/2012 G/AG/N/QAT/8, 11/05/2012
Article 18.2	Domestic support	Annual	G/AG/N/QAT/5/Rev.1, 11/05/2012 G/AG/N/QAT/8 11/05/2012
Agreement on Import Licensing Procedures			
Article 7.3	Questionnaire; rules and information concerning procedures for the submission of applications	Annual for questionnaire; rules and information, Once then changes	G/LIC/N/3/QAT/4, 08/10/2007 G/LIC/N/3/QAT/5, 20/03/2008 G/LIC/N/3/QAT/6, 17/04/2009 G/LIC/N/3/QAT/7, 06/10/2010 G/LIC/N/3/QAT/8, 26/06/2011 G/LIC/N/3/QAT/9, 26/06/2012
General Agreement on Tariffs and Trade 1994			
Article XVII:4(a) of GATT 1994 and para. 1 of the Understanding on the Interpretation of Article XVII	Notification of state trading enterprises	Once, then changes	G/STR/N/11/QAT, 31/07/2007 G/STR/N/11/QAT/Rev.1, 06/08/2007 G/STR/N/12/QAT-G/STR/N/13/QAT, 11 June 2010
Agreement on Subsidies and Countervailing Measures			
Article 25.11	Countervailing duty actions taken	Semi-annual and when measure taken	G/SCM/N/185/Add.1/Rev.1, 14/10/2009 G/SCM/N/186/QAT, 15/01/2010 G/SCM/N/203/Add.1/Rev.1, 20/10/2010 G/SCM/N/212/Add.1/Rev.1, 241/11/2011 G/SCM/N/250/Add.1, 10/04/2013 G/SCM/N/228/Add.1/Rev.2, 26/07/2012 G/SCM//N/242/Add.1/Rev.1, 12/06/2013
Article 25.1	Subsidies programmes	Annual	G/SCM/N/220/QAT, 23/06/2011
Agreement on the Application of Sanitary and Phytosanitary Measures			
Article 7, Annex B	Notification of changes in sanitary and phytosanitary measures	Ad hoc	43 notifications received, please see http://spsims.wto.org/
Agreement on Technical Barriers to Trade			
Article 2.9	Technical regulations	Ad hoc	281 notifications received, please see http://tbtims.wto.org
Articles 2.9 and 5.6	Technical regulations	Ad hoc	G/TBT/N/QAT/22, G/TBT/N/QAT/26, G/TBT/N/QAT/33, G/TBT/N/QAT/34, G/TBT/N/QAT/175
Article 5.6	Technical regulations	Ad hoc	G/TBT/N/QAT/66, G/TBT/N/QAT/67, G/TBT/N/QAT/68, G/TBT/N/QAT/69, G/TBT/N/QAT/70, G/TBT/N/QAT/71, G/TBT/N/QAT/72, G/TBT/N/QAT/73, G/TBT/N/QAT/74, G/TBT/N/QAT/75, G/TBT/N/QAT/55, G/TBT/N/QAT/17, G/TBT/N/QAT/15, G/TBT/N/QAT/16
Article 2.10	Technical regulations	Ad hoc	G/TBT/N/QAT/35, G/TBT/N/QAT/37, G/TBT/N/QAT/38, G/TBT/N/QAT/306

Source: WTO Central Registry of Notifications.

Table A3.1 Prohibited goods

HS	Description
01031000	- Pure-bred breeding animals
01039100	- - Weighing less than 50 kg
01039200	- - Weighing 50 kg or more
05071000	- Ivory; ivory powder and waste
09082100	- - Neither crushed nor ground
09082200	- - Crushed or ground
12079100	- - Poppy seeds
12079910	- - - Poppy
12079920	- - - Hemp seeds
12113000	- Coca leaf
12114000	- Poppy straw
12119020	- - - Black poppy
12119060	- - - Hemp
13021100	- - Opium
13021910	- - - Hashish
25241000	- Crocidolite
25249000	- Other
29399110	- - - Cocaine
40121100	- - Of kind used on motor cars (including station wagons and racing cars)
40121200	- - Of a kind used on buses or lorries
40121300	- - Of a kind used on aircraft
40121900	- - Other
40122000	- Used pneumatic tyres
68114000	- Containing asbestos
68128000	- Of crocidolite
68129300	- - Compressed asbestos fibre jointing, in sheets or rolls
68132000	- Containing asbestos

Source: Qatar Tariff, 2012.

Table A3.2 Restricted goods

HS	Description
02031100	- - carcasses and half-carcasses
02031200	- - Hams, shoulders and cuts thereof, with bone in
02031900	- - Other
02032100	- - Carcasses and half-carcasses
02032200	- - Hams, shoulders and cuts thereof, with bone in
02032900	- - Other
02050090	- - - Other
02063000	- Of swine, fresh or chilled
02064100	- - Livers
02064900	- - Other
02091000	- of pigs
02101100	- - Hams, shoulders and cuts thereof, with bone in
02101200	- - Bellies (streaky) and cuts thereof
02101900	- - Other
05021000	- Pigs', hogs' or boars' bristles and hair and waste thereof
15011000	- Lard
15012000	- Other pig fat
15030011	- - - - of pig
15030021	- - - - of pig
15030091	- - - - of pig
15180011	- - - - of pig
16010010	- - - of swine or animal blood
16024100	- - Hams and cuts thereof
16024200	- - Shoulders and cuts thereof
16024900	- - Other, including mixtures
16029030	- - - Preparations of animal blood
17049080	- - - White Chocolate containing alcohol
18063110	- - - Containing alcohol
18063210	- - - Containing alcohol
22030000	Beer made from malt
22041000	- Sparkling wine
22042100	- - In containers holding 2 L or less
22042900	- - Other
22043000	- Other grape must
22051000	- In containers holding 2 L or less
22059000	- Other
22060000	Other fermented beverages (for example, cider, perry, mead); mixtures of fermented beverages and mixtures of fermented beverages and non-alcoholic beverages, not elsewhere specified or included
22072090	- - - Other
22082000	- Spirits obtained by distilling grape wine or grape marc
22083000	- Whiskies
22084000	- Rum and other spirits obtained by distilling fermented sugar-cane products
22085000	- Gin and Geneva
22086000	- Vodka
22087000	- Liqueurs and cordials
22089090	- - - Other
23070010	- - - Wine lees
41033000	- Of swine
41063100	- - In the wet state (including wet-blue)
41063200	- - In the dry state (crust)
41132000	- Of swine

Source: Qatar Tariff, 2012.

Table A3.3 Qatar tariff summary, 2013

	Number of lines	MFN applied			Bound rate average (%)
		Average (%)	Range (%)	Duty free (%)	
All products	7,300	5.0	0-100	11.1	16.1
HS 01-24	1,374	6.5	0-100	25.1	23.0
HS 25-97	5,926	4.6	0-20	7.8	14.5
By WTO category					
WTO Agriculture	1,195	7.1	0-100	22.3	24.2
Animals and products thereof	157	3.0	0-5	40.1	40.1
Dairy products	35	5.0	5	0.0	15.1
Fruit, vegetables and plants	358	3.7	0-5	25.4	14.7
Coffee and tea	38	8.7	0-100	26.3	19.8
Cereals and preparations	183	3.5	0-5	30.1	15.8
Oil seeds, fats and oils and their products	101	4.8	0-5	4.0	14.7
Sugars and confectionary	40	5.8	0-100	32.5	20.0
Beverages, spirits and tobacco	84	45.7	0-100	1.2	88.3
Cotton	5	5.0	5	0.0	15.0
Other agricultural products n.e.s.	194	4.7	0-100	15.5	17.7
WTO Non-agriculture (incl. petroleum)	6,105	4.6	0-20	8.9	14.5
Fish and fishery products	265	3.5	0-5	29.4	15.0
Minerals and metals	1,202	5.0	0-20	2.2	16.6
Chemicals and photographic supplies	1,257	4.5	0-5	9.1	8.1
Wood, pulp, paper and furniture	425	4.5	0-5	9.4	17.6
Textiles	718	5.0	0-5	0.6	15.0
Clothing	254	5.0	5	0.0	20.0
Leather, rubber, footwear and travel goods	212	5.0	5	0.0	16.6
Non-electric machinery	640	4.2	0-5	16.1	15.0
Electric machinery	313	3.4	0-5	32.9	18.6
Transport equipment	233	4.4	0-5	11.2	14.2
Non-agriculture articles n.e.s.	551	4.6	0-5	8.9	14.9
Petroleum	35	5.0	5	0.0	15.0
By stage of processing					
First stage of processing	939	3.9	0-100	30.1	16.8
Semi-processed products	2,165	4.8	0-20	4.5	11.5
Fully processed products	4,196	5.3	0-100	10.2	18.3
By HS section					
Live animals & product	438	3.4	0-5	32.6	24.0
Vegetable products	461	3.0	0-5	39.7	14.5
Fats & oils	63	5.0	5	0.0	15.0
Prepared food etc.	412	14.0	0-100	4.6	32.6
Minerals	211	5.0	5	0.0	19.9
Chemicals & products	1,198	4.5	0-5	9.9	8.0
Plastics & rubber	272	5.0	5	0.0	12.5
Hides & skins	86	5.0	5	0.0	17.1
Wood & articles	190	4.9	0-5	1.6	15.0
Pulp, paper, etc.	195	4.1	0-5	19.0	16.5
Textiles & articles	945	5.0	5	0.0	16.3
Footwear, headgear	74	5.0	5	0.0	17.2
Articles of stone	229	4.9	0-5	1.3	20.0

	Number of lines	MFN applied			Bound rate average (%)
		Average (%)	Range (%)	Duty free (%)	
Precious stones, etc.	65	3.2	0-5	35.4	14.9
Base metals & products	737	5.1	5-20	0.0	15.1
Machinery	947	3.9	0-5	22.8	16.2
Transport equipment	245	4.4	0-5	11.0	14.1
Precision equipment	286	4.3	0-5	13.3	15.0
Arms and ammunition	23	5.0	5	0.0	15.0
Miscellaneous manufacturing	212	5.0	5	0.0	18.8
Works of art, etc.	11	5.0	5	0.0	15.0

Note: The 2013 tariff is based on HS12 nomenclature, consisting of 7,300 tariff lines (at 8-digit tariff line level).

Source: WTO Secretariat calculations, based on data provided by the authorities.

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