



QATAR NATIONAL DEVELOPMENT STRATEGY



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THE KEY TAKEAWAYS

THE KEY TAKEAWAYS

In 2008, Qatar developed its 2030 National Vision to delineate a roadmap for the country's social and economic future. It structured the vision around three time-bound strategies that share a common high-level objective of reducing the state's income concentration on oil and investing in a knowledge-based economy with a distinct private sector role. Since then, the country trekked remarkable milestones set in the first two strategies of the vision and paved a strong momentum for the remaining one. This report reviews Qatar's progress on its 2030 vision and provides an explainer of the third National Development Strategy (NDS3).

Below are the key takeaways.

QATAR'S VISION 2030 ACHIEVEMENTS



ECONOMIC PILLAR

- Ranked among the top 3 exporters of liquified natural gas
- Grew the size of its sovereign wealth fund
- Developed a solid infrastructure
- Improved its fiscal management
- Established freezones and institutions of innovation.



HUMAN DEVELOPMENT

- Between 2012 and 2022, Qatar's K-12 education system rose over 11 spots in global rankings, improving faster than any other country and making the top 50
- Set a minimum wage
- Improved worker mobility and protection
- Increased life expectancy rate to 80.3 years



SOCIAL DEVELOPMENT

- Maintained welfare benefits and social protection measures
- Increased support for vulnerable groups
- Raised female labor force participation from 37 in 2016 to 42 in 2021



ENVIRONMENTAL DEVELOPMENT

- Lowered emissions via its production of liquified natural gas
- Treated 99.7% of wastewater so that it is usable for landscape irrigation



Qatar's NDS3 aims to build on the successes of NDS1 and NDS2 to achieve the remaining QNV 2030 goals. Its design was based on the comprehensive evaluation of the past two strategies, which showed the need for the acceleration of progress in seven areas of development that **NDS3 identifies as national outcomes:**

- 1 SUSTAINABLE ECONOMIC GROWTH**
- 2 FISCAL SUSTAINABILITY**
- 3 FUTURE-READY WORKFORCE**
- 4 COHESIVE SOCIETY**
- 5 QUALITY OF LIFE**
- 6 ENVIRONMENTAL SUSTAINABILITY**
- 7 GOVERNMENT EXCELLENCE**

Since the launch of Vision 2030, the implementation of NDS1 and NDS2 has driven progress across key pillars: institutional capacity, infrastructure, and human development. **NDS1 laid the foundation by creating public entities, NDS2 focused on large-scale infrastructure development, while NDS3 now prioritizes sustainability.**

Qatar has structured **economic diversification and resilience across four diversification clusters: growth clusters** (logistics, manufacturing and tourism), **enabling clusters** (IT, digital services, financial services and education), **resilience clusters** (food and agriculture, and health services), and **future clusters**.

Qatar's modernization and strength of its energy sector goes hand in hand with sustainable economic growth. The authorities aim to **enter emerging low-carbon energy fields and expand its position in low-emission products** through the introduction of a blue-ammonia plant and carbon-capture technologies.



Qatar's performance in executing NDS1 and NDS2, which included challenges, informed the preparation of NDS3.

The past two strategies encountered bottlenecks like limited human resources and know-how, confounding institutional mandates, and project overruns, which have been iteratively mitigated via institutionalized knowledge-transfer and resource allocation. Today NDS3 also looks to grant more attention to previously underprioritized areas, like charity and community development organizations, in its endeavor to increase human capital formation.



NDS3 outlines a plan to improve the business environment within Qatar.

These include investor-friendly regulatory environment; efficient infrastructure; top-notch government-to-business services; increased access to funding for the private sector; strengthening trade ecosystem and global partnerships; and improving competition.

Through private sector-led innovation, Qatar aims to incentivize businesses to increase their research and development activities, especially large local enterprises and multinational companies. Qatar also looks to foster partnerships with international businesses and organizations that develop cutting-edge technologies to improve the growth of its own innovation ecosystem.



QATAR'S PERFORMANCE
IN EXECUTING NDS1 AND
NDS2, WHICH INCLUDED
CHALLENGES, INFORMED
THE PREPARATION OF NDS3



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INTRODUCTION



INTRODUCTION

Launched in 2008 during the reign of His Highness Sheikh Hamad bin Khalifa Al Thani, the Qatar National Vision 2030 (QNV 2030) is a framework developed to provide a roadmap for the future of Qatar, with an emphasis on achieving the delicate balance of economic growth and sustainable use of both human and natural resources. At its core, QNV 2030 aims to transform Qatar into an advanced economy that is capable of providing its citizens a high living standard for generations, while reducing the state's dependence on hydrocarbon revenues and investing in becoming a knowledge-based economy with a distinct private sector role.

To structure its transformation, Qatar synthesized five principles in its 2030 National Vision:⁽¹⁾

- 1 Balancing Modernization with Tradition**
Embracing modern advancements while holding onto the cultural traditions that shape Qatari identity.
- 2 Addressing Generational Needs**
The development should cater to both present and future generations, ensuring sustainability for all.
- 3 Promoting Managed Growth**
Focusing on guiding growth carefully to prevent the issues that come with unchecked expansion like market distortions.
- 4 Optimizing the Expatriate Workforce**
Managing the size and quality of expatriate labor force.
- 5 Integrating Development Holistically**
Combining economic progress with social well-being and environmental care, creating a balanced path forward.

Overall, this report provides an explainer to Qatar's third National Development Strategy (NDS3) and an analysis of the progress and learnings the country has made on the past two strategies. The report is structured into two main sections. The first describes the current state of Qatar's economy based on its 2030 National Vision and reviews the progress and outcome of the past two strategies. And the second section unpacks Qatar's third National Development Strategy to synthesize its priorities and roadmap for a sustainable future.



WHERE IS QATAR TODAY

NATIONAL VISION 2030

According to Qatar's Vision for 2030, the road to sustainable economic development for the country is structured around four main pillars: human development, social development, economic development and environmental development. These pillars are tied to measurable objectives and targets that aim to eventually transform the Qatari economy into one that is diversified, sustainable, and prosperous for its people.



HUMAN DEVELOPMENT

- **Education:** Develop a world-class education system that prepares citizens to meet global challenges.
- **Healthcare:** Establish a comprehensive healthcare system accessible to all.
- **Empowerment:** Empower Qatari citizens to contribute effectively to society.



SOCIAL DEVELOPMENT

- **Justice and Equality:** Build a just and caring society with high moral standards.
- **Global Partnerships:** Play a significant role in global partnerships for development.
- **Cultural Preservation:** Modernize while preserving cultural traditions and values.



ECONOMIC DEVELOPMENT

- **Diversification:** Reduce dependence on hydrocarbons by diversifying the economy.
- **Competitiveness:** Foster a competitive and knowledge-based economy.
- **Sustainability:** Ensure sustainable economic growth that benefits all citizens.



ENVIRONMENTAL DEVELOPMENT

- **Resource Management:** Ensure the sustainable use of natural resources.
- **Environmental Protection:** Protect the environment, including land, sea, and air.

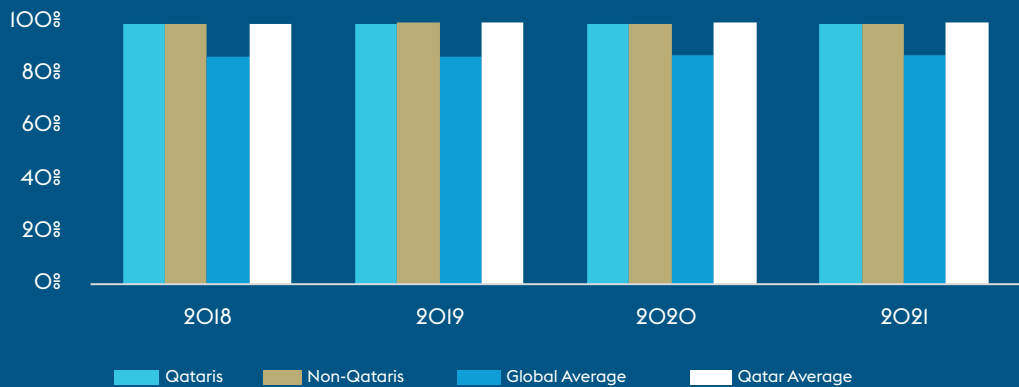


HUMAN DEVELOPMENT

Qatar has consistently maintained high adult literacy rates, far exceeding the global average, at 99.2 and 98.6 respectively. Literacy among Qatar and non-Qatari citizens has hovered at around 99 since 2018, reaffirming Qatar's commitment to high literacy across all its demographics (Figure 1).

Figure 1: Qatar Literacy Rate (by nationality and global benchmark, 2018-2021).

Sources: Qatar, National Planning Council, Macrotrends, World Literacy Rate.



SOCIAL DEVELOPMENT

Qatar has maintained its position as the country with lowest rate of unemployment for both men and women across the GCC and globally, with an average rate of unemployment of just 0.1 from 2015 to 2023 (Figure 2). Female labor force participation has increased steadily over the years, climbing from 58 in 2018 to 63 in 2023. Although this is a forward development, female labor force participation remains significantly lower than male counterparts, which stood at 95.4 in the same year (Figure 3).

Figure 2: Unemployment rates (Qatar vs GCC, 2015-2023).

Source: IMF, Saudi Arabia, Gastat, Qatar, National Planning Council, Labor force statistics.

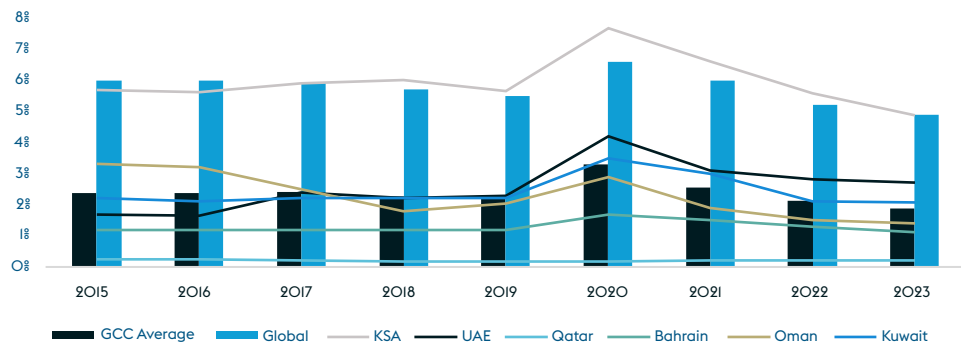
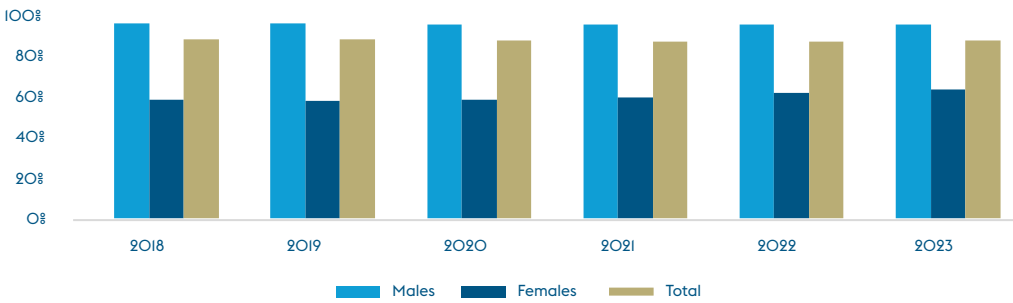




Figure 3:
Employment to
Population Ratio,
Qatar (2018-2023)

Source: Qatar,
National Planning
Council, Labor force
statistics.



Qatar has also made significant developments on other social fronts. Since the launch of QNV2030, crime rates in Qatar have decreased significantly, from 0.83 per 100 thousand of the population in 2008, to 0.33 per 100 thousand of the population in 2021.⁽²⁾



**ECONOMIC
DEVELOPMENT**

Over a 14-year period, Qatar’s economy grew from \$167 billion in 2011 to an estimated \$221 billion in 2024 in nominal terms and registered an annual growth rate of around 3% (Figure 4). Even after the pandemic plunged GDP in 2020 to its lowest level since 2010, Qatar’ economy quickly rebounded to an all-time high in 2022, fueled by the rapid expansion of the non-oil sector which surpassed 60% of GDP by 2022.⁽³⁾ Part of this ongoing expansion is in the tourism sector, which plays an important role in Qatar’s economic diversification efforts—evidenced by hosting the 2022 world cup and bidding for the 2036 summer Olympics.

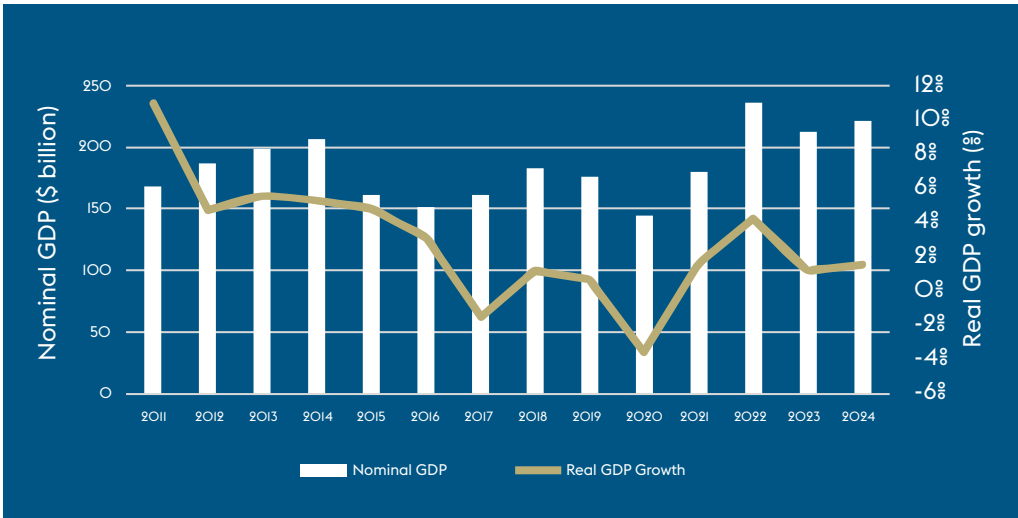
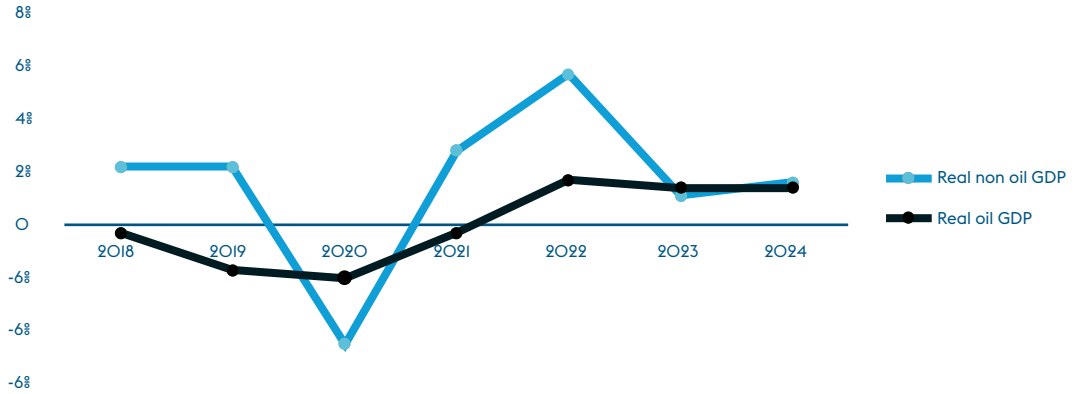


Figure 4:
Qatar GDP &
GDP Growth
between 2018
and 2024

Sources: Qatar,
National Planning
Council, National
Accounts. IMF Regional
Economic Outlook,
Middle East and
Central Asia, October
2024; IMF
Data Mapper.

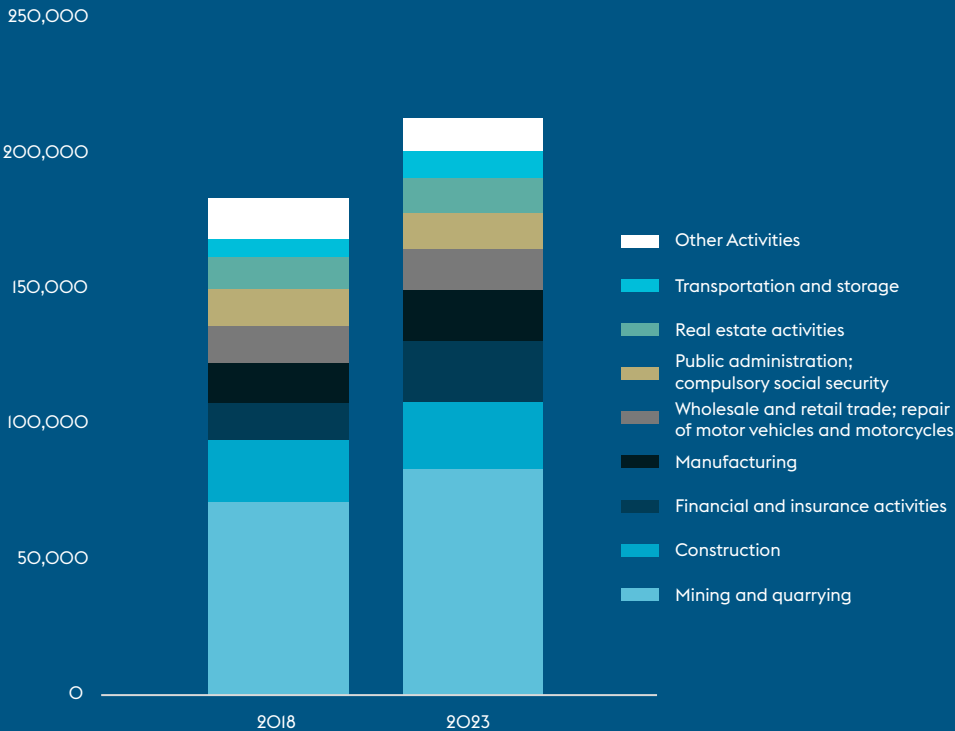
Figure 5: Real Non-oil GDP Growth vs Oil GDP Growth, Qatar (% , 2018-2024)



Source: IMF, Regional Economic Outlook, Middle East and Central Asia, October 2024.

Despite these diversification, Qatar, similar to its counterparts in the GCC, still relies to a large extent on oil to generate government revenues (80% in 2024). In this vein, mining and quarrying represents the country's most valuable economic activity, accounting for \$84 billion in 2023 (39% of GDP). This is followed by the highly active construction sector, with projects like the Doha Metro's Blue Line and the expansion of Hamad International Airport, adding \$24 billion to Qatar's economy. (Figure 6). And subtly making the biggest stride, financial and insurance activities have grown by 67% between 2018 and 2023 and now represents the economic function with the third highest return in the country.

Figure 6: Qatar GDP by Economic Activity in \$ million (2018 and 2023)



Source: Qatar, National Planning Council, National Accounts.



ENVIRONMENTAL DEVELOPMENT

Qatar's CO₂ emissions remained stable at 101 million tons between 2019 and 2022, well below the GCC average (which hovered 205 million tons). Normalizing by population size, however, reveals that Qatar has the highest volume of CO₂ emissions per capita, at almost 10 tons over the GCC average (Figure 8). This echoes Qatar's rising priority of reducing greenhouse gas emissions by 25% by 2030, a priority reverberated by the Qatari government's commitment to addressing climate change, having launched a dedicated Ministry for Environment and Climate Change in 2021. Moreover, the state's national oil company aims to incorporate Liquefied Natural Gas (LNG) into its sustainability practices, given it produces significantly less carbon dioxide than coal and oil.⁽⁵⁾

Figure 7: Annual CO₂ Emissions, GCC (million, tons, 2019-2022)

Source: Our world in data, Qatar, CO₂ and GHG Emissions.

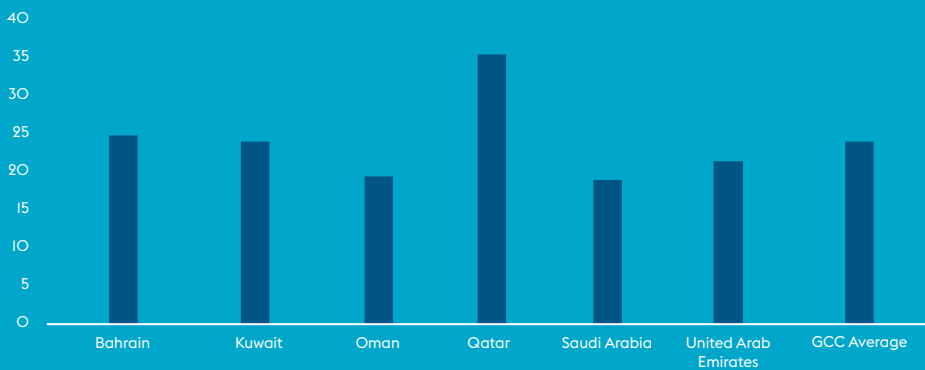
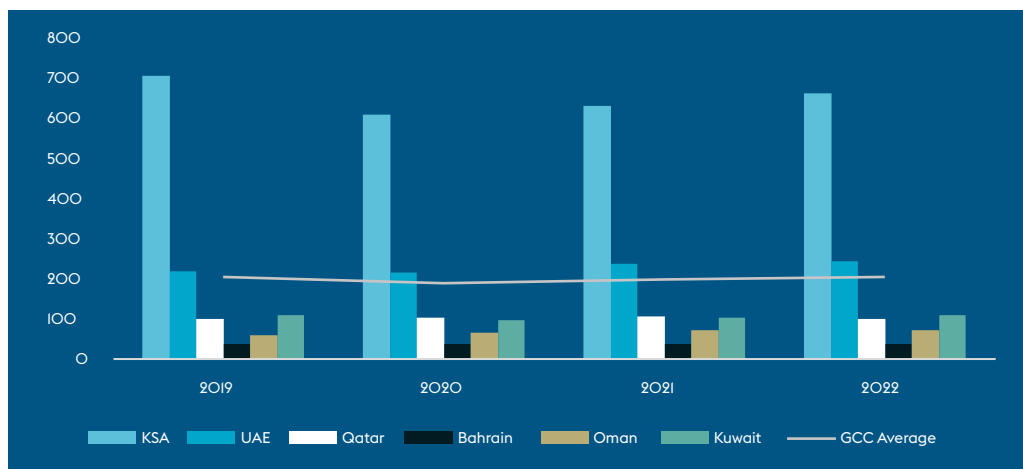


Figure 8: Annual CO₂ Emissions per Capita, GCC (tons, 2022)

Source: Worldometer, CO₂ emissions per capita

To practically achieve the goals outlined within QNV 2030, Qatar has formulated a series of medium-term strategies, which include measurable objectives, that contribute to the state's ability to achieve the pillars defined above. The strategies began with the first National Development Strategy (NDS) (2011-2016), followed by the second NDS (2018-2022), and most recently, the final NDS (2024-2030). These national strategies allow for Qatar to align the efforts of its government and non-governmental bodies with its long-term goals for the state and its people to ensure that sustainable growth and development are possible, and that the progress made benefits all members of Qatari society.

STRATEGY 1 & 2: LESSONS AND MILESTONES

Since the inception of QNV in 2008 and implementation of Qatar's first and second national development strategies, ample progress has been made across all pillars of the national vision. The first and second strategies each played a distinct role: NDS1 focused on the establishment of institutions and public entities; NDS2 emphasized the development of Qatar's infrastructure across multiple facets including economic infrastructure, social infrastructure, environmental infrastructure, and human infrastructure; while NDS3 is focusing on maintaining the success of strategies 1 and 2 and ensuring sustainability for the future.



NDS1:
**Establishment of
public institutions**



NDS2:
**Building economic and
social infrastructure**



NDS3:
**Maintain success
and ensuring sustainability.**

Milestones

On the economic development front, Qatar has managed to maintain a solid 5% average annual growth rate. It has also positioned itself among the top 3 exporters of liquified natural gas (LNG) globally, grown the size of its sovereign wealth fund, and developed a solid infrastructure. Qatar has also managed to strengthen its macroeconomic resilience by improving its budgetary and fiscal management, and setting the foundation for greater diversification and transition to a knowledge-based economy by establishing freezones and other institutions of innovation.

On the human development front, Qatar has managed to make great strides across education and healthcare. Between 2012 and 2022, Qatar's K-12 education system rose over 11 spots in global rankings, from 61 to top 50, improving faster than any other country. Labor market reforms, including setting a minimum wage and improving worker mobility and protection, have led to a fairer labor market. On the healthcare front, improvements are evident in the increased life expectancy rate to 80.3, and further compounded by Qatar having one of the lowest death rates during the pandemic.

On the social development front, Qatar has made noticeable strides, managing to maintain its welfare benefits and social protection measures while amplifying its support for vulnerable groups. Qatar has also made progress in its empowerment of women, with female labor force participation increasing by 5% between 2016 and 2021, from 37% to 42%.

Finally, on the environmental development front, Qatar has managed to considerably lower emissions in its production of LNG, gaining global recognition for its efficiency. The state has also managed to achieve great success in its recycling of water, treating 99.7% of wastewater so that it is usable for landscape irrigation.

These developments were made possible by developments across Qatar's institutions, especially in terms of efficiency and effectiveness within government institutions and services. Digitization across government services has also helped, with services provided online increasing by over 400% between 2014 and 2020.



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QATAR'S THIRD DEVELOPMENT STRATEGY



QATAR'S THIRD DEVELOPMENT STRATEGY

NDS3 aims to lead Qatar's way towards transformative growth with emphasis on institutional and sectoral reforms.⁽³⁾ This approach is based on learnings from NDS1 and NDS2, which included unclear mandates in coordination and implementation, ambiguous accountability where cross-entity outcomes and targets were concerned, limited review of central policy, and more. These lessons have led to the adoption of robust governance model for the implementation of NDS3 so outcomes are met in a timely manner.

As such, the implementation of NDS3 will occur over three distinct phases:

Phase 1 (2024-2025)

Setting the foundation by:

- Removing structural barriers to progress by implementing major policy reforms
- Building capabilities and designing large-scale initiatives

Phase 2 (2026-2027)

Building on the momentum by:

- Advancing large-scale initiatives
- Accelerating transformation by exploiting built-up capabilities

Phase 3 (2028-2030)

Sustaining the transformation by:

- Focusing on areas of established competitive advantage
- Setting the development agenda post-2030

Qatar's path towards transformation hinges on seven key strategic national outcomes set to be achieved within the coming seven years. These outcomes reflect the goals the state shall achieve with defined targets and initiatives to achieve them.

NATIONAL OUTCOMES AND TARGETS

1. SUSTAINABLE ECONOMIC GROWTH

Transforming into a competitive, productive, diversified and innovative economy through the adoption of a sustainable growth model.

Outcome	Targets
Sustainable Economic Growth	GDP growth of 4% per year
	Net a cumulative FDI attraction of \$100 billion
	NHC GDP growth rate of 4% per year
	Top 10 in business environment
	Gross expenditure on R&D of 1.5% of GDP
	Average labor productivity growth of 2% per year

➔ NDS3 places emphasis on sustainable growth through an increase in the role of the private sector, with special concentration of efforts on economic clusters where Qatar has, or can establish, competitive advantage; investment in innovation led by an increase in R&D, and the fostering of an enhanced business environment.

2. FISCAL SUSTAINABILITY

Developing a government budget that is stable, healthy and resilient in the long-run.

Outcome	Targets
Fiscal Sustainability	Overall fiscal balance of 5.5% of GDP
	Sovereign credit rating of AA/Aa2 with stable outlook
	Government expenditure growth to not exceed NHC GDP growth

➔ NDS3 aims to develop a more sustainable, shock-resistant medium-term fiscal framework, distinguished by multiple revenue streams, all of which are stable, and public expenditure characterized by efficiency and effectiveness. Focus is given to an increased share of non-hydrocarbon government revenues, led by efforts to develop stronger tax administration and compliance. Emphasis is also placed on improving the government's debt management framework to reduce risks associated with debt exposure and support balanced fiscal planning.



3. FUTURE-READY WORKFORCE

Foster citizens into individuals competitive within the global market and attract high-skilled expatriates.

Outcome	Targets
Future-ready Workforce	>46% total workforce in skilled and high-skilled jobs
	>20% Qatari workforce in private and semi-private sectors
	>18% of students graduating in STEM fields
	Average PISA score of 483

➡ NDS3 aims to create a more productive and high-skilled labor market by upskilling Qatari talent and reforming labor immigration policy to attract more high-skilled international talent. It also aims to increase the participation of Qatari citizens in the private sector and upskill Qatari citizens by revamping the education system across all stages of education.

4. COHESIVE SOCIETY

Preserve the familial bonds and values of Qatari society, foster proactive citizens, a united community, and a harmonious society to thrive in a globalized world.

Outcome	Targets
Cohesive Society	Fertility rate at 3.0
	30% of people with disabilities economically active
	Volunteering rate of 10%

➡ NDS3 aims to nurture and create strong family units by supporting the institution of marriage, positive parenting, and upholding the religious, cultural and moral values within families. It also aims to improve the lives of vulnerable groups by ensuring that they are supported and have opportunities to participate in society and the economy.



5. QUALITY OF LIFE

Provide all citizens with a high standard of living through excellent healthcare and public safety, with a flourishing cultural life that is well-suited for families.

Outcome	Targets
Quality of Life	Average life expectancy of 82.6 years
	36% reduction in non-communicable disease mortality
	Raise the percentage of adolescents who performs 150 minutes of activity to 79% for males, and 70% for females.
	Achieve a satisfaction score of visitors and residents of more than 88%
	Achieve an infrastructure component of Livability Index of 80 or more
	Traffic accidents mortality of less than 9.4 per 100,000 population

➔ NDS3 aims to achieve the highest quality of life possible for the Qatari people through a reduction in illness and illness-related deaths, achieved through better healthcare, higher patient satisfaction, stronger primary and community care and a reduction in illness-causing issues including obesity, smoking and low activity. Qatar also aims to improve infrastructure, expand public recreational spaces and introduce more sustainable options of transportation such as e-mobility and public transport. The state is also in the process of developing a cultural policy and updating regulations on event organization to ease growth. Qatar also aims to continue being one of the safest places to live by improving road safety, combating cyber-crime, tackling drug crimes and introducing measures to protect against disasters and guarantee prompt responses to emergencies.

6. ENVIRONMENTAL SUSTAINABILITY

Conserve natural resources, guard ecosystems, decrease emissions of greenhouse gases, and build resilience against potential environmental threats.

Outcome	Targets
Environmental Sustainability	Reduce GHG emissions by 25% relative to the business-as-usual scenario by 2030
	Protect 30% of land area and 30% of marine area and restore 30% of degraded natural habitats
	Reduce groundwater extraction by 70%
	Achieve a 4-Gigawatt renewable energy capacity
	Achieve a daily per capita water consumption of <310 liters

➔ In alignment with its GNV goals, Qatar aims to continue its commitment to environmental sustainability by protecting biodiversity, conserving water resources, reducing its carbon emissions, and accelerating its transition into a circular economy.

7. GOVERNMENT EXCELLENCE

Become an exemplary provider of government services to citizens, residents, businesses, and institutions, and a leading nation for effective, efficient, and transparent governance.

Outcome	Targets
Government Excellence	Rank among top 10% on Government Effectiveness Index
	>70 score on the Corruption Perception Index
	Achieve 85%+ satisfaction with government services
	Digitize 90% of government services end-to-end

➔ NDS3 focuses on achieving government excellence by transforming the ways in which public services are designed and delivered through the establishment of service level agreement frameworks, digitizing government services, enhancing and accelerating government decision-making, and strengthening accountability in public institutions.

To achieve sustainable economic growth, NDS3 outlines four key elements it aims to tackle, each having distinct targets and planned activities: energy, diversification, business environment and innovation.



FOUNDATIONS OF SUSTAINABLE GROWTH

In its NDS3, Qatar links sustainable economic development to four interconnected pillars: the energy sector, diversification, business environment, and innovation ecosystem. Each pillar is designed to contribute to sustainable forms of economic resilience and global competitiveness, pushing Qatar to prioritize cross-sectoral integration, private-sector engagement, and innovation-led development to achieve the 2030 national outcomes.

Foundations of Sustainable Growth	Energy Sector
	Diversification
	Business Environment
	Innovation

Energy Sector	Completing North Field Expansion project
	Entering emerging low carbon energy fields
	Expanding its position in low emission products by introducing a blue ammonia plant and carbon capture technologies

Diversification	Growth Clusters	Manufacturing	Logistics	Tourism
	Enabling Clusters	IT & Digital Services	Financial Services	Education
	Resilience Clusters	Food & Agriculture	Health Services	
	Future Clusters	Green Tech	Media	Creative Industries



Business Environment	Investor-friendly Regulatory Environment
	Efficient Infrastructure
	Top-notch Government to Business Services
	Increased access to funding for the private sector
	Strengthening Local Capabilities
	Strengthen Trade Ecosystem and Global Partnerships
	Fostering Competition in Target Clusters
Innovation	Incentivize businesses to increase their R&D activities
	Foster partnerships with international businesses and organizations developing cutting-edge technologies
	Leverage government entities and large state-owned enterprises to stimulate R&D and innovation activities
	Develop academic research activities



LOOKING AHEAD

LOOKING AHEAD



As Qatar enters the second half of this transformative decade, the careful implementation of the last phase of the 2030 Vision based on learnings from the past two strategies will be critical. Qatar's diversification agenda warrants a focus on maintain structural reforms that foster human capital endowments and foster a conducive business environment, which will in return determine the extent to which the economy can shift from public sector-led growth to a diversified private sector one. In this same vein, commitments to streamline regulations, broaden economic zones' benefits, and build skilled workers will be needed to drive this shift in economic identity.



Ultimately, maintaining a high standard of living across all facets for its residents continues to be a priority for Qatar in NDS3. For that, NDS3 acts as a tool to maintain the success of NDS1 and NDS2, address gaps in policy areas that did not receive equal attention or resources, and prepare Qatar for success beyond 2030. Previous gaps include developing and engaging with non-governmental and community development organizations, which Regulatory Authority for Charitable Activities—Qatar's governing body for charity organizations—recently endorsed an operating strategy for.



Meanwhile fossil resources continue to play a strategic catalyzing function for Qatar's economic transformation. Expected medium-term growth from expansions in liquefied natural gas production should sustain Qatar's fiscal and current account surpluses and give it enough policy buffers to navigate global uncertainties and instill corrective actions to ensure a sound implementation of NDS3 for a sustainable future post-2030.



Lessons

The implementation of NDS1 and NDS2 did not come without challenges however. During the first phase, the primary challenges Qatar ran into pertained to the identification of the mandates of different institutions; and the ability to meet its human resource needs for these institutions. Both challenges were successfully mitigated through the capacitation and transfer of knowledge from consultants, advisors and freelancers to Qatari bureaucrats and public servants.

During the second phase, Qatar had to maneuver through the delicate allocation of attention between the different pillars and priorities. It also ran into the challenge of the financial sustainability of its infrastructure projects; some of which remain incomplete to this day due to excessive changes to the scope of work and variation orders from foreign development companies.

	NDS1		NDS2		
Challenges	Limited human resources	Institutional mandate	Balancing priorities	Infrastructure overruns	Sustainability gap
Mitigation	Training and knowledge transfer		Resource allocation		
	Stakeholder consultation				



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