



Building a better
working world

Geographic overview



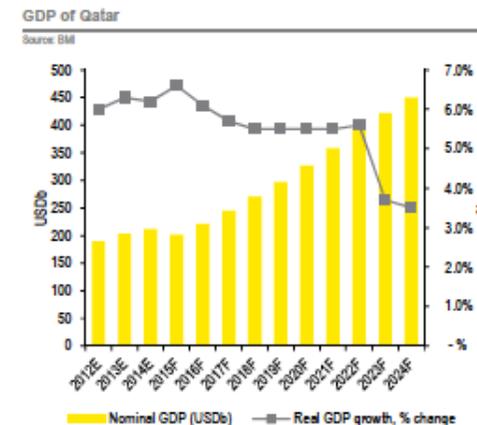
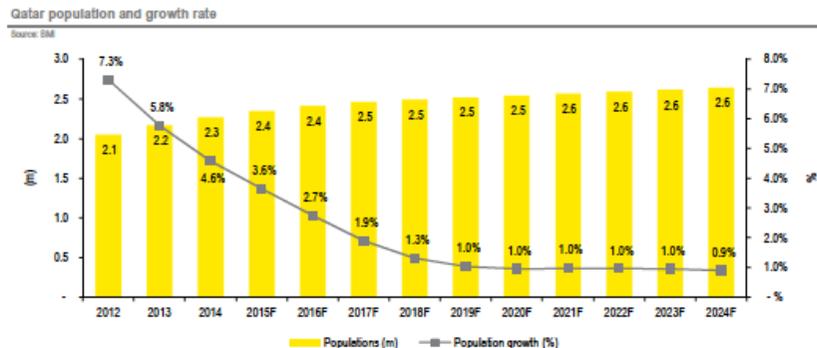
Qatar is a peninsula in the east of Arabia, bordering the Persian Gulf and Saudi Arabia, in a strategic location near major petroleum deposits. Qatar occupies 11,437 km² (4,416 sq mi) on a peninsula that extends approximately to 160 km north into the Persian Gulf from the Arabian Peninsula.



Doha's West Bay skyline in the morning seen from the Corniche Promenade. Qatar's capital is located on Doha Bay in central east of the peninsula

Population and GDP growth overview

- ▶ Qatar's historical and forecast population growth rates are illustrated in the chart below.
- ▶ According to Economic Intelligence Unit, Country Report – June 2014, real GDP growth has moderated now that the latest round of investment in gas export capacity has been completed. Qatar's economic growth rose from 2010 to 11, averaging 15.0% a year mainly due to increasing global hydrocarbon prices and the near-doubling of the Liquefied Natural Gas (LNG) output. Growth weakened in 2012 and 2013 to 6.2% and 6.0%, respectively, with a mere expansion of 1.7% and 0.1% in the oil sector in 2012 and 2013, respectively. Real GDP growth is expected to an average of 6.1% from 2015 to 2018 to offset the adverse impact of lower oil and gas prices, owing to an increase in capital expenditures,. Although the economy is still dependent on hydrocarbons revenue, growth has been driven primarily by the non-hydrocarbons sectors.
- ▶ Currently, Qatar is the world's largest LNG exporter and has the third largest gas reserves in the world.





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Economic structure and growth

Qatar's sports hosting history and pipeline

Source: EY secondary market research

1993 Annual	• Qatar Exxon Mobil Open (Men's Tennis) • Qatar Total Open (Women's Tennis)
1998 Annual	• Qatar Masters (Golf)
2004 Annual	• Qatar MotoGP
2006	• Asian Games host
2010	• World Club Handball Championship host • IAAF World Indoor Championship host
2011	• Asian Football Cup of Nations host
2011 Annual	• World Powerboat Championship Race host
2012	• Asian Cup Football host
2013	• Match Racing International Regatta host
2015	• Men's Handball World Championship host • Boxing World Championship host
2016	• UCI Road Cycling World Championships host
2018	• FIG Artistic World Gymnastics Championships host
2019	• World Athletics Championships host
2021	• FIFA Confederations Cup host
2022	• FIFA World Cup host

► Ahead of FIFA 2022, and in line with QNV 2030 plans, Government spending on infrastructure is expected to reach approximately USD150.0 billion over the next decade.

► The robust growth in GDP in recent years has been predominately driven by the hydrocarbon sector; however, as part of QNV 2030, the Qatari Government is seeking to diversify Qatar's economy with the services and construction sector set to benefit the most.

► The construction sector will remain one of the main drivers of headline growth, on the back of Qatar's vast pipeline of infrastructure investments. According to BMI, a series of infrastructure projects are in the pipeline, including: a USD20.0b investment in roads; USD40.0b to be invested in railways; USD16.0b to be spent on a new airport; USD4.0b to be invested in new stadiums; USD8.0b to be spent on a deep-water seaport; tens of thousands of hotel rooms to be built; and even a new city - Lusail. The significant expenditure on infrastructure and other projects reflects Qatar's expectation of a rapid economic and population growth.

► FIFA 2022

– Plans to build new eco-friendly, carbon neutral stadiums and refurbish three existing stadiums by increasing their capacity with an estimated USD4.0b stadium building program;

– To build 80,000 - 90,000 hotel rooms;

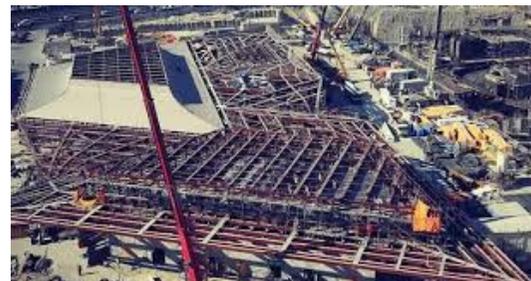
– Road infrastructure - The USD20.0b expansion programme will include construction of four express highways: Lusail Expressway, Doha Express way, Dukhan Freeway and the Doha Bay Crossing; and

– Qatar-Bahrain Causeway linking Qatar and Bahrain and will be the extension of King Fahad Causeway that connects Bahrain and KSA.

FIFA 2022 World Cup



Doha Metro Project



Economic structure and growth

Qatar National Vision 2030

- ▶ Qatar's National Vision 2030, launched in 2008, aims at creating a knowledge based economy in Qatar that is not reliant on the hydrocarbon sector. Furthermore, it defines national values and the nation's long term goals.
- ▶ Qatar's National Development strategy defines short term nationwide initiative towards building and fulfilling Qatar's National Vision 2030.
- ▶ Sector strategies define sectorial priorities that will assist in developing markets away from hydrocarbon reliance and towards knowledge based market.

Qatar National Vision 2030

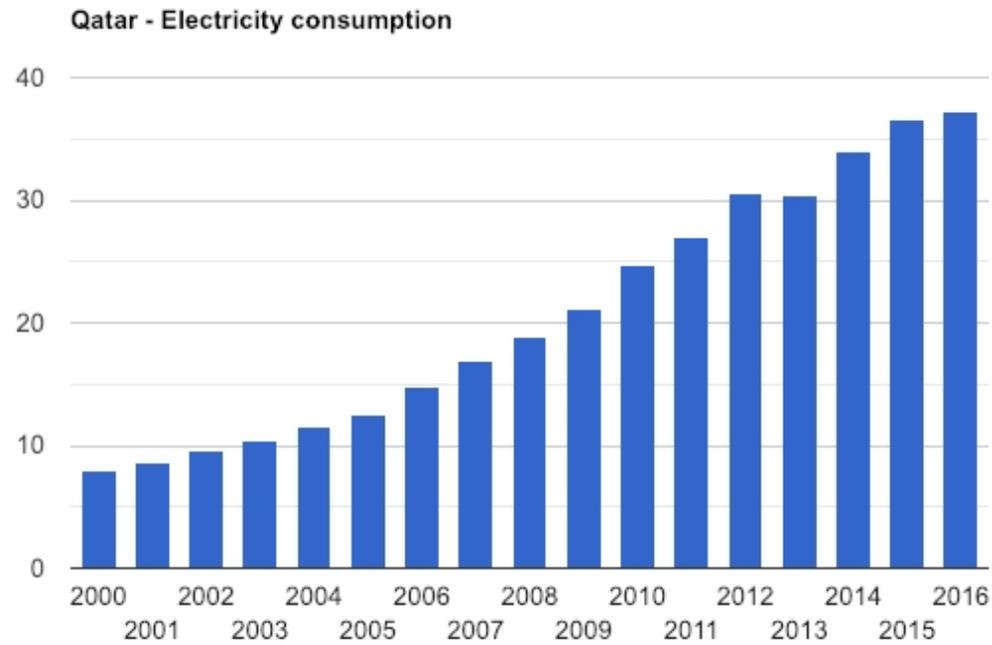
Source: National Vision Strategy



Increased tourism

- ▶ Qatar has been attracting more tourists and visitors primarily through the hosting of sporting events. The Government's strategy has been to promote sustainable tourism by improving transport infrastructure and developing attractions such as the museum of Islamic arts and the Katara cultural village.
- ▶ Qatar Tourism Authority plans to invest USD20b on tourism infrastructure as the number of tourists is expected to grow at a CAGR of 15.9% to reach 3.7m in 2022F and demand for hotels and commercial accommodation increases.

Economic structure and growth



Source: TheGlobalEconomy.com, The U.S. Energy Information Administration

H. E. Sheikh Falah Bin Jassim Bin Jabr Al-Thani



He set-up his business in 1994 and has been actively involved in determining the strategy and development of the Doha Group. His high leadership qualities allowed him to develop focused strategies and maintain an effective and efficient management style that resulted into the achievement of the planned objectives on time. As a result, the Doha Group has grown up continuously over the years to become at present one of the leading group companies in the State of Qatar.

