



Third Qatar National Development Strategy

2024–2030



Building our sustainable future



جهاز التخطيط والإحصاء
Planning and Statistics Authority
دولة قطر • State of Qatar



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Foreword



Foreword

The Third National Development Strategy for the State of Qatar 2024–2030, prepared under the guidance of His Highness the Amir Sheikh Tamim Bin Hamad Al-Thani, outlines the plan for the next phase of Qatar’s development journey towards realising the Qatar National Vision 2030 (QNV 2030).

Since the launch of QNV 2030 in 2008, the State of Qatar has made remarkable progress in its transformation towards becoming an advanced nation capable of sustaining its own development and providing a high standard of living for its people. In doing so, it has had to overcome many challenges, including the COVID-19 pandemic, volatility in commodity and food prices, supply chain disruptions, and multiple regional and international challenges.

The Third National Development Strategy (NDS3) defines bold and transformative initiatives and reforms designed to achieve the remaining QNV 2030 goals. We seek through this strategy to sustainably develop our economy to remain competitive amidst a turbulent and rapidly changing global landscape. This will entail diversifying through priority economic sectors and creating a leading investor and business-friendly environment, making Qatar a favoured destination for foreign investment and skilled talent. By implementing NDS3, Qatar will provide its citizens with the necessary skills required for them to succeed, with meaningful and fulfilling careers, in the workforce of tomorrow. We have also made sure that the strategy supports family cohesion and reflects our pride in our religious and cultural values and in our national identity. Maintaining a high quality of life for our citizens and residents is a hallmark of the strategy, as we preserve and develop the well-being achieved for our citizens while ensuring that our residents feel appreciated for their contributions to the development journey.

Issuing a strategy is only the first and easiest step. A collaborative approach with collective ownership, an openness to acknowledge and learn from our past experiences, a persistence to overcome barriers, and a commitment to excellence, will determine if our ambitions in this strategy are achieved. I urge all stakeholders—citizens, residents, businesses, as well as government entities and civil society institutions—to work together and commit wholeheartedly to the realization of this strategy. Working together with strong commitment, we can turn our collective vision into a tangible reality, guaranteeing prosperity for all those living on our beloved land and for the future generations, and propelling our nation to become among the most advanced countries in the world.

May Allah Guide Our Steps

Mohammed bin Abdulrahman bin Jassim Al Thani

Prime Minister and Minister of Foreign Affairs

Preface



Preface

Shaped by the aspirations and guiding principles in QNV2030, The Third National Development Strategy (NDS3) for the State of Qatar establishes the strategic priorities and overarching framework for the next period of the nation's development from 2024-2030. NDS3 outlines the major outcomes and targets, along with the development initiatives and reforms, that are necessary to achieve the aspirations of QNV 2030. Although NDS3 spans the seven-year horizon to 2030, it has been designed with extensive consideration of challenges and opportunities that Qatar may encounter in the decades beyond 2030 and aims to position Qatar for sustainability and prosperity in the long-term.

Development of NDS3 was based on a comprehensive assessment of past progress and lessons learned from the State of Qatar's two previous national development strategies, NDS1 (2011–2016) and NDS2 (2018–2022). This assessment highlighted the need for NDS3 to be more transformative in accelerating progress in several key areas of development, and particularly in bringing about required policy reform. Furthermore, several areas of improvement were identified related to the execution of previous strategies.

One enhancement incorporated into NDS3 was the development of a seven national outcomes with accompanying targets, that represent the main strategic priorities for the country's next phase of development, outlining the transformation required and aspiration levels for 2030. This NDS3 document summarizes what Qatar aims to achieve for each of these seven national outcomes and how. Another addition in NDS3 was a more systematic approach to economic diversification, with the identification of priority economic clusters and the development of their related strategies, detailing focused specialisation areas and key initiatives.

NDS3 also incorporated broader and more senior stakeholder engagement, including the public and private sectors, civil society, academia, and the general public. Spearheaded by ministers, more than 20 sector teams were established to develop the various components of NDS3. Over 600 government officials, alongside academic and private sector leaders, worked together in these teams, transcending traditional silos. It is intended for this spirit of collaboration and the related mechanisms to remain during the strategy's implementation phase, ensuring coordination and alignment during the detailed planning and execution of initiatives. A further NDS3 enhancement made to support execution was the alignment between planning and budgeting, which will provide more stable funding for NDS3 initiatives. A more rigorous and effective performance management process to monitor and trouble-shoot NDS3 progress will also be implemented.

The crucial implementation stage starts as of this moment, and the Planning and Statistics Authority looks forward to working with all stakeholders to successfully transform the aims of this strategy into reality.

I would like to express my deep appreciation to His Excellency the Prime Minister Sheikh Mohammed bin Abdulrahman bin Jassim Al Thani, the Cabinet, the NDS3 Advisory Group Chair and members, the Executive Groups and Task Teams for each sector, representatives of UN agencies, and members of the public that provided input. I extend my deepest gratitude to everyone involved in developing NDS3.

Dr. Saleh bin Mohammed Al-Nabit

President of Planning and Statistics Authority

Chapter 1

Towards Qatar National Vision 2030



Towards Qatar National Vision 2030

Embarking on a transformative journey towards the Qatar National Vision 2030, Qatar unveils its third National Development Strategy 2024-2030, to the Qatari people, the country's residents, and the world. Prepared under the guidance of His Highness the Amir Sheikh Tamim Bin Hamad Al-Thani, NDS3 is the third and final wave of the series of national strategies aimed at achieving the goals and aspirations of Qatar's National Vision 2030, which aspires to transform Qatar into an advanced country by 2030, capable of sustaining its own development and providing a high standard of living for all its people for generations to come.

Steered by its national vision developed in 2008 and building on its earlier two national development strategies, Qatar has made substantial strides across all the pillars of its national vision.

Economic Development: Since 2008, Qatar's economy has experienced a solid 5% average annual growth. During this period, Qatar has consolidated its position amongst the top 3 global exporters of LNG, established a world-class infrastructure backbone, and substantially grown the size of its sovereign wealth fund. These developments, along with improved budgetary and fiscal management, have greatly strengthened macroeconomic resilience. Qatar has also laid the foundation for further diversification and transition to a knowledge-based economy with the establishment of free-zones and various innovation related institutions.

Human Development: Qatar's educational landscape has transformed into a vibrant and regionally leading ecosystem of learning, offering access to high quality education and being home to branch campuses of some of the world's best institutions. Qatar's K-12 education system has improved at a faster rate than any other country, ranking in the top 50 in 2022 vs. 61 a decade ago. Notable progress has also been made towards a more fair and equitable labour market, with the introduction of reforms that set a minimum wage and improve worker mobility and protection. Healthcare outcomes have made significant strides, evident in increased life expectancy that is the highest in the region at 80.3 years, with Qatar also having one of the world's lowest rates of mortality during the pandemic.

Social Development: Qatar has strengthened its social support network, maintaining its strong welfare benefits and social protection measures. Family continued to be the backbone of Qatar's social policy. The country has also amplified its backing for vulnerable groups and individuals with disabilities and bolstered its commitment to youth

engagement through sports and cultural activities. Moreover, Qatar has made considerable progress in empowering women, with female participation in the workforce increasing from 37% to 42% between 2016-21, and a growing number of female candidates in politics. In terms of public safety and security, Qatar remains one of the safest countries in the world. Internationally, Qatar has also further strengthened its global position as a mediator for peace and a provider of development and humanitarian aid.

Environment Development: Qatar has built an energy sector globally recognized for its efficiency in liquefied natural gas (LNG) production, marked by lower emissions compared to its counterparts. Qatar has also achieved remarkable success in the recycling of water, a key scarce resource, treating an impressive 99.7% of wastewater, rendering it suitable for landscape irrigation.

Supporting progress on the four pillars above, significant advancements have been made in **institutional development**, notably the efficiency and effectiveness of government institutions and services as reflected in an improvement on the Government Effectiveness Index. The number of services provided online has also doubled and online transactions have increased by >400% between 2014 and 2020.

Despite these achievements, considerable gaps still exist to achieve the ambition of Qatar's National Vision 2030.

- While the **economy** has been robust, the development of the non-hydrocarbon economy has remained slow with growth averaging less than 2% between 2017-2022, impacted by the effects of the COVID-19 pandemic and geopolitical tensions regionally and internationally. Growth has been limited by declining labour productivity (1.5% annual decrease between 2010-2022) linked to business models that rely on low wages, barriers to

market entry and foreign investment, various regulatory impediments, and an immature innovation ecosystem. Qatar's performance on international rankings of business environment and innovation have declined over the past decade. The development of a competitive private sector has also been hampered by policies that do not encourage citizens to work in the private sector, and policies and procedures which create difficulties in attracting and retaining highly skilled expatriates. Qatar remains highly dependent on hydrocarbon revenues, with these making up 87% of government revenue between 2017-2021.

- In terms of **human development**, several areas require attention. These include enhancing key education outcomes including K-12 quality, with Qatar still lagging the OECD on PISA tests and having a low tertiary enrolment rate amongst Qatari males. Furthermore, a low proportion of university graduates are in STEM fields. These factors create challenges in increasing Qataris' participation in the private sector. Moreover, various areas in healthcare still demand focused development efforts. These include enhancing the prevention of non-communicable diseases such as diabetes, fostering greater integration between health and social care services, especially for mental health and people with disabilities, addressing the imbalances in specific medical specializations, and optimizing the sector's overall efficiency and utilization.
- On the **societal** front, Qatar faces several pressing challenges that demand attention to ensure continued social cohesion. They encompass factors affecting family dynamics, such as declining fertility rates and increasing pressure on the marriage institution. Safeguarding Qatari society's religious and cultural values in a rapidly changing and increasingly connected world will continue to be a challenge.
- Numerous areas warrant continued **environmental** development efforts. These encompass further emissions reduction across high-impact sectors, curbing national consumption and curtailing CO₂-equivalent emissions imports, bolstering biodiversity protection, improving air quality, and expanding recycling initiatives, in line with Qatar's international commitments and beyond.
- **Institutional** development remains a priority in terms of governance, quality and speed of issuance and implementation of regulations, and speed of digitization of government services. Moreover, there is a need to continue enhancing efficiency and effectiveness of

government operations and address the pervasive cost outlays. Over 50,000 Qataris are expected to enter the workforce over the next decade. Thus, maintaining past shares of government employment will become increasingly challenging, creating the need for a larger portion of private sector employment for Qataris.

The costs of Qatar's current development model are high with the potential to escalate, threatening fiscal sustainability and the welfare of future generations. The policies and incentives inherent in this model hinder private sector development, entrepreneurship, and innovation. Reliance on low-skilled labour accelerates population growth, which in turn puts pressure on environmental sustainability and social cohesion. The need to diversify the economy is only compounded by a global energy transition that continues to gather momentum.

NDS3 charts the course for the next phase of Qatar's development, which will involve addressing its current challenges and expediting progress towards a more diversified, knowledge-based, and sustainable economy, by leveraging the potential inherent in national champions and world-class infrastructure. As part of the development of this next phase, NDS3 aims to accelerate the transition towards a sustainable economic growth model where future growth will be propelled by productivity advances and invigoration of the business and innovation ecosystems. To make this happen, a more focused approach to developing and implementing bold and innovative policy reforms will be required, with significant strengthening of public institutions and human capital, to overcome entrenched barriers that have hindered progress in the past. A rebalancing of the relationship between the government and the private sector and wider society will be required, with the government playing a more enabling role.

Through NDS3, Qatar transitions into the next phase of its development, shifting towards a sustainable economic future driven by its citizens, residents, and the private sector, while maintaining our values, identity, and social fabric.



Chapter 2

NDS3 Strategic National Outcomes



NDS3 Strategic National Outcomes

The transformation that lies ahead is outlined in seven key strategic national outcomes for the next seven years. These outcomes reflect distinct ambitions to be achieved with measurable targets and initiatives to achieve them.

NDS3 Strategic National Outcomes



1. Sustainable Economic Growth

Adopt a sustainable growth model to transform into a competitive, productive, diversified, and innovative economy.



2. Fiscal Sustainability

Strengthen the long-term stability, health, and resilience of the government budget and its balance sheet.



3. Future-ready Workforce

Enable and develop citizens into globally competitive individuals and attract high-skilled expatriates as long-term partners in Qatar's transformation journey.



4. Cohesive Society

Preserve Qatar's values and strong family bonds, fostering active citizenship, an integrated community, and harmonious society to thrive in a globalized world.



5. Quality of Life

Provide quality of life for all through excellence in healthcare and public safety, with a vibrant cultural life, becoming a best-in-class environment for families.



6. Environmental Sustainability

Conserve natural resources, protect ecosystems, reduce greenhouse gas emissions, and build resilience against future environmental threats.



7. Government Excellence

Become a world-class provider of government services to citizens, residents, businesses, and institutions, and a top nation for effective, efficient, and transparent governance.

Strategic National Outcome 1: Sustainable Economic Growth

Adopt a sustainable growth model to transform into a competitive, productive, diversified, and innovative economy

Qatar will accelerate economic growth to an average of 4% per year to 2030, driven by its expanded gas production and economic diversification. As part of the diversification agenda in NDS3, Qatar aims to build a top-10 destination for investors and businesses, develop specialized economic clusters, and foster a vibrant business-led innovation ecosystem. Qatar will also focus on boosting labour productivity, with a 2% average yearly target, to drive economic growth, create high-skilled jobs that can support higher wages, and maintain a sustainable rate of population growth that does not add pressure to social fabric and infrastructure requirements. Ambition levels are reflected in the targets presented below:

Sustainable Economic Growth - 2030 Targets



Average GDP growth rate of **4%** per year



Average NHC GDP growth rate of **4%** per year



Top 10 business environment



Gross Expenditure on R&D (GERD) of **1.5%** of GDP, **60%** by businesses



Average labour productivity growth of **2%** per year



Net FDI attraction of **\$100 Billion** (cumulative)

A Sustainable Economic Growth Model

To successfully accomplish these ambitions, NDS3 calls for a transformation of the country's economic growth model, which includes:

- Increasing the private-sector role in driving economic growth, with a transition away from unsustainable government-funded growth.

- A more enabling role for the government, which includes leveraging the private sector to provide services, where it can do so more efficiently and effectively.
- Embracing bold and rapid reforms in the business environment rather than incremental improvements.
- Concentrating efforts on high-productivity and specialized economic clusters where Qatar already has or can establish a competitive advantage.
- Fostering disruptive innovation, driven primarily by the business sector.
- Encouraging the active involvement of national champions, as well as the Qatar Investment Authority, in ecosystem development to complement government efforts.

Qatar's sustainable economic growth model incorporates four key elements listed below:



Energy Sector

Qatar will further strengthen its role as a global energy leader and build a position in new emerging fields of low-carbon energy. Qatar plans to complete the North Field Expansion project (NFE and NFS) and will retain its status as one of the globe's leading and most efficient gas producer. It also plans to sustain its production from existing oil fields and utilize currently contingent resources to facilitate monetisation in the medium term.

Qatar will also expand its position in low-emission energy products by establishing a blue-ammonia plant and utilizing carbon-capture technologies.

Diversification Clusters

The second element in the sustainable growth model is the development of specialized economic clusters, that have been identified as a focus for economic diversification. Three 'growth' clusters have a primary role in making substantial contributions to non-hydrocarbon economic growth in the near term, while other clusters have an additional secondary role in enabling the growth of other economic sectors or providing national resilience. Qatar will also develop emerging clusters, that while nascent now, have future potential in the longer term.

These clusters will enable Qatar to build competitive advantages in specialized areas within each cluster, maximizing linkages across key private sector businesses,

research entities, academic institutions and government entities, over multiple economic industries. This cluster approach will improve national competitiveness by achieving a critical mass of capabilities in research, development, and innovation, with mutual reinforcement between actors in the ecosystem. The different types of clusters and their impact on the economy are summarized below:

Zoom into the diversification clusters



Growth Clusters

- ♦ **Logistics cluster:** Qatar will further reinforce its position as a global logistics hub. The country will expand its air transport activities and position its logistics cluster as a specialized e-commerce distribution hub. It will also focus on re-exporting pharmaceuticals and goods requiring cold chain infrastructure, along with high-value items such as aircraft parts. Additionally, Qatar will optimize its port operations through technological advancements and operational improvements. The plan includes incentives for digitalization and automation across various transport modes, including warehousing activities. Qatar will also revisit the regulatory framework governing logistics assets, part of comprehensive regulatory reforms.
- ♦ **Manufacturing cluster:** Qatar's chemicals sub-cluster will see expansion in both conventional and blue gas-based petrochemicals, alongside the development of an integrated plastic products sub-cluster. The metals sub-cluster will specialize in low-carbon metals and explore downstream products in the aluminium sector. Leveraging the existing energy sector, the sub-cluster for oil and gas field services will provide specialty chemicals, manufacturing, engineering, and maintenance services. Across all, Qatar will prioritize the adoption of 4th Industrial Revolution practices and promote circular economy principles to ensure long-term competitiveness.
- ♦ **Tourism cluster:** Qatar will build on its unique characteristics to become a tourism destination of choice for families. It will also bolster the Meetings, Incentives, Conferences, and Exhibitions (MICE) segment by leveraging its state-of-the-art infrastructure. Additionally, Qatar aims to cater to specialized demand segments within the thriving sports tourism market. NDS3 introduces a range of initiatives to support these specializations, including the activation of tourism policies to enhance the cluster's attractiveness and competitiveness as well as a better leveraging of the unique connectivity provided by Qatar Airways (over 20 million passengers went through Hamad International Airport in the first half of 2023). Qatar will also develop tourism assets tailored to visitor needs, elevate service excellence, create new tourism packages, and craft an unparalleled visitor experience.

Enabling Clusters

- ♦ **IT & digital services cluster:** This cluster will play a pivotal role in driving the digital economy and the widespread adoption of emerging technologies. To grow this cluster and serve and enable the local market, Qatar

will accelerate the private sector's adoption of emerging technologies through the National Applied Programs for Emerging Technology, establish the National Data & Analytics Program, advance the SMEs & Enterprises Digital Transformation Program, commercialize Qatar-based cloud capabilities on a global scale, refine the regulatory landscape, and develop a cybersecurity legal and enforcement framework.

- ♦ **Financial services cluster:** Qatar will accelerate the establishment of an insurtech hub and enact reforms, incentive programs, and awareness campaigns to increase the penetration of the local insurance market. It will also strengthen asset managers by promoting savings, expanding pension coverage, and the professionalization of pension and endowment funds. Qatar will grow digital payments through ecosystem integration to push growth in other sectors. It will increase liquidity and depth of equity capital markets through new listings and attraction of international investors. Lastly, this cluster will also support financing of Qatari SMEs by introducing new regulations, by promoting banking and alternative financing (e.g., fintech), and by launching mentoring and coaching programs on corporate governance and financial transparency.
- ♦ **Education cluster:** Qatar will strengthen its position as a higher-education hub. Qatar will build on past investments and the numerous institutions that have established a presence in Qatar. Qatar will leverage its higher education institutions to produce world-class graduates for all economic clusters. Qatar will also attract private sector investment to help absorb a future growing student population.

Resilience Clusters

- ♦ **Healthcare cluster:** Qatar aims to optimize the utilization of existing healthcare infrastructure, attract new private sector participants, and develop medical tourism. Qatar will also further develop its global positioning in precision medicine.
- ♦ **Food and agriculture cluster:** Building on its past achievements in food security, Qatar will specialize in the development and application of sustainable agriculture technologies, improve domestic food production to enhance food security, establish mechanisms to diversify trade, selectively expand storage reserves and reduce water consumption.

Future Clusters for Long-Term Competitiveness

Qatar will seed the development of other future clusters, that while nascent now, can provide future long-term competitiveness and/or build on existing areas of competitive advantage, such as a green technologies cluster and a media and creative cluster.

2030 targets for selected clusters are outlined below:

Select 2030 detailed targets



Logistics Cluster

- 6.6% real GDP CAGR
- 2.4% labor productivity CAGR
- Up to QAR25B in re-exports



Tourism Cluster

- 6M in visitors
- QAR 34B total in-dest. spend
- Up to 19M total room nights



Manufacturing Clusters

- 3.4% real GDP CAGR
- 1.9% labor productivity CAGR
- Rank 40 on CIP index



IT & Digital Services Cluster

- 7.8% real GDP CAGR
- 10% of prof. with adv. ICT skills
- 47.3K employees



Financial Services Cluster

- 35 fintechs launched
- 77% & 7% of credit to comp. & SMEs
- QAR10B AuM managed from Qatar

Business Environment

The third element in the sustainable growth model is to position Qatar to have one of the top business environments for both domestic and international investors. This will require several transformative reforms:

A best-in-class investor-friendly regulatory environment for FDI attraction:

- Harmonization of economic zones, will streamline the business establishment process, avoiding redundancy in foreign direct investment (FDI) attraction initiatives.
- Regulatory challenges in the business landscape will be

addressed, including a new movable assets law and the overhaul of the insolvency framework.

Fostering competition in target clusters

- Liberalization and privatization measures will be introduced to unlock the potential of target clusters.
- Public procurement policy reform will enhance transparency, competition, and introduce a more balanced consideration of value-add and cost.
- In-Country Value (ICV) policies will be developed to level the playing field for local companies while not compromising their long-term competitiveness.

World-class Government-to-business (G2B) services

- Business and investor process journeys across the business life cycle will be streamlined leveraging digitization and enhanced performance reporting.
- Transparency of the judicial system will be enhanced, internal procedures streamlined, staff capabilities strengthened, and overall service quality improved.

Increased private sector access to funding

- Credit facilities for a wide range of companies will be expanded by enhancing Qatar Development Bank's product suite and distribution, with a focus on entrepreneurs and start-ups.
- A new national fund-of-funds will activate investors in providing risk capital.
- Governance will be restructured for improved coordination and management of PPP projects, and PPP schemes will be revised to facilitate SME participation.
- Other NDS3 initiatives developing the financial services sector will also enhance private sector funding, including bank credit to SMEs and access to capital markets.

Strengthening capabilities of local entities

- Local firms and start-ups will be incentivized to develop their core management functions, transition to more sophisticated and shock-resilient business models and invest in upskilling their employees and operations. These efforts, in conjunction with the In-Country Value (ICV) policies, will ensure that larger companies and foreign multinational corporations (MNCs) seeking to establish a presence in Qatar can access competitive local suppliers.

Strengthening the trade ecosystem

- The customs clearance processes will be streamlined to improve efficiency, reduce costs, and save time.
- Qatar will expand trade promotion and trade financial products and services to facilitate exports and reduce risks for buyers of Qatari goods and services.
- Additional trade connections will be established, including Free Trade Agreements (FTAs), economic cooperation agreements, and Bilateral Investment Treaties (BITs) with key target markets. Moreover, there will be an emphasis on strengthening supportive partnerships through investment protection agreements and double taxation agreements.

Further developing world-class economic infrastructure

- A national asset management program will be established to ensure the long-term effectiveness, maintenance, and sustainability of Qatar's economic infrastructure.
- ICT infrastructure frameworks and processes will be optimized and enforced to maintain and further enhance its already state-of-the-art ICT infrastructure, while further strengthening cybersecurity capabilities.
- Inter-country freight connectivity will be enhanced and the efficiency of logistics infrastructure improved.

Selected 2030 targets for the business environment are listed below.

Innovation

The fourth element in the sustainable growth model is to bolster Qatar's innovation ecosystem and increase its impact in propelling productivity advancements and economic growth. Innovation will play a key role in equipping the country's new specialized economic clusters with technology-based competitive advantage while also addressing national challenges that demand innovative solutions. Notable themes include climate and sustainability, agriculture and water management, personalized healthcare, and emerging information technologies.

NDS3's innovation ambitions are structured around three primary objectives summarized below that will lead to a substantial scale-up in R&D activity especially in the private sector. Qatar aims by 2030 to double R&D expenditure as a percentage of GDP, of which 60% to be by the private sector, and rank in the top 30 on the Global Innovation Index.

- **Private sector led innovation:** Qatar will customize incentives to intensify business RDI activities within Qatar, with a particular emphasis on Local Large Enterprises (LLEs) and Multinational Corporations (MNCs). Additionally, to invigorate the innovation ecosystem's growth, strategic global partnerships will be

Select 2030 detailed targets



Regulatory Environment

- **>80%** NPS for investors
- **Top 10%** in regulatory quality index



Access to Funding

- **0.1%** of GDP in startup funding
- **70 investment** deals in startups
- **70%** VC funding from private sector



Local Capabilities

- **Top 10** rank in business efficiency
- **Top 20** in GII business sophistication sub-index



Efficient Infrastructure

- **Rank 15** on Logistics Performance Index (LPI)
- **Up to 70%** port capacity utilization
- **Rank 10** on Global innovation index (GII) ICT access



Trade ecosystem and Global Partnerships

- **6-20h** time to export and import
- **>80** companies benefitting from export credit
- **25%** of global GDP in preferential market access



Government to Business (G2B) services

- **1 day** to start a business
- **0.2-1%** of GNI per capita cost of starting a business
- **>85%** G2B customer satisfaction score



Market Competition

- **6%** CAGR in SME contribution to non-hydrocarbon GDP
- NTM frequency ratio **<30%**
- **Up to 55** total business density

forged with international businesses and organizations at the forefront of pioneering cutting-edge technologies. Finally, government entities and large state-owned enterprises will actively participate in stimulating RDI activities and facilitating market access for innovative solutions, a critical element in positioning Qatar as a hub for innovation.

- ♦ **Scientific research:** Qatar will continue to develop academic research activities aligned with the nation's economic plan and geared towards private sector needs. To this goal, strategic partnerships between academic and research institutions and the private sector will be forged to expedite the commercialization of R&D outcomes originating in academic settings.
- ♦ **RDI ecosystem development:** Regulations that facilitate R&D activities and ecosystem development will be implemented to enhance collaboration and foster the exchange of information among all stakeholders.

Selected 2030 targets across these innovation objectives are listed below:

Successful execution of NDS3 will crystallize Qatar's unique economic proposition and position. By 2030, Qatar aims to solidify its status as a global leader in the energy sector, and become a pivotal global logistics hub, a premier, family-oriented global tourist destination, a centre for specialized manufacturing, an innovation leader in strategic areas, and a preferred environment for productive businesses and private capital.

Select 2030 detailed targets



Private Sector Innovation

- ♦ 60% BERD as a % of GERD
- ♦ 60% of BERD to be business funded
- ♦ 50% of total RSE talent in businesses



Scientific Research Foundations

- ♦ Patent-to-GDP ratio of 2.9
- ♦ Publication-to-GDP ratio of 44



Effective Collaboration

- ♦ Innovation output to input ratio of 0.64 on GII

Strategic National Outcome 2: Fiscal Sustainability

Strengthen the long-term stability, health, and resilience of the government budget and its balance sheet

NDS3 will develop a more sustainable, shock-resistant medium-term fiscal framework, characterized by diversified and stable sources of revenues and efficient and effective public expenditures, and by a resilient balance sheet, characterized by healthy debt levels. Ambition levels are reflected in targets presented below:

Fiscal Sustainability - 2030 Targets



Overall fiscal balance of
5.5% of GDP



Sovereign credit rating of
AA/Aa2 with stable outlook



Govt. expenditure growth to
not exceed NHC GDP growth

Qatar aims to achieve an increased share of non-hydrocarbon government revenues, and achieving this will include strengthening tax administration capacity and efficiency, enhancing tax compliance, and implementing a proactive risk system using advanced technologies.

Qatar also aims to maintain a sustainable fiscal budget, reduce procyclicality, and enhance public expenditure efficiency and effectiveness. To this end, Qatar has already established a medium-term fiscal framework and is in the process of implementing programme-based budgeting. It will also better align planning and budgeting processes.

Lastly, Qatar aims to manage public debt and contingent liabilities to generate sufficient fiscal space for economic downturns. NDS3 will enhance the government debt management framework to reduce debt exposure risks and support balanced and stable fiscal planning, by developing comprehensive public sector and contingent liability frameworks, and implementing a sovereign green financing framework.



Strategic National Outcome 3: Future-Ready Workforce

Enable and develop citizens into globally competitive individuals and attract high-skilled expatriates as long-term partners in Qatar's transformation journey

NDS3 aims to catalyse a major shift towards a more productive labour market focused on high-skilled jobs, drawing from an upskilled Qatari talent base, and complemented by high-skilled international talent. This transformation will be supported by coordinated policy reform across economic diversification, labour, education, and social protection. Objectives underpinning this national outcome include increasing skills and productivity of the labour force, increasing Qatari participation in economic sectors of the future, and creating a talent base with stronger fundamental learning outcomes and enhanced motivation. Ambition levels are reflected in targets presented below:

Future-ready Workforce - 2030 Targets



>46% total workforce
in skilled & high-skilled jobs



>20% Qatari workforce
in private & semi-private sectors



>18% of students
graduating in STEM fields



Average PISA score of **483**

Workforce Upskilling: Qatar aims to increase the skills of its labour force and ensure that more than 46% of the total workforce is skilled or highly skilled. To this end, Qatar will:

- Reform the labour immigration policy to enhance its ability to attract high-skilled talent, moving towards a skill-based scheme, enhancing the visa issuance and hiring process for highly skilled expats, and implementing new types of visas for entrepreneurs, freelancers, students, and elite talent.
 - Enable new ways of working (e.g., remote work) and further facilitate worker mobility.
 - Drive a stronger performance-driven culture and workplace environment in the public sector. This will involve developing a new performance management system for civil service with a stronger focus on competency, productivity, and strategic objective achievement, and deploying large scale skilling programs within the government.
 - Develop appropriate plans for the government workforce to improve productivity, including nationalization, succession, and retention plans.
- Qatari Participation in Economic Sectors:** NDS3 aims to have more than 20% of the Qatari workforce in private sectors (includes companies that are fully or partially owned by the private sector). To achieve this ambition, Qatar will stimulate the private sector to increase Qatari employment in mid to high-skilled positions. This includes:
- Providing incentives and rewards for companies to hire Qatari workers.
 - Deploying large-scale upskilling programs, crafted and co-funded in close cooperation with the private sector. This involves a bridge program in partnership with national champions to create an upskilling pathway for Qatari youth into key targeted economic sectors, a wider skilling-credit program enabling Qatari youth to access necessary upskilling courses, and a targeted knowledge transfer program offering opportunities for young, employed Qataris to explore new economic sectors.
 - Adjusting the value proposition of higher education and its attractiveness to Qataris to ensure alignment with labour market. This will provide more flexibility in higher education pathways, attract specific student groups via focused scholarships, and stimulate higher employment among recent graduates through corporate sponsorship of educational programs and internships.
 - Establishing an updated governance model for education-labour market alignment, activating a labour

workforce planning committee to develop a future-looking understanding of labour market requirements in terms of specialization and competencies. This will be connected to an alignment of education graduates with market needs through strengthened career counselling and guidance for students.

A More Educated and Motivated Talent Base: Qatar aims to develop new emerging cohorts of talent with stronger fundamental learning outcomes and enhanced motivation. To achieve this, Qatar will:

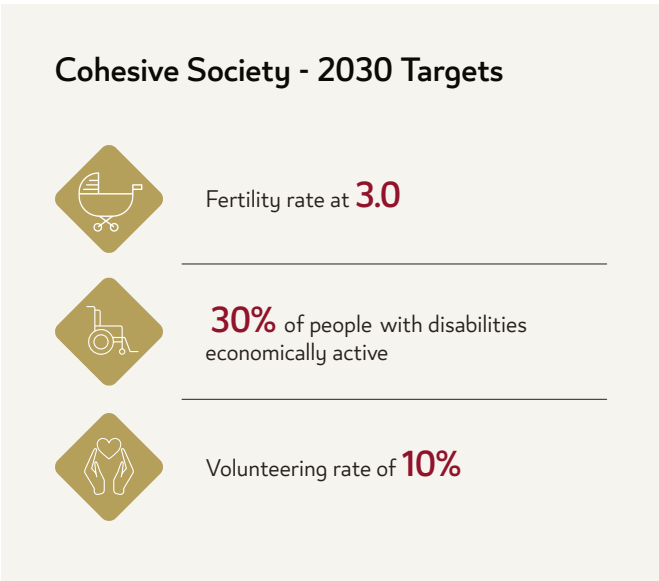
- ♦ Revamp the teaching profession journey from pre-entry to exit, including increasing the quality of college education programs preparing teaching staff, strengthening the admission criteria into the profession, reviewing the value proposition provided to all staff in the government K-12 system, and building a competency-based evaluation and professional development journey.
- ♦ Overhaul the academic oversight model for both public and private K-12 schools by redefining the governance and academic oversight framework, increasing the number of school coordinators and inspectors and improving their skills, implementing tailored school-level intervention plans, and improving quality assurance measures on private schools.
- ♦ Strengthen the behavioural guidance model and expand extra-curricular and community service activities in schools to reduce absenteeism rates and cultivate improved learning habits.
- ♦ Increase the proportion of graduates in STEM disciplines from 10% to beyond 18% and boost higher education enrolment for Qatari males with enhanced career counselling and guidance for school students.
- ♦ Strengthen early childhood education and care and launch revamped curricula for K-12 schools by updating curriculum standards embedded with future-proof competencies, introducing flexible and targeted pathways, and deploying practical and proven digitally enabled learning resources and teaching methods. (using generative artificial intelligence as example).



Strategic National Outcome 4: Cohesive Society

Preserve Qatar’s values and strong family bonds, fostering active citizenship, an integrated community, and harmonious society to thrive in a globalized world

Qatar aims to fortify the family unit, recognizing it as the cornerstone of societal strength and stability. The strategy also acknowledges the need for socio-economic integration of vulnerable segments, ensuring that no part of the community is left behind. Ambition levels are reflected in select targets below:



At the heart of Qatar’s vision is the nurturing of strong, resilient families that form the bedrock of society. NDS3 focuses on the institution of marriage, supporting positive parenting, and reinforcing the religious, cultural, and moral values within families. Qatar will support the institution of marriage through marriage support programs, marriage preparation counselling, and awareness campaigns. In addition, new training and awareness programs on effective money management and improving financial literacy will be launched to reduce the rate of indebtedness among families. Qatar will develop family policies and pro-natalist benefits, enhancing maternity leave and increasing flexible work arrangements in the public and private sectors. It will also support parental education by establishing a centre on child education to promote awareness and support parents.

Qatar is also dedicated to enhancing the lives of vulnerable groups ensuring they have the support and opportunities to actively participate in society. Through NDS3, Qatar will improve the identification of vulnerable individuals, establishing a clear governance around vulnerable groups

support, unifying platforms for services, and conducting mandatory screenings in schools. It will also empower them, developing programs for skill development, and integrating vulnerable individuals into digital communities. Lastly, it aims to increase the number of licensed social workers to 35.8 per 100,000 people and will expand its services to vulnerable segments, launching social home care for the elderly, developing national strategies for domestic violence prevention, and expanding social centres for people with disabilities (PwDs).

As a society where women lead, contribute, and flourish across all fields, Qatar’s efforts in NDS3 are geared towards increasing flexibility in the workplace to allow balance between career and family commitment, and raising awareness and recognition of women’s contributions not only in workplace but in the broader society.

Moreover, Qatar seeks to raise awareness about and celebrate its national identity, fostering the growth of local cultural content production and consumption. It also aims at nurturing a culture of responsibility and engagement, encouraging citizens to contribute through volunteering and service to the community. To this end, Qatar will expand its civic incentive programs and the support provided to productive families. It will also expand the voluntary ecosystem with the target of increasing the share of active registered volunteers out of the total population to 10%, creating more volunteering opportunities within social support entities, strengthening the operating model for volunteering, and removing legal obstacles and simplifying procedures for civil and volunteering work in Qatar.

In addition, Qatar remains committed to its vital role in the international arena, upholding peace and stability and contributing to the peaceful settlement of conflicts and disputes, including through its approach which emphasizes dialogue and mediation as the cornerstone of conflict resolution. Furthermore, Qatar continues to enhance its humanitarian and development aid initiatives, ensuring that assistance reaches those most in need promptly and efficiently. Qatar will continue to fortify international cooperation and solidarity, expand global partnerships, and actively engage in multilateral efforts under the auspices of the United Nations and relevant regional organisations, fostering cooperation and dialogue to address global challenges.

Strategic National Outcome 5: Quality of Life

Provide quality of life for all through excellence in healthcare and public safety, with a vibrant cultural life, becoming a best-in-class environment for families

A high quality of life is paramount to enhancing the well-being of Qatar’s people and positioning the country as an appealing global destination. Qatar aspires to gain global recognition as the nation with the highest quality of life, particularly for families. This aspiration encompasses key areas such as education, healthcare, entertainment, culture, environment, public safety, and a sense of belonging. Ambition levels across these dimensions are reflected in select targets below:



Healthcare: Building on its world-class infrastructure and in its effort to further enhance the overall health of its population, Qatar will launch a national healthy lifestyle and self-care plan and implement advanced epidemiological surveillance systems. These efforts will contribute to

improving the average life expectancy at birth from 80.3 to 82.6 years, reducing infant mortality to 2 per 1,000 live births, and lowering non-communicable diseases (like diabetes and cardio-vascular diseases) mortality rates by 36% to 416 deaths per 100K. They also intend to address adult obesity, smoking prevalence, and sports participation. In addition, Qatar seeks to improve patient satisfaction with care and strengthen primary and community care. This will involve enhancing the quality and availability of home/remote care, aligning healthcare capacity with population needs, empowering the community, ensuring seamless care throughout the patient journey, and fostering the growth of the digital health ecosystem. Qatar also aims to achieve an average patient satisfaction of 85% across all healthcare facilities and reduce patient safety events. To accomplish these goals, Qatar will enhance patient experience and access to clinical services, strengthen clinical standards and regulation of healthcare service delivery and patient outcomes, and enhance reporting to improve safety and quality. Furthermore, the financial sustainability and efficiency of healthcare will be enhanced through value-based healthcare services supported by private insurance schemes.

Infrastructure: Qatar’s urban development will prioritize the quality of life of its residents, implementing an effective, customer-centric engagement process that integrates the inputs of residents into urban development and infrastructure planning. Qatar will also expand public recreational spaces, ensuring their accessibility and enhancing their overall appeal. Qatar will leverage its advanced transport infrastructure built over the past decade by increasing utilization and efficiency, enhancing the citizen and resident experience, and accelerating the transition to more sustainable options, such as e-mobility and public transport. Electricity, water, and telecommunications services will continue to be maintained at world-class levels of quality, availability, and security.

Culture: To further enrich Qatar’s cultural landscape and foster a vibrant, creative ecosystem, Qatar will enhance coordination across various entities, develop a national culture policy to foster creativity, and update event organization regulations to ease growth. Qatar will also invest in talent development and increase creative output across all cultural domains through improved infrastructure, and talent training.



Public Safety and Security: Qatar is already recognized as one of the safest environments to live in globally. Several measures will be launched to reinforce this status. Qatar aims to improve road safety and reduce the traffic accident mortality rate from 7.8 to 4.9 per 100K by implementing advanced technologies and raising public awareness about traffic risks. Qatar also aims to combat cyber-crime by transforming capabilities and infrastructure. Moreover, it aims to tackle drug crimes to protect its population, by increasing trained personnel, boosting awareness campaigns, and enhancing border control capabilities. Lastly, it aims to safeguard society from potential disaster risks and guarantee swift responses to emergencies.

Other national outcomes in NDS3 will also help enhance quality of life such as providing access to world-class education at all levels, expanding entertainment offerings (as part of the tourism cluster strategy), preservation of the environment (e.g., air quality), nurturing of a cohesive society, and streamlining government services.

Strategic National Outcome 6: Environmental Sustainability

Conserve natural resources, protect ecosystems, reduce greenhouse gas emissions, and build resilience against future environmental threats

To uphold its commitment outlined in the QNV2030 to preserve the environment for future generations, Qatar will ensure environmental components such as air, water, and land are well-managed and protected. Furthermore, these ambitions serve the long-term economic agenda of the country – reducing emissions protects the competitiveness of its core economic sectors, and adapting vital resources to climate change ensures the long-term resilience of its economy. Ambition levels are reflected in select targets presented below:

Environmental Sustainability - 2030 Targets



GHG emissions reduced by **25%** relative to the business-as-usual scenario by 2030



30% of land area & **30%** of its marine area protected, **30%** of degraded natural habitats restored



Groundwater extraction reduced by **70%**



4 Gigawatt renewable energy capacity



Per capita water consumption **<310 litres/capita/day**

To attain its emission reduction commitments of 25%, Qatar will implement mitigation measures across key sectors, including oil and gas, power and water, transportation, and building, construction, and industry. These measures include scaling up advanced carbon capture and monitoring technologies, adoption of renewables and low carbon fuels, electrification, energy consumption reduction and efficiency measures, regulations, and enforcement of standards.

To protect biodiversity, Qatar will protect 30% of land area, 30% of sea area, and recover 30% of degraded natural habitats. This includes conducting spatial planning to identify and define biodiversity priority areas and develop management plans for identified areas, deploying plans to rehabilitate natural ecosystems through nature-based solutions, and enhancing the national program to combat desertification in Qatar. Qatar will also take actions to protect endangered species on land, sea, and air, addressing threats such as habitat loss, pollution, overexploitation, and climate change to ensure the health of ecosystems.

To conserve water resources, Qatar will ensure a reliable and sustainable water provision. This will comprise of the implementation of groundwater metering, protection zones, and Water Act regulations to safeguard groundwater and limit its use in fodder cultivation. Qatar will accelerate the adoption of sustainable desalination technologies like reverse osmosis. Additionally, the nation will invest in leak detection technology, conduct water balance projects to identify measures for reducing apparent water loss, and encourage sustainable water conservation behaviour in society to reduce household consumption by 33% and improve water consumption per ton of crop produced by 40%. Qatar will also maintain the quality of all water sources through regular and effective monitoring and the enforcement of consistent water quality standards across sources.

To accelerate the transition to a thriving circular economy, Qatar will integrate circular principles into industrial processes and its industrial cities. Moreover, it will nurture the growth of a circular economy market for recycled and repurposed materials by encouraging the adoption of sustainable, resource-efficient practices across various sectors. Lastly, it will introduce programs to reduce waste generation through societal behavioural change, encouraging individuals, communities, and organizations to foster a sustainable and environmentally conscious society.



Strategic National Outcome 7: Government Excellence

Become a world-class provider of government services to citizens, residents, businesses, and institutions, and a top nation for effective, efficient, and transparent governance

Government institutional transformation is essential to facilitate the realization of envisioned progress across the economic and social agendas of the country. Qatar aspires to attain global leadership in government services and digital government while also strengthening decision-making capabilities and accountability within government institutions. Ambition levels across these objectives are reflected in select targets below:

Government Excellence - 2030 Targets



Among the top **10%** on
Government Effectiveness Index



>70 score
on the Corruption Perception Index



85%+ satisfaction
with government services



90% of services
digitized end-to-end

Government Services: The government will transform the design and delivery of its services by strengthening central capabilities in innovation and digitization. This involves revamping the service catalogue, establishing Service Level Agreement (SLA) frameworks, launching a one-stop shop portal, delivering integrated services and a better customer experience at service complexes, and creating innovation labs and a Centre of Excellence for service design. This approach culminates in government plans to design and launch centralized performance tracking and monitoring systems for government services to improve customer experience, ensure quality and efficiency, and drive continuous improvement.

Digital Government: Qatar aims to position itself as a leader in digital government with the aim of digitizing 90% of its services to citizens and achieving a customer satisfaction score exceeding 85% across all its services. To achieve this objective, a specialized Centre of Excellence for data and emerging technologies, such as AI, will be established to drive several initiatives. This includes the development of a comprehensive national data governance and management framework, ensuring improved data availability and quality. Additionally, there is a strong focus on advancing system interoperability through enhanced data exchange layers. Moreover, a dedicated national data program will fuel cutting-edge use-cases, unlocking opportunities for digitization and automation across core government functions. Recognizing the importance of digital readiness, Qatar aims to equip over 90% of government employees with the necessary digital skills.

Government Policymaking: Qatar aims to enhance the effectiveness and speed of government decision-making. Central functions such as planning, budgeting, and policymaking will be reinforced by reducing mandate overlaps and ensuring clear allocations of functional accountability across the government. Qatar will place a particular emphasis on policy alignment across the various government entities in line with NDS3, also incorporating views from academia, citizens, residents, businesses, and non-governmental organisations systematically. To this end and to enhance execution, the deployment of the suitable expertise and optimal capacity will be ensured. Additionally, tools for monitoring operational and institutional performance will be revamped to actively track progress towards achieving NDS3 outcomes.

Accountability: NDS3 aims to strengthen accountability in government institutions. This will be achieved by enhancing the capabilities, governance, and operating models of independent oversight bodies. Furthermore, the challenge of limited access to up-to-date information will be addressed, ensuring easy access to government reports, policy changes, and open public data. Adherence to Service Level Agreements (SLAs) within and between governmental entities is also expected to exceed 80%.



Chapter 3

NDS3 Proposition to Stakeholder Groups



NDS3 Proposition to Stakeholder Groups

NDS3 offers all stakeholders the opportunity to participate in the county's development over the next 7 years.



Citizens

NDS3 will empower citizens to increasingly participate in economic development, providing them with a future-ready skill set and unlocking their full potential, and enabling them to enjoy a high quality of life.



Women

NDS3 will foster an environment where women can flourish, empowering them across all fields to assume their desired role economically, socially, and politically.



Youth

NDS3 will offer youth outstanding opportunities to study, engage, volunteer, and become active, productive citizens early on – while incentivizing their performance and participation in the future economy.



Vulnerable Segments

NDS3 will empower vulnerable segments of society helping ensure they play a full participatory role in our economy and society, strengthening access to and quality of education, enhancing workforce opportunities, and revamping the social protection system.



Residents

NDS3 will offer residents a high quality of life and a home for them and their families to partner in the long-term sustainable development of the country.



Business and Investors

NDS3 will offer businesses access to an economy with strong and sustainable growth and a globally leading business environment, with a level playing field, transparent and easily enforceable laws, enabling government policies, access to funding and talent, world-class infrastructure, opportunities for innovation, and an outstanding access to international markets.



International Community

NDS3 will partner to solve global humanitarian, social, and development challenges, by sharing knowledge and resources, creating the right forums and connections across the globe and enhancing the role of Qatar in bilateral and multilateral cooperation, to serve as a true bridge between cultures and peoples.

Chapter 4

Moving from Strategy to Implementation



Moving from Strategy to Implementation

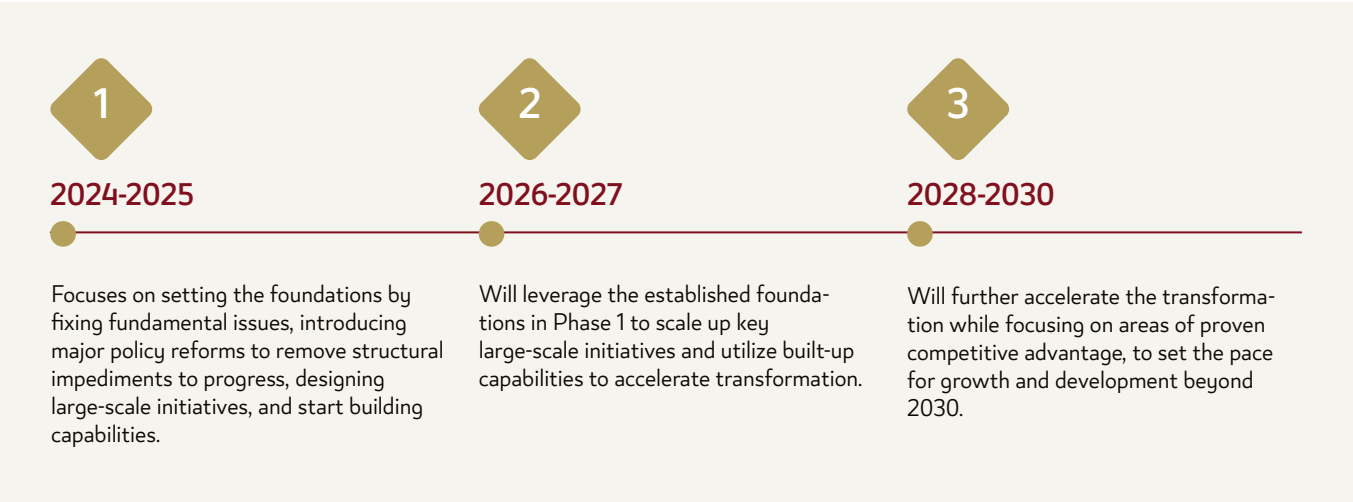
NDS3 entails a highly transformative growth model for Qatar’s economy that consequently requires substantial change institutionally and across multiple sectors.

Thus, a new transformative approach in implementing Qatar’s Third National Development Strategy is needed that will address the past learnings in implementing NDS1 and NDS2. These learnings include overlapping or unclear mandates in coordination and implementation, lack of integration between the planning and budgeting process, a reliance on monitoring instead of active performance management, unclear accountability for cross-entity outcomes and targets, and limited central policy review.

Benefiting from these lessons, NDS3 will be implemented through a robust governance model to ensure the timely achievement of the desired outcomes and ambitions.

Implementation Road Map

NDS3’s implementation plan aims to deliver transformative outcomes, ensure optimal use of resources, adeptly manage interdependencies, and maintain adaptability to counter unforeseen challenges. The implementation roadmap is divided into three phases:



Building our sustainable future





استراتيجية التنمية الوطنية
National Development Strategy

