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# Table of Contents

1. **General Information**
   - Government Structure
   - Population
   - Economic Indicators
   - Economic Sectors

2. **Economic Forecast**
   - GDP Growth
   - FDI Inflow
   - Overview of the construction sector

3. **The Construction Industry**
   - National or Key Projects in Pipeline
   - SWOT
   - Cost of Main Materials
   - Labour Cost
   - Construction Cost and Trend
   - Forms of Contracts and Payment Terms
   - Types of Available Projects
   - Business Cultures
   - Setting Up Business
   - Sectors where Singapore construction companies can engage
   - Forecast and Analysis
   - Green Mark

4. **BCA, MND, Industry Engagements and Issues**
   - Visits to Singapore by Government, Private Companies, Mission
   - BCA, MND Visits, Missions
   - Seminars, Conferences and BCA Engagements
   - Projects done by Singapore Companies

5. **Assessment**
   - Market Assessment
1. General Information

1.1. Government Structure

Rule of the state of Qatar is hereditary, following the male descendants of the Al-Thani family. It is inherited by the son named Heir Apparent by the Emir. The executive authority is headed by the Emir and the Heir Apparent, who are assisted by the Council of Ministers, while the legislative authority is vested by the Advisory Council.

The Emir is the Head of State who represents the country both internally and externally. He is responsible for the appointments and resignations of the Prime Minister and ministers by Emiri Decrees. He is also the Commander-in-Chief of the armed forces, with the assistance of the Defense Council.

His Highness Sheikh Hamad bin Khalifa Al Thani
His Highness Sheikh Tamim bin Hamad Al Thani

The Prime Minister chairs the sessions of the Council of Ministers and supervises the collaboration among different ministries. He also signs resolutions issued by the Council. Based on the proposal of the Prime Minister, the Council is formed by an Emiri Decree.

The Council of Ministers is mandated to monitor both internal and external affairs within its jurisdiction according to the Constitution and the law.

The Advisory Council comprises 35 members, two thirds of whom are elected and the remainder appointed by the Emir. It is concerned with the discussion of proposed laws, policies, state affairs, budgets for public projects and issues raised by the Council of Ministers.

The Central Municipal Council (CMC) is formed from free elections held every four years. The Council, which comprises 29 elected members representing constituencies from more than 230 regions in Qatar, holds public council meetings every fortnight with a quorum of two thirds of the members. It is an independent entity that decides its work programs and budget, make recommendations to the Ministry, monitor the implementation of laws, decrees and regulations related to urban and industrial planning and oversees the economic, financial and administrative management of municipal affairs and agriculture.
1.2. Population

Based on the Qatar Statistics Authority in December 2012, the population stood at approximately 1.84 million\(^1\). Males and females took up about 74% and 26% of the total population respectively as shown below.

1.3. Economic Indicators

According to the World Bank statistics in 2011, the Gross Domestic Product (GDP) of Qatar was US$173 billion, while the Gross National Income (GNI) per capita stood at US$80,440. This has placed Qatar in the high income economies, where the country boasted one of the world’s highest per capita incomes.

1.4. Economic Sectors

The economy of Qatar is mainly driven by the primary sector, which involves the retrieval and production of raw materials. It produces over 800,000 barrels of oil daily and is already the leading global supplier of Liquefied Natural Gas (LNG), producing 77 million tones of output annually. The income from oil and LNG exports accounts for an estimated 60-65% of the government revenue. The oil and gas sector has contributed 51.7% and 58.3% of Qatar’s total nominal GDP in 2010 and 2011 respectively.
A significant portion of Qatar’s surpluses have been invested abroad through the Qatar Investment Authority (QIA) whose aim is to strengthen the country’s economy by diversifying into new areas and reducing its reliance on hydrocarbons revenue. Qatari Diar, a subsidiary of QIA was set up in 2004 to invest in real estate projects both locally and abroad. Such efforts have led to the establishment of petrochemical, oil refining and fertiliser industries, financial services and infrastructure development, as well as the growth of Doha as a regional conference centre and the establishment of Qatar Airways and the Qatar Foundation. As a result, nominal GDP for the non-oil and gas sector reached US$73,292 million, 42.3% of Qatar’s total nominal GDP in 2011.

According to Charts 2 and 3, the relative contributions of the Mining and Quarrying Sector (oil and gas industries) in total GDP has been on an upward trend in recent years, largely due to increases in production of LNG and other gas related products. Rising prices of these products also had significant impact.
Within the Non-Mining and Quarrying sector, the finance, business services, insurance and real estate Sectors grouped under Others made the largest contributions to total GDP.
2. Economic Forecast

Qatar’s oil and gas-reliant economy has been surging at a break-neck, double-digit growth for the past few years as the country has become the world’s largest exporter of LNG as seen in Chart 5. However, it is expected to decelerate to 4.5% in 2013, the weakest rate in decade. This is due to the gloomy global growth outlook and the euro zone debt crisis that pose a risk to Qatar as they are weakening oil prices.

2.1. GDP Growth

The Qatari government plans to invest about $130 billion in its non-hydrocarbon Sector in 2012-2018 and infrastructure spending should average more than 10% of its GDP in 2012 ahead of the 2022 soccer World Cup. Robust activity in the construction sector is anticipated, primed by Qatar’s infrastructure spending plans.

2.2. FDI Inflow

The FDI inflow in Qatar in 2013 is approximately US$86.8 million.

2.3. Overview of the construction sector
The Commercial Bank of Qatar forecasted the Qatar Construction Sector to reach a market size of US$270 billion in 2020. However, during the last two quarters of 2012, the sector had witnessed delays in execution and awarding of new projects. In addition, certain non-core projects had been shelved temporarily as the focus has been shifted towards the core projects to prepare for the FIFA 2022 World Cup. As a result, this has led to a revised forecast of US$219 billion.

The value of the projects to be awarded till 2020 is US$210 billion. Out of the total investment under pipeline, US$36 billion is expected in 2013.

The break-up of announced projects depicts that about 45% is skewed towards the Infrastructure Sector, while 22.5% is towards the Construction Sector. The remaining 32.5% is divided among the Energy, Utilities and Industrial Sectors.
The value of total projects awarded at the end of September 2012 were US$6.9 billion compared to US$7.8 billion during the same period in the previous year, a drop of 12%. The value of projects awarded during the third quarter of 2012 were US$0.9 billion compared to US$2.6 billion during the same period in 2011.

### Awarded Construction Projects

![Bar chart showing awarded construction projects by quarter from Q1-11 to Q3-12.](chart.png)

3. The Construction Industry

#### 3.1. National or Key Projects in Pipeline

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Value (US$mn)</th>
<th>Contractor/Consultant</th>
<th>Expected Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Doha Port phase 1</td>
<td>879 (2mn TEU)</td>
<td>China Harbour Engineering</td>
<td>Sept 2016</td>
</tr>
<tr>
<td>Doha Metro, Green Line</td>
<td>18km</td>
<td>Hill International (PM)</td>
<td>2018-2020</td>
</tr>
<tr>
<td>Doha Metro, Red Line</td>
<td>Na</td>
<td>EC Harris, Jacob Engineering</td>
<td>2018-2020</td>
</tr>
<tr>
<td>Doha Metro, Gold Line</td>
<td>Na</td>
<td>Louis Berger (PM)</td>
<td>2018-2020</td>
</tr>
<tr>
<td>Lusail Light Rail</td>
<td>536 (30km)</td>
<td>Parsons, Aecom, Qatari D Vinci</td>
<td>2016</td>
</tr>
<tr>
<td>Lusail Expressway</td>
<td>983 (5.3km)</td>
<td>Hyundai E&amp;C</td>
<td>2015</td>
</tr>
<tr>
<td>Qatar Bahrain Expressway</td>
<td>5000 (40km)</td>
<td>KBR, Halcrow, Hochtief, Vinci, CCC</td>
<td>2016</td>
</tr>
<tr>
<td>Doha Expressway</td>
<td>135 (90km)</td>
<td>KBR</td>
<td>2016</td>
</tr>
<tr>
<td>Doha Museum</td>
<td>434</td>
<td>Hyundai E&amp;C</td>
<td>2014</td>
</tr>
<tr>
<td>Doha Festival City</td>
<td>1370</td>
<td>Na</td>
<td>2014</td>
</tr>
<tr>
<td>North Gate Mall</td>
<td>290</td>
<td>Habtoor Leighton</td>
<td>2014</td>
</tr>
<tr>
<td>Lusail Golf City Project</td>
<td>4940</td>
<td>Na</td>
<td>2018</td>
</tr>
<tr>
<td>Emir Hamad hospital</td>
<td>Na</td>
<td>Na</td>
<td>2018</td>
</tr>
<tr>
<td>Musheireb Development</td>
<td>5500</td>
<td>Hyundai E&amp;C, Gensler</td>
<td>2017</td>
</tr>
</tbody>
</table>
3.2. **SWOT**

**Strengths**

- The sector has seen continued activity in residential and commercial developments, with large-scale urban development projects under construction or in the planning stages.
- With many large and long-term infrastructure projects – such as the port, airport, railway and metro lines – under development, activity in the sector is set to continue.
- International companies are welcomed, and many are already present in the emirate.
- The tendering process is transparent for the most part.

**Weaknesses**

Power generation is at its limit in the country, and this could delay progress on some projects until new power plants are completed.

- Although Qatar is a member of the International Labor Organization (ILO), much of its labour law still falls short of ILO minimum standards. In recent years, the country has witnessed strikes in the construction sector over non-payment of salaries and poor living conditions.
- Massive over-development in the past and now, for the 2022 FIFA World Cup, means constant pressure on rents.

**Opportunities**

- After winning the rights to stage the 2022 FIFA World Cup, Qatar has committed to a massive real estate construction programme.
- The utilities sector is tackling the rising demand for power and water in the Gulf Cooperation Council (GCC) region through independent power and water projects.
- Qatar’s current transport infrastructure is operating close to capacity, and there is considerable potential for further infrastructure developments, some of which are now under way.
Threats

- Although the level of residential development has been great, global economic instability could lead to the drying up of demand – as has been the case in other GCC countries, such as the UAE (especially Dubai).
- Political disturbance, albeit in neighbouring countries, could affect foreign investment and, more seriously, oil exports.
- The number of international companies willing to invest in the emirate may decline as companies have less to spend on capital expenditure and find it harder to acquire financing.
- The glut of projects being commissioned in Qatar as a result of the 2022 FIFA World Cup and current financial strength of the country mean that in the longer term the real estate landscape will very likely be characterised by oversupply.

3.3. **Cost of Main Materials**

Refer annex A

3.4. **Labour Cost**

Refer annex B
3.5. **Construction Cost and Trend**

<table>
<thead>
<tr>
<th>Table: Qatar Construction And Infrastructure Industry Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2009</strong></td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Construction industry value, QARbn</td>
</tr>
<tr>
<td>Construction industry value, US$bn</td>
</tr>
<tr>
<td>Construction industry, real growth, % y-o-y</td>
</tr>
<tr>
<td>Construction industry, % of GDP</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
</tbody>
</table>

* 1 - BMI forecasts. Sources: Qatar Statistics Authority/ILO

<table>
<thead>
<tr>
<th>Table: Qatar Construction And Infrastructure Industry Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2015f</strong></td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Construction industry value, QARbn</td>
</tr>
<tr>
<td>Construction industry value, US$bn</td>
</tr>
<tr>
<td>Construction industry, real growth, % y-o-y</td>
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<tr>
<td>Construction industry, % of GDP</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
</tbody>
</table>

* 1 - BMI forecasts. Sources: Qatar Statistics Authority/ILO

3.6. **Forms of Contracts and Payment Terms**

In Qatar, the most common form of contract for building works are those issued by the Public Works departments through the Ministry of Municipal Affairs and Agriculture (MMAA) and the Qatar Petroleum Company (QP). These are lump sum contracts, generally using bills of quantities or specifications and drawings. These contracts are onerous and slanted towards the client, but are usually administered in a reasonable manner.

In the private sector, similar contractual arrangements are adopted. However, there are now some construction projects being let using **cost plus** or **design and build** arrangements, although these are usually for smaller scale fitting out or highly specialist works. The last 12 months has seen an increase in the number of **FIDIC-based** contracts being implemented for both private and key public sector clients. In addition, in some very long duration contracts, the government is beginning to introduce a price adjustment mechanism to allow compensation for fluctuations in market prices.
Before any contract is awarded, there are commonly a number of rounds of negotiation, during which the price and other contractual terms can be modified to respond to a reduction in contract price.

3.7. **Types of Available Projects**

The Qatari Construction Sector is seeing renewed demand, stimulated by major projects linked to the right to host the FIFA 2022 World Cup. This has helped accelerate the country’s long-term infrastructure development program, which includes a **metro and light rail system**, railways linking to a regional network and improvements to the road system. It has also added momentum to the ongoing expansion of Qatar’s hotel capacity. Construction of **12 stadiums for the World Cup** will commence in 2013, where nine will be new and three existing grounds will be expanded.

There is also an increasing focus to ensuring that the buildings and utilities to be used during the World Cup are environmentally-friendly. With the environment high on the national agenda, offering green construction options gives developers and contractors an edge in the competitive market.

3.8. **Business Cultures**

**The business culture of Qatar is typically Arabic**, in that a great emphasis is placed on personal relationships between business associates – Qatari businessmen will always prefer to do business with people they are familiar with, and who they feel they can trust. For this reason, you will probably be required to engage the services of a local agent (or sponsor) in Qatar, who’ll be able to provide you with important introductions and recommendations.

Furthermore, you will also have to remain patient during your first dealings with your new Qatari business partners – a good amount of time will be devoted to ‘getting to know each other’, before any ‘actual business’ is discussed. Don’t get impatient: long-term, personal business relationships in Qatar are certainly worth the investment of your time and energy.

The management style that predominates in Qatar is strictly hierarchical – decisions are made at the top level, and clear, direct instructions are given to staff, who are expected to follow them to the letter. Note that it is unusual to hear the word ‘No’ outright in Qatar – a more polite, indirect method of refusal is usually preferred.
Business etiquette in Qatar reflects the close relationship between personal and professional life mentioned above. Handshakes are the accepted greeting between men – be sure to shake the hand of the most senior person present first. Use Arabic titles where appropriate, such as Haji and Sheikh, to indicate your respect for your associates; however, also be prepared to engage in long, personal discussions with them. Especially in the beginning, your new business partners will be far more interested in you, as a person they are looking to befriend, than your corporate expertise or qualifications. Make sure that when discussing business, you can deliver everything you promise – verbal commitments are treated as solemnly (perhaps even more so) as written contracts in Qatar.

In Qatar, business meetings will most likely be lengthy, and subject to numerous personal digressions, and perhaps even unexpected visitors. Meetings should be confirmed shortly before they are due to take place, as business schedules can change at short notice in Qatar. Dress conservatively for business meetings (especially women), and remain patient, even if the meeting's agenda becomes abandoned – do not resort to hard-sell tactics, as they will be interpreted as aggression on your part. Do not publicly criticise or undermine any associates – if you feel the need to say something, do it in private.

It is common to exchange business cards when meeting new associates for the first time. Make sure your details are printed in Arabic on the reverse side of your card, and always spend a little time regarding someone else's card before putting it away. Business dress is smart, formal and conservative – especially for women, who must take care not to wear anything too revealing. Although nearly every building in the country is air-conditioned, you'll still want to make sure your clothes are lightweight – the heat in Qatar cannot be underestimated.

3.9. Setting Up Business

International investors should prepare for business set up formalities to take at least six weeks. Due to high government costs and legal requirement to appoint a local Qatari sponsor as a shareholder, a minimum capital of US$55,000 is required to set up a Limited Liability Company (LLC). As a result, most investors use a corporate service firm in Doha to handle paperwork and liaise with government departments. The first US$27,500 of corporate profits earned in Qatar is tax exempt and investors can freely repatriate capital, profits or dividends from the country. A minimum of two shareholders are
required to fulfill Qatar business set up requirements, where a Qatari citizen is required to hold a 51% share.

3.10. Sectors where Singapore construction companies can engage

Master planning, sub-contracting, material/service supply, facility management, airport expansion and hospitality.

3.11. Forecast and Analysis

Qatar has not seen as spectacular a real estate bubble as the UAE, its eastern neighbour. Consequently, it has not had to deal with the challenges of government bailouts and risks of bondholder losses. The Qatari real estate sector features both state-backed and private sector players, with the state-backed Qatari Diar essentially an arm of Qatari foreign investment strategy.

The 2022 World Cup presents an obvious bonanza for the sector, although it stands to reason that much growth will be organic Qatari demand, as flows of retail-minded tourists are more likely to be directed to the UAE (Dubai). Despite our in-country sources having limited information on vacancy rates, it is clear that the current effect of hosting the 2022 World Cup is an increase in demand. This, together with tougher lending conditions slowing development projects, should help take up some of the supply in the short term.

The al-Wakrah region of Qatar had the largest number of real estate transactions in the country in August 2011, according to the Gulf Times. Al-Wakrah had 150 of the country’s 406 total deals. Doha was second with 93, and the al-Rayyan region was third with 75. Approximately 136 of the real estate deals in al-Wakrah involved unused land. The total value of real estate transactions in Qatar during August 2011 was US$3.8bn. Century 21 Qatar puts the number of real estate transactions in May and June 2011 at record levels compared to the same period in 2010 and points out the value of transactions reached more than QAR1bn at the end of May.

Competition in the industry has increased in light of the amount of money involved in 2022 World Cup related infrastructure projects, and this has attracted firms from overseas, according to Jones Lang LaSalle. The industry expert warns, however, that demand is likely to be rather less than the huge amount of new supply coming on to the market. One element which has not been factored into this estimate is the expansion in hotel rooms, with plans to add at least 45,000 rooms to meet FIFA requirements.
Qatar’s hosting of the 2022 World Cup will provide opportunities for a wide range of construction industry players, from smaller local companies to regional players and even large international contractors. Qatar’s construction industry is dotted with a few domestic companies, of varying capabilities. Most are playing a part in the larger construction projects under way in the sector; however, this is generally in cooperation with major international companies.

Although non-domestic companies have a decent chance of benefiting from World Cup projects, local companies will be almost certain to experience a boost in contract opportunities. Barwa, Al Jaber Engineering and Qatari Diar will likely see considerable benefits from the investments across stadia, hotels and transport. Qatar’s investments ahead of the games will not only fast track all projects planned for the country over the next two decades, but will also create in the country such sophisticated and extensive infrastructure coverage that it is difficult to see what contracts will be left to hand out, other than maintenance and small-scale projects.

In addition, the significant ratio of spending to GDP and construction industry value, by far the highest amongst recent hosts of sporting tournaments (426% of 2020 construction industry value), will precipitate a major boom in the industry, but could also result in just as big a slump. Therefore, while the advice is for companies to come up with a comprehensive entry strategy, an exit strategy will also be essential in order to navigate potential fallout.

### 3.12. Green Mark

Qatar has its own Green Mark known as the Qatar Sustainability Assessment System (QSAS). It consists of several criteria that are associated with environmental goals. The goals set for the buildings in Qatar are as follows:

- The building's planning shall incorporate urban considerations.
- The building's development in relation to existing site conditions shall be controlled.
- The building's depletion of fossil energy over its service life shall be controlled.
- The building's impact on the overall water resource shall be controlled.
- The impact of the building's use of materials on the environment shall be controlled.
- The building's indoor environment shall be controlled.
- The building's cultural and economic value shall be maintained or enhanced.
- The building's management and operations plans shall be defined.

Each goal constitutes a major category in QSAS, which include Urban Connectivity, Site, Energy, Water, Materials, Indoor Environment, Cultural & Economic Value and Management & Operations. A score is awarded to each criterion based on the degree of compliance. Scores range from -1 to 3 or 0 to 3, depending on the criterion's level of impact on the environment. The scores are multiplied by a weight and a cumulative final score is determined.

4. BCA, MND, Industry Engagements and Issues

4.1. *Visits to Singapore by Government, Private Companies, Mission*

Qatar Central Municipal Council visit to BCA – May 2012

4.2. *BCA, MND Visits, Missions*

BCA business mission in Nov 2011 and Sep 2012

4.3. *Seminars, Conferences and BCA Engagements*


4.4. *Projects done by Singapore Companies*

<table>
<thead>
<tr>
<th>Company</th>
<th>Activities</th>
<th>Company</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keppel FMO</td>
<td>Facilities Management (Katara cultural village)</td>
<td>Yong Nam</td>
<td>JV between Qatar Foundation and Singapore Exhibitions (Singex)</td>
</tr>
<tr>
<td>Company</td>
<td>Activities</td>
<td>Company</td>
<td>Activities</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------</td>
<td>----------------------------------</td>
<td>----------------------------------------------------</td>
</tr>
<tr>
<td>Keppel Seghers Engineering Pte Ltd</td>
<td>Sewage Treatment Plant, Domestic Solid Waste (Doha North)</td>
<td>CPG</td>
<td>Consultancy</td>
</tr>
<tr>
<td>Keppel Offshore Marine</td>
<td>JV with Nakilat</td>
<td>United Group Ltd</td>
<td>Facilities Management</td>
</tr>
<tr>
<td>Jurong Consultants</td>
<td>Masterplanning</td>
<td>Alfasi Singapore</td>
<td>Steel work services</td>
</tr>
<tr>
<td>Surbana Masterplanning</td>
<td>Masterplanning</td>
<td>Meinhardt (Singapore) Pte Ltd</td>
<td>Design, PM and Consultancy</td>
</tr>
<tr>
<td>CNA Technologies</td>
<td>Building management</td>
<td>Metaplas Engineering</td>
<td>Stainless steel fabricator</td>
</tr>
<tr>
<td>Somerset</td>
<td>Managing Somerset Doha property</td>
<td>Thakral Global Services Co. WLL</td>
<td>Trading, Automation for Oil and Gas Services</td>
</tr>
<tr>
<td>Frasers Hospitality</td>
<td>Serviced Apartment to be opened</td>
<td>Pteris Global (Formerly- Interroller)</td>
<td>Airport Systems (Baggage and Catering Systems)</td>
</tr>
<tr>
<td>Multiheight Scaffolding</td>
<td>Scaffolding Services</td>
<td>Franklin Offshore Qatar</td>
<td>Oil/Gas Marine Services</td>
</tr>
<tr>
<td>New Art (Overseas) LLC</td>
<td>Interior Fit-out</td>
<td>Falcon Incorporation</td>
<td>Interior Fit-out</td>
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<td>Qatar Jemix Jasscan</td>
<td>Oil/Gas Marine Services</td>
<td>Mini Environment Service Pte Ltd</td>
<td>Foreign Workers Dormitory and Services</td>
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<td>CBM-Afrina</td>
<td>Facilities Management</td>
<td>Indeco Qatar</td>
<td>Facilities Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Great Eastern Building</td>
<td>Contracting</td>
</tr>
<tr>
<td>DP Architects</td>
<td></td>
<td></td>
<td>Architecture Services (Lusail waterfront and Festival City)</td>
</tr>
</tbody>
</table>
5. Assessment

5.1. Market Assessment

The viable sector that Singapore companies can engage is broad as Qatar is pushing ahead in the preparation for the World Cup 2022. Qatar will look to developed nations to model its physical and business infrastructure and lacks expertise and experienced manpower in executing the mega projects. Singapore companies with the relevant capabilities can fill these market gaps as system integrators with management know-how. Many downstream opportunities arise from mega development like the sports and tourism facilities with Singapore companies like Keppel FMO as the facility manager for the Katara Cultural Village. It is critical for Singapore companies to start establishing connections and network early to catch the wave of construction activities starting from 2015.

The biggest source of competition for contracts will come from the large regional and international players: Saudi Binladin Group, Arabtec, Galfar Engineering, Orascom Construction Industries, Consolidated Contractors Company, Hyundai and Daewoo are just a few examples. The region's biggest companies are already jostling for position in Qatar. The same can be said of the building/raw materials providers. Overall, the business environment is rather easy to navigate. However, similar to other GCC countries, overseas companies require local partners in their venture.

6. Travel and other information

6.1. IES office in Doha

International Enterprise Singapore, c/o Embassy of the Republic of Singapore, New West Bay Area (Off Lusail Street), P.O. Box 37610, Doha, Qatar.

Tel: +974-44553421
Fax: +974-44553802
Centre Director: Mohd Moinuddin
6.2. **Flight connectivity**

Direct flight to Doha by Qatar Airways.

6.3. **Currency**

Currency exchange - 1 SGD equivalent to 0.31 QR

6.4. **Visa**

Visa application is processed upon arrival for 100 QR