

DEFENSE & SECURITY IN QATAR

MILITARY PARTNERSHIPS

- Qatar has been a major defense partner to the US, starting most notably in 1991, when the US-Qatar Defense Cooperation Agreement (DCA) was signed.
 - The DCA has been renewed twice, each time for 10 years in 2002 and 2013.
- The US and Qatar share a strong partnership through their involvement in the 33-nation Combined Maritime Force (CMF) Task Force-152.
 - Qatar's Navy and Coast Guard make up the largest maritime contribution to this task force.
- In January 2019, the second annual "Strategic Dialogue" between the US and Qatar took place in which both countries reaffirmed their intent to combat international terrorism.
 - The Anti-terrorism Assistance (ATA) training program provides US assistance to local law enforcement agencies of partner nations to build their knowledge and protection in areas such as aviation security, terrorism investigations, and the protection of soft targets.
 - An MOU was signed to coordinate efforts on the expansion of Al Udeid Air Base in Qatar which would help increase operational capabilities of US forces.

MILITARY & DEFENSE CURRENT PROJECTS

- In addition to the expansion of Al Udeid Air Base, Qatar aims to increase its naval forces from approximately 3,000 to 7,000 by 2025.
- In June 2007, Qatar began working on the world's largest "greenfield" port-development project: the Hamad Port.
 - This commercial port, south of Doha in Al Wakra, will include a port, a naval base, and a canal for the planned Qatar Economic Zone 3.
 - This project is part of the Qatar National Vision 2030 and will span a total of 26.5 square-kilometer area.
 - The port was inaugurated in 2017 and construction for the new Qatar Amiri Naval Base began earlier in 2019.
 - The project includes a quay wall and basin revetments, infrastructure, utility buildings, security facilities, a helicopter airfield, and an access bridge.
 - The boundary is secured with bulletproof-glass buildings, detention facilities, and security gates; the base will have special defense and surveillance towers too.
 - The base will accommodate approximately 6,000 individuals with 200 buildings and will house the recent military purchases by the State.

QATAR-US DEFENSE ACQUISITIONS

- France was Qatar's main arms provider in the 1980s and 1990s. However, \$25 billion in new US FMS and a predicted \$40 billion in the next 5 years of FMS purchases show a shift towards US arms.
- Since 2009, Qatar has made major purchases of US-made defense equipment, along the following timeline:
 - 2009: Qatar introduces 2 C-17 Globemasters to its fleet
 - 2012-2013: US sells \$23 billion in arms to Qatar including:
 - Patriot Configuration-3 Missile Fire Units & Missiles, UH-60M Black Hawk Helicopters, MH-60R & MH-60S Seahawk Helicopters, AH-64D Apache Block III Longbow Helicopters, Hellfire Missiles, Javelin Guided Missiles, Large Aircraft Infrared Countermeasures Systems, Terminal High Altitude Area Defense Fire Units, A/N FPS-132 Block 5 Early Warning Radars, C-17 Globemaster III Equipment and Support, M142 High Mobility Artillery Rocket System, M57 Army Tactical Missile System Block 1A T2K Rockets, M31A1 Guided Multiple Launch Rocket System Rockets
 - 2014: US sells Qatar Apache attack helicopters, Patriot Missile Systems, and Javelin air-defense systems valued at \$11 billion
 - 2015: Qatar purchases 4 Boeing C-17 Globemasters, doubling its fleet
 - 2016: US State Department approves FMS to Qatar for RIM-116C-2 Rolling Airframe Missiles worth \$260 million

QATAR-US DEFENSE ACQUISITIONS

- Qatar major purchases of US-made defense equipment, continued:
 - 2016: US State Department approves FMS to Qatar for Javelin Guided Missiles worth \$20 million
 - 2016: US State Department approves FMS to Qatar for Mk-V Fast Patrol Boats worth \$124.02 million
 - 2016: State Department approves possible FMS to Qatar for the continuation of logistics support services and equipment at an estimated cost of \$700 million to include:
 - Contract labor for sustainment engineering, on-site COMSEC support, support equipment repair and spares replenishment, supply chain management, maintenance and back shop support
 - 2016: US approves sale of 72 F-15QA fighters to Qatar worth \$21.1 billion
 - 2017: Qatar purchased 36 F-15 aircrafts and early warning radar systems (of the 72 approved F-15QAs)
 - 2018: Qatar purchased 5,000 Advanced Precision Kill Weapons Systems II Guidance Sections for use on Apache fleet
 - 2019: US approves possible FMS of 24 AH-64E Apache Attack helicopters and related equipment for an estimated \$3 billion

OPPORTUNITIES FOR VIRGINIA COMPANIES

Equipment & Infrastructure

- Qatar relies heavily on US defense contractors for maintenance, upkeep, and training for all of their purchased military equipment.
- Part of the package of Qatar's 2016 \$21.1 billion purchase of F-15QA Fighters is US-based Lead-in-Fighter-Training, associated ground support, mission-critical resources and maintenance support equipment, personnel training, and simulators so the local forces can be well prepared for the arrival of the aircraft.
- The \$1.8 billion expansion of Al Udeid Air Base provides and opportunity for assistance in services and contracting as Qatar aims to add new family housing facilities for over 200 officers.
 - Construction efforts will include recreational facilities, barracks, and security service buildings.
 - The goal is to improve the quality of life of troops stationed at Al Udeid.

Border Security

- Qatar has low population borders and its only land border is with Saudi Arabia, thus there isn't a major need for border security assistance.
- Up until 2017, the only land border crossing between Qatar and Saudi Arabia was in the town of Abu Samra on the Qatari side, which is protected by the Permanent Committee for the Management of Abu Samra Border Port.
- Halul is Qatar's most important island, located 56 miles east of Doha. It is used as a storage area and loading terminal for oil. A main Qatari Navy base and a Coast and Border Security Base is located on the island.

OPPORTUNITIES FOR VIRGINIA COMPANIES

Physical Security & Training

- Qatar has established various committees to enhance its security efforts.
 - The Centre for Strategic Security Studies provides strategic security research to ministry departments and assesses the reality of emerging security issues.
 - The Permanent Committee for Emergency specializes in preparing plans to face potential natural, fire, or oil disasters, as well as other emergencies.
- Despite Qatar's small police force, they have acquired top technologies like Porsche Panamera police cruisers to help secure Qatar as one of the safest countries.
- The upcoming 2022 World Cup brings with it new challenges to national security.
 - One way Qatar plans to handle the influx of people is by having experience international police officers present. Officers from participating countries will be drawn in to help in maintaining order.
- Qatar has a Police College which specializes in scientific and practical training in police science and legal areas, aimed towards future officers.
- The National Academy for Professional Training provides professional consultation and training in fields including aviation, maritime, military, and security sectors.
 - The semi-government owned organization has over 400 students in the local and international locations, including the US. They provide 74 security courses, 95 military courses, 82 police courses, 27 aviation courses, and 15 IT courses.
- In terms of physical security, with the upcoming World Cup, Qatar would benefit from equipment and technology that could help secure buildings and stadiums. Examples:
 - Control rooms with integrated systems and video surveillance, security rooms, image analysis and processing software, metal detectors, barriers, and CCTV to name a few.

OPPORTUNITIES FOR VIRGINIA COMPANIES

Cyber Security

- Qatar has been a victim of cybersecurity breaches in the past and has thus worked to strengthen its cyberspace and relating data.
- Sectors like finance and energy are increasingly adopting ICT solutions to better their operations and transfer their data.
- The Qatar National Cyber Security Strategy (NCSS) was developed by the National Cyber Security Committee (NCSC) to address current and emerging threats.
 - The NCSS has 5 main objectives: safeguard national CII, respond to and resolve cyber incidents, establish a legal and regulatory framework, foster a culture of the appropriate user of cyberspace, and develop national cyber capabilities.
- The government set up the Qatar Computer Emergency Response Team (Q-CERT).
 - Q-CERT is developing a Threat Monitoring System using data from SPAMTRAPS and HONEYPOTS to create an early warning system for cyber threats and a Malware Analysis Lab to investigate digital footsteps of cybercrimes.
- The Botnet Eradication project focuses on sensitive government, corporate, and individual data and how to detect compromised systems, notify infected IPs, remediation efforts, and blocking IP addresses which are defined as bot.
- With these initiatives and World Cup 2022, the Ministry of Transport and Communications launched a new cyber security framework.
 - With the help of international suppliers, this framework will align ICT programs with the best digital information protection practices.

KEY PLAYERS IN THE MARKET

- The US is Qatar's primary trading partner, providing Qatar with nearly 20% of all imports.
- More than 753 US companies have been established in Qatar, with 118 100% fully owned by the American partner.
- American companies are very active in Qatar's defense sector, with many of the construction firms operating on an around Al Udeid base being American.
- Base services are mainly provided by American companies.
- Qatar's Deputy Prime Minister & Minister of State for Defense Affairs has made clear that Qatar's defense forces will be comprised of 80% American-made equipment and American training.
- Despite a strong US presence in Qatar, Turkey, China, France and the UK play an active role in Qatar's private and defense sectors.
- Major US defense companies in the market (not exhaustive):
 - Boeing
 - Collins Aerospace
 - DynCorp International
 - Harris Corporation
 - KBR
 - Lockheed Martin
 - L3 Technologies
 - Raytheon
 - RosserECG Joint Venture

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ENTERING THE MARKET

- As of 2019, Qatar has new investment laws that allow foreign companies to directly invest in almost all sectors of the economy, including security and defense.
- Foreign companies no longer need to have a local partner or act in a JV.
- Non-Qatari investment projects are to be exempt from customs duties on imports of machinery and equipment needed for their establishment.
- The Qatar Free Zone Authority was established in 2005 to promote foreign direct investment in its 2 zones.
 - Ras Bufontas is a 400-hectare airport free zone area with recommended industries of logistics, consumer products, light manufacturing, services, technology and application, and pharmaceuticals.
 - Umm Alhoul is a 3000-hectare port free zone located adjacent to the Hamad Port with recommended industries of maritime industries, polymers and plastics, advanced manufacturing and logistics.
 - Locating with the free zones allows for 100% foreign ownership, 0 custom duties and tax exemptions for corporation tax and individual personal income.
- Having a local partner has its benefits such as intimate local knowledge of the market, infrastructure and capital, and established connections and operations.
- Local partner: Barzan Holdings
 - Established in 2018, Barzan Holdings is a strategic subset of Qatar's Ministry of Defense and a commercial gateway for the defense industry.
 - It partners with leading international companies to collaborate on R&D, facilitate knowledge transfer, and create innovate defense and security technology.
 - Barzan helps advise the Ministry of Defense's procurement of strategic projects conducted by the Ministry to maximize design and implementation effectiveness.