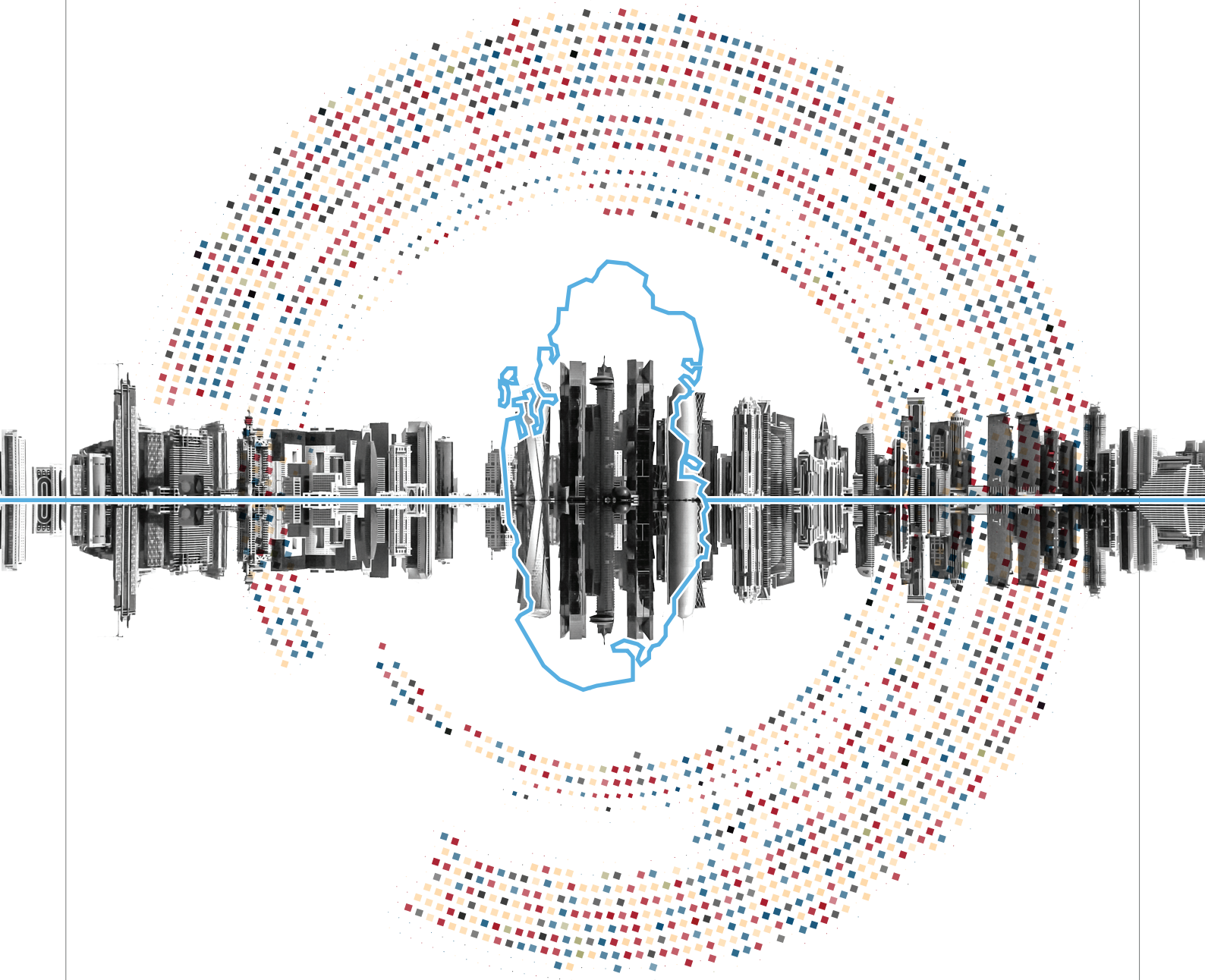


COMMUNICATIONS REGULATORY AUTHORITY  
ANNUAL  
REPORT 2014/15







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Qatar's Communications Regulatory Authority Annual Report

2014/15





HH Sheikh Tamim Bin Hamad Al-Thani

The Emir

State of Qatar

THE HALLMARKS OF QATAR'S  
REGULATORY FRAMEWORK  
WILL REMAIN **PREDICTABILITY  
AND CLARITY**, ENSURING  
THAT QATAR CONTINUALLY  
ENHANCES ITS RICH  
LANDSCAPE OF SERVICES.

## MESSAGE FROM THE PRESIDENT



MOHAMMED ALI AL-MANNAI  
PRESIDENT

## THE ESTABLISHMENT

of the Communications Regulatory Authority as an independent regulatory authority in February 2014 underscores the continuing commitment of Qatar's leadership to fostering competition and promoting consistency, certainty, transparency, and flexibility across the regulatory framework. Our ultimate goal is to contribute to Qatar's transition to a smart, digitally connected nation with a growing, diversified economy and to ensure that individuals, businesses, and government have access to a broad range of innovative and reasonably priced communications services. On behalf of CRA I extend our gratitude and thanks to HH The Emir, Sheikh Tamim Bin Hamad Al-Thani for his visionary approach. CRA is also grateful for the support and co-operation it receives from all ministries and government bodies as it carries out its mandate.

In its three-year regulatory strategy (2013–2016), CRA sought to improve the competitive environment as well as the clarity and predictability of the regulatory framework, while safeguarding the interests of consumers. In addition, CRA pursued efficient management of public resources and support for Qatar's transition to a connected digital economy. This regulatory strategy will stay in place for the intended timeframe as we develop the strategy for the next three-year period, continuing to consult with stakeholders and Qatar's leadership about future regulatory directions.

For us, the key to success moving forward is to accelerate a dialogue with all relevant players in the sector to ensure that we all understand the "big picture" for the sector's future, and that all stakeholders' roles and responsibilities—and expectations—are clear. Future regulation should ensure that the investments of all players complement one another so that consumers benefit, and it must also address security concerns of individuals and businesses.

The hallmarks of Qatar's regulatory framework will remain predictability and clarity, ensuring that Qatar continually enhances its rich landscape of services. In addition, building the next-generation platforms to support an effective, modern, and coherent ecosystem for smart cities and integrated e-health systems will require coordination and cooperation among all players. CRA will continue to work closely with the Ministry of Transport and Communications to develop and put in place a new communications and postal law to ensure that CRA is able to fulfill its mandate and develop the regulatory framework that contributes to a smart, digitally connected, and economically diverse nation.

As CRA's mandate extends to regulating access to digital media, CRA is well positioned to be a pioneer in relation to Internet services. CRA will be assessing sector dynamics and balancing policies and regulations that consider the economic impacts of digital media on telecommunications service providers, OTTs, platforms, and applications. To support this approach, CRA will coordinate and cooperate with other regulators in the region to foster the development of a buoyant, smart economy.

In the pages of this annual report, you will read about the progress we have made over the past two years—including enhancing a growing and healthy communications sector—as well as our approach for the future. We look forward to many more accomplishments in the years to come.

# INTRODUCTION

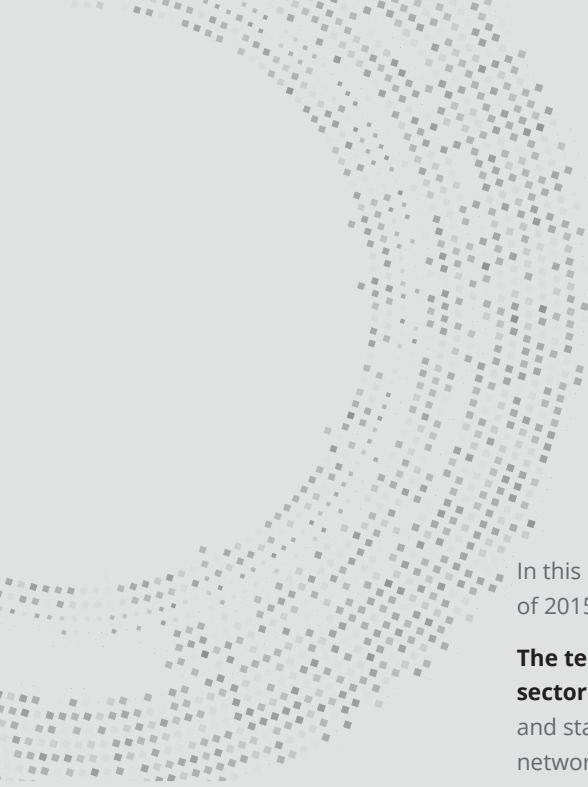
Building on a decade-long commitment to a buoyant telecommunications sector and a regulatory environment that fosters a knowledge economy, in February 2014 Emiri Decree 42 established the independent Communications Regulatory Authority (CRA) to continue to bring a broad range of innovative, high-quality, and reasonably priced communications services to individuals, businesses, and government.

This move to an independent regulatory authority puts Qatar in line with other leading countries in the region and around the globe.

CRA's mandate is to use a range of regulatory and enforcement powers to ensure that competition in the communications sector thrives and consumer rights are protected, including:

- Regulate the communications sector, postal services, and access to digital media
- Encourage competition and prohibit or minimize anti-competitive practices, and prevent misuse by any person or entity of its market-dominant position
- Ensure the efficient management and allocation of scarce resources such as radio spectrum, numbering, and domain names
- Protect the rights and interests of consumers and service providers, promote transparency, and provide advanced, innovative, and quality services at reasonable prices to meet the needs of the public
- Set quality of service standards and monitor compliance
- Manage a dispute resolution system that is transparent, fair, swift, and effective
- Set conditions and criteria for licensing and approval for telecommunications and information technology services, access to digital media, the use of frequencies, and the issuance of related licenses and approvals; and ensure compliance with their conditions
- Set standards and procedures necessary for Type Approvals of telecommunications devices and equipment, including devices and equipment that have already been approved by other countries; and issue necessary certification and approvals
- Analyze the state of competition in the telecommunications market to determine if further measures are needed to promote competition





In this report, which covers the period from the establishment of CRA through the end of 2015, several themes emerge.

**The telecommunications market is healthy and growing, and investment in the sector remains strong,** with increased revenues and market size, new products, and stable net profits. Both service providers continue to invest significantly in their networks with the launch of LTE/LTE+ networks in 2014–15. Competition in the mobile sector has developed, although competition in the fixed sector has yet to fully emerge, which will impact the future growth of that sector. Fiber broadband connection speeds reach up to 100 Mbps. Qatar has one of the highest mobile SIM penetration rates in the world, and competition has brought significant uptake in mobile data services.

**Consumers are benefiting from wide-ranging consumer protection efforts,** including a dispute resolution mechanism, a new advertising code of conduct, the Consumer Protection Policy, and a new mobile app—Arsel—that allows dissatisfied consumers to send instant comments and feedback to CRA directly, with one touch on their smartphones. While a great deal of work has been done in the area of consumer rights, CRA is continuing to strengthen the codes and frameworks that will protect consumers in the future.

**A robust regulatory and legal framework that supports the development of the sector continues to be put in place.** A recently developed competition policy framework is aimed at creating a certain and stable environment in which market participants understand under what circumstances CRA will undertake investigations into anti-competitive behavior—targeted at segments that pose challenges in the delivery of effective competition and good outcomes for consumers. A quality of service (QoS) framework is being developed so that the performance obligations of networks and service providers are clear. Terms and conditions for access to and/or sharing of civil infrastructure have been put in place. In addition, CRA is focusing on regulation in wholesale markets to decrease retail regulation, which is expected to benefit the fixed sector in particular, and to reproduce some of the steady growth in the mobile sector. The intent is to gradually remove, where possible, intrusive regulation at the retail level to encourage service providers to develop better services and innovative products.

The pages of this annual report further highlight CRA's achievements and the progress made.



# REGULATING FOR THE FUTURE

## A HOLISTIC AND TRANSPARENT APPROACH

In June 2014, CRA published *Regulating for the Future*, a policy statement that guides it in regulating the communications sector to promote sector growth while enhancing consumer benefits. The document was published as part of CRA's commitment to provide greater clarity to stakeholders and promote regulatory certainty in the communications sector.

CRA's approach to regulation follows six key principles, all aimed at ensuring that consumers have access to a broad range of innovative, reasonably priced communications services.

- Promote consistency, certainty, transparency, and flexibility across the regulatory framework, including constructive engagement with stakeholders in a timely manner to identify needs and appropriate regulatory measures.
- Focus regulation on wholesale markets to decrease retail regulation, expected to benefit the fixed sector in particular, to reproduce some of the steady growth in the mobile sector. The intent is to gradually remove, where possible, intrusive regulation at the retail level to encourage service providers to develop better services and innovative products.
- Develop where necessary a set of minimum terms and conditions on all networks and service providers including, for example, quality of service obligations, terms and conditions for access to and/or sharing of civil infrastructure, and network deployment standards.
- Limit the regulation on dominant service providers to address identified bottlenecks at the wholesale level.
- Develop a comprehensive competition policy that will detail market behaviors that CRA considers anti-competitive as well as describe how CRA will assess and address behaviors it considers anti-competitive.
- Introduce a continuous monitoring of sector performance and development to identify trends and any obstacles that may hinder the growth of the communications sector.

**CRA'S APPROACH TO REGULATION  
AIMS AT ENSURING THAT CONSUMERS  
HAVE ACCESS TO A BROAD RANGE  
OF INNOVATIVE, REASONABLY PRICED  
COMMUNICATIONS SERVICES.**



# MARKET DEVELOPMENT AND COMPETITION

## STATE OF THE TELECOMMUNICATIONS MARKET

## MARKET DEFINITION AND DOMINANCE DESIGNATION (MDDD)

## COMPETITION POLICY LICENSING ACTIVITY

## RETAIL TARIFFS

## WHOLESALE FRAMEWORK

### State of the Telecommunications Market

The market continues to exhibit growth in terms of size and number of subscribers in mobile, fixed, and mobile broadband. Total market revenue in 2015 has increased by around 10 percent per year for the third consecutive year.

Today, the licensed service providers in Qatar include two mobile licensees—Ooredoo Qatar and Vodafone Qatar; three fixed licensees—Ooredoo Qatar, Vodafone Qatar, and Qatar National Broadband Network (Qnbn), which holds a license to supply passive telecommunications only. There are also three VSAT licensees—Harris Salam, RigNet Qatar, and QSAT Communications, which provide telecommunications services for closed user group networks via satellite; and one licensee—Es'hailSat—authorized to provide public telecommunications services via satellite.

During the period of this annual report:

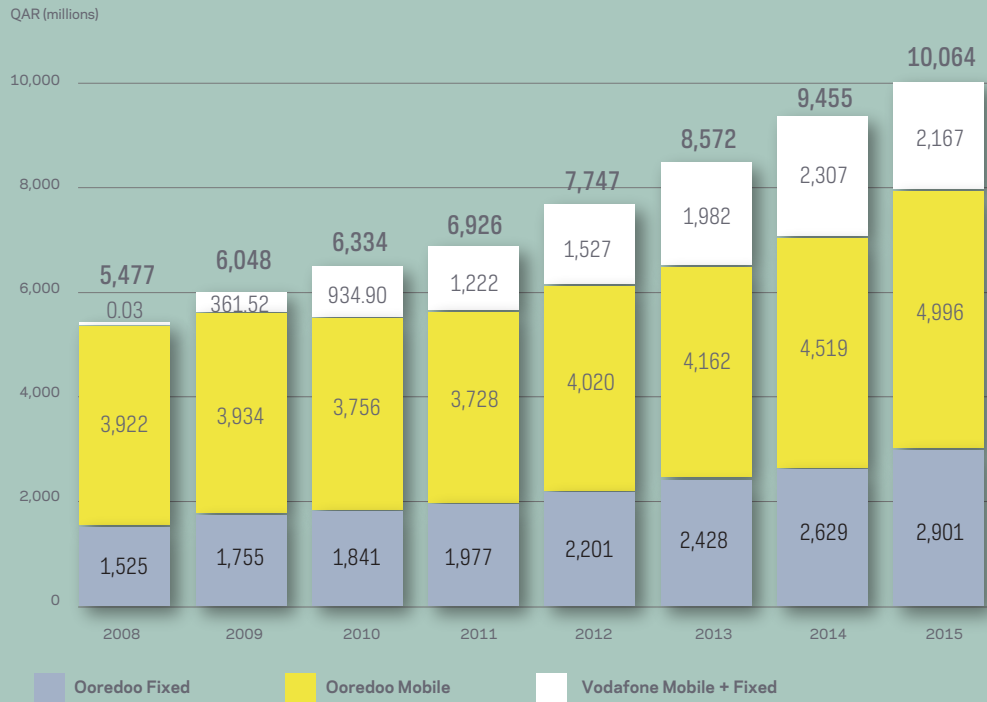
- Both mobile service providers launched 4G/LTE and LTE+ networks, and saw a massive increase in mobile data use.
- Fiber broadband connections surpassed copper—with 10 Mbps download speeds as a minimum.
- Qnbn continued its network rollout.
- Es'hailSat launched its first satellite and began service provision, and is preparing to launch its second satellite.

Both Ooredoo Qatar and Vodafone Qatar continue to invest in their networks.

**Market Revenue and Subscriptions** Total market revenue in 2014 was QAR 9,455 million and reached QAR 10,064 million in 2015, with mobile revenue continuing to provide the greatest proportion of revenue and growth in the market (see Figure 1).

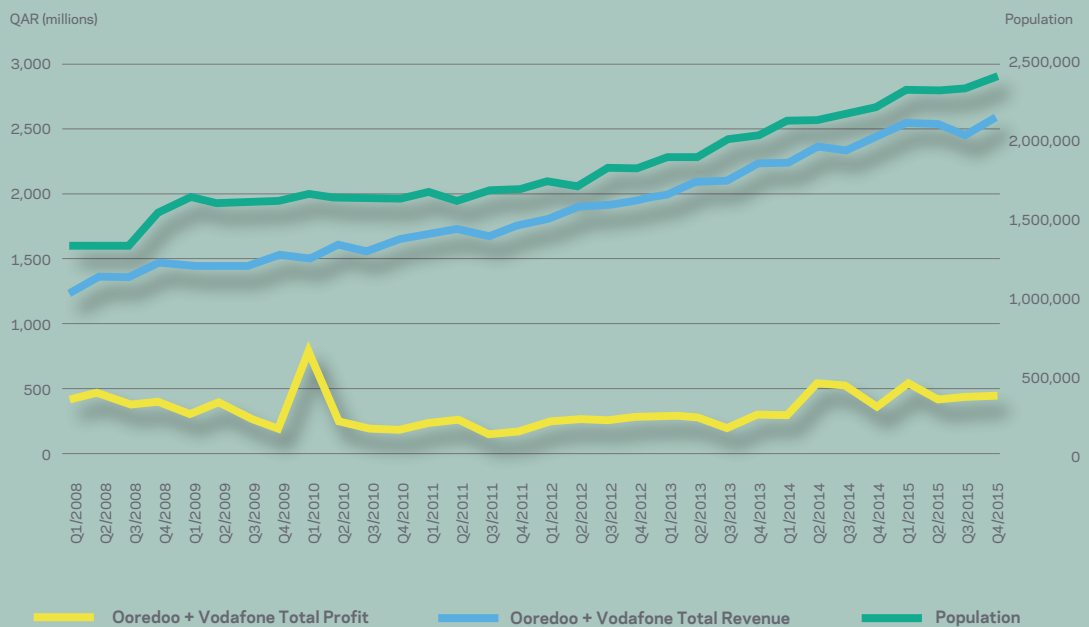
Qatar's continued population growth maps directly to revenue growth. While revenue has shown a steady increase in 2014 and 2015, market profitability has seen less significant growth (see Figure 2).

**FIGURE 1. Total Market Revenue**



Source: Service Providers' financial statements

**FIGURE 2. Total Market Revenue, Profit, Population**

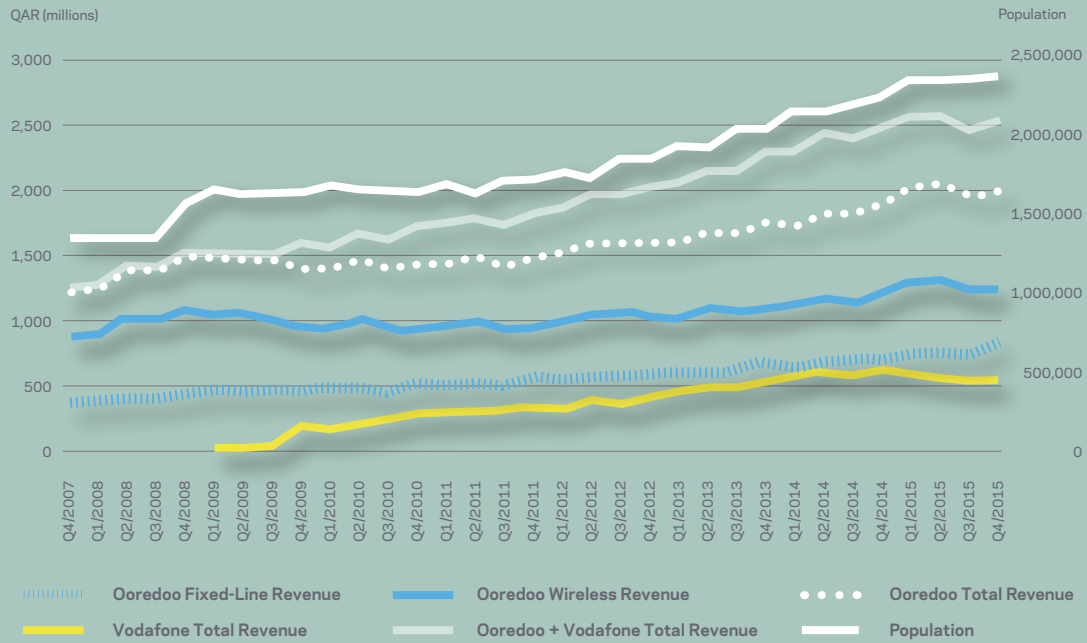


Source: Service Providers' financial statements

Ooredoo's quarterly revenue is substantially above Vodafone's in the mobile market; QAR 1.222 billion vs. QAR 537 million in Q4 of 2015, with Ooredoo also generating QAR 778 million in fixed-line revenue (see Figure 3).

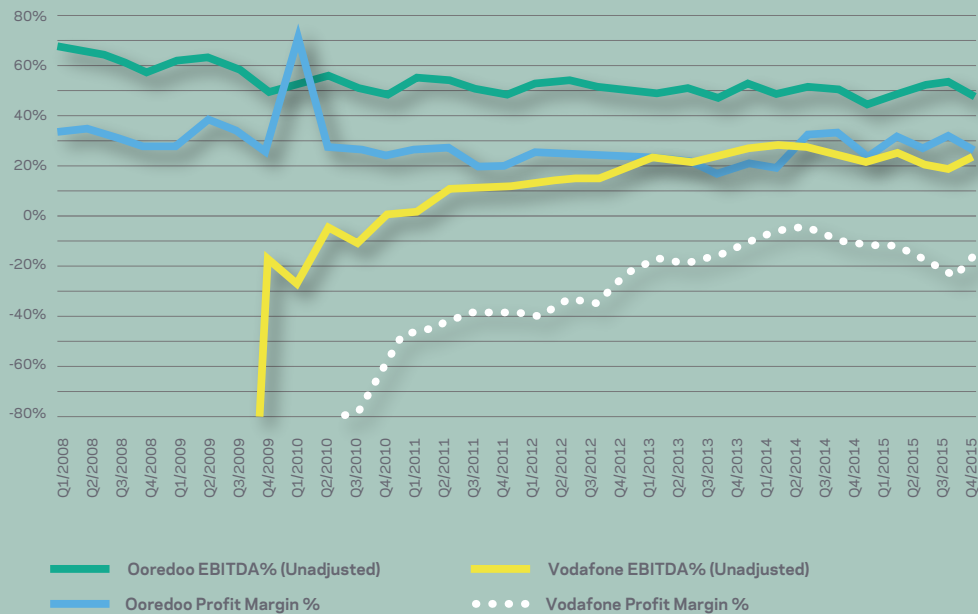
Ooredoo's earnings before interest, taxes, depreciation, and amortization (EBITDA) and profits clearly surpass Vodafone's (see Figure 4).

**FIGURE 3. Telecommunication Market Revenues (Quarterly)**



Source: Service Providers' financial statements

**FIGURE 4. EBITDA (%) and Profit Margins**

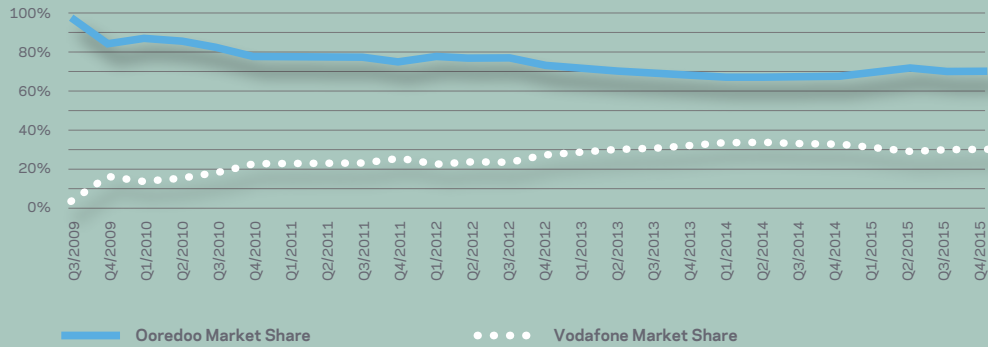


Source: Service Providers' financial statements

Ooredoo’s mobile market share (revenues) remains strong and has seen an improvement in 2015—increasing to 70 percent. Vodafone’s mobile market share (revenues) during the same time period has seen a drop to 30 percent (from a peak of 34 percent) (see Figure 5).

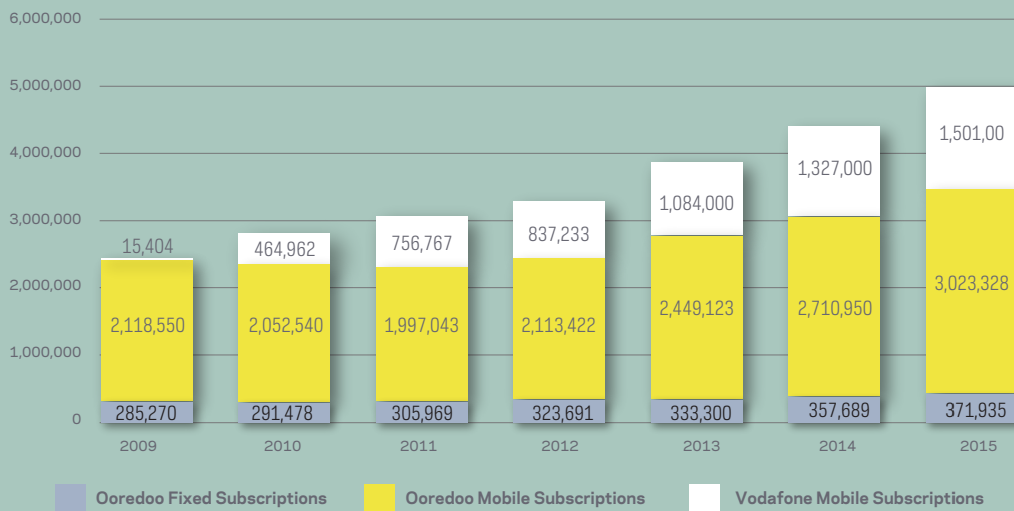
Mobile and fixed-line subscriptions (including broadband) have steadily increased. From 2009 to 2015, total subscriptions have more than doubled—and reached 4.896 million in 2015. Ooredoo has 67 percent of reported mobile subscriptions (see Figure 6).

**FIGURE 5. Mobile Revenue Market Share**



Source: Service Providers’ financial statements; Vodafone adjusted for fixed

**FIGURE 6. Reported Fixed and Mobile Subscriptions (including Broadband) by Service Provider**

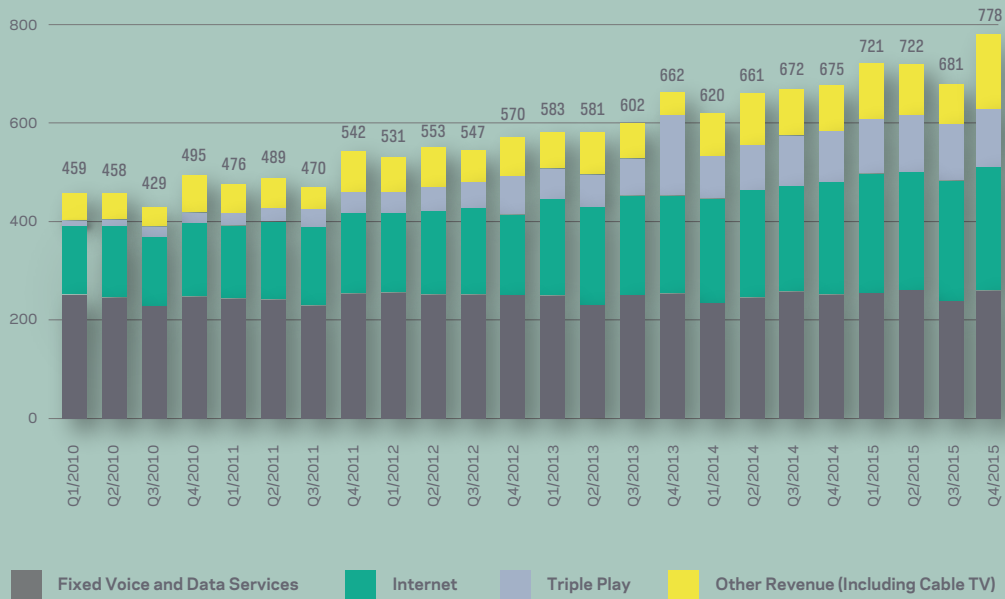


Source: Service Providers’ financial statements

Ooredoo has continued to grow its fixed business with the contribution from cable TV growing in recent quarters but with a significant contribution from other fixed-line services (see Figure 7).

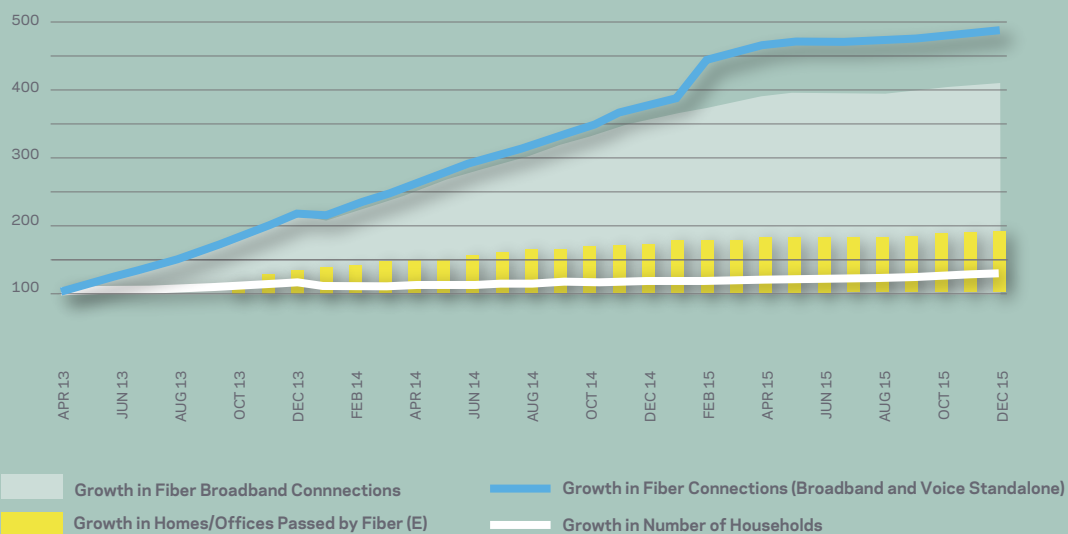
Ooredoo's fiber has continued and now essentially covers the whole country (see Figure 8).

**FIGURE 7. Ooredoo Fixed Revenue Breakdown**



Source: Service Provider's financials

**FIGURE 8. Growth in Fiber Connections (Residential and Business) Compared with Growth in Premises Passed, Indexed to April 2013**



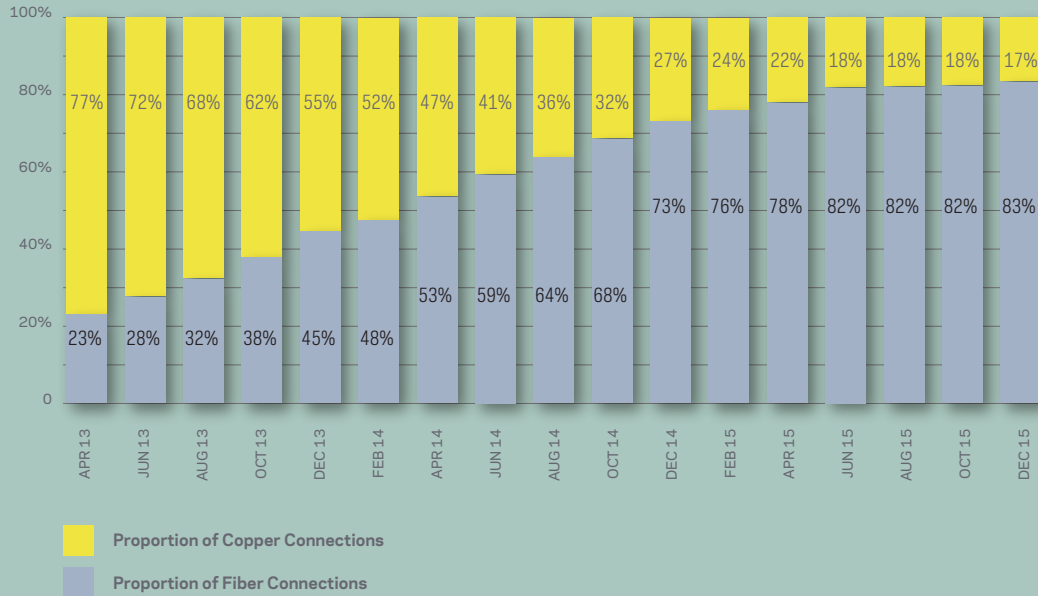
Source: Service Providers' submissions



The migration from copper to fiber is well underway, with relatively few customers remaining on copper infrastructure. Growth in total broadband connections has been minimal despite the population growth, which may reflect the increased usage of mobile data as a substitute for fixed broadband (see Figure 9).

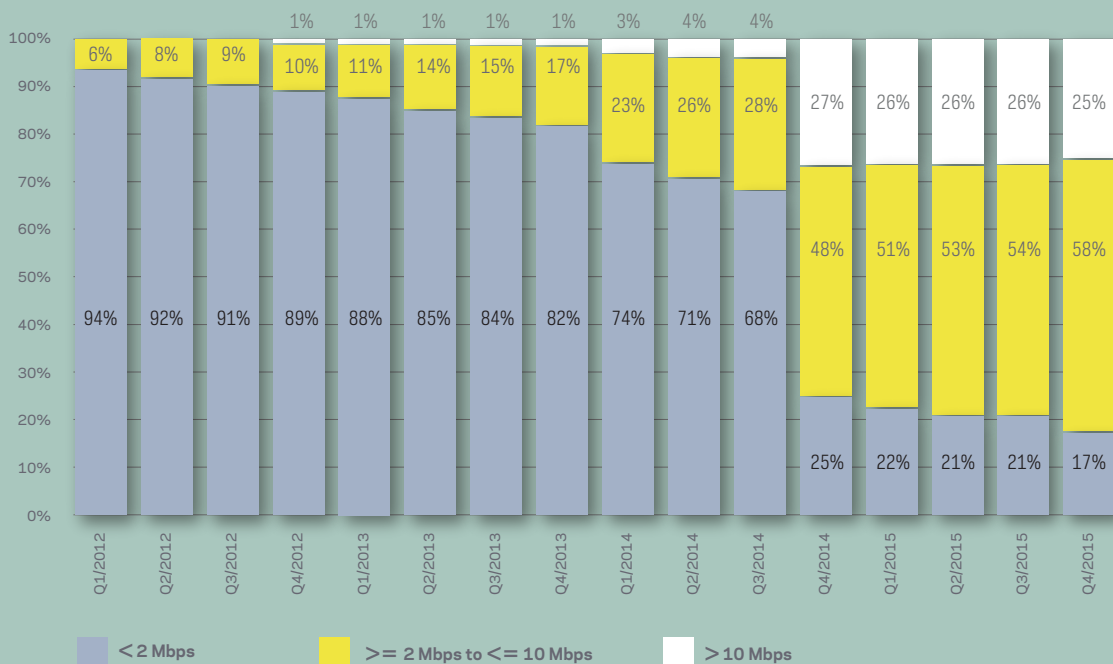
Figure 10 below shows the bandwidth split of Ooredoo broadband customers. The speed increase in Q4 2014 accounts for the large increase in over 2 Mbps services. The majority of consumers in Qatar select the intermediate speed (2 Mbps–10 Mbps).

**FIGURE 9. Percentage of Fiber and Copper Broadband Connections—Ooredoo**



Source: Service Provider's submissions

**FIGURE 10. Subscribers by Speed (Copper and Fiber)**



Source: Service Providers' submissions

## **Wholesale Framework**

In its June 2014 policy statement, CRA said that it would focus regulation on wholesale markets to decrease retail regulation. This increased focus on wholesale markets is expected to benefit the fixed sector in particular and enable it to reproduce some of the steady growth observed in the mobile sector. The intention is to promote fair access to networks while removing gradually, wherever possible, intrusive regulation at the retail level. This evolution will encourage the development by service providers of better services and innovative products to the benefit of end users. The reduction of retail regulation will be phased and will be linked to the successful implementation of the wholesale regulatory framework as well as the development of effective regulatory tools for monitoring the market.

In order to achieve this, CRA has issued a number of orders relating to the wholesale framework in Qatar. The approval of the reference offers (RO) marks an improvement in Qatar's regulatory regime and aligns the country to international best practices. ROs enhance transparency, assist in preventing non-discriminatory treatment, and provide more legal certainty to market players, and thus contribute to the enhancement of the competitive environment.

### ***Reference Offers: Orders and Approved ROs of Ooredoo and Vodafone—September 2015***

The orders and the approved ROs establish terms and conditions for interconnection products (Reference Interconnection Offer—RIO) of both Ooredoo and Vodafone, and for transmission links (Reference Transmission Offer—RTO) of Ooredoo.

The RIOs of Ooredoo and Vodafone permit a customer of Ooredoo to call and/or receive calls/SMS/MMS from a customer of Vodafone and vice versa. The main services in the RIO are voice calls/SMS/MMS, termination of emergency services, and interconnection links.

The wholesale services in the Reference Transmission Offer (RTO) of Ooredoo are generally defined leased lines that permit the conveyance of traffic within the Vodafone network and are necessary to allow customers of Vodafone to talk to Ooredoo customers, and vice versa.

### ***Wholesale Charges and Their Relationship with Retail Charges: Order and Economic Analysis—September 2015***

The Order sets the wholesale charges to be applied by Ooredoo and Vodafone for the years 2015, 2016, and 2017. Wholesale charges have been set for terminating calls and messages on Ooredoo and Vodafone networks, for interconnection and transmission links offered by Ooredoo, and for access to Ooredoo's ducts.

They supersede the wholesale charges currently agreed to by the service providers. Further, Ooredoo and Vodafone are required to include these charges in their wholesale reference offers.

### ***Reference Infrastructure Access Offer (RIAO) of Ooredoo—November 2015***

This decision will enable all existing and future licensed service providers a fair and non-discriminatory access to Ooredoo's telecommunication ducts, with the objective of enhancing availability of additional networks for people in Qatar.

The Order requires Ooredoo to publish the approved RIAO in its official website within 14 days of the date of the Order. Qualified service providers may then initiate access requests with Ooredoo and negotiate agreements based on conditions stated in the RIAO.

The provision of access to the incumbent operator's ducts brings CRA on par with its regional and international counterparts. This RIAO, together with the previous reference offers for interconnection and transmission, form a critical part of CRA's strategy to foster competition in the market.

#### ***Passive Civil Telecommunications Infrastructure Access Regulation—June 2015***

This regulation governs the provision of access to certain passive civil infrastructure required to support the delivery of telecommunications services in the State of Qatar, and establishes the general obligations of service providers and owners of civil infrastructure. The regulation, now enacted after publication in the *Official Government Gazette* (Issue No. 18, dated November 29, 2015), applies to all public or private entities that control access to such infrastructure.

#### ***Regulatory Accounting System (RAS) 2013 Orders—July 2014***

Under the Telecommunications Law and By-Law, CRA is authorized to ensure that the prices and charges of dominant service providers (DSP) are efficiently cost based and appropriately applied to products and services offered at both the wholesale and retail levels.

A regulatory accounting system (RAS) describes a set of systems, processes, policies, and procedures that enables a DSP to establish a record-keeping regime necessary to meet its regulatory obligations, and that keeps track of revenues, costs, assets, and capital employed. One of the key objectives of the RAS is to calculate, trace, and analyze costs in order to demonstrate compliance with a cost orientation and non-discrimination obligation for regulated services. The main instruments of the RAS are: (i) the cost model; (ii) the separated financial statements; and, (iii) the audit and statement of compliance.

The RAS 2014 order was finalized at the end of 2015.

Moving forward, CRA will continue to work on the wholesale framework and anticipates that it will consult on further reference offers in the near future for bitstream VULA, leased lines, and access to passive infrastructure, specifically ducts.

#### **Market Definition and Dominance Designation (MDDD)**

In line with the requirements under the Telecommunications Law and international best practices, CRA is in the process of defining economic markets for telecommunications services (such as the market for mobile national calls or mobile data), and evaluating whether those markets have a tendency toward competition, and then, whether a particular service provider is dominant in that market. This was previously undertaken in 2010. CRA intends to finalize this project in 2016.

CRA is conducting the next MDDD in order to determine the need for ex-ante regulatory intervention and to ensure that any resulting regulation is in line with the underlying market dynamics. A commonly applied “three criteria test” is being used to assess the need for ex-ante regulation in a particular service market based on whether that market exhibits three specific characteristics:

- High and non-transitory barriers to entry
- No tendency to effective competition
- Insufficiency of competition law to address competitive concerns

Both retail and wholesale services are being assessed, including broadband services at a fixed location, broadband services via a mobile device, access to public telecommunications networks at a fixed location, and wholesale physical network infrastructure access, among many others.

### **Competition Policy**

CRA has developed a comprehensive competition policy framework that focuses on enhancing the role of competition as a catalyst for investment and innovation. The policy aims to create a stable and certain environment in which market participants understand under what circumstances CRA will undertake ex-post investigations into potential anti-competitive behavior as well as the main criteria guiding its decisions.

## **THE POLICY AIMS TO CREATE A STABLE AND CERTAIN ENVIRONMENT.**

As CRA has begun to focus more on the wholesale markets and lifting regulation at the retail level, this policy is important to ensure that the market remains competitive and that service providers can raise any issue arising from anti-competitive behaviors.

Thus agreements and behaviors that may prevent or substantially limit competition are prohibited. Such actions include price fixing, output limitation, sharing of markets and customers, bid rigging, limiting or controlling investments in or use of research and development, and agreements for fixed and minimum resale price maintenance. The prohibition can also apply to disclosing strategic information and thus increasing the likelihood of coordination within or outside the field of cooperation covered by the agreement; limiting the possibility of the undertakings competing against each other or against third parties; raising barriers to entry or expansion or leading to anti-competitive foreclosures of other suppliers or buyers; and softening competition or facilitating collusion between the supplier and its competitors or between the buyer and its competitors, among others.

The Competition Policy, finalized and released on October 21, 2015, does not prohibit the holding of a dominant position in itself, but rather, it prohibits the abuse of that position. Firms that have a dominant position have a special responsibility not to allow their conduct to impair genuine undistorted competition. Abuse of a dominant position can be targeted at potential competitors (exclusionary abuses), or at consumers or suppliers (exploitative abuses).

When investigating alleged abuses of a dominant position, CRA will consider whether there is any reasonable justification for the conduct in question, in which case it may choose not to make an infringement decision if the investigated service provider can demonstrate reasonable justification, such as the conduct is proportional or indispensable to the provision of the product or service or the conduct brings efficiency gains, for example, by reducing costs for the provision of the services in question, and the efficiency gains are passed on to consumers. In addition, CRA will assess the effects of mergers and transfer of control on deciding whether to approve the merger, reject it, or approve it with conditions.

Notably, the policy details the remedial actions that CRA can take in an ex-post investigation if a service provider is found to have infringed the prohibition on abuse of dominant positions or other anti-competitive behavior. The remedies applied by CRA are guided by two main objectives:

- **Effectiveness** The proposed remedies must be able to successfully resolve the competition concerns in an efficient manner. This will involve ensuring that remedies are sufficiently well targeted and do not have adverse competition effects, and are practical to implement.
- **Proportionality** This concerns the regulatory burden imposed by the remedies and the appropriateness of the level of intervention to the abuse of market power. Considerations of proportionality would ensure that the implementation costs of the remedy do not outweigh its benefits.

Remedies may be behavioral or structural, including requirements that enforce a specific behavior on the service provider(s) involved in the alleged infringements of the competition aspects of the Telecommunications Law; or structural remedies that lead to the divestment of assets of the service provider(s). CRA may also respond to anti-competitive behavior with other remedial actions including binding commitments, requiring the infringing party to publically acknowledge the CRA decision, issuing a warning to the relevant service provider(s), or referring the matter to the public prosecutor.

## Licensing Activity

In May 2015, CRA consulted with the industry on revising the individual licenses in order to:

- Simplify and streamline the structure and content of the licenses
- Replace the majority of the annexures of the current licenses with separate regulatory instruments in order to provide for more regulatory efficiency and flexibility
- Unify the public fixed and mobile licenses in line with international trends
- Ensure consistency among the licenses, especially between licenses of the same type
- “Clean” the licenses of provisions that were needed in the past but are no longer relevant
- Remove the radio spectrum provisions from the licenses in order to maintain a clear separation between service licenses and spectrum licenses
- Reflect the important regulatory and market changes since the issuance of the licenses

- Update the licenses to reflect the development of telecommunications technologies and services since the issuance of the licenses, and therefore, make the revised licenses technology neutral
- Make the licenses as future-proof as possible, reducing the need to revise them again in the future
- Update the licenses to reflect recent changes (e.g., establishment of the Ministry of Information and Communications Technology and CRA)

The individual licenses have been revised in due course, taking into consideration the comments of the stakeholders and will be issued in line with the upcoming telecommunications policy and new market structure.

#### ***New Class License for the Provision of Public Telecommunications Services On Board Aircraft—April 2014***

The first of its kind in Qatar, this Class License was published in April 2014. It permits aircraft operators to provide public telecommunications services on board aircraft registered in the State of Qatar. In order to mitigate possible radio interference with terrestrial telecommunications services, the Class License stipulates that the authorized services can only be offered when the aircraft is at an altitude of at least 3,000 meters.

This Class License includes obligations with respect to information to be provided to the customer, confidentiality of communications and customer data, content filtering, and Type Approvals of equipment used on board the aircraft to support the telecommunications services.

#### **Retail Tariffs**

In May 2015, CRA published a revised Retail Tariff Instruction, which outlines the general rules and the process for approval for all retail tariffs. This includes detailed rules regarding permanent and promotional offers and how these rules apply to dominant service providers and non-dominant service providers. The instruction applies to all individually licensed service providers offering telecommunications services to the public and was effective immediately. In particular, the revised instruction prohibits all service providers from offering different prices for on-net calls compared to off-net calls.

# SERVING CONSUMERS

**CODE ON ADVERTISING,  
MARKETING, AND  
BRANDING**

**CONSUMER PROTECTION  
POLICY**

**CONSUMER  
SATISFACTION SURVEY**

**RESOLVING CONSUMER  
COMPLAINTS**

**REDUCED ROAMING  
CHARGES FOR VOICE  
CALLS, SMS'S, AND  
MOBILE DATA**

**QUALITY OF SERVICE  
FRAMEWORK**

**INDEPENDENT QUALITY  
OF SERVICE AUDIT**

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## **Code on Advertising, Marketing, and Branding**

In order to protect consumers from misleading and unfair practices by telecommunications service providers, in October 2014 CRA issued the Code on Advertising, Marketing, and Branding as part of its mandate to protect consumers, enhance transparency in the ICT sector, and help consumers make informed decisions in terms of their choice of telecommunications services. The code clarifies the obligations of telecommunications service providers vis-a-vis consumers, and specifies how CRA will ensure compliance.

This far-ranging code requires that advertisements and information provided to consumers be fair, truthful, and accurate, and not be misleading. This obligation is underpinned by more-detailed provisions for print and broadcast advertisements, product promotions, and special offers, to name a few. The code is applicable to all service providers, together with their distributors, dealers, agents, subcontractors, and representatives; all persons who offer premium services to consumers; and advertisers who offer and/or sell applicable products and services through agents or third parties.

One of the key requirements in the code is that direct marketing, such as telephone calls, text messages, and emails, must be non-intrusive. Therefore advertisers who are subject to this code must limit the number of contacts on a daily basis. Additionally, any such contact should take place at an appropriate time so as not to disturb consumers. Finally, advertisers must give consumers the ability to opt out of receiving any further advertisements of this kind without any cost to consumers.

Another key requirement stipulates that advertisements containing comparisons with other competitors' or other service providers' products or services should not create an unfair advantage for the advertiser or mislead the consumer. Such advertisements should also refrain from judgments and opinions about the competitor or its products or services unless those assertions are objective and are based on facts that can be substantiated and have not been unfairly selected. Furthermore, any comparison should be fair and accurate and address comparable offers or services.



The code also takes into account that different audiences have different needs and levels of knowledge concerning applicable products and services. Thus, the details and content of the advertising material must be adjusted to take into account these differences. For example, advertisements aimed at consumers who are at home or at small businesses must be simple and clear, and must not use technical words or phrases that are not part of everyday use or would not be understood by the average consumer. However, advertisements aimed at consumers who are telecommunications specialists or at large businesses may use, as appropriate, more-specialized language, as long as the product and service are clear to the target audience. In addition, advertisements aimed at children or people with special needs must ensure the protection of that group.

## **Consumer Protection Policy**

In January 2014 CRA issued the far-reaching Consumer Protection Policy (CPP), which aims to ensure that consumers can make informed purchasing decisions with confidence, that the services they purchase are fit for purpose, and that there is an effective remedy if something goes wrong. The policy was developed following a public consultation with all relevant stakeholders, and incorporates internationally and regionally recognized standards for telecommunications consumer rights protection.

CPP establishes the basis of consumer protection in Qatar by bringing together the existing obligations on service providers and imposing a set of new obligations on operators to ensure they compete fairly. It establishes a core set of consumer protection rules that are binding on the service providers and a dispute resolution system that enables customers to seek redress from an entity that is independent of the service providers. It also enables CRA to see trends in compliance and take enforcement action against individual service providers where appropriate. Additionally, it gives CRA the authority to regularly monitor and report important industry statistics and service quality measures that enable CRA to amend the regulatory framework as appropriate.

CPP includes a strengthened system for monitoring and enforcing compliance with the rules, and provision for an independent resolution process. The policy also outlines new services for people with disabilities.

The CPP provides many other benefits to consumers, including:

- Advertising and promotional material from service providers that is up-to-date, accurate, truthful, and in no way misleading
- Contracts with service providers—in both English and Arabic—that clearly spell out the terms of the contract, including a description of services, costs and payment terms, duration of contract, and cancellation terms, among others
- Ability to cancel contracts or switch service providers with terms that are fair and not burdensome
- Accurate and clear bills, in an easily understandable format
- Notification to customers when they have spent 80 percent of the value of the plan to which they have subscribed
- A set of quality of service standards for service providers
- A concise and easy-to-understand process for lodging complaints with service providers, with provisions for refunds when appropriate
- Specific, limited circumstances under which services can be disconnected
- Privacy protection of customer information

## Arsel Mobile App

In March 2014 CRA launched Arsel, a mobile app that empowers telecommunications consumers in Qatar to lodge complaints or provide their feedback directly to CRA. The word Arsel means “to send” in Arabic, and the app is available on Android, iOS, and BlackBerry.

Through the app consumers can:

- Lodge a complaint with CRA about issues or complaints pending with service providers
- Provide feedback about quality of service directly to CRA
- Access an online network coverage map showing other consumers’ experiences (updated every 48 hours)
- Test the speed of their connection to the Internet

The data collected through the app helps CRA work with service providers to improve quality of service in Qatar.



## Consumer Satisfaction Survey

In order to gain more insight into consumers’ satisfaction with their telecommunications services in Qatar, CRA commissioned an independent market research firm to conduct a first-of-its-kind large-scale survey of consumers in 2014. The findings have been shared with Ooredoo and Vodafone, who have expressed willingness to work with CRA to address challenges and concerns highlighted by consumers in the survey.

The survey found that while a majority of telecommunications users in the country are generally satisfied with the quality of service offered by their service providers, pricing, rate plans, and complaint resolution were cited as key areas for improvement. In addition, about one-fifth (22 percent) of consumers surveyed believe prices of various services in Qatar to be low or very low. Consumers believe international calling and roaming charges to be particularly expensive.

Al Daayen residents and 15- to 24-year-olds are less satisfied than consumers overall with the quality of their telecommunications service. Overall quality of service satisfaction levels are slightly higher than the global average (84 percent) and slightly lower than those in North America (91 percent.) Table 1 shows Qatar benchmarked against selected countries.

**TABLE 1. Quality of Services: International Benchmarks**

Services	Qatar	UK	Australia	Singapore*	UAE
Fixed Voice	89	89	89	78	94
Internet (Copper)	55	NA	NA	NA	NA
Fiber Broadband	96	88	79#	65	93#
Mobile Voice	88	93	86	73	93
Mobile Voice +	91	88**	79#	66**	93#
Data	86	NA	NA	NA	NA
Data-Specific SIM	89	NA	NA	NA	NA

Figures above represent proportion (%) of satisfied consumers

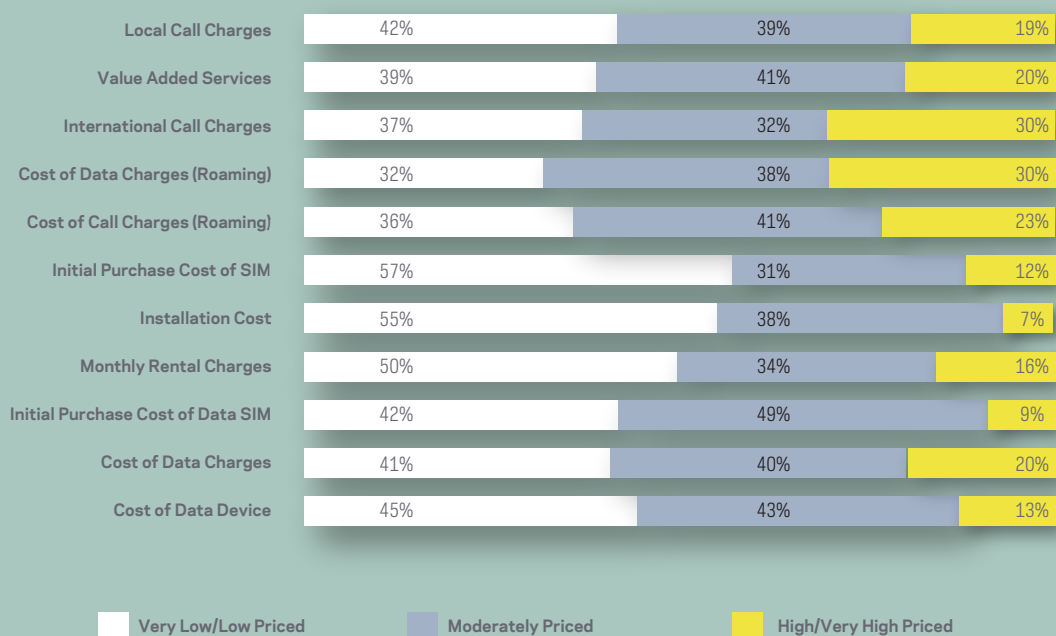
\* Singapore benchmarks are calibrated from mean

\*\* Mobile broadband

# Only Internet reported rather than mobile broadband and fixed broadband

Source: CRA Consumer Satisfaction Survey; overall sample n=2,526

**FIGURE 11. Price Perception**



Source: CRA Consumer Satisfaction Survey; overall sample n=2,526

When consumers were asked about their rate plan, they were least satisfied with the “variety of rate plans,” with the highest dissatisfaction among males, non-Qataris, 15- to 44-year-olds, and prepaid users. Generally, 93 percent of customers were satisfied with the clarity of rate plans, 90 percent with clear terms and conditions, and 89 percent with competitiveness of tariffs. This reflects positively on the impact and effectiveness of the Consumer Protection Policy.

In terms of consumers’ perceptions of whether Qatar’s telecommunications market is competitive for services, 32 percent said the market was extremely/very competitive, 46 percent said somewhat competitive, and 22 percent said not very/not at all competitive. In terms of prices, 29 percent rated the market as extremely/very competitive, 45 percent as somewhat competitive, and 26 percent said not very/not at all competitive. Dissatisfaction was highest among males, non-Qataris, 25- to 44-year-olds, and prepaid users. Figure 11 shows details about consumers’ perceptions regarding prices of selected telecommunications services.

Consumers’ wish list for the sector includes more competition in the market, better services at affordable rates, reduced Internet prices and higher speeds, and protection of consumer rights related to call charges and incorrect deductions, among others.

Other major findings include:

- Network coverage is rated high across all services offered—mobile voice, mobile voice and data, mobile broadband, and data-specific SIM—and across all regions.
- Satisfaction on network availability is relatively weak among Internet (copper users) at 60 percent and those residing in Al Daayen at 67 percent.
- While overall satisfaction with “voice and SMS services” is high—including voice quality and clarity, lack of call drops, and SMS delivery—improvement can be made in the Al Shamal and Al Wakra regions.
- Users of most of the data services (other than copper Internet) are satisfied with the services provided, with quality of data services at 93 percent, data network coverage at 94 percent, speed of data services at 93 percent, and video access/streaming quality at 92 percent.
- Dissatisfaction on “ease of activation” is higher among mobile broadband, mobile voice, and fiber broadband users.
- More than 90 percent of consumers are satisfied with the switch from copper to fiber (94 percent) and also with the quality of broadband after the switch, with 90 percent rating quality of broadband after the switch very much or much better.
- Only 32 percent of those surveyed are aware of mobile number portability (MNP) and of those who are aware, 9 percent took advantage of this service. Of those with experience with MNP, 72 percent were satisfied and 48 percent claimed that porting took between one and five days.
- While there is low incidence of consumers raising complaints with service providers (7 percent during the time of the survey), 25 percent of consumers are dissatisfied with the speed of resolution.
- While consumers do not find the SMS promotions to be misleading, they are less satisfied with “options to opt out of promotional messages.”

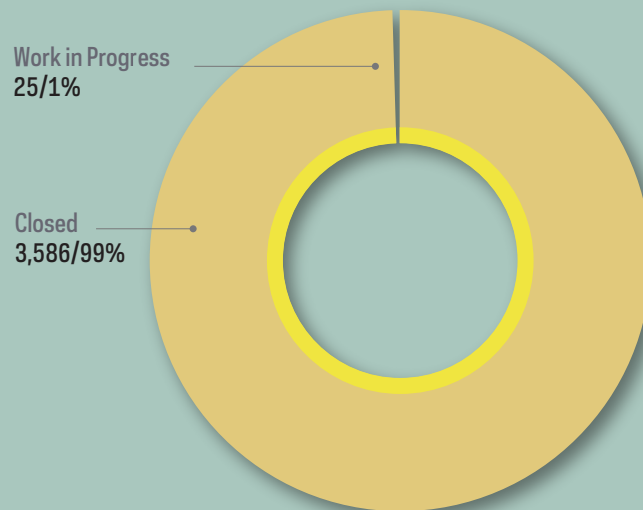
Following this recently conducted consumer satisfaction survey, CRA has begun a business satisfaction survey, which will be concluded in 2016.

### Resolving Consumer Complaints

CRA is actively involved in resolving complaints that consumers haven't been able to resolve with their service provider. From February 2014 through December 2015, 99 percent (3,586 complaints and inquiries) have been resolved, with 1 percent still in progress (see Figure 12).

The graphic on the opposite page depicts the consumer complaint process and the many channels available to consumers.

FIGURE 12. Status of Consumer Complaints and Inquiries—February 2014 through December 2015



Source: CRA data

## The Complaint Process



Please ensure that you have all the relevant information including details about all your phone calls or visits, name of the person with whom you spoke, and the date you lodged a complaint. Ask for a reference number for your complaint.

This information will help us in case you are unable to resolve the complaint with your service provider.

If your complaint remains unresolved for 30 calendar days or you are dissatisfied with the resolution, move to **Step 2**.

- **Your contact details** (phone, email, residential or company address, etc.)
- **The complaint "Reference Number"** provided by your service provider
- **Your consent to disclose** your complaint details to the service provider, if necessary
- **Copies of any documents** relating to your complaint (e.g., bills, advertisements, receipts)
- **A full description** of your complaint and any resolution offered to you by the service provider
- **Your Qatar ID number**, as proof that you are the subscriber of the service related to the complaint
- **CRA will examine your complaint** and may request further information from you to investigate the complaint.
- **With your consent, CRA may disclose your identity** and the details of your complaint to the service provider.
- **The CRA will keep you informed** as the investigation continues and notify you of an outcome.

## Contact Channels to Lodge a Complaint



Call the Consumer Protection Hotline:  
103 from Qatar and 00974 4406 9938  
from overseas



E-mail us at:  
[consumervoice@cra.gov.qa](mailto:consumervoice@cra.gov.qa)



Download **Arsel** mobile app



Twitter official account:  
[@CRAqatar](https://twitter.com/CRAqatar)



## Reduced Roaming Charges for Voice Calls, SMSs, and Mobile Data

At its June 2014 meeting in Doha, the Gulf Cooperation Council (GCC) Ministerial Committee for Post, Telecommunications, and Information Technology announced the reduction of roaming charges in member states, which will benefit telecommunications consumers in Qatar and other GCC member states.

Reduced roaming rates for voice calls, SMS, and mobile data services will be effective April 1, 2016. The reductions in roaming charges on both the inter-operator wholesale level and end-user retail level will take place gradually, over a three-year period for voice calls and SMS, and over a five-year period for mobile data services.

CRA has put in place the necessary regulatory instruments to ensure the effective implementation of this decision.

Service providers in Qatar already have special roaming packages, particularly aimed at those customers who extensively use roaming mobile and data services abroad. This new regulation will reduce rates for roaming, telephone calls, text messaging, and data services throughout the GCC member states even for customers who need only limited access to roaming services.

The reduction in roaming charges is a continuation of the collaboration and cooperation among GCC regulators, under the auspices of the GCC General Secretariat. The first roaming regulation was issued in June 2010 and took full effect in February 2012. It covered roaming voice calls but excluded other roaming services such as mobile data and SMS. The new regulation, a result of comprehensive study and public consultation by the GCC Roaming Working Group, addresses this gap.

**TABLE 2. Retail Price Ceilings for Voice Calls, SMS, and Mobile Data Services**

While roaming	Current	After April 1, 2016	After April 1, 2017	After April 1, 2018	After April 1, 2019	After April 1, 2020
Making local voice calls within the visited country [QAR/min]	1.00	0.95	0.091	0.88	NA	NA
Making voice calls to other GCC countries (including home country) [QAR/min]	2.40	2.33	2.26	2.19	NA	NA
Receiving voice calls [QAR/min]	—	1.277	1.022	0.803	NA	NA
Sending SMS [QAR/SMS]	—	0.292	0.255	0.219	NA	NA
Mobile data [QAR/MB]	—	4.74	3.10	2.19	1.825	1.533



To implement this decision, CRA announced specific price ceilings for voice calls, SMS, and mobile data services (see Table 2). The service providers are free to set prices below these regulatory caps. Some of the current local retail charges for voice calls are lower than the GCC price ceilings. Additionally there are promotions such as “Passport” roaming packages that are useful for specific consumer roaming needs.

### Quality of Service Framework

High-quality telecommunications services provide important benefits for consumers, for service providers, and for the country as a whole. For consumers, access to telecommunications services has evolved from being “nice to have” to being “essential,” and ubiquity of access is taken for granted. It is against this backdrop that attention turns from simply having access to telecommunications services, to the quality of the available services. Enhanced quality of service will further help service providers improve revenues and profitability and thus provide the foundation on which to build new business models and allow new services to emerge. Finally, the quality of the telecommunications services available in Qatar is an important factor in determining the country's ability to compete internationally and to realize the full social and economic benefits of existing and future telecommunications services.

In light of the growing importance of the quality of telecommunications services, CRA is in the process of developing a comprehensive and forward-looking quality of service (QoS) framework, which takes into account the needs and expectations of both end users and service providers, as well as the ambitions of the country.



### Consumer Rights Day

CRA observes and celebrates World Consumer Rights Day in March of each year by hosting an awareness campaign. CRA held events in 2014 and 2015 at the Ezdan and Landmark Malls, respectively. CRA launched its Twitter account for consumers at the 2015 event. Each year has seen large numbers of visitors to the CRA booth/ kiosk where CRA staff were on hand to provide advice and information regarding telecommunications services in Qatar. CRA also distributed useful information on telecommunications in Qatar and CRA's role in protecting telecommunications consumers.

The QoS framework being developed will apply to all operators providing public networks and services and aims to:

- Satisfy current user expectations as well as create a level of quality that will support the diversification of Qatar's economy, for example, providing a platform to support the emergence of new and innovative e-commerce businesses
- Allow subscribers of telecommunications services to access transparent, objective, and comparable quality information in order to make informed decisions about their choice of service provider and services, and thus promote competition based on quality

In order to realize these objectives, CRA will directly monitor the performance of service providers in the areas of customer relations (including billing-related issues), fixed and mobile voice services (at the national and international levels), fixed and mobile data services (including broadband, video and multimedia services, and web browsing) for both residential and business consumers. CRA will then periodically publish comprehensive and clearly understandable reports on quality of service in order to allow customers to compare the quality of service offered by the different service providers.

The focus of the QoS framework will, therefore, be on services as seen by end users as well as on the network parameters that are relevant to enhancing the consumer experience.

This framework is being developed through constructive cooperation with both customers and service providers. CRA is also considering other measures to further promote engagement with all stakeholders to give all parties the opportunity to raise issues and facilitate open discussion on matters related to QoS.

### Independent Quality of Service Audit

In order to help safeguard the interests of telecommunications consumers in Qatar, an independent audit of Ooredoo's and Vodafone's mobile services was conducted to verify compliance with coverage obligations of the licenses and benchmark the quality of service offered by Qatar's mobile network operators. The audit, conducted between October and December 2014, included geographical and data coverage, voice quality, rate of SMS/MMS received, and successful uploads and downloads among the services measured.

The audit showed some areas of improvement over the previous year and other areas where quality has declined.

Key results include:

- **Voice quality** Voice quality is assessed using a measure called "perfect quality rate" (PQR). In 2014, Ooredoo's PQR was 96.3 percent and Vodafone's was 94.5 percent. Both rates declined slightly from 2013 levels—from 97.6 percent for Ooredoo and 96.4 percent for Vodafone.
- **The rate of SMS received within 2 minutes** also declined slightly from 2013 to 2014—from 99.9 percent to 99.3 percent for Ooredoo and 99.8 percent to 99.2 percent for Vodafone in that same period.
- **For rate of MMS received within 5 minutes**, Ooredoo is at 94.9 percent in 2014, down from 98.4 percent in 2013; Vodafone stood at 94.3 percent in 2014, down from 96.1 percent in 2013.



- **The rate of web pages successfully downloaded within 30 seconds** for both operators rose over the previous year: Ooredoo stands at 98 percent in 2014, up from 96.9 percent in 2013; Vodafone's rate of success rose to 98.5 percent in 2014, up from 82.1 percent in 2013.
- **The FTP upload successful transfer rate** in 2014 was 99.5 percent for Ooredoo and 95.6 percent for Vodafone, both up—from 98.7 percent and 88.6 percent, respectively, in 2013.
- **The HTTP successful data transfer rate** (based on 5 MB files for DL and 1 MB files for UL) was 98.2 percent for Ooredoo and 94.4 percent for Vodafone in 2014, a decline from 99.1 percent and 96 percent, respectively, in 2013.
- **HTTP download average throughput** in 2014 for Ooredoo was 9.48 Mbps, a decline from 10.2 Mbps in 2013; Vodafone's average throughput rose from 2.4 Mbps in 2013 to 12.1 Mbps in 2014.
- In terms of **geographical coverage on 2G, 3G, and 4G** for both operators (rate represents the percentage of 100 m X 100 m areas in which the measured signal strength was -85dBm or higher), Ooredoo stood at 99.2 percent for 2G, 92.1 percent for 3G, and 51.6 percent for 4G. Vodafone's coverage stood at 97.5 percent for 2G, 86.6 percent for 3G, and 22.7 percent for 4G.
- **The rate of successful calls** for Ooredoo was 98.9 percent for 2G and 3G; for Vodafone the rate was 85.1 percent for 2G and 95 percent for 3G.

## Consumer Hotline 103

Consumers can dial 103 and their call goes to a dedicated telecommunications consumer complaint hotline that operates 24 hours a day. Consumers can contact the hotline if they are dissatisfied with the way their service provider has handled their complaint or if they are unhappy with the outcome of a complaint already lodged with their service provider. Consumers can also lodge complaints if they are unhappy with advertising, marketing, or branding done by service providers in the telecommunications sector.



# MANAGING SCARCE RESOURCES

**RADIO SPECTRUM ALLOCATION**

**SPECTRUM MONITORING**

**ESTABLISHMENT OF NATIONWIDE AUTOMATED SPECTRUM MONITORING SYSTEM AND AUTOMATED FREQUENCY MANAGEMENT SYSTEM**

**SPECTRUM MANAGEMENT STRATEGY FOR MAJOR EVENTS**

**RADIO FREQUENCY EMISSIONS**

**19<sup>TH</sup> ARAB SPECTRUM MANAGEMENT GROUP MEETING**

**QATAR DOMAIN REGISTRY**

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## Radio Spectrum Allocation

Demand for radio spectrum in Qatar is high and growing every day, particularly because many advanced technologies need new radio spectrum alongside existing technologies. In fact, the challenge among regulators worldwide is to find enough spectrum for future radio applications and next-generation networks such as 5G, and to work together to rearrange the spectrum allocation to accommodate future needs.

Given the importance of this issue, the Emiri Decree establishing the independent regulatory authority in 2014 gave CRA the authority to manage scarce resources such as radio spectrum, numbering, and domain names, and to ensure their optimal use. CRA's responsibility is to plan, coordinate, assign, and license the frequency spectrum—to ensure its efficient use by the most competent users. CRA is also responsible for monitoring the spectrum to ensure its authorized usage, for monitoring the licensed frequencies to ensure compliance with license terms and conditions, and for monitoring emissions of electromagnetic radiation from transmitters. It also sets necessary criteria and instructions to ensure compliance with international standards in coordination with concerned authorities. In allocating spectrum, CRA strives to balance public and private-sector spectrum needs, including those of the military, the government, media organizations, and companies in the oil and gas sector, as well those of companies in the telecommunications and civil aviation industries. The policies regarding spectrum management also ensure that Qatar is well positioned to use its spectrum for critical communication needs such as air traffic control and emergency services.

In 2014–15, CRA published the National Frequency Allocation Table (QNFAT) in coordination with the Qatar National Spectrum Coordination Committee, a group chaired by CRA whose membership comprises major wireless users including ministries, government authorities, and both public and private operators. QNFAT shows the frequency bands allocation for different radio communication services on both the national and international levels. It is subject to periodic revisions so that it conforms to the changes in international, regional, and national spectrum management regulatory frameworks.

CRA plans to update QNFAT after the World Radiocommunication Conference (WRC-15), and to develop the National Frequency Allocation Plan (QNFAP) by Q2 2016, which includes QNFAT and its relevant appendices and annexes.

In addition, CRA has conducted a public consultation on the future spectrum demand in Qatar in order to estimate the spectrum requirements over the next five years. This consultation provides transparency regarding CRA's approach to managing the spectrum and assists CRA in making decisions about future planning, assignment, licensing, and pricing for the radio frequency spectrum. CRA received 20 responses from inside and outside Qatar that are being analyzed and used for future planning.

CRA has also updated and published *Annexure (2) of Class License for Short Range Devices*, which updates the Class License issued in May 2010 stipulating the frequency ranges and the corresponding technical parameters allowed for short-range devices (SRDs). To be in line with international technology advancements, CRA decided to update the existing Class License to reflect these technological advancements, which include the addition of new frequency ranges and associated technical parameters and amendment of existing ones where necessary.

And for the period 2014–15, CRA issued 5,492 spectrum licenses, 2,278 Type Approvals for Radio and Telecommunications Terminal Equipment (RTTE), 1,839 frequency assignments, and 1,233 new Import Authorization licenses for RTTE, investigated 115 interference cases, and conducted 18 QoS investigations.

During the same period a total of 75,044 customs clearance applications (46,423 through the Single Window Process and 28,621 through the manual process) were also processed.

### **Spectrum Monitoring**

CRA employs available spectrum-monitoring resources to ensure the authorized use of spectrum and the availability of interference-free spectrum for licensed users. With the advent of the latest radio communication technologies, the demand for interference-free frequency assignments is critical. This demand is a result of the liberalization of telecommunications services worldwide and the subsequent appearance of new market entrants in wireless services, as well as the use of frequencies for non-telecommunications applications. All interference cases reported to CRA for various radio communication services were resolved effectively. In addition, CRA took appropriate administrative, regulatory, and enforcement actions to manage the interference in the UMTS band due to DECT 6.0 devices—unauthorized for use in Qatar—and facilitated interference-free operation of 3G services. CRA also ensured interference-free operation of broadcasting/radio communication services during Qatar's 2015 Men's World Handball Championship and other national events. Further, CRA also coordinated with neighboring administrations through the GCC Telecom Bureau to minimize spillover interference issues in LTE 800 and TETRA 400 bands.

### **Establishment of Nationwide Automated Spectrum Monitoring System (ASMS) and Automated Frequency Management System (AFMS)**

CRA is in the process of establishing a state-of-the-art spectrum monitoring system with the latest capabilities to monitor unauthorized or illegal use of spectrum and to detect sources of interference. This system is expected to be fully operational in Q3 2016. In addition, a fully automated frequency management system is being developed to automate the management of all spectrum activities, including allocation, assignment, and licensing—scheduled to be operational in the third quarter of 2016. This will also allow all applications related to spectrum management to be submitted online and all applicable fee payments to be made online. Any relevant issued licenses will be made available to be downloaded through the web portal. This system will greatly benefit applicants by saving time and providing more efficiencies.

## **Spectrum Management Strategy for Major Events**

CRA is developing a strategy for spectrum management during major events. Qatar continues to host many mega events every year, and with the 2022 World Cup on the horizon, a specific spectrum management strategy for these types of events is needed to ensure that spectrum is available to meet the demand. It is also necessary to ensure that the available radio spectrum is utilized efficiently during the events, with interference-free access to all users. This includes consideration of the different types of devices and their frequencies and making required regulatory adjustments to the existing applicable regulatory framework to ease the spectrum assignment and licensing processes. It also includes preparing a detailed spectrum monitoring strategy to mitigate the expected higher number of interference cases during the events.

## **Radio Frequency Emissions**

In terms of radio frequency (RF) emissions, CRA plans to procure its own measurement tools in 2016 to enable it to carry out continuous monitoring of all RF transmitter levels of electric and magnetic field (EMF) exposure. In order to ensure accurate measurements and the smooth operation of this equipment, RF emission guidelines are being developed that deal with conducting the EMF measurement and limiting exposure to EMF fields.

## **19th Arab Spectrum Management Group Meeting**

For the first time, CRA hosted the ASMG meeting in Doha during mid-February 2015. Representatives from the ministries and organizations concerned with radio communications in the Arab countries attended the meeting.

A key objective of the meeting was to conduct preparatory work in advance of the World Radiocommunication Conference 2015 (WRC-15) held in Geneva in November. Conference participants studied the draft report issued by the International Telecommunication Union, the result of four years of extensive studies. Issues discussed at the conference included procedures and regulations to ensure the efficient use of radio spectrum in relation to the deployment of most advanced technologies and techniques to enhance the growth of the telecommunications sector.

The meeting concluded with agreement on a uniform position for Arab countries.

## **Qatar Domain Registry**

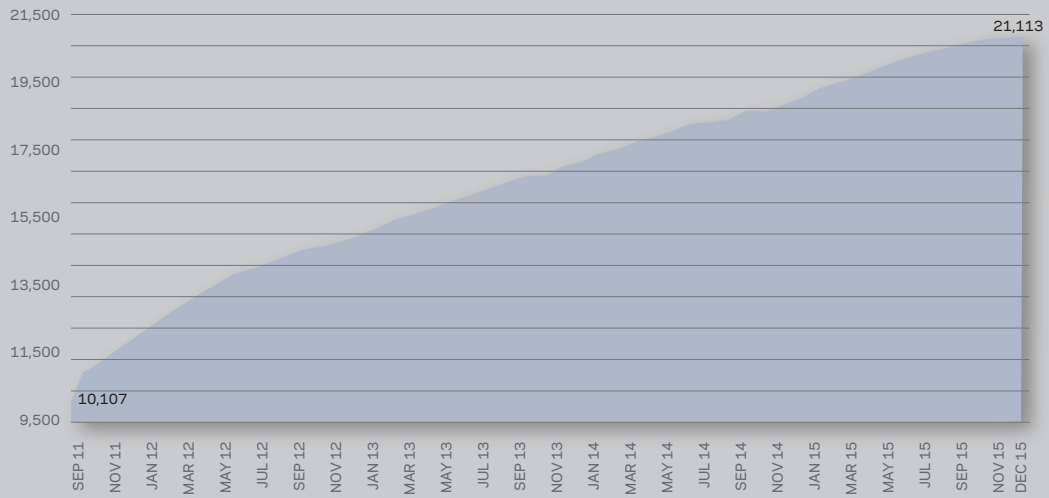
By December 31, 2015, the number of registered domains in Qatar reached 21,113, more than doubling since the Qatar Domain Registry (QDR) was established in 2011 (see Figure 13).

This includes registrations of .qa and .com.qa, net.qa, and the Arabic equivalent of .qatar, or قطر, as well as registrations for closed domains for the various government entities, including .go.qa, .mil.qa, .org.qa, .edu.qa, and .sch.qa. (see Figure 14).

The QDR provides stable, secure, and trusted domain name services, helping to shape Qatar's role in the digital economy. Qatar domains provide businesses and individual users with a means of differentiating themselves as distinctly Qatari and also of getting noticed in search engines and country-specific directories, all of which can help target both local and global audiences. CRA has been encouraging locally owned SMEs to register their businesses through the QDR.

The number of registrars has grown as well, with Ooredoo registering around 53 percent of the domain names, followed by other registrars including internationally accredited registrars.

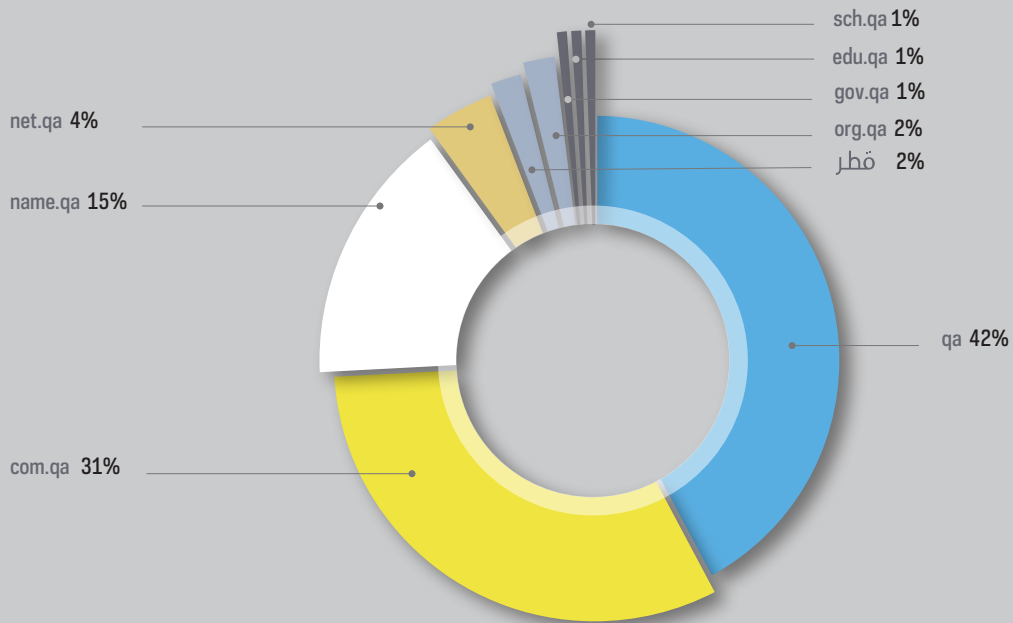
FIGURE 13. Registry Growth Indicator Based on Total Domain Count



Note: Legacy included

Source: Data from Oracle Enterprise Manager (SYSMAN) through December 31, 2015

FIGURE 14. Domain Distribution (%) by Type



Notes: Zones with a share of less than 1% are not indicated; legacy included

Source: Data retrieved from the Registry System December 31, 2015



# SETTING STANDARDS FOR INFRASTRUCTURE READINESS AND ROLLOUT

**PASSIVE CIVIL TELECOMMUNICATIONS ACCESS REGULATIONS**

**ROLLOUT OF BROADBAND AND FIBER NETWORKS**

**REVIEW OF TECHNICAL STANDARDS**

**IPV6 ADOPTION AND IMPLEMENTATION**

**FIXED NUMBER PORTABILITY**

**LAUNCH OF “.DOHA”**

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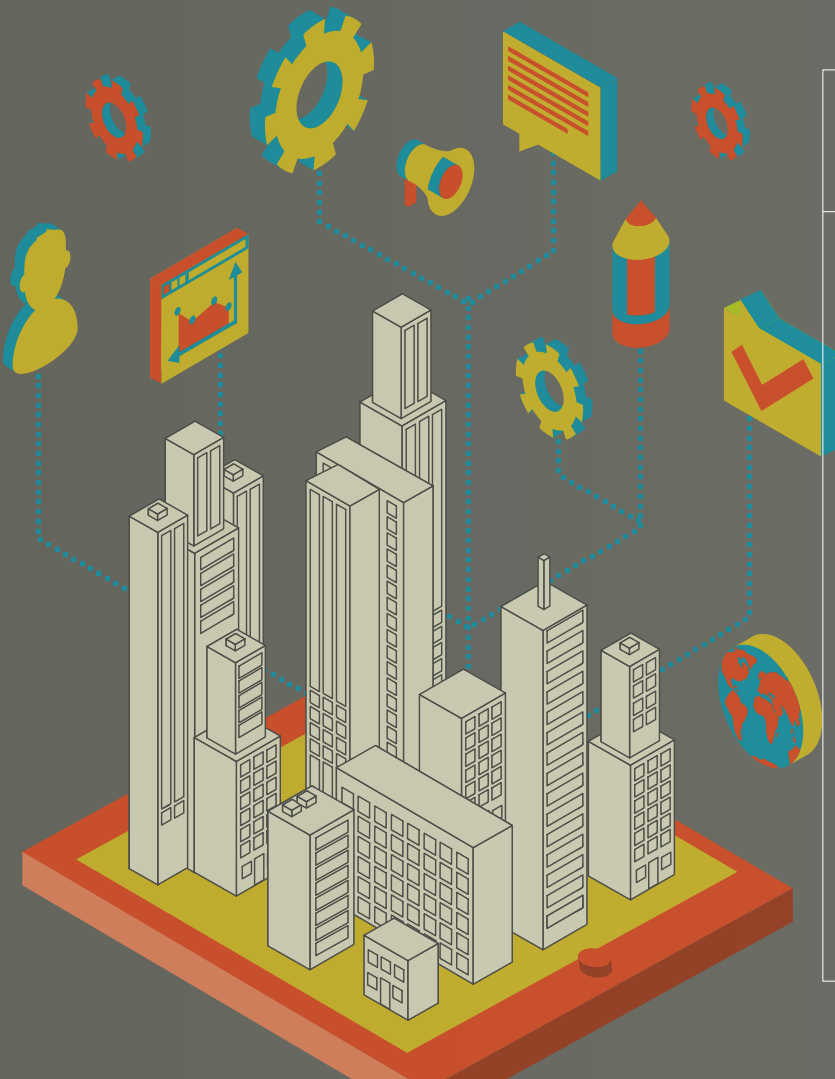
Development and investment in state-of-the-art infrastructure have been the very foundation of a knowledge-based economy. CRA has an important role to play in setting, monitoring, implementing, and ensuring compliance of the technical standards for the Internet, broadband, and next-generation networks; developing and monitoring implementation of technical standards for interconnection, access, and sharing telecommunications infrastructure; and managing and monitoring implementation of the national numbering plan and regulations related to telecommunications services.

## **Passive Civil Telecommunications Access Regulations**

In June 2015, CRA established general obligations governing access to certain passive civil infrastructure required to support the delivery of telecommunications services in Qatar. This regulation, now enacted after publication in the *Official Government Gazette* (issue no. 18, dated November 29, 2015), establishes the obligation of access providers to grant access to passive civil infrastructure such as ducts and towers that may be required to set up a telecommunications network. This regulation sets out minimum terms and conditions under which a provider will make the passive civil infrastructure available to those seeking access, as well as the terms and conditions the seeker must meet.

In general, an access provider must provide access on reasonable terms and conditions; on a non-discriminatory basis; on terms and conditions proportionate to the request; on a timely basis; in accordance with transparent procedures where technically feasible; and by negotiating in good faith for alternate solutions in case of insufficient capacity.

Setting out the minimum terms and conditions under which this infrastructure will be made available provides clarity and certainty in relation to the supply of passive civil infrastructure.



## Role of ICT in Smart Cities

Increasing urbanization is a global phenomenon, and Qatar, with an urban population in excess of 90 percent, is a prime example of this global trend. How best to organize the vast number of people living in a confined city space is being studied and is now better understood. As a result, “Smart Cities” are being created. The role of ICT in such smart cities is especially important, as it not only provides the telecommunications connectivity but also enables the intelligence that produces the “smartness” of a city.

CRA supports smart cities and ultimately a smart nation by enabling fair competition and a regime of open access to ducts and transmission capacity. To this end, CRA has issued the Passive Civil Telecommunications Infrastructure Access Regulation, which provides for fair access to ducts and towers.

## Rollout of Broadband and Fiber Networks

In order to expedite the rollout of broadband and fiber networks in Qatar, CRA; the Ministry of Information and Communications Technology; and Ashgal, the Public Works Authority, signed a Memo of Understanding in 2014 to construct and deploy telecommunications ducts infrastructure in all the new public roads and development areas in the country. The new infrastructure gives operators access to the newly established telecommunications ducts within public roads to lay fiber cable as needed. The availability of this telecommunications ducts infrastructure will enhance Qatar’s network readiness as well as facilitate and ease the rollout of future broadband and fiber networks.

## Review of Technical Standards

During 2014 and 2015, CRA underwent a major review of its technical standards and approval procedures for telecommunications networks and infrastructure rollout in order to enhance and modernize its regulatory technical instruments and ensure that next-generation networks and technologies are adopted. CRA issued new technical standards and procedures for the construction of mobile telecommunications sites. In addition, after a review of the current status of the mobile sites sharing arrangements, CRA issued a mobile sites regulatory decision emphasizing that all newly constructed mobile sites need to be shared with other service providers. The sharing of mobile sites will enable faster deployment of mobile networks and reduce the cost of establishing new mobile sites.

## **Fixed Number Portability**

Continuing on its successful launch of mobile number portability (MNP), CRA issued Fixed Number Portability Policy and Guidelines. Licensed service providers have already started the process of preparing to comply with this policy. The introduction of fixed number portability allows those individuals and businesses with fixed-line phones to change service providers and still keep their phone numbers, introducing further competition in the fixed services marketplace. The National Numbering Committee (NNC), chaired by CRA and including the licensed service providers, is coordinating the implementation of fixed number portability.

## **IPv6 Adoption and Implementation Strategy**

In a move guaranteed to facilitate the continued growth of the Internet and e-businesses, Internet Protocol version 6 (IPv6) was adopted. It is a new and improved version of IP that makes it possible to have virtually unlimited IP address space, going from 32 to 128 bits. In early 2014, a national strategy for adoption and implementation set guidelines for different stakeholders in different sectors to plan and manage Qatar's migration to the IPv6 platform. A national multi-stakeholder task force, led by CRA, was established to monitor the implementation of the strategy.

## **Launch of ".Doha"**

Building on the successful establishment of the Qatar Domains Registry and the relaunch of the Qatar domain name spaces (.QA and قطر. ), CRA is leading the application for establishing ".Doha"—a new top-level domain for the city of Doha. CRA has applied to the Internet Corporation for Assigned Names and Numbers (ICANN) and has been granted approval to run the new gTLD .Doha. This new domain is important because it will be used to promote the city of Doha in cyberspace. It will provide government entities affiliated with the State of Qatar and Doha City with an official, authoritative online space for promoting the city and, by extension, its residents, culture, events, commerce, institutions, and landmarks. The .Doha domain will also advance the development of legitimate, accurate, up-to-date content about the metropolitan area. Launch is planned for 2016.

# COMPLIANCE

## DISPUTE RESOLUTION FRAMEWORK

## COMPLAINT PROCESS

## ADVERTISING CODE COMPLIANCE

### Dispute Resolution Framework

In order to encourage competition and transparency, minimize anti-competitive practices, and ensure compliance with applicable regulatory frameworks, in February 2015 CRA published the Dispute Resolution Procedures. These procedures establish a regulatory framework to fairly and efficiently investigate and resolve disputes between access providers and/or access seekers. Access providers include public or private entities that own and/or directly control access to passive civil infrastructure, such as developers, service providers, government entities, and other NGOs. Access seekers include service providers who are in good faith negotiations to be in a contract with an access provider or in consultation with another access provider.

Broadly, the procedures set forth include:

- The form and manner in which a dispute may be referred to CRA
- The information CRA expects to receive during the course of the proceedings
- The process for investigation and conclusion of a dispute
- The remedies available to CRA, including but not limited to financial penalty or an order requiring the respondent to cease the identified offending or non-compliant behavior

CRA will issue decisions within 60 calendar days after either receiving a complaint, initiating a complaint, or initiating an investigation on its own.

### Complaint Process

CRA has also established a complaint process that deals with issues between service providers related to competition, or complaints from third parties against service providers. These issues could involve violation of the advertising code or issues related to the competition policy. Most important, the process establishes the level of evidence CRA needs to be able to make a decision.

## Advertising Code Compliance

CRA regularly monitors advertisements and promotions issued by the licensed service providers in Qatar to ensure compliance with the advertising code that was issued in 2014. The code protects telecommunications consumers from misleading and deceptive advertisements about telecommunications service and products.

In 2014–15, CRA intervened in several situations where the promotions and advertisements did not comply with the provisions of the advertising code requiring advertisements and information provided to consumers to be fair, truthful, and accurate.

**Vodafone Qatar's "3 Months Free" Campaign** CRA found Vodafone Qatar's "3 Months Free" marketing campaign to be in breach of the Code on Advertising, Marketing, and Branding, and issued an order to Vodafone to remove all its advertisements related to this promotional campaign. The advertisement included inaccurate and misleading messages for customers, leading them to believe that customers subscribing to this offer would receive a free three-month subscription. The promotion created the perception that the offer was free of any charges when in reality, this promotion offered customers a discount of 30 percent of the subscription fees over a 10-month period.

CRA ordered Vodafone to remove all promotional materials related to this campaign, or correct the promotion by changing the content to reflect the published tariff to state that "all new postpaid customers will get a discount equal to three months' subscription free over 10 months on their postpaid plan's monthly rental 'discount'." In addition, customers who paid for this promotion from January 14, 2015, onward receive three months free and are not penalized for exiting the promotion within the 10-month time period.

## THE CODE PROTECTS TELECOMMUNICATIONS CONSUMERS FROM MISLEADING AND DECEPTIVE ADVERTISEMENTS.

**Ooredoo's "4G For Free Forever" campaign** CRA ordered Ooredoo to remove all advertisements for its "4G For Free Forever" campaign because they included inaccurate and misleading messages for customers. After conducting its own analysis of the campaign, CRA concluded that the advertisements created the perception that the 4G service and data are free, when according to the tariff filing, it is only the 4G key that is free and subscribers were to be charged for data as per the data tariff lodged and approved by CRA. Ooredoo removed the campaign and changed it to comply with CRA's orders. The customers that paid for the 4G subscriptions from February 2, 2014, were credited for the complete value of the subscriptions for the 4G key.

**Ooredoo's and Vodafone's advertising claims relating to network speed and coverage** In advertising campaigns, Vodafone claimed that it had "Qatar's fastest data network and widest 4G+ coverage." Ooredoo's advertising campaign alleged "to be the biggest and fastest network in Qatar" and "has a higher data download speed of 2225 Mbps plus 4G." After investigating both claims, CRA found that both service providers made claims that were not truthful, honest, or accurate, and were misleading and deceptive to consumers. CRA said the providers' claims were not substantiated with proof. Thus on August 5, 2015, CRA directed both service providers to remove all of these advertisements and to amend their advertising material to comply with the advertising code when making network speed and other network-related claims. Further, CRA said that any speed claims included in advertising material must be supported by an independently audited report that complies with international standards.

